FROM MANAGEMENT CONSULTATION

TO

MANAGEMENT DEVELOPMENT

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Catch a fish for a man and he will eat tonight.
Teach a man to fish and he will feast for a lifetime.
-- Zen proverb

Employee Assistance Program (EAP) professionals, whether working within an organization or as outside consultants, frequently are approached by managers requesting advice or assistance in dealing with a problem employee. Typically, the manager wants to know what to do with this individual to solve the problem, and wants to take quick ameliorative action. Often, this amounts to asking the EAP professional to figure out a way to "fix" the problem within a reasonable period of time. Termination is likewise an alternative; however, managers often consider this only as a last resort, particularly with previously high-functioning staff or those with a long employment relationship with the company.

Many EAP professionals feel compelled within this context to comply with the essence of the manager's request. If the EAP is internal, there are concerns about the position of the EAP in the organization, including how the EAP professional's behavior will affect his or her standing with upper management, where the manager making the request ranks in relation to the EAP professional, and what the functions and roles the EAP plays in the organization include (i.e., Is the EAP of high or low status? Is its value respected? Etc.). If the EAP professional is an external consultant or vendor, the aforementioned issues of status, role, and value will impinge upon his or her behavior, with the additional concern of how a response will affect the future relationship and contracting with the organization. Further, in either case, a sophisticated EAP professional needs to assess how the problem employee is seen structurally and politically within the organization (i.e., is this a valued employee or a chronic thorn in management's side? Is there diversity, Americans with Disabilities Act (ADA), or age discrimination issue involved? etc.). All of these factors will provide the background and underpinnings of an EAP professional's reaction to a request for intervention of any kind.

Given this context, it is sometimes difficult or awkward for many EAP professionals to resist an immediate response. However, for the long-term sake of the employee, the manager, the organization, and the EAP professional as well, a more measured and broader response is more likely to be beneficial. This chapter will outline how to move from a request regarding an individual case (management consultation) to an intervention that considers the larger issues in the organization, the manager's abilities to bring out the best in employees, and the relationship between the manager and the specific employee involved. By contrast to consultation regarding only a specific current situation, this process, which takes into account larger scale issues of the manager's skills and abilities, is what we consider management development. Management

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consultation is catching a fish for a manager; management development is teaching that manager to feast for a lifetime.

To provide the reader a process-oriented sense of how a request for management consultation can be shifted to a management development intervention, a case study will be presented. This case will serve throughout this chapter as the basis for illustrating the phases of such a developmental intervention.

THE CASE OF SHARON: GOOD COP/BAD COP

Sharon approached her Human Resources (HR) manager because of difficulty she was having with an employee. The HR manager suggested that she take up the problem with a workplace consultant who served an EAP function on a consultative basis.

Sharon discussed the problem employee's unsatisfactory performance with the EAP consultant. Specifically, for the past several months, the employee, Linda, had often come in late to work, had treated customers on the telephone without enthusiasm or respect, and had not completed projects that were expected of her. What made the situation more complex for Sharon and the organization was the fact that Linda, who had been employed with the company for approximately one year, was the victim of domestic abuse and the mother of three small children. During the period of the problematic behavior, she was living with her parents while trying to obtain a court order of protection to keep her husband away from her and her family.

Sharon was a manager of a technical support unit of employees and had worked for the firm for three years. Her current employer recruited her because of her expertise in technical support and customer service, although her previous technical background was in a different specialty area than that for which she was now responsible.

In his effort to assess the present conflict at work between Sharon and Linda, the

consultant gathered information about the historical relationship between the two that revealed a complex and entangled past. Initially, Sharon had gone out of her way to accommodate Linda because of her personal problems. She would ask others on her staff to cover Linda's shift, would help her on special projects, and would not fully report her tardiness and absences to Human Resources. However, when Linda's behavior did not improve, Sharon began to feel unappreciated and taken for granted. Consequently, she became less tolerant with Linda. She shifted from acting as a flexible and empathic supervisor - behaving in ways that bordered on being an enabling influence that allowed Linda to avoid constructively addressing her own behavior - to being a strict, unsympathetic disciplinarian. Sharon's initial attitude of concern and subsequent feelings of anger, guilt, and resentment, along with behavior that shifted from enabling to harsh, had complicated and aggravated the situation, making problem resolution all the more difficult and intractable. Sharon's HR officer stated that other employees in the department were also concerned about Sharon's recent harsh treatment of Linda. In discussing the development of the current difficulty, Sharon readily admitted to the consultant: "I am all black or white; there is no gray with me." She was also aware that she tended to react quickly, sometimes without thinking through her responses before taking action.

To help Sharon address the present problematic circumstances, the consultant helped Sharon document Linda's pattern of unsatisfactory performance and motivate her to seek professional assistance in solving her problems outside the workplace. The consultant was able to develop a specific action plan for Linda that included evaluation and treatment for depression, a safety plan for her and her family, and resignation from her job to devote more time to her children's welfare and development while relying on her parents for financial support. The consultant also arranged for the firm to offer Linda the opportunity to reapply for her job once

her family conflicts were resolved so that she had adequate child support, a safe environment for her children, and full preparedness to focus on work.

During this process, it became clear to both Sharon and the consultant that she could benefit by assistance in developing a more consistent and balanced approach toward managing her staff, rather than functioning in the "black-and-white" world of "good cop/bad cop". Sharon's HR manager contributed information indicating that her managerial style could be too aggressive at times, with others perceiving her as stubborn and difficult to interact with. The HR manager noted further that Sharon did not have the full confidence of senior management, adding, "When she talks to you, you feel like she is backing you into a corner." With Sharon's permission, the EAP consultant sought senior management's approval for her to participate in a management development service at the company. The HR manager readily agreed, stating that if Sharon could improve her managerial style and hone her interpersonal skills, she would be more readily appreciated for what she was able to contribute to the firm.

CATCHING FISH

What is the essence of what has been described to this juncture about the intervention with Sharon and her employee Linda, and what allowed for or created the movement from consultation toward management development? There are several points that are worth emphasizing.

Sharon came to the consultant with a specific problem and in a state of need. It is well known and intuitively obvious that an intervention that is more relevant to the immediate needs of a manager is more likely to be responded to, understood, and incorporated by the manager into his or her "tool kit" of management skills (Daniels, 1994; Kinlaw, 1989). Because Sharon had reached a state of frustration, anger, and resentment, she was ready to accept the intervention that

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was provided. She also recognized that she was in over her head with Linda and did not know how to proceed on her own to ameliorate the situation.

Second, while Sharon was aware of problems she was having that were specific to the situation with Linda, she also knew that she had some difficulty with certain management skills in general. She knew she was "all black-and-white," and that "gray" might sometimes be a useful place to be as a supervisor. She also recognized her inclination toward impulsive reactions that sometimes appeared not well thought out, leading her to seem less competent and knowledgeable than was the case. Her self-awareness in this regard and her willingness to work on the issue paved the way for the consultant to be able to intervene not only regarding the specifics of the situation with Linda, but in more general ways regarding Sharon's management style as well. Without some sense on the client's part of a need for change, the shift to management development is tenuous at best. In Sharon's case, this had already occurred; in other cases, this desire for change needs to be created by the EAP consultant or is imposed by the organization in the form of a referral to the consultant by an HR professional or the client's supervisor.

Third, Sharon was a valued but problematic manager within the organization. Her HR manager and senior management were aware of her abilities in technical and customer support areas, but also of her tendency to be harsh, aggressive, and impulsive at times. They agreed readily with the consultant that Sharon's deficient interpersonal skills interfered with her ability to be a superior manager, inhibiting her effectiveness in the workplace. By implication, Sharon's advancement, and even her retention in her current managerial position, depended on enhancing these skills. In short, the organization was receptive to the idea of management development for Sharon, as was Sharon herself; in other cases, a client's supervisors or senior management must

be sold on the idea so that a commitment to the process is made.

Finally, the consultant was able to act in such a way as to demonstrate concretely to Sharon the value of behaving a certain way as a manager. The consultant "caught fish" for Sharon by helping her design and implement an intervention with Linda that resolved the problem in a way that was satisfactory to all parties involved. Sharon was also "taught to fish" by being encouraged to enroll in management development.

To summarize, the consultant's intervention was relevant to the issue at hand, immediately responsive to the clients' needs (including, in this case, the organization, HR, Sharon, and Linda), and concrete and specific in form. These features allowed Sharon to find the intervention inherently useful; it reduced the level of urgency, guilt, and anxiety she was experiencing regarding Linda. The consultant's response was also instructive for Sharon and opened the door to addressing larger, more all-encompassing issues in her functioning in the workplace, including her resistance to confronting Linda initially, the complexity of her emotional responses to the situation, and the ways in which her managerial style interfered with her ability to be effective in coping with Linda's behavior. Of course, the support of higher levels of management was also crucial in allowing the consultant to intervene in the first place; clearly, this support is likewise central in moving from consultation to management development.

THE PROCESS OF MANAGEMENT DEVELOPMENT: LEARNING TO FISH

The initial stage of movement from consultation to management development is the induction of the manager into a commitment to the idea of developing skills and tools to improve management style. By analogy, it is not possible to teach people to fish unless they experience the relevance of fishing to their lifestyle. Someone who is not hungry, or who doesn't like the

taste of the fish once it is prepared, will be less likely to undertake the effort of learning how to be autonomous in providing that lifelong food source. By analogy, in their development and coaching guide, <u>For Your Improvement</u>, Lombardo and Eichinger (1996) maintained that their book would be of value only for individuals with a need for problem resolution, whether at work or in their personal lives. When the manager has accepted the concept of management development, the process can continue. Without this critically important commitment, little of real value will be learned or put into practice.

Once an agreement to engage in management development has been made, the phases of the process are as follows: assessment; creating developmental goals; designing measurements to evaluate goal attainment; and coaching to achieve goals.

Phase 1: Assessment

Assessment actually begins with the first consultative contact with a client, frequently before the idea of development has arisen. In Sharon's case, the consultant was assessing her management style and abilities from the outset by collecting information about the history of her relationship with Linda; by ascertaining the perception of Sharon by subordinates, the HR manager, and senior management; and by observing her behavior and responses in relation to himself and his interventions. Generally, the clinical acumen of the consultant will cause assessment to become an integral part of the ongoing process of any consultation.

Nevertheless, a more formalized assessment is essential in negotiating the transition from consultation to development. Effective assessment for management development includes several components: interviews with the client, interviews and surveys with others in the organization about the client, and standardized psychological assessment of the client.

<u>Interview with the client</u> - This interview can be a loosely structured intervention akin to

the initial session a psychotherapist undertakes with a new client or patient, or it can be more formally structured with a list of questions (for example, see Figure 1). In some cases, a paper-and-pencil questionnaire may be employed.

FIGURE 1: GUIDELINES FOR ASSESSMENT INTERVIEW

1.   WHAT'S YOUR MANAGEMENT STYLE? DESCRIBE HOW YOU TELL EMPLOYEES WHAT YOU NEED FROM THEM. HOW DO YOU GET THEM TO PERFORM UP TO STANDARDS? HOW DO YOU DEVELOP EXCELLENCE?

2.   WHAT PROBLEMS HAVE YOU RUN INTO WITH EMPLOYEES? HOW DO YOU ADDRESS PROBLEM AREAS? HOW HAVE YOU TRIED TO RESOLVE THEM? HAS IT BEEN SUCCESSFUL?

3.   WHAT ARE YOUR RESPONSIBILITIES AS A MANAGER? HOW MANY PEOPLE DO YOU MANAGE? HOW ARE THESE PEOPLE ORGANIZED – (I.E., AS A TEAM? AS INDIVIDUALS WORKING SEPARATELY?) HOW ARE YOUR MANAGEMENT RESPONSIBILITIES GOING AT THE PRESENT TIME? WHAT CHALLENGES DO YOU ENCOUNTER AS A MANAGER?

4.   WHAT EXPERIENCES WITH SUPERVISORS HAVE YOU HAD AS AN EMPLOYEE THAT YOU FELT WERE POSITIVE? NEGATIVE? DESCRIBE THE BEST MANAGER YOU EVER HAD AND WHY? HOW HAS YOUR EXPERIENCE WITH SUPERVISORS AFFECTED YOUR MANAGEMENT STYLE? WITH SUPERVISEES?

5.   WHAT ARE SOME ATTRIBUTES OF A GOOD MANAGER? MOTIVATIONAL STYLE? INTERPERSONAL APPROACH? WAYS OF SUPPORTING THE EFFORT AND OUTPUT OF EMPLOYEES?

6.   WHAT ARE YOUR STRENGTHS AS A MANAGER? AREAS THAT NEED IMPROVEMENT?

Overall, the following areas should be included in this interview, which is likely to take at least two hours to implement: Work history at current company; previous employment and reasons for leaving past firms; accomplishments in career, in both past and current positions; other definitive and defining past experiences, within and outside the workplace; frustrations in

career; relationships with manager, peers, subordinates, and other key employees; goals/aspirations for the current job and the future; expectations for the coaching/development process, including what the client would like to improve upon and has been unable to accomplish to date. A more clinically oriented approach may also be taken in concert with the above, as demonstrated in Figure 2.

FIGURE 2: INDEPTH BEHAVIORAL INTERVIEW (IBI)--AREAS COVERED

1.   COGNITIVE STYLE

2. APPROACHES TO PROBLEM-SOLVING

3.   PERSONAL/EMOTIONAL STYLE

4.   LIFE GOALS

5.   WORKPLACE/MANAGEMENT STYLE

6.   INTERPERSONAL STYLE

7.   FIT OF CLIENT TO JOB

Whatever the specific approach, structured or free flowing, job-related or behavioral/psychological, when implementing an interview of this sort, it is essential for the consultant to follow the lead of the client where possible. This is salient for two reasons: First of all, as in more directly clinical circumstances, it is unlikely that the client will respond positively and openly to someone who does not seem to be listening attentively or responsively; second, the process is most effective when it is designed as a mutual exploration of the client's experience, allowing the client to come upon connections and insights with the support and guidance of the consultant (as opposed to being led or railroaded toward certain points of view); and finally, by

attuning the interview to the client's thought processes, the consultant is modeling behavior which will help the client become a better manager. That is, because hallmarks of good management style include the ability to listen attentively and responsively, to "resonate with" the experience of the employee, and to come to a mutual understanding of what needs to be done to resolve problems (Kinlaw, 1989; Tobias, 1990), the consultant is behaviorally demonstrating what he or she wants the client to absorb and manifest later on.

Other Interviews and Surveys - Without having access to information from the point of view of others within the organization, the consultant is at a serious disadvantage in working with a specific client. This is because the client's point of view is likely to be skewed by his or her experience of interactions in the workplace, sometimes to the extent of being out of touch with the effect of his or her behavior on others. Hard data from others in the organization is therefore useful not only as information for the consultant, but also as a "wake-up call" for the client regarding sequelae of his or her actions. In the present case example, some of this information was gleaned informally from the HR manager, who notified the consultant about the opinions of Sharon voiced by supervisees and senior management. In turn, awareness of these opinions was part of what motivated Sharon to participate in management development.

It is frequently useful, if not essential, to implement brief interviews or structured surveys with not only direct reports of the client, but also peers and supervisors as well. The clearest picture of a given client is likely to be provided through contact with a number of individuals in the organization who have different kinds of relationships with the client; this approach is known as a "360" because feedback is received from "360 degrees" around the client -- from below through direct reports, above through supervisors, and laterally through peers. Supervisees of the client can offer information about their manager's abilities and skills in delegation, exercise of

authority, support, reinforcement of work well done, methods of addressing substandard performance, and so on. Peers will provide data regarding the client's ability to work on a team, or within a unit or department, and to collaborate and cooperate with others within the organization. Supervisors can report regarding the manager's ability to take direction, respond to deadlines, access and benefit from mentoring, and produce measurable bottom line results and outcomes in products or services. All can also offer information regarding the client's interpersonal style in general, including range and intensity of emotional reactions, functioning under stress, and degree of clarity and effectiveness in communication.

In brief, then, salient areas to be covered in interviews or surveys with others in the organization include the manager's abilities to communicate clearly and effectively; delegate responsibility; motivate supervisees to perform at optimal levels; inspire trust and confidence; get tasks completed in a timely, efficient manner, and at a high standard of quality; respond to others in a respectful and mature way; deal with requests to and from other units within the organization effectively; work as an integral part of a team, unit or division; take direction and mentoring willingly; approach others in a manner that is not offensive and does not create defensiveness; focus on the development of his or her own career as well as those of others; and work within the organization with a general sense of purpose, focus, vision, and commitment.

Standardized Psychological Assessment - In principle, assessment with standardized psychological measures allows the consultant to gain a broader and more in-depth perspective on the client. In practice, such measures frequently affirm what a clinically astute consultant has already discovered through the interview process, and are useful as confirmatory evidence as well as to extend the self-exploratory process of the client. They are also informative regarding discrepancies between what a client presents verbally to the consultant and what he or she

reports in a more structured testing situation.

There are many standardized measures available, and more being created all the time. To engage in a discussion of the relative merits of various tests is beyond the scope of this chapter. However, one point should be made: It is important to consider one's goals in the use of a measure before the measure is chosen. For example, among widely-used measures, the Myers-Briggs (Myers, 1975) compiles scores on four dimensions of personality, producing a quick and fairly simple picture, by character type, of how an individual tends to function; by contrast, the California Psychological Inventory (CPI--Gough, 1991; McAllister, 1988) offers scores on twenty scales and three vectors, which allow for a richer and more complex matrix of personality components. The simplicity of the Myers-Briggs is attractive in some circumstances, but can lead to something akin to an astrological "what's-your-sign" sense of personality and self-definition, while the CPI is sometimes too complex for its results to be fully absorbed and integrated by a non psychologically-sophisticated manager. Further, some measures are restricted regarding who is permitted to administer them, requiring individuals with advanced training in psychology in many cases, which makes them inaccessible to some EAP professionals.

Although psychological assessment can be highly informative, there is a risk in placing too much importance on the results of standardized testing. At times, clients, HR officers, senior managers, and sometimes consultants see these results as having greater explanatory power than is actually the case, and use test scores and profiles in a way that constrains or "pigeon-holes" the consultation (such as in the "astrological" approach to the results of the Myers-Briggs). It is wise to remember at all times that standardized assessment data are provided by the client him- or herself, and results are therefore useful as summary descriptors of the *self-perception* of clients

and how this *self-perception* compares with results from reference populations. In point of fact, results are <u>not</u> definitive, fully objective constructs that exist beyond the client's way of perceiving her- or himself.

Summary - Assessment of a candidate for management development is a tripartite, integrated process, which includes an extensive interview with the manager, interviews with others within the organization, and standardized psychological assessment of the manager. Interviews can be structured or free flowing, but in all cases the intent is to obtain a broad-based sense of who the manager is and how the manager interfaces with the work environment. The interview with the client should also begin the engagement of the client in the process of self-examination, which is vital to any successful management development; promote the working alliance and trust between manager and consultant; and provide a basis for the next steps in the process of development. Interviews and surveys with others within the organization are employed to obtain a view of the client from all angles (a "360"). Standardized psychological assessment is useful as one component of an integrated assessment of a candidate for management development, and should be seen as one perspective among several. It should not be represented as a stand-alone method of understanding a manager, since there is a risk that results can be misinterpreted or misused, either by the manager or by senior management to whom reports may be required to be submitted.

Phase 2: Creation of Developmental Goals

The assessment phase serves as the foundation of the second phase of management development, in which goals for the intervention are created and delineated. In order to describe this phase of the process more fully, a return to the case example is necessary.

Feedback - Along with interviews with Sharon herself, information was obtained from

her supervisor, colleagues, and direct reports. The following became clear:

Sharon intimidated colleagues and direct reports; her supervisor, Eliot, felt "she came on too strong". Eliot also noted that she seemed overwhelmed by her work at times and often did not seem to think through responses to immediate requests from him. He felt that she would frequently "shoot from the hip": Although she would often respond with correct information to requests, she would just as often be wrong. Sharon agreed that "shooting from the hip" caused credibility problems for her. She felt that this tendency grew out of the fact that she managed a large unit within the company, which had a fair share of crises on a daily or weekly basis. In response, she frequently experienced a need to act quickly, without necessarily stopping to think through what would be the best, most productive, or most incisive way to proceed. As a result, she was aware that she was not always a good model for her subordinates, sometimes "throwing things together" in a desultory way and subsequently feeling stupid or incompetent.

Sharon also recognized that she had difficulty delegating for fear that the work would not get completed. She realized that, in order to gain confidence in (and the confidence of) her staff, she needed to learn to respond in a more measured way and to trust her direct reports more. Sharon was decent at catching fish, but not as good at teaching fishing.

Sharon began the coaching process enthusiastically, but recognized that she harbored some resentment toward Eliot and the company. She sought assistance in how to interact with Eliot, whom she felt undermined her by not being supportive and by encouraging her direct reports to criticize her. She also felt that her career was blocked because she was a "strong woman", and people like that did not do well in the organization.

While not taking issue with Sharon's perceptions, the consultant tried to focus Sharon's attention on factors more likely to be within her control, such as what she did (and did not do) to

interfere with her career and advancement in the company. He also helped her to experience some empathy for Eliot, with whom Sharon identified regarding pressures faced by managers in the organization. She began to recognize that she had options in responding to him beyond just getting angry and feeling thwarted.

In this phase of integration of feedback with the intent to set goals for management development, Sharon also became aware of the value of her relationship with a senior manager who had taken a liking to her. He proved to be an important role model for her, and she was able to avail herself of his function as a mentor. He set a good example, managing by delegating responsibilities and motivating others in a positive, encouraging manner. He was willing to come to Sharon and others subordinate to him in an open search for answers to problems. He had advised Sharon to "learn to trust people more" and to take her time in responding to crises.

Goal Setting - Once the feedback from others was discussed, and Sharon had examined her reactions to that feedback as well as her own feelings about the areas in which she needed improvement, the consultant worked with her to construct goals for the intervention. In order for management development goals to be effective, they need to meet several criteria: They must be attainable, clearly delineated, specific and concrete, and capable of motivating the client to action.

If the consultant allows unattainable, "pie-in-the-sky" goals to be set, the manager will invariably end up feeling frustrated, losing self-confidence and self-esteem, and the consultation will fail. Although this appears patently obvious, it is not as easy in actual practice to design goals that are genuinely achievable, or to avoid ones that are not. At times, a goal may appear attainable when this is not the case; for example, a manager may set a goal of becoming a vice president in a family-owned company in which there are only two such positions, both occupied

by young relatives of the owners. In other circumstances, the consultant may unwittingly compel the client toward a greater degree of personality change than is likely to occur; for example, allowing an anxious "bean-counter" to construct a goal which requires a free-spirited, entrepreneurial style. Clearly, designing attainable goals is a process that requires a realistic perception of oneself and the current circumstances of the work environment. In Sharon's case, for example, it would have been unwise for the consultant, whatever his view of the situation, to encourage Sharon to set a goal of confronting the possibility of inherent gender bias in her place of work, at least not until other more accessible goals had been addressed and Sharon's management style had improved.

To the extent that goals are clearly delineated, specific and concrete, they can be measured by objective methods. This is vitally important in the process of management development, since measurement of achievements is what allows for a sense of accomplishment. Conversely, a lack of achievement of goals becomes the basis for a re-examination of the process, an analytic endeavor which itself creates a learning experience in which goals can be modified or reconstructed. Without specificity and objective measures, goals become vague and motivation can easily flag. Moreover, from the point of view of modeling the consultation process after an image of good management practices, clarity and specificity of goals helps the client understand how to implement similar approaches in the workplace.

Goals that are attainable, clearly delineated, specific and concrete are more likely to motivate managers to action as well. To return to the fishing metaphor, the consultant and manager might agree that the manager will go to a specified, stocked pond and try to catch one fish per day at first, building up to a goal of three per day. By contrast, if the manager were told, "there are lots of fish in the world -- go catch some", the motivation to persevere would be

reduced by vagueness and lack of concrete criteria for success.

If Sharon's goals were "be a better manager" or "don't cause problems with your supervisor", consultation would be less likely to be effective since the generality of these goals could lead to miscommunication and confusion ("what does 'better' mean?" "what problems?", etc.). Sharon and the consultant chose to focus the work of development most directly on her tendencies to respond without first thinking incisively about a given situation, a behavior they felt was caused by anxiety regarding the quantity of work needed to be done and the quality of output required. They presumed that her aggressiveness was a consequence of feeling this anxiety and pressure. The consultant also felt that Sharon needed to learn to regard mistakes and failures as opportunities to learn and improve, which he felt would reduce her tendency to feel like she was running too fast all the time. Therefore, the goals set by Sharon and the consultant were as follows:

1) lessen strong aggressive stances and reactions to work events;

2) increase credibility in the workplace by making well thought out, considered responses to requests for information; and

3) develop a more preventive, methodological approach toward work tasks and incorporate crises as opportunities in a continuous quality improvement process.

Summary - Assessment in management development should include feedback from others within the organization in which the client works. This feedback then leads naturally into the phase of setting the goals for the developmental intervention. These goals should be constructed so as to take into account several features, including that they must be attainable, clearly delineated, specific and concrete, and capable of motivating the client to action. The establishment of goals for the intervention should flow seamlessly into the third phase of the management development

process, in which ways of measuring progress are created and implemented.

Phase 3: Designing Measures to Evaluate Goal Attainment

The character of measures to evaluate progress toward and attainment of goals is crucial in effective management development. If such measures are not carefully designed to capture the essence of the goals, which have been established, the energy of the consultation is likely to dissipate; if they are not also potent motivators for the client, momentum can easily be lost. Here again, specificity is paramount: Measures should be objective, behaviorally anchored, and quantifiable where possible.

By objective, we mean that the client and consultant (and others in the client's organization) can see, evaluate, and agree upon the content of a measure. For example, "Sharon is less aggressive" is not as objective as is "Sharon has made fewer than three aggressive comments in the past week"; "Sharon is more credible" is less useful than "Sharon responded to at least 50% of my requests in a credible manner".

The above examples also demonstrate the requirement of behaviorally anchored specificity as well. That is, either Sharon makes fewer than three aggressive comments per week or she does not; either she responds in a credible way more than half the time or not. Further, these examples are quantifiable: It would even be possible to maintain a chart of Sharon's levels of aggressiveness and credibility by tracking the behaviors she manifested.

In Sharon's case, as she and the consultant reviewed the areas in which she needed improvement and development, it became clear that the underlying factors of impulsive responses (i.e., "shooting from the hip") and lack of organization and prioritization were most salient and in need of attention. As a result, the measures designed by Sharon and the consultant focused on these issues, as can be seen in Figure 3.

FIGURE 3: EVALUATION OF PROGRESS TOWARD GOALS

1. Sharon does not try to immediately "fix" individuals or Issues

Strongly Agree   Agree Neutral   Disagree   Strongly Disagree

2. Sharon gives proper time, thought, and research to inquiries from senior management

Strongly Agree   Agree Neutral   Disagree   Strongly Disagree

3. Sharon prioritizes and follows through on tasks based on their urgency and importance

Strongly Agree   Agree Neutral   Disagree   Strongly Disagree

4.   Sharon provides a comprehensive analysis and review of her service operations, including all relevant details and data components

Strongly Agree   Agree Neutral   Disagree   Strongly Disagree

5. Sharon makes effective contributions to senior management which aim to optimize operational procedures throughout the company

Strongly Agree   Agree Neutral   Disagree   Strongly Disagree

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<u>Likert Scales</u> -A fairly simple method of creating quantifiability, which is frequently employed in measuring behavioral change, is the Likert scale (Likert, 1961). In essence, Likert scales delineate a list of responses along a conceptual continuum from one pole to another (such as like-dislike or agree-disagree). They are best designed for statistical purposes to have a neutral midpoint so that there are an odd number of choices on the continuum. Each choice is then given a score; for example, a five-point Likert scale may be scored 1 through 5 or -2 to +2 (see Figure 3).

By developing Likert scales to measure progress, a consultant provides the client with an opportunity to track movement toward goal attainment. Progress can be graphically demonstrated by noting changes in scores from week to week; further, differential progression

toward goals can be noted as well. For example, Sharon may find that after three weeks, her mean score (on a -2 to +2 basis) on Item 1 in Figure 3 is +1.35, while her score on Item 2 is -0.44. This would suggest to her that she is doing a better job of responding in a more thoughtful way regarding her tendency to "fix" things immediately, but has not improved substantively in the degree of careful consideration she gives to requests from senior management. In turn, this would allow her to focus on trying to develop her skills in interacting with senior management in a more effective manner.

"360" Revisited--It is generally useful to measure progress toward goal attainment in management development by obtaining information on a regular basis from the client's managers, peers, and direct reports, as is done in the assessment phase. For this purpose, Likert scales are well-suited for two reasons: 1) Each individual reports on the same issues, maintaining a high level of consistency in the information received by the client and consultant; and 2) the report is completed quickly and easily, increasing the likelihood of compliance among those from whom information is sought. Likert-based reports may be administered anonymously, by category (i.e., manager, peer, staff, etc.), or with each individual identified on the report. The advantage of anonymity is that individuals may feel more comfortable being honest in their responses, since they will not feel constrained by reactions the client may have to their opinions; however, this approach does not allow for a more fine-grained analysis of the resulting data. Requiring individuals to identify themselves leads to a clear picture of the effects of management development on relationships with others in the organization; on the other hand, specificity may be gained at the expense of complete truthfulness, and the response rate (that is, the percentage of people who return the reports) may suffer because of the discomfort some individuals may feel as a consequence of the direct exposure of their opinions.

This dilemma may be avoided in two ways: First of all, those who complete the reports may be identified only to the consultant and not to the client, although this may lead to an erosion of trust within the client-consultant relationship. A second, and perhaps preferable approach is to have reporters identified only by category and not individually. This method allows for a compromise between the advantages of anonymity and those of specificity, increasing the likelihood of honesty and a higher response rate while also permitting a finer analysis of the resulting data.

Summary - Measurement of progress toward goal attainment serves as a powerful feedback mechanism since information is gathered from individuals who interact with the client on a frequent basis. Weekly reports based upon quotidian contacts indicate graphically for the client and consultant what progress is being made and what still needs to be accomplished. It is for this reason that progress measures must be designed to cleave closely to developmental goals and to be simple, quick, and objective. Hallmarks of good progress measures are that they be objective, behaviorally anchored, and quantifiable; Likert scales are widely used and recommended for this purpose. Again, as in the assessment phase of management development, gathering information from supervisors, peers, and staff is the most effective way of obtaining a clear, in-depth, and realistic picture of movement toward goal attainment.

Phase 4: Coaching to Achieve Goals

The process of coaching is not an entity separate within itself in management development. It is a method of interaction between consultant and client, which mirrors the management style the consultant (or coach) would like to instill in the client. Consequently, the coaching process begins with the onset of the relationship between consultant and client, and inheres in that relationship through all phases of management development. It is not simply one

phase of the relationship that occurs in a linear fashion after goals are set and measurement methods are designed, although it tends to take "center stage" once the first three phases of the process are in place. Presenting the coaching process as a phase of management development is therefore somewhat artificial, and we do so with the assumption that it will be kept in mind that this is the core of the client-consultant relationship.

A Coaching Model - Our approach to coaching is based upon that put forth by Dennis Kinlaw in his book, Coaching For Commitment (Kinlaw, 1989). As he defines it, Kinlaw regards coaching as the essence of superior management. The process of coaching develops management practices including a focus on clear objectives and concrete actions; high productivity and quality standards; continuous quality improvement; close contact with direct reports; positive relationships within the organization and with outside contacts; ongoing career and competencies development; cooperation and commitment to common goals in the workplace; and high personal ethical and work standards. Kinlaw believes that these outcomes occur through the process of coaching which centers on developing focus and commitment to one's career, position, and organization.   Coaching is comprised of four processes: Counseling, mentoring, tutoring, and confronting. The first three processes are directed at problem solving; confronting is intended to improve performance. Counseling, with a focus on personal sensitivity to others, leads to increased self-sufficiency; mentoring, focused on career development, increases a manager's commitment to the organization's goals and values; tutoring, directed at skills development, deepens the appreciation of the value of continual learning; and confronting, intended to overcome performance deficiencies, increases the likelihood of a sustained, high level of quality in job-related activities (see Kinlaw, 1989, p. 25). Coaching is implemented in a positive, respectful, mutually influential, future-oriented manner, with a confluence of attention

paid to the process of interaction between coach and coachee. In other words, the attitude of the coach (or consultant) must include a nonjudgmental, positive regard for the coachee (or client); a respectful stance must be conveyed by encouraging the expression of the needs and concerns of the coachee with the intent to understand and develop information more thoroughly; the process must allow for the coachee to influence the coach as well as vice versa; and the agenda must be to correct behavior in the future, not to affix blame for what was wrong with it in the past. Coaching also targets concrete behaviors -- what the manager does not what he or she intends -- and is logical, objective, and descriptive. A revisiting of our case study should help clarify how this process operates in actual practice.

Coaching Sharon - To reiterate, the coaching process with a client should serve as a mirror image of the kind of management style the consultant wants the client to develop. To this end, management development with Sharon explicitly focused on the four coaching processes outlined above: Counseling, mentoring, tutoring, and confronting. In order to help identify Sharon's strengths and shortcomings in these processes, her direct reports were asked to complete the Coaching Skills Inventory (CSI; Kinlaw, 1989), an instrument which requested that they rate her use of a skill or behavior on a five-point Likert scale. The scale ranges from "5" -- indicating that a behavior was "very characteristic" of Sharon -- to "1" --indicating that it was "very uncharacteristic" of her. Sharon was asked to complete the CSI about herself as well.

Overall, scores were in the range indicating that her direct reports thought Sharon was a good manager. However, her own self-report scores were higher than those of her supervisees. There were two coaching components -- counseling and tutoring -- in which her self-perception was statistically not congruent with the perception of her among her direct reports. This indicated that it was particularly in these areas that Sharon needed increased awareness and skill

improvement.

When confronted with this information, Sharon was largely receptive. However, she began by placing some of the responsibility for the situation on the break-neck pace of work in her department, maintaining that this had compromised her ability to focus on and understand the needs and concerns of her staff. Since this suggested some level of resistance to the consultant's confrontation, he shifted gears to a counseling stance, using Sharon's concerns as the subject of coaching, "dropping the agenda" of his own goals (Kinlaw, 1989, p. 96). This allowed Sharon to admit that intellectually she wanted to be more responsive to staff concerns and needs, but that she had difficulty doing so.

It became clear that Sharon brought an intensity of feeling to the current situation from past events and relationships in her life. For example, in one session, she vigorously complained about how insensitive, intrusive, and disruptive Eliot was. The consultant then asked her who else in her life had evoked such an intense reaction in her, which led Sharon into an emotionally-laden description of her disappointing, unsatisfying, aggressive relationship with her parents. Sharon was able to recognize that she experienced Eliot as like her neglectful and hostile father and the majority of her staff as like her younger siblings. In childhood, she lived in a rural community with few other families nearby; both parents worked outside the home and Sharon was left responsible for her younger siblings after school by the time she was nine years old. The realization of the feeling of a repetition of family dynamics with her staff and supervisor was a profound experience for Sharon, and it took time and the consultant's assistance to work through this newfound awareness. She needed to remind herself frequently that she was no longer an abused, helpless child; she discovered that she could show restraint, a behavior not accessible to her as an angry latency age girl.

The counseling process thus focused on increasing Sharon's awareness of the impact of the dynamics of her family of origin on her current behavior. Once this awareness began to flourish, the consultant was able to shift toward a mentoring and tutoring function, supporting Sharon's ability to react to circumstances and events in a more measured way. She learned how not to "shoot from the hip", and subsequently began to acknowledge that Eliot and other senior managers were actually more helpful than she had realized in the past.

The consultation process then moved toward assisting Sharon in integrating the results of her new understanding and experience in her own management style. She began working on taking a more balanced, less frenetic approach to the coaching process with her direct reports. She focused on developing a fuller understanding of the problem before reacting; supporting staff in finding their own solutions; structuring her conversations so that her logic was more easily understood; increasing her staff's commitment to their own self-sufficiency; and designing more effective methods for training them in technical competence. She also paid closer attention to her ability to serve as a resource for staff, peers, and senior management.

By employing a process of intervention that moves easily between counseling, mentoring, tutoring, and confronting, management development consultants can be flexible in taking advantage of whatever issue is most compelling and current in a client's experience. If the consultant in Sharon's case had not been able to shift gears, his confrontation of skills needing amelioration may have led to an impasse; because he was able to counsel Sharon on more deep-seated psychological issues which made her resistant to the consulting process, she was then freed to examine ways in which she herself could improve as a manager. Practical tutoring and mentoring then allowed her to enhance her methods of leading and motivating her staff.

Summary - Coaching, as an approach to management development can be highly effective

because of its flexibility, immediacy to the issues at hand, and mirroring of the process of excellent management style. It serves to increase the client manager's self-awareness and psychological-mindedness, heightening understanding of management as a process founded upon interpersonal relationships. As the manager becomes more effective, the effectiveness of individuals within the manager's unit is likely to improve because of the manager's more developed skills in counseling, mentoring, tutoring, and confronting. Since this process is respectful and interpersonally responsive, it also should allow for improved performance without removing or suppressing the qualities, which make various individuals successful in the first place. Finally, a more in-depth method such as this -- a method that teaches managers to fish -- is more likely to enhance the value of the consultant to the manager, unit, and organization. By contrast to one-shot, quick fix approaches to isolated problems, management development by coaching can lead to genuine, systemic "sea changes" throughout the organization.

BUT I DON'T WANT TO FISH: MANAGING RESISTANCE

The consultation with Sharon proceeded relatively smoothly, with little resistance on her part and receptivity to the process by senior management and others in the organization. This is not always the case, and the ability to manage and disarm various forms of resistance to the process is a vitally important function of a management development consultant. The following case is illustrative of the difficulties in addressing resistance to management development.

The Case of Nathan: "Just Fix It"

Nathan, the Chief Executive Officer (CEO) of a semi-autonomous division of a financial services firm, contacted the consultant. Nathan and his Chief Operations Officer (COO) partner had built the division from a "mom-and-pop" entrepreneurial boutique to a loosely structured corporate environment, increasing by 2500% the amount of money they managed. Nathan

recognized that he was having difficulty with some employees because they were too independent, "lone wolves" as he called them. At first, he appeared receptive to the idea that the shift in the corporate culture needed to be understood from a systems perspective, that he might need to make some changes himself, and that consultation should not be a quick fix. He acknowledged that although he needed to let go of the reins to some extent, he was a "control freak" who had a hard time delegating to others. At the same time, he did not want to be responsible for keeping people in line.

A younger employee who was a main concern for Nathan was Mike, who had a background as an options trader. Mike was accustomed to the "wild west" atmosphere of the trading pit, and was not a very good team player. He tended to make investment portfolio decisions on his own, without consulting others in the division who may have had valuable expertise to offer. Despite Nathan's attempts to rectify this situation, Mike seemed unreceptive.

The consultant implemented Individual Behavioral Interviews (IBIs; see Figure 2 above) with Nathan, the COO, Mike, and other key players in the division. He also administered the California Psychological Inventory (CPI) to the same people, and, following assessment, scheduled feedback sessions with each. Finally, he interviewed individuals who reported to Nathan about their experience of the CEO as a manager. Nathan was somewhat uncomfortable during his feedback session, wanting to get to immediate, concrete solutions from the beginning. Further, he wanted to know "what's wrong with Mike", trying to understand right away what he should do to get Mike to become more responsive.

The consultant made an effort to help Nathan become more aware of the systems issues involved, and to see Mike's behavior in the context of an organization shifting from a successful entrepreneurial shop to a corporate behemoth. Nathan had difficulty grasping the concept that

Mike's behavior was a symptom of an organizational problem, and that Mike was in danger of being scapegoated. He was also unwilling to examine his own part in the problem, in that he had initially encouraged Mike's aggressive individualism, which reminded him of his own youthful exuberance. Now that that approach was no longer viable, Nathan felt uncomfortable in his role but was able to see it as problematic only in Mike's behavior. Ultimately, Nathan contacted the consultant and said: "Just tell me, should I fire Mike or not?" The consultant again tried to get Nathan to understand that the question was not that simple nor the solution that clear-cut. The result was that the consultant was the next to go.

Resistances

Resistances can appear in a number of forms, some subtler than others can. Further, some resistances reside more within the manager, while others are more embedded in the culture of the organization itself. It is beyond the scope of this paper to investigate the issue of resistance in detail, and organizational resistances in particular; however, some fundamental forms of resistance and ways to address them will be outlined below. These include: 1) Client's unwillingness; 2) problem employee's intractability; 3) power imbalances; and 4) misconceptions and preconceptions.

Unwillingness - At times, the manager who would become the subject of development is not interested in moving beyond the specific issues, which brought in the consultant in the first place. Often, as with Nathan, this amounts to a wish on the manager's part to have the consultant simply "fix" the identified problem employee; this is tantamount to wanting a fish dinner to be served without having to participate in the preparation of it. Such a potential client is likely to be unwilling to examine his or her own behavior and contributions to the problem situation. Frequently, guilt, anger, a sense of responsibility, and/or fear feed this unwillingness. Sharon,

for example, initially had some difficulty directly facing her harsh treatment of Linda, in part because she felt responsible and guilty, and this in turn made her angry when Linda was not responsive. Sharon's difficulty was also fed by her childhood experience with being responsible for others and feeling resentful and angry as a result. Likewise, although Nathan paid lip service to the idea that his division needed a consultant's help in making an organizational leap forward -- he contacted and hired the consultant himself-- he resisted any exploration of his own part in the problem. Certainly, his identification with Mike was ambivalent. On one hand, he saw in Mike the entrepreneurial spirit that made him (Nathan) successful; on the other, he felt threatened by Mike's youth and expansive future while he felt he was beginning his own decline. Uncomfortable with this vulnerability, Nathan was unable to move forward with management development, preferring to retrench in the idea that a decision had to be made promptly about Mike's continued tenure in the organization.

Intractability--Sometimes the issue is not the inflexibility of the manager/client, but the resistance of the identified problem employee (IPE) to change. This may be caused by a response to a perceived threat in being confronted or challenged to improve. Certainly, in Nathan's case, Mike was not an easy employee to manage. He was resistant, suspicious, and guarded. In fact, he refused to sign off on the IBI report until his wife, an attorney, had looked it over. He returned to the consultant with requests for numerous rewordings of phrases that he thought might cast a negative light on him. He was unwilling for the most part to engage in an examination of the feelings he had about being portrayed as he was in the report, despite the fact that the information in the report all came from him. Mike was apparently overly conscious of the risk in the process of consultation, and his fear of negative repercussions detracted from the possibility that he could gain from the experience.

Power Imbalances--Frequently, a consultant is brought into an organization "from above"; that is, the contracting is done with senior levels of management. A manager who approaches the consultant for assistance with a problematic employee may feel the need to be self-protective, in that there may be an implication that the manager is at fault for not being effective in the first place. This is even more likely to be the case when the consultant is told by senior management to contact the manager because of problems with a direct report. It is a common fact of life in organizations that power is an undercurrent to many interactions, and those implied threats to one's position are sometimes the context of communications from supervisors. Such is likely to have been part of what impelled Mike to be so self-protective, even hyper-vigilant, when approached by a consultant hired by Nathan. It is also likely to have been a substrate to Sharon's tendency to cast responsibility for her problems in Eliot's direction.

Misconceptions and Preconceptions - Some resistance occurs more because the client is unclear as to why the consultation is occurring, or has inflexible ideas about what management consultation should be. Although there is some obvious overlap between this category of resistance and those above -- because some lack of clarity and inflexibility is caused by cognitive "blinders" which themselves arise out of fear, guilt, anger, or resentment in the first place -- there are some instances in which the requisite approach for the consultant needs to be more educational and informative than addressing resistances per se. Some managers, particularly those fairly new to management positions, can be quite naive regarding the interpersonal and psychological skills necessary for their work. In such cases, psycho educational tactics (tutoring) are more appropriate than confrontational ones.

Working Through Resistance

The essence of the first three forms of resistance described above is that they are founded

upon fear, guilt, anger, and self-protection. In order to work through such resistances, it is first necessary to develop an alliance with the client founded upon trust, respect, and understanding. In fact, the word "resistance" is probably counterproductive in itself, since it implies that the client is actively doing something, which undermines the consultative relationship. Frequently it is more the case that the client is behaving in a way that is consistent and with how he or she perceives the environment in which the consultation occurs, the circumstances, which made it, arise, and the relationships, which need amelioration so that performance can improve. Without empathy for the client's position and point of view, the consultation will fail.

From this perspective, then, it is evident that addressing resistances first requires understanding them "from the inside out"; grasping what is the adaptive function of the behavior, which appears to be an impediment to the consultation. Two objectives are accomplished by taking this stance: First of all, an empathic understanding of the client's experience requires the consultant to respond to the client in a nonjudgmental, essentially therapeutic, manner. This conveys a sense of respect for the client's view of his or her surroundings, which in turn promotes the client's ability to trust the consultant as an objective and compassionate individual.

The second objective accomplished by this stance is that by understanding the client's "take" on the situation, the consultant learns immensely valuable information about what is occurring not only within the client, but also in the workplace environment itself. This is because, in our view, a manager's experience invariably will be reflective of the interpersonal and cultural dynamics of the workplace in which he or she manages. Therefore, the quality and nature of the manager's resistances -- i.e., responses evolving from his or her interpretation of events and relationships within the organization -- will inform the consultant regarding the workplace itself as well. For example, Mike's hyper vigilance, while certainly partly a

characterological trait, was also evidence for the likelihood that Nathan was scapegoating him because of Nathan's own ambivalence. Nathan's difficulty easing up on the reins of management and his envy of younger employees and their "Dodge City" approach to their work were part and parcel of Mike's concerns about how he was represented by the consultant's reports. Without this level of understanding of the dynamics of the situation, the consultant would be less able to function in an effective systemic way; without empathy for Mike's position, the consultant would have been more likely to participate in the scapegoating, supporting the idea that Mike should be removed from his position in the company.

Clearly, then, when resistance arises, it behooves the consultant to regard it as an opportunity to understand what is occurring on a deeper level, and to convey this understanding to the client in a respectful and empathic manner. An effective way of accomplishing this is to "drop the agenda" (Kinlaw, 1989, p. 96), reorienting the consultation away from the tasks at hand and toward an understanding of the client's present concerns and emotional state. By doing so, the consultant conveys respect for the client, underscores the value and importance of his or her feelings and concerns, and opens the consultation up to gaining vital information about the functioning of the client in the organization and the organization in the client as well.

Summary--Resistances arise in many forms, and are generally best viewed as comprehensible responses by the client given the client's experience of the workplace. From this perspective, resistances are taken as opportunities to propel the consultation forward by conveying a sense of respect for the client's point of view, deepening the consultant's understanding of the client and the organization, and enhancing the client's sense of trust in the consultant. Consequently, the consultant should act to address the resistance directly in an objective, nonjudgmental way, bringing that aspect of the client's experience to bear on the consultation itself.

CONCLUSION: BAITING THE HOOK

In the final analysis, the ability to shift one's stance as a consultant from case-by-case interventions with specific employees to a longer-term developmental relationship with their manager is a practiced art. One frequently needs first to catch fish for the manager, to intervene in a given instance in such a way as to quickly ameliorate its most problematic aspects. If Sharon's consultant had not been effective in assisting her in managing Linda, it would have been far less likely that the relationship could have proceeded to one in which the focus was on developing Sharon's managerial abilities. Further, if the consultant had not been cognizant of the fact that his behavior would model for Sharon the methods and techniques that he was trying to develop in her, there would have been less incentive for Sharon to acquire these methods and techniques for herself. By alleviating her management problem and modeling superior management approaches, the consultant convinced Sharon that his interventions had value for her.

Once a fish has been caught -- once the pressing issue has been resolved -- then the consultant can "bait the hook" by proposing the idea of management development to the manager (or human resources officer or senior manager when appropriate). Having demonstrated the efficacy and utility of his or her approach, a consultant is in a far stronger position than if a course of action had been suggested and not implemented. Effective intervention in a specific case allows the manager to feel comfortable with the consultant's way of working, and facilitates the necessary support of others in the organization (senior management, human resources, and so on) as well. Subsequently, the manager's comfort level is more likely to lead to the requisite degree of commitment to the process of management development, which can be difficult and arduous at times, particularly when issues of resistance are being confronted.

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Finally, management development interventions, because of the depth and breadth of the process, can be very gratifying professionally and personally for the consultant; perhaps more so than case-by-case problem resolution, the traditional EAP role. To what extent EAP professionals will embrace this new role and function is open to question and beyond the scope of this chapter. However, the ability to observe and participate in the growth and development of a manager as manager and as human being makes management development a highly worthwhile pursuit. In the final analysis, the consultant can learn immensely valuable lessons from the manager: Teaching fishing sometimes leads to the reciprocal experience of being served a truly delicious seafood feast.

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