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Letter from the Editor:

Best Global Practices in Internal Organization Development

by Thiet (Ted) K. Nguyen, Johnson & Johnson

You are holding the first of a three-volume set of the global Special Edition of the O.D. Journal, which represents the collaborative labor of love (and sweat) of an all-volunteer team of 105 practitioners worldwide who have invested thousands of hours during the last year to bring this publication from concept to reality. This is the first Special Edition of its kind in the 39-year history of the O.D. Institute, and it is our gift to the global O.D. community. None of the individuals who contributed to this effort is a professional editor or proofreader, and all became actively engaged because of their passion and burning commitment to enhance the capabilities and reputation of our profession. Collectively, we share the common goal of advancing the field of organization development by strengthening the internal body of practice literature.

Two distinct and dedicated groups of professionals worked side by side to bring this Special Edition to life. The first group, a Peer Review Board, consisted of Senior Human Resources and Organization Development executives from 70 corporations worldwide who anonymously reviewed the content of submissions with 21 highly credentialed external consultants. Once the Peer Review Board determined that papers were ready for editing, the second group, a Special Edition project team of 14 dedicated O.D. professionals, managed all processes from design to execution. Under challenging circumstances, both teams have done their utmost to create the highest quality publication for you, our professional colleagues, and yet, we must ask that you forgive us for any errors you may discover as you read these articles. It is the spirit of worldwide collaboration that enriches the value of this global Special Edition.

This Special Edition will benefit the H.R./O.D. community in several ways:

1. **Academic community** – The academic community will find the content of these contributions of value to raise its awareness of current best internal practices. Program directors can be informed to strengthen their curriculums and research directions. Graduate students may use this edition as they prepare to enter the O.D. profession and compete for opportunities in the global marketplace.
2. **Current practitioners** – Both internal and external practitioners can use this knowledge to guide their practice areas, enhance their skills, and strengthen their core competencies, by learning from other O.D. professionals.
3. **Our clients and business partners** – Potential and existing clients can be better informed of the capabilities O.D. professional can bring to enhance employee engagement and organizational growth and vitality.

The genesis of this Special Edition was the May 2006 O.D. Institute Annual Conference during which participants discussed the need to encourage internal practitioners to share their stories in the O.D. Journal. During the conference I was extended the "invitation" to serve as Editor of a proposed Special Edition on "Best Internal O.D Practices," in part because of my role as Past Chair of the Global Committee on the Future of O.D. and as President of the New Jersey O.D. Community since 1998. My existing networks allowed me to quickly reach out to internal practitioners globally.

The results of this outreach effort have been overwhelming. Over the last 12 months we received about 100 manuscripts from internal practitioners on every continent (except Antarctica). This tremendous response led us to conclude the best way to share the breadth and depth of this work would be in three volumes: May, August and November 2007.

As the project team reviewed and edited each manuscript, its respect for diversity and commitment to making this an inclusive effort drove us to preserve the original voice, style, and intent of every author knowing that many are not native English speakers. The power and foundation for this work comes from this commitment to diversity and inclusion, which superceded strict scholarly conformance.

Content like this has never been captured or disseminated because internal practitioners tend not to have the luxury of time to write, and few are professional writers. This is the first time many of these authors took the time to document their work, secure the support of their company to release the information, and share their internal efforts with all who are interested. We applaud all our authors for their trust in us, and their willingness to provide working papers without the benefit of professional editors. What readers will experience in this global Special Edition is truly the authentic voices of internal practitioners worldwide who share their stories from a place of caring and eagerness to advance the field of organization development.

While this series is titled a best internal O.D. practice edition, no one associated with its production has judged or evaluated"a best global practice". Rather, authors were encouraged to share what they perceived to be a best practice within their organization, whether that organization is a start-up company in India, a non-profit organization in the USA, an energy company in Africa, or a hi-tech company in China. We also chose not to judge whether an article fits the definition of organization development, since there are variations among the definitions of O.D. We recognized, too, that O.D. is practiced differently across geographies, countries, sectors, industries, organizations, groups and contexts.

To share additional insights into their workplaces, many authors have generously provided a one-page reflection outlining their working environment, the benefits of the intervention as described in their paper, and finally, to share their take on the experience. In some articles, the reflection page includes one or two brief testimonials from their business partners, internal clients, and/or others who were directly affected by the interventions.

Look for the next volume of this global Special Edition in August 2007 when we plan to share another 15 papers with you. The November 2007 edition will contain 30 papers. All tolled, you will have the opportunity to read a total of 75 best global practice papers. We hope you will enjoy reading this global Special Edition, and we welcome your feedback (tnguye19@corus.jnj.com). Sharing your input is the most effective way to support our community and to help us continually improve. **Thank you.**

Ted Nguyen
New Brunswick, New Jersey
April 2007

The Future of Organization Development: Enabling Sustainable Business Performance Through People

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Abstract

The following synthesis of a global business leader survey conducted by the research team of the Global Committee on the Future of Organization Development is juxtaposed with a case study from Sony Electronics to illustrate how effective organization development practices can be applied to, add value to, and enhance a world-class company.

Survey results reveal that leaders across a wide range of industries see increasing opportunities for O.D.-related work that is critical to the future of business and society. Since there is considerable room for improvement in the effectiveness of organizations in areas that organizational leaders consider critically important to the sustainability of their businesses, and the field of O.D. offers some of its greatest strengths in these very areas, this paper is a ***call for action*** for Organizational Development practitioners to help close the gaps that are identified in this study.

Overview

Corporate business leaders in the 21st century face daunting, complex and unrelenting challenges. In the competitive global marketplace, business leaders must simultaneously identify new opportunities for growth and innovation to remain agile and responsive, as they continue to lead organizations in:

- Becoming global and multi-cultural;
- Developing productive, performance-based work environments;
- Building their talent and organizational capabilities to fulfill future needs;
- Accommodating new and changing external regulation;
- Leveraging and integrating new technologies to support the business; and
- Meeting increasing expectations for socially responsible and sustainable business practices.

Additionally, corporations are increasingly asked to collaborate with government, non-governmental organizations (NGOs), and non-profit efforts to support the social, economic, and natural environment – and to transform themselves into more sustainable enterprises within this larger ecosystem (Wirtenberg et al, 2007).

The key to meeting these enormous challenges lies in utilizing the knowledge, expertise, and commitment of people to enhance organizational performance. Not coincidentally, it is Organizational Development practitioners who possess the required organizational resources and competencies that can address these very issues. A recent study found that companies that"invest in human capital, work to develop and retain valued employees, and measure and hold people accountable for that investment, have a powerful competitive advantage" (IBM, 2005). Moreover, in a recent special issue of the Journal of Applied Behavioral Science (JABS) entitled: *"Is Organization Development in Crisis?"*Bradford and Burke (2004) argue that indeed Organization Development does have much to offer in its emphasis on releasing the human potential within organizations -"It has developed many valuable approaches. It has stressed the importance of values in a time when too much behavior seems valueless."

Scope of the Problem

The problem, then, appears to lie in the discrepancy between these strategic and operational management challenges and the actual utilization of Organizational Development practitioners to meet them. In the same JABS issue cited above, Greiner and Cummings argue that"O.D. can move ahead only if it learns more about substantive issues facing organizations and how to address them and only if it gains in power and reputation for helping senior management to resolve these issues." (2004, p.389)

Organizational Development practitioners are addressing these issues as a profession. Indeed, this is a significant development. For example, in their recent book"Reinventing Organization Development"David Bradford and Warner Burke (2005, pp. 5-6) point to the work of the Global Committee on the Future of Organization Development as"a positive sign that the major O.D. organizations have commissioned a study to assess the present state of affairs."But at the same time they question "whether the findings will be put into practice."

This is the starting point for our work as a special team of Organizational Development practitioners who have organized as a volunteer research team of the Global Committee on the Future of Organization Development. It is our mission to shape and shepherd our field of Organization Development along with the thousands of O.D. practitioners who are our colleagues to: (1) align the field more closely with the substantive challenges facing business leaders; (2) add value by leveraging the strengths O.D. can offer business; (3) blend theory with practice; and (4) create a significant and positive impact on business and society by infusing the values and process expertise that O.D. brings to mainstream business and society.

Mirror, Mirror on the Wall

This article describes the results of Phase 2 research conducted by the research team of the Global Committee on the Future of Organization Development[1]. These Phase 2 results complement Phase 1 findings (Wirtenberg et al, 2004) which analyzed the perspectives of O.D. practitioners toward their own professional field of O.D.. Phase 1 study was accomplished by a survey with more than 900 O.D. practitioner respondents, an extensive literature review, and in-depth interviews with more than a dozen business leaders, and yielded six key integrated themes (KITs) which organized substantive challenges and opportunities for business leaders and their organizations:

1. Globalization and multicultural and whole system perspective
2. Building a great workplace, productivity, and performance culture
3. Leveraging technology and worldwide integration
4. Corporate Social Responsibility is increasing
5. Building leadership and organizational capabilities for the future
6. Regulatory environment and new organizational forms

Results suggest that O.D. practitioners believe their greatest strengths lie in the following:

- the ***systemic orientation*** they bring to organizations
- their ability to assist in ***managing change***
- the ***techniques and processes*** they use; i.e., supporting teamwork and leadership development, and
- the ***values*** they bring to their O.D. practices.

To balance their positive self-assessment, O.D. practitioners acknowledged that their profession embraces opportunities to develop skill and reputation in the following areas:

- Refine the **definition and distinction** of the O.D. field of practice
- Enhance the **quality control** of practitioner skills
- Increase opportunities for O.D. practitioners to enhance their **business acumen including the ability to accurately identify and meet customer needs**
- ***Measure and communicate*** the return on investment (**ROI**) and /or the perceived **value** of O.D. work to the business.

We believe that there is no doubt O.D. practitioners can, and do make contributions within and across these broad areas of challenges. However, in this Phase 2 study, we sought to explore and define in greater detail the **relative importance** of specific challenges associated with each of the KITs as well as the **extent of the performance gaps associated with these challenges**, from the perspective of the Business Leaders, rather than the Organizational Development practitioners who were our primary focus in Phase 1 of our study. In this way, we hoped to find specific value-added domains for O.D. practitioners to close these gaps, and in so doing, add more value in those areas that Business Leaders want and need most.

Phase 2 Research Methodology

Survey Design and Distribution

The Internet-based survey of business leaders was designed and piloted with GCFOD Communities of Practice (COP's) between mid-December 2004 and early January 2005. The survey was administered between May 15 and August 15, 2005, by the third-party survey vendor, Quantisoft. The survey was sent electronically to a large sample of for profit organizational leaders (using a purchased distribution list) including CEO's,VP's, and Directors of Fortune 1000 companies across all industries,

	FOR PROFIT RESPONSES
Respondent Sample (N)	120
Gender Female Male	N= 43 (36%) N= 77 (64%)
Age 50 or over 40 – 49	 N=60 (50%) N=38 (32%)
Country United States Outside the US	 N=106 (88%) N= 14 (12%)
Industry Focus (Top 3)	Manufacturing (13%) Financial Services (10%) Hi Tech (9%).
Functional Areas (Top 3) General Management Other HR/Personnel	 N=47 (39 %) N=18 (15%) N=13 (11%)
Level of Management: Executive Middle Other	 N=71 (59%) N=38 (32%) N=11 (9%)
Annual Sales (P) / Annual Budget (NP) (% of total, descending order)	$100 - $499 million; N=24(20%) $1-4.99 billion; N=18(15%) Under $25 billion; N=16 (13%) $10-24.99 billion; N=16 (13%).
Number of Employees (% of total, descending order)	Under 500; N=32 (27%) 50,000+; N=17 (14%) 2,500 to 4,999; N=17 (14%) 1,000 to 2,499; N=16 (13%) 500-999; N=11 (9%) 25,000 to 49,999; N=10 (8%)
Company Life Cycle New Venture Expansion Prime Early Bureaucracy Declining Revitalization	 N=5 (4%) N=20 (17%) N=35 (29%) N=18 (15%) N=16 (13%) N=25 (21%)
OD Role / Department OD Role / Department (%) If Yes, Location of OD	 Yes; N=43 (36%) No; N=77 (63%) HR; N=33 (76% of yeses) Other; N=7 (16% of yeses) Line; N=4 (9% of yeses)

Table 1. Demographics and key sample characteristics.

[1] *Company Life Cycles were defined in response categories as follows:*

New Venture (developing and implementing a business plan, building commitment, highly flexible)

Expansion (rapidly growing, developing systems and processes, highly flexible)

Prime (sustaining growth and profitability, balancing flexibility with control systems, corporate culture drives creativity and innovation)

Early Bureaucracy (stable, strong financial position, searching for next growth opportunity/diversification; has lost the creativity, innovation and flexibility that took it to Prime)

Declining (organization has lost flexibility and is bureaucratic; reduced demand for traditional products/services; considering strategies such as downsizing or mergers to ensure organization survival)

Revitalization (organization engages in change initiatives to restore flexibility and reduce bureaucracy that is limiting competitiveness; change initiatives result in a return to the Prime stage) mostly from U.S. with some from Canada. These distributions were supplemented by the Global Committee Communities of Practice members forwarding to their actual/potential clients, and/or submitting names anonymously. It was further supplemented by e-mail notices with connecting links in the newsletters of five sponsoring organizations, GCFOD newsletters and notices, letters to Advisory Board members, and others. Press releases were sent to 36 major business and HR organizations, with personal follow-up. Numerous announcements were made at various meetings and conferences and recipients of the survey were also encouraged to forward the survey to their personal networks.

In total, the survey was administered via the Internet to a large volunteer (non-probability) sample of Fortune 1000 business leaders. Of the 235 total respondents, 120 were from the for-profit sector and 115 from the nonprofit sector. We report the for-profit results here and the nonprofit results by request[2]. Respondents were representative of the targeted demographic profile in all dimensions: size, function, level of management, age, gender, dispersion across industry sectors (Table 1).

The patterns and trends reported here are internally consistent and indicative of the perceptions of 120 executive/middle managers who represent a broad spectrum of corporations across the United States, some with some global participants outside the US (14).

Business Leaders' Greatest Challenges and Opportunities

The first section of the survey of leaders focused on seventeen questions (Table 2), stemming from the six key themes that had been identified in Phase I of this research as critical for business leaders.

For each item (e.g., *"Aligning and executing strategies in a way that meets financial goals and are consistent with core values"*), leaders were asked the importance to their organization and the *effectiveness* of their organization's performance in this key area. Significantly, the survey validated the importance of the six key themes identified in Phase 1 and listed above, with 15 out of the 17 items above 4 on a five point scale.

The *effectiveness scores* were consistently lower (ranging from 2.92 to 4.18, with only one item scoring 4.0 or above), indicating that ***for profit leaders were not satisfied with the performance of their own organization in most of the areas cited.***

By displaying all seventeen items on a 2x2 Importance by Effectiveness matrix (Figure 1), it is possible to see on one page which areas are the most urgent and which areas are the highest priorities, as well as identifying which particular weaknesses needed to be addressed.

1. Aligning and executing strategies in a way that meets financial goals and are consistent with core values
2. Effectively addressing organizational culture during organizational realignments, industry consolidations and mergers and acquisitions (M&A's)
3. Effectively applying organizational change principles to business and product life cycles
4. Aligning strategies, people, systems and processes organization-wide to enhance productivity and profitability
5. Developing and maintaining the commitment of the workforce to the goals of the organization for better overall performance results
6. Clarifying purpose and mission to inspire and engage the workforce
7. Attracting and retaining top talent
8. Leveraging and aligning existing information technology with business and people strategies
9. Facilitating adoption and use of new information technologies for competitive advantage
10. Using information technology to support learning and innovation
11. Enhancing reputation among communities where we work, with consumers and with employees and investors
12. Enhancing employees' commitment by focusing on corporate citizenship in the community and contributions
13. Ensuring accountability for business ethics among employees at all levels
14. Building leadership capacity for now and the future
15. Solving organizational problems systemically as opposed to solving them on a piecemeal basis
16. Establishing collaborative relationships and partnerships among public, private and nonprofit sectors
17. Increasing speed to market and profit for critical products and services through shared commitments and organizational values

Table 2. Areas of potential support by organization development practitioners.

Urgent Opportunities

Items identified as urgent consisted of those items high in Importance (mean of 4.35 or greater), but relatively low in Effectiveness (mean = 3.55 or less). For this group as a whole, two items surfaced as urgent, both of which had a gap of 1.35 or higher between importance and effectiveness, suggesting that these items need immediate or"urgent"attention.

1. (Item) 14. Building leadership capacity for now and the future (Importance = 4.63, Effectiveness = 3.18, Gap = 1.45 (p<.001))

The organization success factor with the largest gap between the importance and effectiveness (1.45) *was building leadership capacity for now and the future*. Business leaders identified strategic succession planning – the identification, development and management of a leadership pipeline – **as the most neglected critical high-impact activity in their organizations**. Twelve of the respondents noted particular challenges in developing leadership capacity: conflicting internal philosophies regarding talent recognition, problems in defining, recognizing and rewarding leadership competencies, lack of time and resources, and the aging workforce and upcoming retirements. One leader reported that,"In 10 years we lose 80% of the workforce to retirement in a field that has few replacements developing and with budgets that do not permit hiring for development."

2. Effectively addressing organizational culture during organizational realignments, industry consolidations and mergers and acquisitions (M&A's) (Importance = 4.52, Effectiveness = 3.17, Gap = 1.35 (p<.001))

Written comments by twenty respondents describe these events as"windows of opportunity,"but the role and processes of culture disruption and change are not taken seriously in their companies and organizations. When confronted by the immense challenges of execution of M&A's and realignment, five respondents note that"too little is done, too late,"and that clear and effective processes to implement mergers are often absent. Four of the respondents noted that O.D. should be playing a key role in these transitions, and that while"organizations talk about the importance of aligning cultures during reorganizations/restructuring; however they do not design O.D. interventions that assist in the alignment. They expect people impacted by the change to adapt."

High Priority Items

Items identified as High Priority were rated high in Importance (mean of 4.5 or greater) and relatively high in Effectiveness (mean = 3.35 or higher). Five items surfaced as high priority, all of which had gaps between 1.03 and 1.27, which, while these were not as low in their Effectiveness ratings as the Urgent items, given their relatively high Importance scores, business leaders could profitably focus greater attention and resources in these areas.

1. Attracting and retaining top talent (Importance = 4.74, Effectiveness = 3.46, Gap = 1.27 (p<.001)

The largest gap in the high priority items was the ability to attract and retain top talent. Fourteen respondents who added comments reported that company-wide talent management initiatives are viewed as critical business strategies in most companies. "We hire the best," the respondents generally agreed. However, when it came to retaining top talent, five of the respondents observed that"this issue is not on the radar right now." Some suggested that the poor economy was to blame, while others suggested that the"high turnover rate is a direct result of sacrificing employees for shareholder value." In general, in the words of one respondent,"we give lip service to valuing people, but our corporate culture and structure does not put this value into practice."

2. Aligning strategies, people, systems and processes organization-wide to enhance productivity and profitability (Item # 4 – Importance = 4.64, Effectiveness = 3.38, Gap = 1.26 (p<.001))

Comments from fourteen business leaders indicated that while leadership sees this alignment as important, it is not always given a high priority in for profit organizations. Seven of the respondents noted that productivity is a direct function of process and its effective alignment of vision, strategy, and people. However, some suggest that the complexity of the task and the size of the organization make this alignment difficult to accomplish. As one business leader observed, there is"no longer a clear path. Profitability depends more on new, undefined business models with no track record in an environment where customers are competitors and old rules have turned upside down."

3. Developing and maintaining the commitment of the workforce to the goals of the organization for better overall performance results (Importance = 4.78, Effectiveness = 3.66, Gap = 1.12 (p<.001))

Workforce commitment is vitally important in achieving organizational goals and business objectives. Five respondents noted that in order to execute strategies and achieve profitability, a company must have alignment and engagement of its workforce. "Engagement is a multiplier – good and bad – to the execution component," one respondent noted. Moreover, four respondents noted that systems and processes must be in place to support employee engagement and commitment -- it must"connect with motivation factors, namely salary, bonus, rewards, work environment, etc. The company can't expect employees to commit to high performing results until it demonstrates the commitment to employees' growth both professionally and personally."

4. Clarifying purpose and mission to inspire and engage the workforce (Item # 6 – Importance = 4.56, Effectiveness = 3.50, Gap = 1.07 (p<.001))

Inspiring and engaging the workforce in support of a clear vision and mission was viewed as a critical organizational business objective. Fourteen of the respondents noted that when each individual understands how they contribute to the mission and objectives of the organization – what are the outcomes and how will they be affected and effect the success of the organization – they will be committed and motivated to perform at a higher level. "It is a critical Leadership responsibility," they note, and "you have to communicate, communicate, and communicate."

Unfortunately, however, companies are not always successful in communicating and engaging their workforce in support of a shared vision and purpose. Six of the respondents noted that mission and purpose statements are often ambiguous and unclear – they only make sense to the upper levels of the organization and mean little to the lower levels. One respondent reported that their "mission statement was written by a senior team with no input from the 'hoi polloi' and then groomed by an agency. We see it on our external web site, but that's about the extent of it."

5. Aligning and executing strategies in a way that meets financial goals and are consistent with core values (Importance = 4.80, Effectiveness = 3.77, Gap = 1.03 (p<.001))

The 24 respondents who voiced comments to this item identified the critical importance of alignment between strategies, values, and tactics to deliver shareholder value. One person observed that their company "is ruthless in maintaining shareholder value. It is a clear unambiguous understanding of its responsibility to its shareholders that takes clear precedence over individual employee needs." Measuring effectiveness (metrics) and project management (scheduling) are viewed as keys to success in aligning and implementing strategies. One observer noted that "how to measure effectiveness is a huge barrier especially for interventions that do not tie easily to the bottom line or ROI." Additionally, nine respondents spoke to the ongoing and cyclical tension between strategic alignment and tactical execution, three noting that the tension is often resolved in favor of tactical execution –"there is a recognition that focus on the human element is essential – stronger results through stronger relationships – but employees continue to hear 'schedule and budget' over everything else."

Strengths and Weaknesses

Finally, from Figure 1, we note the primary strength and weakness of the for-profit organizations. For the for profit leaders, there was only one item that was reported to be a strength (high importance and high effectiveness):

- Ensuring accountability for business ethics among employees at all levels. (Importance = 4.82, Effectiveness = 4.18, Gap = .63 (p<.001)).

Five of the respondents mentioned the role of public scandals and organizational policy or legal requirements (e.g., Sarbanes Oxley) as the basis for this important emphasis and set of activities.

The area receiving the lowest effectiveness rating was item 15.

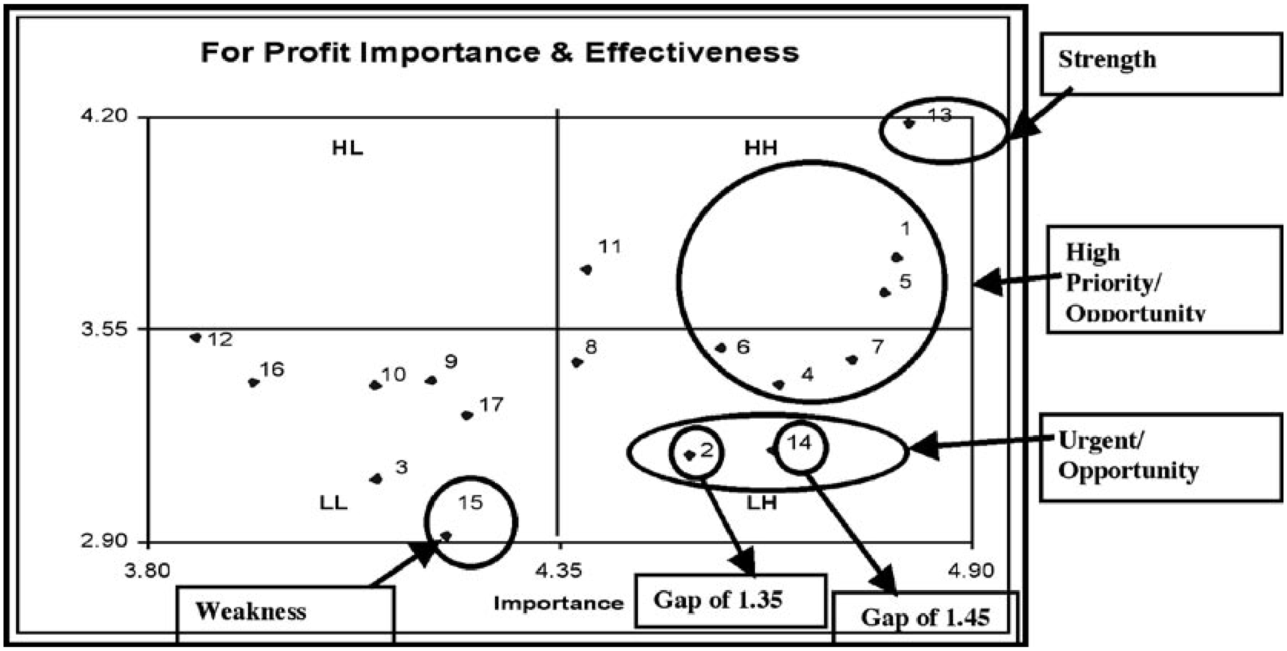

Figure 1. For profit key findings on importance and effectiveness.

- Solving organizational problems systemically as opposed to solving them on a piecemeal basis. (Importance =4.20, Effectiveness =2.92, Gap = 1.27 (p<.001))

Six of the respondents emphasized that a systemic focus is important in solving organizational problems; however, there is not enough evidence that this is done in their organizations – we're"still plugging too many holes with temporary patches." However, there was some ambivalence regarding the usefulness of systemic approaches: two respondents questioned whether or not a systemic approach is necessary as"this depends on the nature and severity of the organizational problems."

Sources of Expertise and Support: To whom do Business Leaders Turn for Support?

For each specific item related to the key themes, business leaders were asked *"To whom do you/would you most likely turn for support?"*

When looking for assistance in positioning industry consolidation, M&A, and strategic alignment for success from a cultural perspective, business leaders turn to line management first, to consulting firms second, to HR third, and O.D. fourth. When building leadership capacity for now and the future, business leaders turn to HR first, and line management second when identifying, attracting, developing and retaining leadership talent. But they turn to line management primarily to foster leadership courage, decision making, and problem solving. Similarly, with regard to building a performance culture, executive leaders turn to line management first, HR second, and O.D. third when seeking to enhance workplace productivity and performance culture and foster employee engagement and commitment.

O.D. Investment Intentions: Plans to Grow Organization Development

Only 36% of for-profit respondents were from organizations that had a distinct O.D. department, and of those who did, it most often reported into HR. Despite, or possibly because of their dissatisfaction with the current effectiveness, fully 63% of the respondents said they were either very likely or somewhat likely to invest in O.D. over the next three years. Over 90% said they planned to invest more (39%) or about the same (54%) as in 2004.

When we compared the perceived effectiveness of organizations that did or did not have an internal O.D. department, the pattern of results indicated that **having an O.D. department has a slight but beneficial impact on the perceived effectiveness of their organization's performance.**[2] Specifically, this was the trend in 13 of 17 (76%) of the differences in effectiveness ratings which were in that direction. Furthermore, those who are **more likely to invest in O.D. have higher importance and higher effectiveness scores than those who are unlikely to invest**. On 15 of the 17 items (88%), the performance gaps are larger for those who are less likely to invest in O.D..

Sony Electronics: The Contribution of Organization Development

To further illustrate and illuminate how the results from the **Business Leader Survey can be applied to a world class company**, we include a brief illustration and case study of Sony Electronics (SEL). Through this example, we will demonstrate how an internal O.D. function can be, and has been instrumental in identifying and closing the gaps that business leaders deem most important for the sustainability of SEL.

Over the past five years SEL has made a concerted effort to integrate and focus its organization development efforts to address four of the improvement areas identified in the **Business Leader Survey: (1) Talent; (2) Culture; (3) Alignment; and (4) Engagement. The research results also suggested we look at the SEL organization as a** *whole system* and identify ways to leverage integrated approaches to impact all four key areas. Key questions we used to drive these efforts included:

- What does business success look like?
- What are the key organizational capabilities needed for success?
- What are the individual competencies needed to support the organizational capabilities?
- What cultural characteristics are needed to retain and grow our talent?

The responses of business leaders to these questions helped us focus our efforts on high-impact areas including speed to market, financial acumen, risk taking and developing direct reports.

The Business Leader Survey guides us to seek O.D. opportunities to increase organizational productivity and employee engagement that has lasting business impact. Sony Electronics followed these Organizational Development guidelines and focused on building the bridge between solid data collection and impactful O.D. execution.

In 2002 SEL was going through a transformation that reduced headcount, changed organizational structure, and moved the U.S. headquarters from the East to the West coast. These changes impacted employee morale, engagement and created critical talent issues with positive business impact. SEL had focused on becoming lean and agile by cutting non-value added costs and shifting business focus to building the muscle and stamina needed in a very challenging marketplace. To address these challenges we first created a vision for our change efforts:

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[2] Due to space limitations, these data are not included here; however, crosstabs are available on request.

> *Sony Electronics will regenerate itself to be a lean high performing organization with:*
>
> *- A keen focus on our customers*
>
> *- An optimistic highly engaged workforce*
>
> *- An environment with opportunities for people and the company to grow*

These efforts were also intended to support the Sony parent company goal of global recovery and regeneration. Next, we created clarity around the current state and desired future state and committed ourselves to focusing our O.D. efforts on creating optimistic sustainable solutions. We did this by building on our organizational strengths, focusing on long-term solutions and committing our development resources to build internal change capability.

Recipe for Success = Ask, Listen, Act, Learn/Thank and Repeat

As we learned from the Business Leader Survey, it is incumbent on O.D. practitioners to be better connected with the needs, opportunities and challenges of the businesses we support. This translates into O.D. professionals needing to simplify the language we utilize to drive change in organizations. A simple model we utilize to accomplish this has emerged after many years of practice. The model includes:

- **Asking** key stakeholders, especially people closest to the work and our customers what they need to be successful
- **Listening** includes the fine art of separating the non-value added feedback from the substantive feedback and ensuring you really understand what people are saying
- **Acting** quickly involves being proactive about what you can change but also what you cannot and why. People are smart and if you do not tell the truth they will see through it.
- **Learning and thanking** helps us build the institutional knowledge needed to grow and not repeat our mistakes. Thanking people is a critical step for helping them see the connection between their feedback and the actions taken.

Our first effort was to engage our employees and managers and give them an opportunity to express their concerns and offer suggestions to maximize our business transformation. We conducted transformation workshops around the country and received important feedback from our employees.

Participant feedback from the organizational changes included a wide range of emotions including surprise and anxiety. Employees also stated what they needed from management: a concrete plan, shared vision, more detailed communications, consistency of strategy and approach, and the rationale behind changes. Based on this feedback we focused our change efforts on four areas: (1) Communication; (2) Career development; (3) Clarity of direction; and (4) Leadership sensitivity and support. Some of our efforts in these areas included:

- **Communication** - We partnered with Employee Communications to address employee questions and concerns, beginning with a message from the COO and a bi-monthly newsletter called"SEL on the Move."
- **Career development** – We offered ongoing Career Development programs for employee groups who were staying as well as for those leaving the company.
- **Clarity of direction** - We increased leadership communications addressing our direction and strategy as well as the rationale behind these.
- **Mission and Values Project**- We initiated a *Vision, Communication and Alignment* project. Using a cross-business team of senior leaders and high potential managers, we articulated our direction and purpose and clarified the values and behaviors that serve as the cornerstone of the lean, fast and flexible culture that we were building. This team also helped to develop a process to engage employees in what they can do to contribute to the realization of our vision, strategies and values.
- **Leadership sensitivity and support** - We partnered with an outside firm to deliver a session that focused on the proactive role leaders need to play during transformations. The first group we delivered this to was the Operating Committee which represented the leaders of all business and functional groups. During this first session we shared the feedback from employees and discussed organizational opportunities to better support our changes.

Talent Management Councils were set up to systematically work through the organization to identify our key talent who possess the individual competencies needed to contribute to business success. Once we identified these individuals we then partnered with an outside organization to validate our work by utilizing an assessment center.

On the development front we set up leadership development programs to communicate and engage our leaders, managers and employees in our vision for the future as well as the skills needed for success in our new culture. Based on the competency feedback we designed programs around building financial acumen and business leadership skills. We partnered with an outside organization to create financial simulations to help our top talent implement this new knowledge and these skills and to ***build their leadership capacity* (which was the most urgent gap in the business leader survey).**

These sessions also provided opportunities to get additional feedback on our cultural challenges and identify additional gaps we needed to address to help guide our ongoing O.D. efforts. Employees told us we needed to do a better job of developing and communicating a clear image of the future. Based on this feedback we launched a mission and values project to improve **alignment and understanding of our most important goals (another key gap in the business leader survey)**. This reinforces the power of utilizing research like the Business Leader Survey to help O.D. practitioners ask better questions which result in improved interventions and increased business impact.

Discussion and Implications

Business leaders see increasing opportunity for O.D. related work that is critical to the future of business and society. As we saw in the Business Leader survey results and the Sony Electronics illustration, there are clear trends about their pain points and opportunities. Organization Development practitioners can and do have a critical role to play in assessing, addressing, and proposing solutions for these challenges and opportunities. Because there exists considerable room for improvement in the effectiveness of organizations in areas that business leaders consider very important, this is a ***call for action*** by business leaders and line managers for O.D. practitioners to step up to the plate and help close the gaps that are identified in this study. Although these two parallel findings are preliminary because they are based on patterns noted in a small sample of respondents, they are worth repeating, and worthy of further research and exploration: (1) having an O.D. department has a slight but beneficial impact on the perceived effectiveness of organization performance, and (2) those who are more likely to invest in O.D. have higher importance and higher effectiveness scores than those who are unlikely to invest. To illustrate, the Sony case example showed how one internal O.D. practitioner was able to add real business value by first understanding the business gaps and opportunities from a people perspective, and then by applying the theory and practice of Organization Development.

The Business Leader Survey, and the Sony example, both pointed to four areas in particular where there are significant opportunities for improvement: ***talent, culture, alignment, and engagement.*** Leaders urgently need support in areas related to talent, including developing current and future leadership capacity, as well as attracting and retaining top **talent**. There is also an urgent need for support in effectively addressing organizational **culture** during organizational realignments, industry consolidations and mergers and acquisitions.

Another high priority area requiring more effective support is **alignment**. Successful firms must align and execute business strategies in ways that meet their financial goals and are consistent with their core values. Moreover, strategies, people, systems and processes must be aligned organization-wide to enhance productivity and profitability.

Finally, business executives and leaders need support to **engage their workforce**. An organization can best achieve its business results when its workforce is engaged and committed to achieving its goals and objectives. An organizational leader must be able to clarify and communicate succinctly the purpose and mission of the organization to inspire and engage the workforce.

Caveats and Limitations

Mindful of the nature of applied research, the conclusions we discuss carry caveats and limitations with regard to sample, survey instrument, and process. One limitation arises from the sample. Respondents were self-selected, coming from many sources including newsletters, emails, and list serves. We cannot be certain that the business leader to whom the survey invitation was sent actually completed the survey. Similarly, the general demographic skew favoring middle-aged males in business leadership positions may also have affected the sample. Second, because the GCFOD is a voluntary organization without the name recognition and branding of established survey firms (e.g., McKinsey, Gallup, etc.) , and the difficulty in obtaining business leader respondents, reality required the use of a non-probability sample, namely a convenience (voluntary) sample, as commonly employed in applied research situations. Finally, the sample contained a small percentage of respondents who had internal O.D. resources available to them, which made the question about the O.D. resource to whom they turn potentially problematic. Many respondents, of necessity, had no other option but to seek help for their O.D. issues from other or external sources.

The process also contributed constraints to the study's generalizability. For example, resource limitations prevented telephone follow-up. The sponsoring organization, the GCFOD, lacked sufficient resources for follow-up interviews for further probing, which might have produced additional insights into issues facing business leaders in the 21st century, as well as the sources they turn to for help and their plans to commit resources in the future for O.D.. Web survey constraints also may have impacted the response rate -- spam filters, secretarial filters, and other barriers make it impossible to determine unequivocally how many people actually received the survey. Despite these caveats and limitations, the authors are confident that the information provided and the conclusions we can draw from them will be of significant use to O.D. practitioners and business leaders going forward.

Summary and Conclusions

What can O.D. practitioners do to have a greater impact?

The world of business and civil society faces challenges as never before. Business leaders need real-time practical help and support. There is considerable room for improvement in many areas that leaders consider most important. This article identifies specific areas of urgency and high priority and points the way for practitioners (O.D., HR, internal and external consultants) to add value where it is needed most. Currently, it is important to note that O.D. as a distinct field or function is not often recognized by executive leaders as a source for much of the business performance improvement work that O.D. could and should support. Business leaders usually go elsewhere, at least initially, for the support they need and want, first, to line management, then HR, and consulting firms.

What assistance can O.D. professionals provide?

O.D. professionals can be enormously helpful to leaders as they try to step up to these formidable business challenges. For example, O.D. professionals can ensure that all stakeholders have a basic understanding of O.D. theory and focus on building core leadership competencies. At the same time, O.D. practitioners can help line leaders recognize the interconnectedness of the individual, the organization and society, and support leaders to evaluate whether their espoused core values—those deeply held views we hold as a compass for ourselves, regardless of whether or not we are rewarded—are aligned with the behavior and actions of the organization as a whole.

Another strength of O.D. is its whole systems perspective, and there are numerous possibilities for O.D. professionals to contribute and add value here as well. O.D. professionals can leverage this strength in supporting line leadership in becoming"whole system thinkers" in helping them to understand that every organization, no matter how large or how small, is a system. Organizational problems are linked together, and change in one area often impacts other areas of the whole system. Discovering the links and how they fit together and, therefore, what steps the organization can take to improve the situation is the foundation of holding a whole systems orientation. O.D. practitioners can also identify and utilize best practices and formulate processes for strategic thinking about the future, so that even in the midst of change there is a perpetual focus on direction. Furthermore, O.D. practitioners can facilitate processes to support the definition and alignment of core values, mission and vision statements, and ambitious but realistic strategic objectives and organizational goals across the organization. Additionally, they can offer follow-through and coaching services that provide ongoing planning and evaluation mechanisms to support greater alignment and accountability. Finally, O.D. practitioners can help to build skills and competencies in cultural competency and fostering inter-organizational collaborations and relationships across sector boundaries to address some of our most intractable problems.

Summary

In summary, we believe that O.D. practitioners need to work closely with Executives and line managers to understand the challenges and opportunities they are facing, and come to agreement on how O.D. tools and practices can support the business to make and measure changes to capitalize on those challenges and opportunities. By adding their unique contributions around vision, values, leadership, change, whole systems alignment, culture, workforce engagement, coaching, learning, development, and so forth, Organization Development practitioners can make a much needed difference in creating more purposeful, life-giving, humane, productive and sustainable enterprises for the 21st century.[3]

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Endnotes

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2. Complete Results for the For Profit and Nonprofit Sectors are available at www.whenitallcomestogether.com. For further information on the Nonprofit sector, contact Tim Lannan at tim@timlannan.com; or Beth Applegate at beth@applegateonline.com.
3. In response to these findings the Global Committee on the Future of O.D. (GCFOD) has established three ongoing volunteer Action Teams which are working together to address the gaps that have been uncovered through this research: the Enterprise Sustainability Action Team (ESAT) which is compiling "The Sustainable Enterprise Fieldbook" targeted at line managers, O.D. and HR practitioners; the Business Strategy Action Team (BSAT) which is looking at rebranding, marketing and the value equation (ROI) for the field of O.D., and the Change Management Action Team (CMAT), which is looking at building new models of change, development, action learning and communities of practice.
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