Practicing **OD**

» Developing Leadership: Using Triggers as a Wake-Up Call *by Rosalind Spigel and Beulah Trey*

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Welcome to *Practicing OD*, a collection of short articles (900–1200 words) on useful ideas, lessons learned, and practical suggestions for managing the day to day challenges of doing OD. We welcome brief case studies; guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools; and thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.

Submit Microsoft Word electronic copies only to:

Stacey Heath (*stacey279h@gmail.com*)

Deb Peters (*deb.peters@morganmcguireleadership.com*)

Rosalind Spigel (*Rosalind@Spigelconsulting.com*)

Include your name, phone number, and email address. If your article is accepted for publication, you will be notified via email. We look forward to hearing from you.

Submission Guidelines

» Articles should be practical and short *(900–1200 words; 3–4 pages single-spaced)*

- Write in your own (first-person) voice using simple, direct, conversational language.
- Focus on **what** you are discussing, **how** it works, or can be used, and **why** it works (what you believe or how theory supports it).
- Use bulleted lists and short sections with subheads to make it easier to read.
- Include everything in the text. No sidebars. No or very limited graphics.
- Do not use footnotes or citations if at all possible. Citations, if essential, should be included in the text with a short list of references at the end of the article.

» Articles can be written from various perspectives, including but not limited to:

- Brief case studies that highlight useful concepts, applied theories, lessons learned, and implications for future practice.
- Guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools.
- Thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.

» Include a short (25–50 word) author bio with your email so readers can contact you.

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Developing Leadership

Using Triggers as a Wake-Up Call

By Rosalind Spigel and Beulah Trey

Julie, a colleague of ours, was struggling with Emma, her co-worker. Emma was someone Julie considered a friend, had known for years, admired, was mentored by, and worked with on many projects. After years of creative and successful collaborations, tensions were surfacing.

When Julie turned to us for coaching, we were tempted to ask her about the juicy details of her possible falling out with Emma, but, instead of getting into the story, we decided to apply *Mussar*, an ancient approach to Jewish character development, which includes awareness, compassion, and humility. We have been studying *Mussar*, and Beulah has been teaching and developing the contemporary practice of *Mussar* for the past few years. As leadership coaches and organizational consultants, we have been intrigued with the efficacy of applying *Mussar* with our clients. We believe that at its core leadership development is a form of moral and character development.

Our approach to *Mussar* is based on a clear premise: we hone our characters by serving others, and those people who irritate us the most are actually waking us up to ways we can improve ourselves. When somebody annoys us enough, we get triggered, tend to become self-involved, and only think of ourselves. While co-consulting with Emma, Julie was becoming bothered by Emma's domineering attitude and tone of voice. Julie realized she had become focused on the relationship with Emma, to the potential detriment of the project and the client's desired outcomes. Her thoughts were distracted by escalating negativity with Emma.

As we began to investigate Julie's dilemma, she saw one result of getting triggered was a shift in her focus from her client to her emotions about Emma. She woke up to the fact that she was being pulled from her leadership role. With this consciousness, she started applying a leadership skill we call "getting back into role." So, how did she get back into her role as a co-consultant?

We began a *Mussar* approach by encouraging Julie to use two precepts. First, focus on the correct goal and be open to learning the path forward. Second, be curious about what is happening with the other person involved in the situation. From this context, Julie took the steps to get back into her role.

Step One: Clarify your personal and/or professional goals.

Julie's first goal was to serve and guide the client to the client's outcomes. However, Julie began to see she may not have fully articulated to herself or to Emma that she felt ready to shift her position from being mentored to being a full partner. In the past two years, Julie had paid particular attention to her professional development and felt she was Emma's equal, now able to bring models, theories, and ideas that were unfamiliar to Emma. Julie clarified her goals—to serve the client and adjust her dynamic with Emma as an equal partner.

Step Two: Get curious about what could be going on for the other person. Keep exploring until you feel a softening and can genuinely appreciate the other's experience.

One reason Julie was pulled out of her role was that she was focused on her own story of being undermined by Emma. In our conversation, we asked what might be going on with Emma. Julie brainstormed some possibilities:

» Emma was uncomfortable with the shift in power dynamic.
» Emma was experiencing a loss of status in her relationship with Julie and with the client.
» Emma was aggressively maintaining her mentor role.
» Emma deeply believed her approach with the client would produce better outcomes than anything Julie suggested.
» Emma was facing some challenging personal issues that were pulling *her* out of her role—perhaps neither of them were in their roles.

All of this was conjecture. The point was not that any of these suppositions were true or false, rather, did any of them open Julie's heart to what might be going on for Emma? By acknowledging Emma's possible challenges, Julie found a gateway from irritation to compassion and was open to a different kind of conversation with Emma.

Step Three: Prepare for action and get grounded.

To prepare for her conversation with Emma, we turned to Beulah's leadership skill-cepts, "skills derived from leadership concepts" (Trey & Gordin, 2011).

Know your stuff

Through years of experience and dedication to her professional development, Julie had acquired a depth and breadth in organization development consulting. However, in her relationship with Emma, her confidence lagged behind—until this client. With both the client and with Emma, Julie was now feeling both knowledgeable and confident.

Have a goal for the conversation

Julie's goal was to re-establish a relationship with Emma as peers and equal partners rather than as mentor and mentee.

Stay "in role"

Julie's role was that of co-consultant. She realized that she had a tendency to fall back into the mentee role with Emma. To stay in co-consultant role she needed to maintain her footing as an equal partner.

Love the resistance

Julie needed to be ready for the possibility of Emma becoming defensive. Loving the resistance meant recognizing Emma's reactions as information about how to move forward. It was important that Julie not take responsibility for Emma's reactions. By anticipating the kinds of resistance that might come up, Julie was able to keep from being disarmed.

Step Four: Take action

With an open heart, Julie approached Emma. Emma was confused and hurt by Julie's questioning and corrections in their approach to the client. She was not prepared for this kind of input from Julie and it surprised her. Julie also discovered that Emma was indeed facing some personal difficulties at home. Emma, with her attention being called in the direction of her family, relied heavily on how things had been between them. Julie—staying in role—compassionately heard Emma and talked with her about the role she now wanted to play in their consulting partnership and with the client. They were on the road to co-creating a new working relationship and providing the best possible consulting to their client.

Conclusion

A premise of *Mussar* is to be guided by our responsibility to serve the other. This means to be sensitive to the burdens of the other and to respond compassionately. By shifting focus from herself and her own story, Julie was then able to focus on her client, her partner, and employ a four-step process to get herself into a leadership role. Noticing she was irritated was the wake-up call Julie need to embark on this process.

Rosalind Spigel, MSOD, ACC, Principal of Spigel Consulting, is an OD consultant and leadership coach who specializes in helping mission driven organizations grow and prosper. She can be reached at *rosalind@spigelconsulting.com*.

Beulah Trey, PhD, is an organizational psychologist and co-founder of Vector Group Consulting, an international consulting group that works in the area of cultural transformation, LEAN acceleration, team building and executive coaching. She can be reached at *beulah@vectorgroupconsulting.com*.

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> "A strategic and well-designed process to plan for leadership and key employee turnover can support the culture and strategic direction of the organization."

Four Dimensions of Designing Succession Plans

By Jill Nissan and Paul Eder

Ask managers or leaders about succession planning and their answers may reveal limited strategy about this important component of an organization's sustainability. A strategic and well-designed process to plan for leadership and key employee turnover can support the culture and strategic direction of the organization.

Based on our experience, we suggest four dimensions to consider when designing a succession planning program:

1. Degrees of Formality
2. Locus of Decision-Making
3. Scope of Planning
4. Identification and Assessment of Talent

Dimension 1: Degrees of Formality

Succession plans may involve multi-page, in-depth methodologies while others are stored solely within the minds of managers. "Degrees of Formality" describes the extent to which an organization has a documented and generally accepted process for succession planning. The following degrees of formality may be present.

Informal succession planning is marked by lone-wolf supervisors who have an innate sense of future workforce needs. They work towards those needs without extensive documentation and actively groom one or two individuals.

Quasi-formal succession planning programs may be documented and use generally accepted forms or templates in which managers identify required competencies, candidate readiness, and development plans. For example, some federal and private organizations use a position profile form to document critical information about positions targeted for succession planning (Dowell, 2002). Quasi-formal programs often generically focus on leadership development.

Formal succession planning is a broadly communicated process that defines positions targeted for succession planning; identifies and assesses the potential talent pool; and applies succession planning strategies. Generally, employees can either indicate their interest in being included or the organization's succession planner(s) determine who is in the talent pool.

Culture and tradition may influence the level of formality. While detailed plans are more likely to be enacted as intended, there are several reasons why formal plans do not get enacted. For example, a Director or

CEO may resist identification of his/her successor (Dattner & Chamorro-Premuzic, 2016). Other factors identified by practitioners include (Sutton & Cheatham, April 2013):

» No knowledge of succession planning
» Lack of internal discussion indicating importance
» Open rejection by key leaders
» Time and cost

Dimension 2: Locus of Decision-Making

Some succession planning efforts involve single CEOs or leaders. Others involve groups of leaders or independent committees. We characterize these differences according to the "Locus of Decision-Making."

A Lone Decision-Maker is the succession planner who runs his/her own organization, often a small business (US Small Business Administration, n.d), as well as government agencies that may not have a corporate approach. The Lone Decision Maker creates plans to deal with the eventuality of employees vacating their positions. The Lone Decision Maker can make plans efficiently but may not be aware of larger organizational changes.

A Succession Planning Cadre uses management teams or assigned committees (Chapman & Vogelsang, 2005) to plan for identified positions(s). These planners can deploy an informal or formal process. Informal scenarios may use ad hoc discussions about staff and make decisions based on implicit knowledge (e.g., "who knows what about whom"). In quasi-formal to formal situations, multiple succession planners make decisions based on an explicit, agreed-upon process.

For Lone and Cadre decision-makers, the following questions are appropriate to ask:

» What is the scope of positions involved?
» Who is the talent pool?
» How will they be assessed?
» How much money is the organization willing to pay for development?
» What types of developmental opportunities are appropriate?

Dimension 3: Scope of Planning

The third dimension identifies whether the organization conducts succession planning for individual positions, a cohort of positions, or for the enterprise at large.

When organizations conduct succession planning for individual positions, they usually focus on a highly specialized position or a key leadership position. It is critical to capture unique aspects of these positions from the incumbent before he/she exits.

Succession planning for a group of positions requires that planners strive to understand the commonalities and distinctiveness involved. Senior leaders, for example, tend to be more externally focused, and junior leaders are more internally focused, which may influence the type of developmental experiences needed to foster expertise. Alternatively, organizations may choose to focus succession planning efforts on targeted types of technical talent (e.g., lawyers, accountants, doctors).

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Alternatively, organizations may choose to focus succession planning efforts on targeted types of technical talent (e.g., lawyers, accountants, doctors). Planning for these groups involves knowledge transfer rather than the leadership skills development relevant for management positions (Rothwell, 2010).

An organization may choose to see the workforce as a portfolio, just as one would see a collection of financial investments (CEB, 2016). The organization can build leadership and technical capacity to fulfill multiple and changing needs (e.g., filling newly created positions or creating cross functional roles).

Dimension 4: Identification and Assessment of Talent

The fourth dimension addresses how talent is identified and assessed. Typically, succession planners assess talent pools against competencies or other key attributes.

In some succession planning efforts, the identification of talent happens by employees self-selecting or self-nominating to be in the talent pool. If an employee wants to be considered, she may nominate herself, for example, and may be asked to provide self-assessment pertaining to the organization's defined leadership competencies.

In other scenarios, executives decide the talent pool. In a recent succession planning effort, senior leaders at the US Geological Survey (USGS) determined the talent pool to include all direct reports to the executives in senior-graded positions and other senior management positions.

Once the pool is identified, the organization deploys its assessment methodology. For individual-level assessment, greater detail about each employee is available and training and development can be customized accordingly. Collective assessment enables leaders to view their talent pool as a whole and generate overall ratings. While the collective approach reduces potential sensitivities around individual ratings and increases speed, collective assessments are less useful for customizing developmental opportunities.

Conclusion

As practitioners, we have observed and implemented succession planning efforts driven by addressing each of these dimensions. These four dimensions build a strong framework for planners to design effective programs while proactively mitigating challenges associated with ill-defined efforts. When a program addresses each dimension, the resulting plan is more detailed, defensible, and driven by strategy.

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Jill Nissan is the Workforce Planning Program Manager in the Office of Human Resources at the US Geological Survey. She earned her Masters of Science in Organizational Development and Strategic Human Resources at the Carey School of Business, Johns Hopkins University, and has applied her Organizational Development skills to various human capital projects within the federal sector. She can be reached at *jnissan@usgs.gov*.

Paul Eder is a Lead Consultant at The Center for Organizational Excellence, Inc. He earned his Doctorate in Social Psychology from the University of Delaware. He has over 15 years of experience as a human capital and organizational evaluation consultant, working with private and public sector clients to design metrics and analyze data in innovative ways. He is a certified Project Management Professional (PMP)® and a Lean Six Sigma Black Belt. Eder can be reached at *paul.eder@center4oe.com*.

> "Viewing problems from the user perspective inspires empathy, unleashing freedom and creativity, forcing practitioners to put aside preconceptions and assumptions, challenging ways of thinking, and creating fresh opportunities for innovation and improvement."

Practicing Human-Centered Design (HCD) for Innovation

By Gabriel Chung

> A human centered approach to innovation draws from the designer's toolkit to integrate the need of people, the possibilities of technology, and the requirements for business success.
> —Tim Brown
> President and CEO, IDEO

Apple's Steve Jobs once said, "Design is not just look and feel. Design is how it works." As a colleague of Jobs, a founder of IDEO, and an eminent leader in design, David Kelley's commitment to the relationship between design and user experience has made him a pioneer of the Human-Centered Design (HCD) approach. Today, his HCD methods guide organization development practitioners through the steps to convert user-based design into reality by starting with the end in mind.

The HCD approach places users at the forefront—encouraging OD practitioners and HCD teams to discover deep understanding of the target users to generate a range of ideas and prototypes and gather real-world feedback from these users. This creative approach utilizes collaboration between the OD practitioner, the project team, and users, and helps ensure the final product fills a need. By emphasizing the user as an essential starting point, HCD ensures sustainable solutions. HCD consists of three phases—Inspiration, Ideation, and Implementation.

Inspiration Phase

In the Inspiration phase, the HCD project team and OD practitioner explore different ways of understanding the target users. They step into the target user's world to observe and ask questions, listen, and watch, to understand how users think and feel. Learning about their lives, hopes, needs, feelings, and desires inspires new ideas for improving their lives. Inspiration triggers the search for solutions by identifying a need and translating it into an opportunity. The steps include:

» Identify a design challenge
» Recognize existing knowledge
» Identify people to speak with
» Choose research methods
» Develop an interview approach
» Establish team's mindset

In this stage, empathy, extremes, and mainstreams are the key to HCD.

Inspiration Phase—Empathy

HCD is rooted in empathy—understanding other people's feelings and seeing things from their perspectives. The goal is an innovative solution that meets the needs and desires of the target users. Throughout the process, the route to success is through understanding and involving target users.

Viewing problems from the user perspective inspires empathy, unleashing freedom and creativity, forcing practitioners to put aside preconceptions and assumptions, challenging ways of thinking, and creating fresh opportunities for innovation and improvement. Empathy is the best way to stay on track, keeping focused on target users.

Inspiration Phase—Extremes and Mainstreams

To create a solution that works for everyone, it is important to include people from the extremes of the spectrum areas and those who fit squarely in the mainstream. Consulting with people at either extreme will stretch creativity the most, pushing the team to consider more nuanced cases, challenges, and opportunities.

Depending on specific projects and goals, the definition of an "extreme user" will vary. When recruiting participants for interviews, there are many basic factors to consider such as age, gender, and income level. It is also important to identify characteristics and experiences that place someone at either end of the spectrum.

Ideation Phase

Ideation entails generating as many ideas as possible from the data gathered and lessons learned. This is a collaborative process: the project team shares the findings with all team members, encourages an exchange of ideas, and then collectively decides which concepts to pursue. The project team provides rough prototypes, for instant feedback—which guides further refinements. Ideation is the process of generating ideas and testing them with potential users. The key steps include:

- » Develop the approach
- » Share stories
- » Identify patterns
- » Create opportunity area
- » Brainstorm solutions
- » Make ideas real
- » Gather feedback

In this phase, synthesis and prototyping are the keys to HCD.

Ideation Phase—Synthesis

Synthesis makes meaning out of what is seen and heard to uncover opportunities for design. The project team and OD practitioners begin by examining what they have learned from their research and drawing from everything they observed and heard from target users. Users then identify key themes and insights that will help define differentiated and generative opportunities. With thoughtful intuition and critical thinking, the team emerges with greater clarity and direction.

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Ideation Phase—Prototyping

Prototyping is a quick and effective way to test ideas with the user community. This removes the guesswork and ensures that any changes, decisions, and iterations are guided by the user group. Prototyping should be a continuous exchange that takes place early and often in the design process to avoid investing significant resources into a product or solution that will ultimately fail. By sharing rough models with the target audiences the team gathers valuable feedback at every stage, learning from mistakes, and honing initial concepts into a powerful solution.

Implementation Phase

Any successful idea, innovation or invention starts with a solid business case. The strategic, high-impact business case aligns with organizational strategy and realizes organizational benefits. This phase requires frequent collaboration with key sponsors or stakeholders for assessing the project's cost/benefit balance. The business case may include:

- » Key parameters for assessing objectives
- » Organizational strategy alignment
- » Transformation strategy—comprehensive change aimed at delivering and sustaining breakthrough organizational performance

Implementation is the route from ideas and concepts to solutions that benefit both users and the organization. The key steps include:

- » Develop a sustainable revenue model
- » Identify capabilities for delivering solutions
- » Plan a pipeline of solutions
- » Create an implementation timeline
- » Plan mockup (mini-pilots) ad iteration
- » Create a learning plan

Conclusion

Inspired by HCD processes, innovative employees tend to be more motivated and involved in the organization. Empowering employees to innovate and improve their work processes provides a sense of autonomy that boosts job satisfaction. From a broader perspective, empowering employees to engage in broader organization-wide innovation creates a strong sense of teamwork and community, and ensures employees are actively aware of and invested in organizational objectives and strategy. Managers who promote an innovative environment can see value through increased employee motivation, creativity, and autonomy; stronger teams; and strategic recommendations from the bottom up.

Organization development with HCD can deliver benefits by generating business value, enhancing current capabilities, facilitating business transformation, maintaining an asset base, offering new products and services to the market, or developing new capabilities for the organization, which in turn may increase competitive advantage and provide meaningful differentiation. Innovative organizations are more nimble in the face of rapidly changing markets, disruption from outside, and new competition.

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Gabriel Chung, CBAP, PMP, CSSBB, and CPLP, holds certification as a Human-Centered Design Facilitator. In addition to serving as Director of HKIPI Association and Think Tank of InnoEdge Consulting, he is an author and consultant in the business innovation and transformation fields. He led the 2016 ISPI Award-winning project. He can be reached at *gabriel@hkipi.org*.