

I. Supplementary and Contextual Information

TalkInc is an organizational development consulting agency that provides individual and organizational assessment services, executive coaching, small group facilitation, relational mediation, peak performance programming and strategic planning interventions to a primarily family-business client base. Talkinc's Key Employee Effectiveness Program (KEEP) includes consultation services and psycho-educational seminars in these principle areas: effective interpersonal communication, stress management, conflict resolution, motivation, leadership and team building, values-based adaptations to change, happiness and hardiness, creativity in business and mind state mastery. A client firm usually enters into an annual contract with Talkinc that provides its executives and employees with full access to Talkinc's organizational psychology expertise.

Our fundamental theoretical orientation is a dynamic, developmental approach to organizational psychology and executive coaching that meshes Maslow's theory of the hierarchy of needs, Grave's theory of the bio-psycho-social stages of human development and Wilber's model of integral psychology into Beck's applied system for matching individual and organizational core values and adaptive intelligences to changing life conditions. In addition to our fundamental theoretical orientation whenever we perform general assessments and coaching consultations for an individual and/or organization within a specific focus area we utilize the appropriate theoretical grounding. For instance, the Jungian theory-based Myers-Briggs Type Indicator (MBTI) when assessing for personality types, temperaments and communication styles, Kolb's Theory of Experiential Learning when assessing for individual learning orientations and the Thomas-Kilmann Conflict Mode theory when assessing for interpersonal differing styles.

II. Case Summary

The following work sample is a summary of a case in which, Al, the family founder and president of a client company was concerned that his firm's sales had leveled off during the previous two years and that the primary reason for this lack of revenue growth was that the sales team was floundering and stagnating. Recently a seasoned, high producing salesperson had unexpectedly left the firm for a new position at a competing company. In an effort to bolster team spirit and cohesion as well as move toward meeting the firm's sales goals for the next three years, the sales manager had hired two new salespeople bringing the total number of people on the sales team to four: the sales manager, Ken; an existing salesperson, Judy; a new, but experienced salesperson, Cal; and a nephew of the founder and inexperienced salesperson, Frank.

As is common with most of our organizational consulting projects a senior executive in a firm is frustrated and confused with respect to its performance, culture and/or human relations. In this case, Al had contacted Talkinc hoping to find someone who could help him reestablish a harmonious and productive sales team. Initially we met with Al for three hours to scope out and discuss his view of the nature of the organization's problems and needs. By the end of our initial meeting it was determined that the primary objectives of this project would be: to assess the organizational and individual fit with respect to

core values and adaptive intelligences, to determine the personality types, temperaments, communication styles, learning orientations and conflict resolution skills of each sales team member and AI, to facilitate and coach the salespeople, the sales manager and AI toward becoming a thriving and effective team that could plan and implement innovative and effective sales efforts so as to exceed the firm's revenue growth requirements and goals.

Our second round of contact with the company involved a one hour meeting with each of the four people on the sales team to introduce the project, to build rapport and to obtain a sense of each person's understanding of the situation. Subsequent to these meetings Dan and Joe met to discuss and strategize the case and determine the general assessment tools and action plan that would best suit this project. The flow of events we decided upon involved: administering and scoring the assessment tools, meeting with each person privately to discuss their results, running a one day small group workshop where each person could share their results and personal insights with the other team members and designing a strategic plan to enhance individual awareness, improve the fit between the person and the organization as well as facilitate discovery of ways they could increase sales.

Administering and scoring the assessment tools

Each of the following tests was self-administered and the accompanying profile was used as an individual self-awareness tool, as a coaching device and merged into group process interventions for organizational development applications.

The four assessment tools, instructions for completing the assessments and details with respect to confidentiality and informed consent were packaged into a booklet. Each person completed the assessments during the next week and hand-delivered them to us for scoring.

The Graves/Beck Values Test: Scoping the Seven Levels of Psychological Existence

The purpose of the Values Test is to reveal a person's assumptions about living and how he/she establishes priorities. It provides a comprehensive method of scoping and mapping, current and desired personal and organizational values. Results provide a continuum of points at which the individual accepts or rejects the seven levels of psychological existence.

The Myers-Briggs Type Indicator (MBTI)

The purpose of the MBTI is to enable a person to identify their personal style or typology so that they can learn to better understand the influence of personal style on their thoughts and actions and on the thoughts and actions of those with whom they interact. The MBTI also helps a person to identify strengths and weaknesses in their style of thinking and acting as reflected in their personal typology. Results provide an objective framework to improve team communication and conflict resolution.

The Kolb Learning Style Inventory (KLSI)

The purpose of the KLSI is to assist a person in understanding their strengths and weaknesses as an experiential learner. It measures how much a person relies on four different learning modes that are part of a four-stage cycle of learning. The KLSI characterizes a person's typical manner of thinking, remembering, problem solving and information processing. Results provide a means for increasing one's learning power and getting the most from learning experiences.

The Thomas-Kilmann Conflict Mode Instrument (T-KCMI)

The purpose of the T-KCMI is to assess a person's behavior in conflict situations. Conflict situations are situations in which the concerns of two people appear to be incompatible. In such situations, a person's behavior can be described along two basic dimensions, assertiveness and cooperativeness. These two basic dimensions of behavior are used to define five specific methods of dealing with conflicts. Results provide an overview of the repertoire of the preferred conflict-handling skills a person uses during conflict situations.

Table of Comparative Results begins on next page....

Table of Comparative Results

INDIVIDUAL RESULTS

	Al	Ken	Judy	Cal	Frank
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ASSESSMENT - **H=high**
PARAMETERS - **L=low**

Graves/Beck

Kin/Belonging	L	L	H	L	H
Power/Control	L	H	L	H	H
Rules/Structure	L	H	L	L	L
Rational/Achievement	H	H	L	H	L
Egalitarian/Ecological	H	L	H	L	H
Integrative/Synthesis	H	L	L	L	L
Holistic/Spiritual	L	L	H	L	L

Ourers/Briggs

Extroverted	H	H	L	H	L
Introverted	L	L	H	L	H
Sensing	L	H	L	H	H
Intuitive	H	L	H	L	L
Thinking	H	H	L	H	H
Feeling	L	L	H	L	L
Judging	L	L	L	H	H
Perceiving	H	H	H	L	L
MBTI – Coding	eNTp	eStP	iNFp	eStJ	iStJ

Capital letters indicate the person's MBTI core temperament rating

Kolb

Concrete					
Experimentation	L	H	H	H	L
Reflective					
Observation	L	L	H	L	H
Abstract					
Conceptualization	H	L	L	L	H
Active					
Experimentation	H	H	L	H	L
Kolb – Learning Type	Converger	Accommodator	Diverger	Accommodator	Assimilator

Thomas-Kilmann

Competing	H	H	L	H	L
Collaborating	H	H	H	L	L
Compromising	L	L	H	L	H
Avoiding	L	L	L	H	H
Accommodating	L	H	H	L	H

The Private Meetings

Once the assessments were completed and scored each person attended a two-hour, private feedback session with us acting as their executive coach. The fundamental goal of the session was to improve their self-knowledge and inter-personal awareness. Discussion centered on the notion that success in our life and career is determined, only in part, by our energy, motivation and intelligence. Much of what we accomplish can be directly affected by “who we are.” By “who we are,” we mean the totality of how we: interact with others, collect and process information, organize our life around our personal values, resolve conflict, think, feel and present our core character typology and temperament to the social circle.

Based upon their results from the assessments and our coaching discussion, each person created an action plan that addressed what behaviors they would like to stop doing, continue doing and start doing during the next ninety days. During our meeting each person compiled some reasoned guesses as to where each of the others scored on the four assessments and composed a set of questions they would like to ask the other team members and AI about their assessment profiles. In addition to speculating on the scores of the other people they rated the organization (High vs. Low) on each of the Seven Levels of Psychological Existence described in the Graves/Beck Values Test.

The Small Group Facilitation and Strategic Planning Workshop

Once each person clearly understood their results from the four assessments and insights from the personal coaching meeting and he/she had developed an action plan complete with a map of the concomitant behaviors needed to enhance their personal awareness and change strategy, we scheduled a one-day group meeting to tackle interpersonal sharing, team cohesion and strategic planning. The crucial theme of the meeting was to have the team engage in new conversations with each other. Six conversation-based agendas were used to drive a transformative and effective team-building and strategic planning process:

- A frank and detailed discussion about their personal core values and their perceptions of the company’s organizational core values. This discussion included an examination of the values alignment among the participants as well as between each participant and the perceived values of the company.
- The sharing of everyone’s MBTI, KLSI and T-KCMI results as well as participation in role-playing exercises to highlight each person’s profile and enhance the understanding of individual differences and communication styles within the team.
- The sharing of everyone’s core motivations and assisting in the recognition of the common interests between team members.
- The sharing of everyone’s action plan and the reaching of an agreement to support each other in their efforts to realize their plan.
- The sharing of everyone’s perception of the core business and the sales goals and the specific role that each person was to play in the team’s fulfillment of those

- goals. A comprehensive list was created of the milestones that would be used to measure the successful realization of the goals.
- A frank and detailed discussion about establishing an on-going executive coaching program and a commitment that everyone would participate in a KEEP psycho-educational training seminar in the forthcoming year.

III. A consolidation statement about some of the perceived consultation and coaching outcomes.

Two weeks after the small group strategic planning workshop we met with Al to evaluate our organizational psychology interventions. He thought and felt that we had definitely achieved the primary objectives of this project as outlined and discussed during our first meeting. He was quite excited about the whole process and the transformative results that he and the sales team members realized. In his view the company was back on track. Al asked if we could continue to be an executive coach for him and Ken, the sales manager. Since then we have been meeting with both of them on a bi-weekly basis helping them to implement their personal action plans and acting as a problem-solving consultant and sounding board. During the spring of 2004, Al and the sales team are scheduled to complete TalkInc's KEEP program in which they will complete eight one-half day psycho-educational modules on intrapersonal and interpersonal discovery. We have scheduled to have everyone redo the four assessments in nine to twelve months and to have a follow-up small group meeting to discuss the results and possible changes to their action plans and goals. As a result of the work that we have done with this organization we are confident that everyone involved is more psychologically fit and ready to adapt to the shifting future life conditions and changes that they will undoubtedly encounter, both individually and organizationally.