

An Integral Model for Organizational and Individual Performance, Leadership and Learning

By Dan Montgomery, Hal Richman and Jean Tully

Today's organizations demand a high level of flexibility, coordination and adaptability in the face of rapidly shifting markets and competitive strategies. There are a number of performance-enhancing solutions available – such as training, process improvement initiatives, quality management, lean manufacturing, and balanced scorecards, among others.

While all of these have value, taken together, they are often done in a patchwork manner and organizations often feel burdened by “initiative overload” – resulting in confusion about priorities, incomplete implementation and disappointing results. Our view is that all of these efforts, and others, need to be looked at as part of a larger strategic management initiative. Far from being just another project, strategic management **simplifies** the view for leaders by placing all these activities in one larger, integral model.

We believe that organizational performance requires leadership that not only addresses measurable business goals and objectives such as strategy and performance management, but also the “interior condition” of the people in the organization – their dreams, motivations, and way of looking at things – as well as the way these collectively play out in the “culture” of the organization.

To support this view, we have developed an **Integral Model for Organizational and Individual Performance, Leadership and Learning** that addresses objective business systems, plans and measurable results as well as the more subjective, tacit dynamics of people and culture. We address these areas from the point of view of the individual and the collective, producing four quadrants of practice (see below). We work in all quadrants to get the right blend of the dynamics of people and culture and the science of management.

	Subjective <i>Dynamics of people and culture</i>	Objective <i>Business Plans, Systems And Measurable Results</i>
Individual	Individual meaning, motivation and commitment	Measurable skills / competencies and individual performance management
Collective	Organizational culture and trust	Business planning and organizational performance management

Although there are lots of consultants, trainers, and coaches out there who address these issues one-off, our approach is to evaluate and improve organizational performance through a holistic, or integral, view of your organization or business. This approach enables us to focus on very specific business problems that beg for an integral solution. Some examples follow:

- ❶ Moving away from a commodity orientation, a manufacturing company wants to develop a more consultative sales process based on deeper understanding of client needs. The old sales approach is based on technical features and price, supported by a sales culture that celebrates technical expertise and aggressive sales tactics. The new approach aims to encourage greater cross selling of a new generation of configurable products and integrated solutions into large clients, and will require much higher levels of deep listening, empathy and collaborative selling on the part of the sales force. The only practical way to reach a large, busy and globally distributed sales force is by web-based training – even though the emphasis is on “soft” skills.

The integral solution ensures that:

- The sales training prepares “old style” sales people to develop empathy via video based simulations
- This shift in sales focus is supported by communities of practice and individual and team coaching, performed in local groups or via teleconferencing

- The current performance management and reward/recognition program is structured to support a shift in sales techniques

As a result, the company is able to execute its new brand promise clearly and effectively.

② An ambitious and successful consulting engineering company moving into a new geography acquires a smaller player. The acquired company is overstaffed for its size, and suffers from poor morale and productivity.

The integral solution: A cross-functional team is chartered to identify how well current business processes, organizational structures and culture in the acquired company support desired financial and market objectives. Using the Balanced Scorecard as a strategic framework, metrics are developed for core business processes. A culture assessment is undertaken, focusing on the behaviors that support efficient bottom line performance. Based on a skill and competency mapping process, a learning strategy is developed for the organization. Leadership assessments are used to evaluate senior executives' fit with the desired new culture of the organization and ensure that their strengths are acknowledged and utilized. Leaders with perceived gaps are offered executive coaching services.

Results: The company is able to achieve required reductions in force without compromising productivity, while maintaining the positive aspects of the organizational culture.

③ A Fortune 500 resource company, growing rapidly by acquisition, is seeking ways to utilize the collective experience and best practices of its diverse operations in order to maximize operating performance and achieve planned post-merger synergies. The parent company has traditionally been a top-down culture.

The integral solution includes:

- Creating communities of practice (CoP's) around particular operational areas

- Hosting conversations that invite CoP members to share their perspectives and ideas around specific business problems, using techniques such as World Café and Appreciative Inquiry
- Implementing a technology platform to host knowledge sharing discussions across regions and time zones
- Using CoP's to develop performance measures that are included in divisional and corporate scorecards

Results: Professional employees worldwide are made to feel they are truly part of the organization, and can contribute their expertise and have an impact on operations. This has powerful benefits for morale, employee retention, and post-merger synergies.

What Problems Does This Solve?

Conventionally, we have tended to make a hard and fast distinction between “personal” and “business” issues. Increasingly, however, we are realizing that all business is ultimately personal – work is where we make our livelihood, express our dreams, and learn through the challenges of working with and through others. A poorly performing organization manifests its problems in every quadrant and a high performing organization thrives in every quadrant.

Systems thinking teaches us that to optimize a system's performance you have to look at both the parts, and the interactions and interdependencies among the parts, as well as the impact the parts have on the whole. Fixing only parts of the system is insufficient to achieving peak performance. Instead, all the parts of the system must be understood and made coherent in how they impact each other and the whole.

	Subjective <i>Dynamics of people and culture</i>	Objective <i>Business Plans, Systems And Measurable Results</i>
Individual	<ul style="list-style-type: none"> • Apathy • Stress • Alienation • Resentment • Resignation • Poor productivity • Cynicism • Lack of concern for the success of the organization • Lack of healthy ambition 	<ul style="list-style-type: none"> • Incompetence • Poor employee performance • Inability to improve employees' performance • Disconnect between employee performance & organizational goals • Undesirable levels of turnover
Collective	<ul style="list-style-type: none"> • Resistance to change • Lack of employee support for needed directions as declared by management • Lack of trust • Poisonous gossip • Dead meetings that don't resolve issues • Broken commitments • Unwillingness to get together and solve problems • Political conflicts within the organization 	<ul style="list-style-type: none"> • Wasted or duplicated efforts • Right hand doesn't know what the left hand is doing • Unfocused or failed projects • Misused resources • Planning and budgeting conflicts • Getting blind sided by shifts in the macro environment • Top management inability to focus on activities that really matter • Focus on the urgent, not the important • No clear feedback if you're on the right track • No idea if investments in learning and training are paying off

Services

In order to address these problems systematically, we offer services designed to work together across two or more quadrants. A sample of services we provide are noted below.

	Subjective <i>Dynamics of people and culture</i>	Objective <i>Business Plans, Systems And Measurable Results</i>
Individual	Personal mastery and authenticity, such as: <ul style="list-style-type: none"> • Contemplation/Reflection practices • Individual Coaching • Chaos Leadership© 	Plans and tools for individual learning and performance: <ul style="list-style-type: none"> • Unit and organizational competency maps • Facilitating the development of individual learning and performance plans with measurable objectives • Designing learning and training activities to develop measurable skills and competencies
Collective	Helping teams work better: <ul style="list-style-type: none"> • Culture assessment • Organizational alignment & strategic readiness assessment • Building trust & commitment for organizational sustainability • Strategic Conversation and Collective Intelligence tools – Café, Open Space, Appreciative Inquiry • Chaos Leadership© • Team coaching 	Tools for business planning and performance management: <ul style="list-style-type: none"> • Value network analysis • Business strategy and mapping • Corporate and unit learning and performance plans • Performance management systems • Training planning and implementations • Training evaluation • Talent management strategies • Balanced scorecard • Scenario planning

Benefits to Your Organization

A high performing organization will have measurable success factors in all four quadrants. “I” as a subjective individual will gain meaning and fulfillment from my work. “We” as a culture will be able to work together effectively. People will be in the right jobs, with the right tools. As a business system, the organization will deliver value to its customers, investors and other stakeholders.

	Subjective <i>Dynamics of people and culture</i>	Objective <i>Business Plans, Systems And Measurable Results</i>
Individual	<ul style="list-style-type: none"> • I am authentic • My body, emotions and language are coherent • I make choices • I am a learner • I am adaptive • I focus on what I truly care about • I know what I am feeling • I am able to ask for help when I need to 	<ul style="list-style-type: none"> • People are in jobs that suit them and challenge them • People have the skills, tools and competencies to do their job • People have access to the learning, training and development activities needed to improve their skills and competencies • People receive the resources and support they need from others to do their jobs • People receive fair and frequent feedback on how they are performing • People connect their work to the organizational priorities & goals
Collective	<ul style="list-style-type: none"> • We have honest, authentic conversations • We are able to make mutual agreements that meet our individual needs • We maintain trust among ourselves • We understand where the organization is going • We tell each other stories about the organization that are generative • We are able to think strategically together 	<ul style="list-style-type: none"> • There is a clear model of how the organization provides value • The organization is prepared for future, plausible scenarios that reflect shifts in the macro environment • There is a clear link from strategy to measurable performance objectives • Performance objectives are supported by adequate investment and management attention • There is a model of skills and competencies to support the required organizational performance

Assessing Your Performance

How well are you and your organization doing? These questions can be useful in assessing that question.

	Subjective <i>Dynamics of people and culture</i>	Objective <i>Business Plans, Systems And Measurable Results</i>
Individual	<ul style="list-style-type: none"> • Do you feel passionate about your work? • What isn't working well for you? What is working well for you? • What outcomes do you want for yourself? • Are you healthy? • Do you have a sense of how your work supports the mission of the organization? • Do you feel proud to work here? • Do you feel empowered? • Are you having fun? 	<ul style="list-style-type: none"> • What skills does your organization have in place to move forward? Are these sufficient to take you where you want to go? • Are the right people in the right jobs? • How do your performance objectives support the organization's strategy? • Do other peoples' performance objectives support the organization's strategy? • How is your performance evaluated? Do you feel it's fair and constructive? Others? • Are you planning ahead to have the right skills in place given the way the workforce and demands on the organization are changing? • Do you have access to the learning, training and development activities needed to develop your skills and competencies? • Do you receive the resources and support from others needed to do your job?

	Subjective <i>Dynamics of people and culture</i>	Objective <i>Business Plans, Systems And Measurable Results</i>
Collective	<ul style="list-style-type: none"> • How would you describe the culture in this organization? • Does the culture support the organization's goals and strategies? • Would you say there is a high level of trust? • If not, tell me a story about lack of trust and its consequences.... • Is there a lot of gossip in the organization? • Does the company's "brand" feel real to you? • Are people able to work together effectively to generate successful actions? • Do people have a system for making requests & following through on commitments made? • Are people able to think strategically together? • Do people care whether the organization succeeds? 	<ul style="list-style-type: none"> • Do you know why your organization exists? • Does that influence how decisions are made day to day? • Is the organization putting financial resources into the right places to move forward? • What issues does top management pay the most attention to? • Does your organization plan for plausible futures? • What business processes are the most critical to the strategic success of your organization? • Are you measuring performance on those processes? How are you doing on those? • Is there a clear link between strategy, performance objectives, competencies and learning? • Does the organization appreciate learning? Does your organization understand that learning, and changing behaviors, takes time?

About Us

Daniel Montgomery is an organizational coach, trainer and consultant. His experience spans a variety of industries, including high technology, health care delivery, banking, utilities, telecommunications, government and economic development. He served as a senior manager in two of the former “big five” consulting firms. Dan’s practice focuses on building high performance, high trust organizations through strategic conversations, improved ability to manage accountability and commitments, and development of performance scorecards and feedback systems.

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Dr. Hal Richman has more than 15 years experience as a consultant, writer and speaker in the areas of eLearning, performance management and healthcare. As an entrepreneur he has co-founded companies in both eLearning and patient-centered education and decision-making. Hal has provided services to provincial and Federal government in Canada, large inter-governmental organizations (the United Nations Development Programme), bi-laterals (the Canadian International Development Agency, SNV) systems of higher education (the University of North Carolina), corporations (Citigroup), as well as organizations in Canada, the United States, Europe and Asia-Pacific.

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Jean Tully is a consultant, trainer, and coach who brings her background as an engineer, an organizational learning practitioner and teacher, and an internationally ranked sailboat racer, to her work helping individuals and teams navigate changing environments while improving their operating performance. Following a 30-year tenure at Hewlett-Packard, she has consulted to a variety of clients including Ford Motor Company, Micron Technology, Intuit, and the Society for Organizational Learning. By combining her technical background with an understanding of the role relationships play in getting work done, she balances her approach between focusing on process improvements and facilitating improved team dynamics, always with an eye on the impact to business results.

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