**Case 2.1 – The Consulting Contract**

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**Executive Summary**

A software design firm’s senior management team has determined that the six managers of the software development and the six managers of the customer service department are ineffective communicators. The consultant team, LSS Miracle workers have been assigned the task to develop a 2-hour introductory seminar on “Communicating for Managerial Effectiveness.” This is a challenging task since the 12 managers are unaware that they are considered to be ineffective and they have never participated in training on communicating for effectiveness.

The purpose of this case study is to identify the different factors that affect communication and identify the different steps that were taken to create an effective seminar to improve communication strategies of the 12 managers. First, LSS Miracle Workers reflected on the things that we know about the Vice President, Senior Management and the 12 managers. We identified the three targeted audiences and the generations that they associate with. We concluded that the values and beliefs of different generations and communication approaches play a factor in the way things are being communicated amongst the different groups.

LSS Miracle Workers did research on the traits of the different generations and communication approaches. Much of the research was conducted through a focus group survey. The participants of the focus group were invited to participate in a cross-generational event to share and learn about the challenges and opportunities employees are identifying within the workforce. This helped identify what theme or work place benefit was most important to each generation. This research helped pinpoint the best approach to take regarding presentation strategy of the seminar to each management group by determining and identify the generational preferences.

LSS Miracle Workers realized that it was important to identify each manager’s personal communication approaches. We researched and identified the traits of the three management styles; arrow, circuit and dance management. This led us to creating the recommendations for the software company.

Recommendations included strategies and tactics that LSS Miracle Workers identified. The objective was to communicate the importance of these strategies and how they will be a benefit to the employees and the organization. Strategies consisted of presenting the information to the Vice President in a separate one on one meeting and presenting the information to senior management and the 12 managers in a large group format. LSS Miracle Workers will educate the groups about communication approaches, innovation, boundary-spanning and communication channels.

LSS Miracle Workers have included rejected recommendations based on seminar presentation strategies. They have also included continuous improvement ideas regarding communication channels, innovation and evaluation.

LSS Miracle Worker’s goal is to receive a major contract with the software company. They will achieve that goal by creating a seminar to increase each targeted audience’s knowledge of communication strategies. Increasing their knowledge will allow them to become effective communicators.

All of these pieces of the case study prove to be crucial points to consider and teach upon. Using information learned from research and findings analysis helped build a solid seminar to improve the communication effectiveness of the management teams. If the Vice President and the participants of the seminar integrate the strategies learned in the seminar, it will prove to be successful. As a result the goals of everyone involved will be achieved.

**Introduction**

**Overview of Case Study**

LSS Miracle Workers have been asked to present a seminar to improve the communication effectiveness among the 6 managers of the software development department and the 6 managers of the customer service department. Top management told LSS Miracle Workers that if the initial training is successful, they will hire the firm for a major contract.

The purpose of the case study is to identify the different factors that affect communication. This case study will more specifically identify how generational differences and communication approaches affect communication. Analyzing those factors allowed LSS Miracle Workers to develop information to compose into a 2 hour seminar that is appropriate for each target group.

**Problem Statement**

Senior management feels that the six managers of the software development department and the six managers of the customer service department are “ineffective communicators.”

**Methods**

LSS Miracle Workers identified that there are three targeted audiences: Vice President, Senior Management and the 12 managers. They realize that each generation interprets information differently and has different values and concerns. Identifying the generations of the audience was a crucial factor in developing the seminar for the company. Researching the different communication approaches: Arrow, Circuit and Dance management helped them identify the positives and negatives of the different approaches.

LSS Miracle Workers picked out crucial points to teach upon in order to improve communication effectiveness among the managers. They encouraged the managers to reflect on the different communication approaches. They also encouraged the manager to integrate the different strategies of encouraging innovation and the strategies and techniques of boundary spanning. It was also important to point out the different communication channels and how to use each one appropriately.

**Findings**

**Case Study Purpose**

1. Specify the precise material you would cover with each group of managers.

2. Specify how you would present the material: a) to the vice president, and b) to the two groups of managers.

3. Most importantly, provide a rationale for all of your choices based on the material presented in the book.

**Situational Background**

Consulting group, LSS (Laura, Sarah, Sandy) Miracle Workers, has been hired by a software design firm to conduct a 2-hour introductory seminar on “Communicating for Managerial Effectiveness”. Top management has told you that if this initial training is successful, they will hire LLS Miracle Workers for future major contracts.

Senior management identified a group of managers that they felt were “ineffective”. The group of managers consists of six IT Managers and six Customer Service Managers. These managers have never participated in this kind of training and are unaware that the senior management views them as “ineffective”. All the managers have college degrees and are under 35 years old. The customer service managers have degrees in management and the software managers have degrees in computer science.

The main contact is a 28-year old vice president who seems introspective. There are a number of paintings by Claude Monet around the vice president’s precisely organized room. The initial meeting with the VP started and ended right on time.

**Results**

**Audience Analysis**

There are three targeted audiences identified; Vice President, Senior Management and Managers. To summarize the chart in Appendix 5, the known facts of the three identified audiences are:

Senior Manager’s generation identity is unknown; however the Vice President and Managers are identified as Millennial generation. Based on research found in Appendix 4, the most important corporate benefits for Millennials, Gen-X and Baby Boomers are culture, company benefits and flexible work options.

Education is unknown for the Vice President and the Senior Managers however the Customer Service and IT Managers all have college degrees. The IT Managers have Computer Science degrees and the Customer Service Managers have Management degrees. There is unknown data as to what type of degrees these managers have because we are not given data if the college degrees are Associate Degrees or Bachelor Degrees. In addition, it is unknown if the degrees have been beneficial to each manager at this company.

The managers have not attended seminars in the past to improve ineffective communications and we do not know if the Vice President and Senior Managers have ever experienced this type of seminar either.

It is unknown what management approach the Vice President, Senior Manager and Managers utilize. We do not know if they utilize Arrow, Circuit, Dance or other communication approach when managing people and groups. We are unaware of their “comfort zones” of introverted or extraverted personalities when choosing communication channels.

Targeted objectives presenting the seminar for each audience varies of which will need to be considered by the consulting group.

Since the Vice President is top management, the presentation objective, based on the case study materials, is to present information about the seminar that will be meaningful, engaging and yield concrete evidence that receivers of the seminar will take away concepts and skills to improve their managerial communication effectiveness. The success of the program will determine future business with the consulting firm thus the presentation should convey how the seminar will yield a return on investment as well as seminar success that is measurable. In addition, according to the case study material, one of the Vice-Presidents major concerns is organization and time management which should be reflected in the presentation given to all groups.

The presentation objective for the senior managers and managers is to present material necessary to educate, influence, engage, measure and improve effective managerial communications. In addition, the presentation must yield positive results identifying strengths and weaknesses of the managers in order to identify areas of improvements.

**Communication Approaches**

Communication approaches such as Arrow, Circuit and Dance management styles each have their own identifiers. Appendix 1 provides a summary of the facts supporting each one of the approaches detailed below.

The data and research indicate the following:

Arrow managers focus on accurately encoding their thoughts into language involving “targeting an audience”, attacking arguments and “firing a volley of commands”. In the Arrow manager approach, receivers of messages are viewed by the Arrow manager as passive processors, who react appropriately if the words are “on the mark”. Arrow managers believe soliciting feedback about their messages is unnecessary and feel redundancy is an ineffective use of resources. They see communication as a one-way activity based primarily on the skills of the sender.

Circuit Managers readily acknowledge that communication falls short with their approach. This is because Circuit Managers invest vast amounts of time in reaching an understanding and building relationships, instead of other task-oriented goals, even as they overlook the costs of creating consensus. They make conceptual leaps from communication behavior to job satisfaction to productivity. The research suggests that these leaps, particularly from job satisfaction to productivity, are dubious at best. Circuit managers believe that employees’ values, ideas or feelings may be so dissimilar that they have difficulty in relating to one another. The language of Circuit managers involves “networking”, “going with the flow” and “making connections”. This approach represents an evolution from arrow to the circle or Circuit manager approach.

Dance managers, like great scientists, believe that critique, debate, and argument are not some peripheral features of good decision making but rather represent the core of its practice, and without it, unreflective prejudice prevails. Communication effectiveness cannot be limited to either the 'results' or the 'understanding' criteria as characterized by the Arrow and Circuit perspectives, respectively. No single measure of communication effectiveness exists. Dance managers are effective communicators able to forecast with some accuracy the actions of others, their responses, and interpretations. Managers who view communication as a dance have a more vivid metaphor with which to analyze organizational situations. They see the complexities in the apparent simplicity of communication. Dance managers are not exclusively concerned with relationships; they know precisely when to stir things up with a wisely selected display of displeasure. Dance managers are not solely focused on immediate results but seek deeper patterns of sustained success. Dance managers do not believe that all humans are lazy, nor do they believe that all humans are well-intentioned.

**Generations**

\*Millennial Generation - Findings on Millennials from the research and focus groups presented in this case are found in Appendix 1 -100 facts.

Millennials are individuals who reached adulthood around the turn of the 21st century. According to the Pew Research Center, Millennials were born from 1981 through 1997. This results in an age range from 19 years old to 35 years old. They grew up in an electronics-filled world offering them the opportunity to be tech-savvy and in this increasingly online and socially-networked world is imperative. Millennials can be very dependent on the Internet for learning how to do things. Not only do Millennials have a strong interest in technology innovation, but they also tend to think about business and technology in a unique way.

Millennials, however, are not great team players. Millennials are the most ethnically diverse generation. Millennials tend to be tolerant of difference. They were raised, being told they were special and to follow their dreams. Therefore, they tend to be confident which appears to result in being narcissistic or entitled. Millennials' are slightly more optimistic about the future of America.

Millennials have become the largest generation in the U.S. workforce. Workplace satisfaction matters more to Millennials than monetary compensation. Work-life balance is often considered essential. Compared to previous generations, Millennials are less likely to deal with an unpleasant work environment. Satisfied Millennials are often employee advocates for the organizations they work for.

Whether buying products and services or considering employment, Millennials are more likely to listen to their friends than to be affected by marketing or public relations material. Because Millennials are skeptical about promotional materials it makes both conventional marketing and employee recruitment practices often ineffective for this generation.

Millennials tend to adjust readily to new programs, operating systems and devices and are able to perform computer-based tasks more quickly than older generations. Although it's been proven that multitasking is not usually an effective way to work, Millennials may be the employees that are most likely to pull it off.

Retaining employees is difficult in this challenging economic climate, but knowing the characteristics of Millennials can help leaders tailor a mentoring strategy to retain their younger workforce. Millennials are hesitant to devote themselves to one company. Millennials don't want a boss - they want a coach or mentor. When Millennials quit, they don’t' quit the company - they often quit their boss.

Millennials want an agreement, which is, "I will give you my intelligence, my time, my commitment, my capacity, but you have to be committed to my development and to my learning."

The primary drivers for Millennials tend to be relationships and experiences. While every generation likes to keep things interesting, Millennials are hardwired to crave new experiences in the workplace. Learning experiences keep Millennials engaged and contributing. Managers should have things already in place (relating to challenges) instead of waiting for Millennials to come to you and say, 'I'm bored.'

Don't hold a tight budget when it comes to investing in Millennials' ability to learn. Millennials need a boss who listens to them and supports their ideas. Millennial workers really strive on instant gratification and constant feedback. According to our Focus Group Summary, Millennials would like opportunities to advance their career and they would like their ideas heard.

\*Gen X Generation - According to the Pew Research Center, Generation X begins in 1965 and ends in 1980. Comparing Millennials, Baby Boomers and Gen X'ers, the Gen-X generation is the smallest of the three. They are known to have entrepreneurial-thinking, but rank low on executive presence. The technically-inclined members of Generation X may have started when electronics were hobby kits and the best gaming machines were unquestionably self-built computers. Generation X has a deeper understanding of programming and hardware issues. According to our Focus Group Summary, Gen X'ers would like the autonomy to take more risks and reduce the amount of time required for changes processes. Gen X'ers attitudes on political and social issues often fit between those of the more conservative Baby Boomers and the more liberal Millennials. They are more pessimistic than other generations about having enough money for retirement.

In 2010, Pew Research asked adults of all ages if they thought their own generation was unique. About 60% of Boomers and Millennials said yes, but only about half of Gen X'ers said yes. For those that did say they were unique there was little consensus about why they are distinctive.

One reason Gen X'ers have trouble defining their own generational persona could be the they've rarely been doted on by the media, compared to Boomers and Millennials. Gen X'ers are savvy, skeptical and self-reliant and are not into preening or pampering.

**\***Baby Boomer Generation - According to the Pew Research Center, Baby Boomers are individuals that were born from 1946 through 1964. Boomers are team players and loyal and do not adapt as well as other generations.

According to our Focus Group Summary, Baby Boomers are frustrated by the amount of Computer Based Training Thrivent requires while Gen X'ers and Millennials accept this requirement.

According to our Focus Group Summary, Baby Boomers would like traditional business attire in the workplace, while Millennials prefer causal wear.

According to our Focus Group Summary, Baby Boomers are concerned about their pension plans, other retirement benefits and affordable health care.

**Analysis / Assumptions**

There are no details as to why or how the Senior Managers came to this conclusion.

Understanding who you are managing is directly correlated to understanding the generation that identifies workers.

All audiences in this case study consider culture, benefits and flexibility in work schedules very important to their well-being and could be correlated with the seminar location and timing.

We do not know what type of managerial or communication approaches are currently used by the Vice President, Senior Managers and Managers; Arrow, Circuit or Dance or other.

Rich channels are especially impactful in situations involving complex issues and issues requiring rapid feedback and communication.

The 12 managers are not aware of their perceived poor performance hence the process to convince these managers of the necessity of the seminar will be challenging.

The issues of ineffective communication may not lie with just the 12 managers.

The seminar should offer cost-effective, time-saving and credible solutions.

The seminar and presentation need to be tailored for each level of management.

Each group will be impacted utilizing time and resources hence the ROI for the educational development needs to be identified and measureable.

The goal is to improve the communication effectiveness of managers.

We do not know the type of communication style that is proper for each group.

We know from our research and classwork that cultivating an innovative spirit is an essential part of an effective communication system.

**Insights**

Senior Management has identified a need to develop the twelve managers’ communication effectiveness. As a result, the Vice President is supporting a seminar to be presented to the managers in order to improve managerial communications and effectiveness. In order to accomplish this, the seminar needs to successful in its purpose, however, in order to determine success of the seminar(s), it must be measurable.

There are three targeted management groups, all having varying and unknown generation attributes, education backgrounds and managerial approaches of which needs to be identified in order to know what weaknesses and strengths exist in their current managerial communications. In addition, communication approaches identified; Arrow, Circuit and Dance approaches are important to understand and decipher in order to educate managers as well as improve their communication effectiveness. Integrated in the approaches is the ideology of further understanding preferred and correct communication channels to utilize.

Each of the three management groups have different purposes for the seminar presentation. The Vice President has clearly communicated the seminar must be successful in order to commit to future seminars and projects from the specified consulting group hired. The Senior Managers need their presentation to convince them that the 12 managers who take the seminar will in fact have tools, education and be able to show improvements to their managerial communication effectiveness.

Realizing through the research conducted, culture, benefits and flexibility in work schedules are very important to all the generations in terms of their well-being, these benefit variables should be highly considered and integrated into the development of the seminar.

Course materials support that in order for the managers to become successful in improving their communication effectiveness, they must understand and learn from the consultant group the following:

1. They must learn to select the proper communication styles.
2. They must learn to communicate ethically.
3. The must select and use the appropriate communication technologies.
4. They must properly manage data, information, knowledge and action.
5. They must provide useful performance feedback.
6. The managers need to learn to encourage communication across organization boundaries.
7. They must successfully communicate about change.
8. They must cultivate an innovative spirit.

Combining these eight important communication variables along with assessment tools, a communication strategy and a plan for implementation will finalize the connection to improved communication effectiveness for all three groups identified; the Vice President, Senior Management and Managers.

**Recommendations**

**Strategies**

LSS Miracle Workers need to identify key ideas on communicating for managerial effectiveness. LSS Miracle Workers will present those key ideas in a 2 hour seminar with senior management and the 12 managers.

It is best to present the details of the seminar to the Vice President prior to the seminar. This will help him understand the steps that LSS Miracle Workers will take to help the managers with their communication. We know that time management is a concern of the Vice President so presenting the information to him in a fast and ‘to the point’ style will be imperative. The best way to present the information that will be covered in the seminar is by having a face to face meeting with him. Prior to the meeting we will email him an outline for him to follow along with while we discuss the seminar. This will also allow him to review the information prior to the meeting. The email will demonstrate the different concepts that will presented on and why it is important to discuss those concepts.

**Vice President E-Mail**

**Effective Communication Seminar**

*Communication Approach*

* + All attendees will complete Agree/Disagree Quiz
  + Present the different characteristics of Arrow, Circuit and Dance approaches.

Why is this important?

* It is important to understand which approach each individual uses to best understand their communication strategies.

*Innovation*

* + Discuss the four stages to the innovation process: idea generation, feasibility analysis, viability assessment and implementation
  + Discuss questions to answer when considering an idea.

Why is this important?

* It is important to understand that if individuals feel their opinions and ideas are important, their workplace satisfaction will increase, therefore increasing their communication effectiveness.

*Boundary Spanning*

* + Discuss the different skill set of boundary spanners: must be proficient at developing and maintaining relationships, skilled at seeking out information and persuading others, and they must be comfortable with uncertainty and conflict.
  + Discuss the five strategies of boundary spanning: select and train the right people, implement error correction processes, encourage activities that promote shared experiences and common goals, integrate boundary spanning into the structure of the organization, and promote a collaborative communication style.

Why is this important?

* It is important to understand that boundary spanning can increase workplace satisfaction and communication between the departments.

*Communication Channels*

* + Discuss the different channels of communication.
  + Discuss the most effective use of the channels.
  + Discuss SMCR Model and its applications to effective communications as well as present congruency test options.

Why is this important?

* It is important to understand that the message that is communicated must match the channel one is using to communicate the message.

*Evaluation of Seminar*

* + Each manager will take a knowledge test after the seminar to measure the information learned in the seminar.
  + Each manager will take a seminar survey to give feedback on seminar subject, instructors, time-management and give suggestions for improvements.
  + Senior management will be given a base checklist to utilize in performance reviews.
  + Posters, visual props and a digital copy of information will be provided to utilize throughout the building and in company emails.

LSS Miracle Workers will end the meeting with the Vice President by allowing him to have a copy of the PowerPoint presentation being used for the seminar. This will allow him to view the information in full and do so in his own time. We will further explain how important it will be for him make time to view the information as it will be helpful in his own communication effectiveness.

After the information is presented to the Vice President, the seminar can be presented to senior management and the 12 managers. It is important to realize that the 12 managers do not realize that they are thought to be ineffective communicators. LSS Miracle Workers need to be careful how they communicate the information to the managers and have to do so in a way that wouldn’t offend the managers. If it is presented to the managers in a negative way they may reject the seminar entirely and the seminar would be unsuccessful.

It would be beneficial to start the seminar off with having senior management and the 12 managers complete an agree/disagree style quiz that asks questions relating to the different communication approaches. The quiz will allow each person to answer truthfully without swaying one way or the other to alter the results. It will help LSS Miracle Workers to truly identify which type of communication approach each person prefers.

**Communication Approach Agree/Disagree Quiz**

* I assume that receivers are passive information processors.
* I assume that words are containers of meaning.
* I encourage clear thinking, lucid expressions and organized speaking.
* I link communication behavior and action; meaning that I discourage idle chatter and unnecessary information sharing.
* I often feel that people “don’t connect”.
* I often feel that people are poor listeners.
* I often feel that people fail to develop proper communication climate; meaning that I feel people have hidden agendas.
* I feel that understanding should be the primary goal of communication.
* I feel it is important to co-orient with one another.
* I feel communication is rule governed; meaning that I understand that special rules apply in different settings.
* I feel that communicators should develop a repertoire of unconscious skills.
* I feel that communication can be viewed as a patterned activity.

After completion of the quiz LSS Miracle Workers would ask everyone what effective communication means to them. This would be a good ice breaker into why they are present for the seminar. It would encourage participation and involvement and create an interactive atmosphere.

Next, it is important to move to presenting information on the three communication approaches to reveal to everyone which approach they align with, based on the quiz results. LSS Miracle Workers would explain that if an employee agreed most with the first 4 questions they align to the arrow approach. If an employee agrees most with the next 4 questions they align to the circuit approach. Finally if an employee agrees most with the last 4 questions they align to the dance approach.

LSS Miracle Workers would identify that an arrow manager focuses on accurately encoding their thoughts into language. They see communication as a one-way activity based primarily on the skills of the sender. An arrow manager feels it is unnecessary to solicit feedback about their messages. A positive attribute of an arrow manager is that they encourage maximum performance since they discourage unnecessary chatter.

LSS Miracle Workers would identify that a circuit manager readily acknowledges that communication often falls short and that employee’s values, ideas or feelings may be so dissimilar that they have difficulty in relating to one another. The circuit manager invests a lot of time in reaching an understanding and building relationships instead of task-oriented goals. Circuit mangers view communication as a two-way process.

LSS Miracle Workers would identify that like great scientists, a dance manager believes that critique, debate, and argument are not some peripheral features of good decision making but rather represent the core of its practice, and without it, unreflective prejudice prevails. A dance manager doesn’t focus on immediate results but seeks a deeper pattern of sustained success.

It is crucial to acknowledge that communication effectiveness cannot be limited to either the results or the understanding criteria as characterized by the arrow and circuit perspectives. There is not a single measurement of communication effectiveness but effective communicators are able to forecast with some accuracy the actions of others, their responses and interpretations.

The goal of presenting information on the communication approaches to senior management is to help LSS Miracle Workers better understand what type of approach senior management would view as the most successful approach. Another goal is to allow them to understand the positives and negatives of each approach. Perhaps this will help senior management reflect on their approach and can make improvements on their own communication approaches. LSS Miracle Workers must present to senior management that this information will help them better understand how the 12 managers communicate and what approach the managers use. Senior Management will view this information as being valuable because they will see and learn how they can better communicate with the 12 managers.

The goal of presenting information on the communication approaches to the 12 managers is very similar to that of the senior management. We need to allow the 12 managers to understand the positives and negatives of each approach and utilize information to apply it to their individual communication approach. Each manager and senior manager will better understand their opportunities for growth and it will help them focus on where they need to improve. We will need to identify what approach senior management views as most successful as this will help them integrate those skills into their communication habits.

It is crucial for all levels of management to encourage innovation from all employees. Presenting information to senior management and the 12 managers on how they can encourage innovation and still properly reject bad ideas would be helpful to increase communication effectiveness. LSS Miracle Workers will explain the four stages to the innovation process: idea generation, feasibility analysis, viability assessment and implementation. A further understanding on how the innovation process works would give senior management motivation to encourage innovation from the 12 managers. LSS Miracle Workers know that the 12 managers are part of the millennial generation. Work place satisfaction is very important to the millennial generation. If they feel their opinions and ideas are heard, their satisfaction will increase, therefore increasing their communication effectiveness. Presenting the four stages of the innovation process will help the 12 managers further understand how they can create ideas. LSS Miracle Workers would give the managers questions to answer when considering an idea they may have. At the idea generation stage- Is the idea novel? At the feasibility analysis stage- Is the idea possible? At the viability assessment stage- Does the idea produce a reasonable return on investment? Does the idea fit with organizational objectives? Does the organization have the start-up capital for the idea? Finally at the implementation stage- Has the idea been acted on? Presenting this information will prove to be beneficial for the company as innovation will increase among all levels of management.

It is also crucial to present information to senior management and the 12 managers about boundary spanning. Boundary spanners require a special skill set. Providing the different skill sets of a boundary spanner will be beneficial to senior management, the vice president and the 12 managers as this can help them identify what areas they could improve. Boundary spanners must be proficient at developing and maintaining relationships, skilled at seeking out information and persuading others, and they must be comfortable with uncertainty and conflict. There are five strategies of boundary spanning. First, one must select and train the right people by creating awareness of one’s personal culture. Second, one must implement error correction processes by using quizzes and tracking organizational processes. Then, one must encourage activities that promote shared experiences and common goals. An employee can exhibit boundary spanning behavior by having company-wide seminars or hosting brainstorming sessions. One must also integrate boundary spanning into the structure of the organization. One can do this by supporting job switching or job shadowing and also using cross-functional teams. Lastly, one must promote a collaborative communication style by advocating a spirit of inquiry, encouraging others to express doubt and respectively resolving conflicts. It is also helpful to make use of electronic collaboration tools for people who may not be at the same location. It will be beneficial to present the strategies to senior management and the 12 managers to help them understand how it can increase workplace satisfaction and communication overall between the departments.

Communication channels are crucial to effective communication. Please see the table below, which outlines the channels of effective communication, as referenced in our text, *Communicating for Managerial Effectiveness*.

|  |  |  |
| --- | --- | --- |
| **Channel** | **Most Effective Use** | **Examples** |
| Telephone | Sending short, simple messages  Sending confidential messages  Providing feedback  Providing quick “turn-around” time | Negotiating a meeting time and place  Discussing a work problem |
| Fax | Sending informal messages  Seeing visual display of information  Providing a hard copy | Viewing a copy of a brochure  Providing directions to a meeting |
| E-mail | Sending impersonal, brief messages  Keeping employees updated on routine matters  Efficiently gathering routine information | Conducting an in-house survey  Confirming a meeting time |
| Voicemail | Sending short, simple messages  Sharing routine information  Informing others when feedback isn’t needed | Responding to an information request |
| One-on-One  (face-to-face) | Sharing potentially emotional, complex information  Persuading, negotiating, and managing conflict  Providing feedback  Reading nonverbal communication  Sharing knowledge | Hold a performance appraisal  Promoting/firing an employee |
| Memo | Sending short, simple messages  Distributing to numerous receivers  Informing others when feedback isn’t needed  Providing scannable information | Communicating a routine update  Confirming a policy change |
| Letter | Sending a message needing a personal touch  Conveying formality  Providing detailed information  Providing a written record | Expressing appreciation, condolences  Writing a complaint letter |
| Webpage | Communicating noncontroversial, nonconfidential, general information  Efficiently sharing routine information with large audiences | Summarizing company’s expertise, career opportunities  Responding to “frequently asked questions” |
| Videoconference | Connecting emotionally with large audiences  Sending noncomplex, unambiguous messages | Updating company performance  Outlining a major organizational initiative |
| Wikis | Collaborating with experts separated in space and time  Sharing information and knowledge | Refining plans, ideas, and proposals |

We recognize that using more technology based channels of communication would be a favorite with the millennial groups. It will be important to discuss the most effective use of the channels depending on what the message is. This will be a benefit to senior management and the 12 managers as they will be able to evaluate the message they want to send and see what channel would best fit with that message.

Below are some of the communication channels that LSS Miracle Workers will be using:

|  |  |
| --- | --- |
| **Channel** | **Example how the channel will be used** |
| Telephone | To contact the company to set up date for the seminar |
| E-Mail | Confirming the one on one meeting and seminar date  To send the Vice President overview of seminar |
| One-on one  (face-to-face) | To review the overview of the seminar with the Vice President  Conducting the seminar  Present seminar in person face to face to group |
| Webpage | We will provide the link for the company to review our webpage |

**Tactics**

LSS Miracle Workers understands that workplace satisfaction and culture is one of the largest concerns of the millennial generation and they may question why they have to partake in the seminar and ask “what’s in it for them?” It is crucial to identify and present the objectives of the seminar at the beginning of the seminar. The objective of the seminar is to give senior management and the 12 managers different strategies to increase their communication skills.

The objective of presenting the information about the seminar separately to the Vice President is to help him understand that it will be meaningful and yield concrete evidence that the receivers will take away. All levels of management will benefit from the information presented as it will increase work place satisfaction and increase productivity. It is important to identify that if productivity increases, company rewards may be offered. Pointing out the objective and benefits of the seminar in the beginning will increase senior management and the 12 managers likelihood of integrating the ideas and suggestions.

It is best to coordinate the one-on-one meeting with the Vice President during work hours. It is also best to conduct the seminar with senior management and the 12 managers during work day hours. If the meeting and seminar would require working extra hours, employees may become displeased.

Since the millennial generation grew up in a tech-savvy environment, presenting the communication information must be done so using technical tools. Using a PowerPoint presentation and sending out an email with the information rather than a paper handout would be the best approach. It will be crucial to explain to the Vice President that the presentation will be within the 2 hour time allotment.

Evaluating the effectiveness of the seminar is essential. After the information is presented senior management and the 12 managers will complete a test to assess the information they learned. However, true evaluation of the seminar cannot be determined until time has passed after the seminar, in order to allow the employees to incorporate practices learned in the seminar. LSS Miracle Workers will create a base checklist for senior management to use to evaluate if the managers have incorporated what was learned from the seminar into their daily work habits. The base checklist will provide ideas and encourage them to expand their checklist and add more points to the checklist based on what they feel will be most beneficial for the company.

Evaluation of the seminar itself is crucial to the continual improvements needed to successfully continue a relationship and contract with the company. Not only is this evaluation important to understand the outcome of the presentation for the employee, it is a measurable tool for the Vice President and Senior Managers to evaluate the performance of LSS Miracle Workers. As a result, a seminar survey will yield valuable feedback offering a baseline to measure and establish benchmarks from which to compare variables over time. In addition, the feedback allows for future changes that will reinforce competence, confidence and success for future contracts.

**Evaluating Seminar Effectiveness Base Checklist**

* Has the manager displayed knowledge on different communication approaches?
* Has the manager brought ideas to the table and evaluate the ideas and their benefit to the company?
* Has the manager willingly participated in boundary spanning activities?
* Has the manager utilized proper communication channels?

The expanded checklist created by senior management will ultimately determine whether the seminar was effective for the company. It is important to realize that evaluation of the seminar needs to be accessed a few times. The first time a performance review is conducted it may appear that the seminar was very effective. However, the seminar will prove to be truly effective if the strategies and techniques are being utilized long-term. It will be important for LSS to provide the company with the base checklist. It will be crucial for us to include different table graphs with the information on innovation processes, boundary spanning and communication channels for those who are more of visual learners and interpreters. It would be beneficial for the company if LSS would provide posters and visual props to post throughout the company as reminders of the different strategies learned in the seminar. It may also be a benefit for LSS to provide senior management and the Vice President with a digital copy of the different strategies learned. Therefore, all of these items will be provided. When senior management and the Vice President need to send out informative emails they can add a simple reminder to the end of the email of a strategy learned from the seminar. These simple reminders will encourage the continued use of the information learned in the seminar without creating frustration or the feeling of information overload.

**Rejected Recommendations**

LSS Miracle Workers recommended starting the seminar with an ice-breaker.  The ice-breaker would allow employees to feel trust, collaboration and understanding, amongst the team.  LSS Miracle Workers did not think that starting the seminar by presenting the outline immediately would allow time for employees to feel comfortable in giving and receiving feedback.

Another recommendation was to present to each of the three groups together in one group seminar.  This idea was rejected because it was decided that it would be best to present the information separately to the Vice President first, in order to help him further understand the benefits of the seminar. LSS Miracle Workers found it to be the best to bring senior management and the 12 managers together for the seminar because the presentation offered opportunities for collaboration, therefore fully encouraging and integrating the idea of boundary-spanning amongst the two groups.

**Continuous Improvements**

In an effort to improve the seminar as well as the content of the seminar, continuous improvements are necessary for the success of the seminar and also the success of the company. In addition, continuous improvements are ever-changing. Each year as businesses, departments, roles and financials shift, it is necessary to re-align these changes with new and more applicable continuous improvements. In this case, below are suggestions for continuous improvements as it stands currently in relation to the seminar and LSS Miracle Workers today. However, keep note that as the results of evaluations and feedback are analyzed and measured, the continuous improvements necessary will parallel and realign with these results.

Communication Channels

1. If a channel being used is not compatible with the receiver’s needs, the action will be to evaluate the alignment of the SMRC Model, utilize appropriate congruency tests and understand that perceptions vary on messages and that it takes time to select the proper channel. Understanding incompatible use of channels from a management standpoint will allow opportunity for the manager to shift and accept another channel that is perhaps more appropriate.
2. If it is detected that channels that compliment oneself and seem to be more convenient because he/she feels more comfortable are being used, then the action will be to consider re-evaluation of the choice channel so that the person is communication the most effective way, not necessarily the most convenient way. This includes an agreement to diversify the portfolio of channels to use, consider using multiple channels and to have a clear understanding when to use rich channels and when to use lean channels.

Innovation

1. If there is a need to cultivate an innovative culture, the actions to take will be to utilize abstract commitment tactics to cultivate innovation, including education, expectations, rewards, celebrations and high status roles. In addition, employees will be trained so they are aware of their role in the innovation process. This includes idea generation, feasibility analysis, viability assessment and implementation. This will help them understand that small ideas have huge significance and the innovative process has impact on decisions and path choices. It is also important that failures are expected and should offer learning opportunities.
2. Creating an innovative environment by creating open and free flowing work spaces so that unexpected meetings and conversations can take place will help foster a creative environment and result in more innovation.

Evaluation

1. If feedback from the seminar survey indicates patterns of poor ratings, the action will be to identify the area of concern and to examine and adjust the information and/or process accordingly. This valuable feedback is the baseline to measure and establish benchmark from which to compare variables over time. In addition, the feedback allows for future changes that will reinforce success and future business for LSS Miracle Workers as well as improved materials for employees to gain improved communication effectiveness.

**Summary**

Consulting group, LSS Miracle Workers are tasked with presenting a seminar to improve effective communications targeted to 12 managers of whom were chosen from Senior Management identified as weak in effective communications. In addition, the Vice President of the company inculcated to the consulting group the seminar must be successful in order to be chosen for future projects and seminars.

LSS Miracle Workers researched areas involving the target audience, communication approaches, management styles and generational identifiers in order to understand best ways to approach teaching as well as the best culture to present the seminar. Insightful findings and insights were culminated as a result helping to direct LSS Miracle Workers to create a plan of action and seminar information necessary to present in a positive, informational and direct way. Consequently, LSS Miracle workers were successful meeting goals that had been identified upfront; to specify precise materials used to present to each group, specify how to present the materials, and most importantly provide rationale for all choices made based on materials found in class materials.

Strategies and Tactics were also determined based on research, findings, results and insights allowing the consulting group the ability to recommend directives for this project. These directives included timing and length of the seminar, how communications should be presented to the Vice President versus how the information is presented to the Senior Managers and Mangers, incorporating important factors of workplace satisfaction, company rewards, and generational parallels. As a result, the consulting group the seminars materials, content and communication techniques were targeted to the appropriate audience. LSS Miracle Workers were able to then create and implement evaluation criteria determining seminar success as well as employee’s success.

Important to this project is the creation of measurable tools and continuous improvements in order to determine and continue a successful seminar. As a result, the success of the program is determined by the measured results. This adds confidence and ease deciding on the continuation to do business with LSS Miracle Workers.

**Conclusion**

LSS Miracle Workers identified and presented targeted seminars to specific audiences in order to accommodate each of their goals. Utilizing research, audience analysis, communication approach management styles and connecting these to strategies, measurable results and tactics positioned LSS Miracle Workers as experts in the field of communication effectiveness. Key to the success and future business is to maintain the core strengths of the seminar focusing on education and measurable results. The company’s efforts, while of good and sound purpose, need to be open minded to the seminar information and continue to enforce the concepts and theories presented. Implementing key communication concepts such as choosing the applicable channels to utilize, the importance of cultivating an innovative spirit, organizational choices to communicate change and the ability to utilize boundary spanning are key performance indicators that must be given the attention necessary from the organization in order to improve effective communication. Expounding on measurable tools to determine employee improvement and seminar success will foster continuous improvement opportunities, continuous back and forth feedback overall and ultimately a strong and valued relationship for LSS Miracle Workers. LSS Miracle Workers identified the following continuous improvements to evaluate channels used, communication of change and innovation based on initial seminar research. As feedback is received from the organization and employees, continuous improvements will be altered to accommodate the feedback results.

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\*The number at the end of each reference that is encompassed by parenthesis is present in order to align cited information within this Case Study.

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**Appendix 1**

**100 Facts**

\*There are 111 Facts total.

\*Credibility – How reputable is the source?

\*Utility – How useful is the information?

Table 1.1

|  |  |  |
| --- | --- | --- |
| **Facts** | **Credibility** | **Utility** |
| **General Facts** | H | H |
| There are 3 major audiences in this Case Study: Senior Management, Managers, and the Vice-President. (3) | H | H |
| According to the Case Study material, the Senior Management's major concern is the fact that they have deemed the Managers, 'ineffective communicators.' (3) | H | H |
| According to the Case Study material, the Manager's major concern is yet to be determined. They are not aware that Senior Management feels they are 'ineffective communicators.' (3) | H | H |
| According to the Case Study material, the Vice-President's major concern is organization and time management. (3) | H | H |
| The three key trends that shape generations are parenting, technology and economics. (2) | H | L |
| If being an effective manager is understanding who you're managing, much of that knowledge comes down to understanding the generation that identifies your workers. (7) | H | H |
| There is a great deal of variation from one individual to another within any generational cohort. (1) | H | H |
| The particular environment for any generation affects those individuals in ways that are observable as broad tendencies. (1) | H | H |
| As management shifts to younger generations, the research reveals areas companies can focus on to enhance skill sets, address the challenges of managing multiple generations, and retain and engage employees by understanding which workplace perks they may value most. (7) | H | H |
| According to our Focus Group Summary, culture, benefits and flexible work options were the top three themes for all three (Millennials, Gen X, Baby Boomers) generations. (8) | H | H |
|  |  |  |
| **Facts about Communication Approaches** |  |  |
| Arrow managers focus on accurately encoding their thoughts into language - much like selecting, aiming, and firing arrows at a target. (12) | H | H |
| Arrow managers see communication as a one-way activity based primarily on the skills of the sender. (12) | H | H |
| The language of the Arrow manager involves 'targeting an audience,' 'attacking arguments,' and 'firing a volley of commands.' (12) | H | H |
| In the Arrow Approach, receivers of messages are viewed as passive information processors, who react appropriately if the words are 'on the mark.' (12) | H | H |
| To Arrow managers, soliciting feedback about their messages is unnecessary. (12) | H | H |
| To Arrow managers, redundancy would be considered an 'inefficient use of resources.' (12) | H | H |
| The Arrow manager would be puzzled by research indicating that effective managers deliberately make use of redundancy in multiple channels. (12) | H | H |
| According to a Harvard Business Review article, deliberate redundancy is less about message clarity than it is about 'making your presence felt.' (12) | H | H |
| The Circuit manager readily acknowledges that communication often falls short. (12) | H | H |
| Circuit managers believe that employees values, ideas or feelings may be so dissimilar that they have difficulty in relating to one another. (12) | H | H |
| Circuit managers invest vast amounts of time in reaching an understanding and building relationships, instead of other task-oriented goals, even as they overlook the costs of creating consensus. (12) | H | H |
| Circuit managers make conceptual leaps from communication behavior to job satisfaction to productivity. The research suggests that these leaps, particularly from job satisfaction to productivity, are dubious at best. (12) | H | H |
| The language of the Circuit manager involves 'networking,' 'going with the flow,' and 'making connections.' (12) | H | H |
| The Circuit approach represents an evolution from the arrow to the circle. (12) | H | H |
| Circuit managers stress feedback over response, relationship over content, connotations over denotations, and understanding over compliance. (12) | H | H |
| Circuit managers view communication as a two-way process involving a dynamic interplay of an active sender and receiver. (12) | H | H |
| Dance managers, like great scientists, believe that critique, debate, and argument are not some peripheral features of good decision making but rather represent the core of its practice, and without it, unreflective prejudice prevails. (12) | H | H |
| Communication effectiveness cannot be limited to either the 'results' or the 'understanding' criteria as characterized by the Arrow and Circuit perspectives, respectively. (12) | H | H |
| No single measure of communication effectiveness exists. (12) | H | H |
| Effective communicators are able to forecast with some accuracy the actions of others, their responses, and interpretations. (12) | H | H |
| Managers who view communication as a dance have a more vivid metaphor with which to analyze organizational situations. They see the complexities in the apparent simplicity of communication. (12) | H | H |
| Dance managers are not exclusively concerned with relationships; they know precisely when to stir things up with a wisely selected display of displeasure. (12) | H | H |
| Dance managers are not solely focused on immediate results but seek deeper patterns of sustained success. (12) | H | H |
| Dance managers do not believe that all humans are lazy, nor do they believe that all humans are well-intentioned. (12) | H | H |
|  |  |  |
| **Vice-President** |  |  |
| The VP is 28 years old (a Millennial) and introspective. (3) | H | H |
| By definition, introspective is characterized by introspection, the act or process of looking into oneself. (5) | H | H |
| There are a number of paintings by Claude Monet around his precisely organized room. (3) | H | H |
| Claude Monet was a famous French painter whose work gave a name to the art movement Impressionism. (11) | H | H |
| Monet was born in Paris, France, on November 14, 1840. (11) | H | L |
| Monet struggled with depression, poverty and illness throughout his life. (11) | H | L |
| Impressionism art is more concerned with natural form and capturing light than realism. (11) | H | H |
| Critics used the title to name the distinct group of artists 'Impressionists,' saying that their work seemed more like sketches than finished paintings. (11) | H | H |
| Historians believe that Claude Monet helped change the world of painting by shaking off the conventions of the past. (11) | H | L |
| By dissolving forms in his works, Monet opened the door for further abstraction in art. (11) | H | L |
| Monet is credited with influencing such later artists as Jackson Pollack, Mark Rothko and Willem de Kooning. (11) | H | L |
| Monet is best known for his series of paintings called 'Water Lillies." | H | L |
| One of Monet's most noted works was 'Impression, Sunrise' which depicted Le Havre's harbor in a morning fog. (11) | H | L |
|  |  |  |
| **Millennials - Software Development and Customer Service Managers** | |  |
| Millennials are individuals who reached adulthood around the turn of the 21st century. (1) | H | M |
| According to the Pew Research Center, Millennials were born from 1981 through 1997. (6) | H | H |
| There are many proposed dates for the beginning year and end year birthdate for Millennials. The earliest proposed birthdate for Millennials is 1976 and the latest is 2004. (1) | H | L |
| Millennials grew up in an electronics-filled world. (1) | H | L |
| Millennials are tech-savvy, but aren't great team players. (7) | H | H |
| A Millennials' world is increasingly online and socially-networked. (1) | H | M |
| Millennials are the most ethnically diverse generation. (1) | H | M |
| Millennials tend to be tolerant of difference. (1) | H | M |
| Millennials were raised, being told they were special and to follow their dreams. Therefore, they tend to be confident. (1) | H | H |
| Millennials' confidence appears to be narcissistic or entitled. (1) | H | H |
| Millennials' are slightly more optimistic about the future of America. (1) | H | M |
| Millennials are the first generation, since the Silent Generation, which are expected to be less economically successful than their parents. (1) | H | M |
| The Silent Generation consists of those born from 1928 through 1945. (6) | H | L |
| Individuals within the Silent Generation are also known as Traditionalists. (2) | H | L |
| Workplace satisfaction matters more to Millennials than monetary compensation. (1) | H | H |
| Work-life balance is often considered essential. (1) | H | H |
| Compared to previous generations, Millennials are less likely to deal with an unpleasant work environment. (1) | H | H |
| Satisfied Millennials are often employee advocates for the organizations they work for. (1) | H | H |
| Weather buying products and services or considering employment, Millennials are more likely to listen to their friends than to be affected by marketing or public relations material. (1) | H | M |
| Because Millennials are skeptical about promotional materials it makes both conventional marketing and employee recruitment practices often ineffective for this generation. (1) | H | L |
| Millennials tend to adjust readily to new programs, operating systems and devices and are able to perform computer-based tasks more quickly than older generations. (1) | H | H |
| Although it's been proven that multitasking is not usually an effective way to work, Millennials may be the employees that are most likely to pull it off. (1) | H | H |
| Millennials can be very dependent on the Internet for learning how to do things. (1) | H | H |
| Millennials have become the largest generation in the U.S. workforce. (2) | H | H |
| Millennials are concerned about social justice and will not support institutions that they see as in conflict with social and economic equality. (1) | H | L |
| Retaining employees is difficult in this challenging economic climate, but knowing the characteristics of Millennials can help IT leaders tailor a mentoring strategy to retain their younger workforce. (4) | H | H |
| Millennials are hesitant to devote themselves to one company. (4) | H | H |
| Millennials don't want a boss - they want a coach or mentor. (4) | H | H |
| When Millennials quit, they don’t' quit the company - they often quit their boss. (4) | H | M |
| Millennials want an agreement, which is, "I will give you my intelligence, my time, my commitment, my capacity, but you have to be committed to my development and to my learning." (4) | H | H |
| CIOs should strive to gain Millennial loyalty through open communication that includes employee goal setting and career paths. (4) | H | H |
| The primary drivers for Millennials tend to be relationships and experiences. (4) | H | H |
| While every generation likes to keep things interesting, Millennials are hardwired to crave new experiences in the workplace. (4) | H | H |
| Learning experiences keep Millennials engaged and contributing. (4) | H | H |
| Managers should have things already in place (relating to challenges) instead of waiting for Millennials to come to you and say, 'I'm bored.' (4) | H | H |
| Don't hold a tight budget when it comes to investing in Millennials' ability to learn. (4) | H | H |
| Millennials need a boss who listens to them and supports their ideas. (4) | H | H |
| Millennial workers really strive on instant gratification and constant feedback. (4) | H | H |
| Not only do Millennials have a strong interest in technology innovation, but they also tend to think about business and technology in a unique way. (4) | H | H |
| According to our Focus Group Summary, Millennials would like opportunities to advance their career and they would like their ideas heard. (8) | H | H |
|  |  |  |
| **Generation X** |  |  |
| According to the Pew Research Center, Generation X begins in 1965 and ends in 1980. (6) | H | H |
| Gen X’ers are entrepreneurial-thinking, but rank low on executive presence. (7) | H | H |
| The technically-inclined members of Generation X may have started when electronics were hobby kits and the best gaming machines were unquestionably self-built computers. (1) | H | M |
| Generation X has a deeper understanding of programming and hardware issues. (1) | H | M |
| According to our Focus Group Summary, Gen X'ers would like the autonomy to take more risks and reduce the amount of time required for changes processes. (8) | H | H |
| Gen X'ers have been coined, 'America's neglected middle child' by Pew Research Center. (9) | H | H |
| Comparing Millennials, Baby Boomers and Gen X'ers, the Gen X generation is the smallest of the three. (9) | H | L |
| Gen X'ers attitudes on political and social issues often fit between those of the more conservative Baby Boomers and the more liberal Millennials. (9) | H | H |
| Gen X'ers are more pessimistic than other generations about having enough money for retirement. (9) | H | H |
| In 2010, Pew Research asked adults of all ages if they thought their own generation was unique. About 60% of Boomers and Millennials said yes, but only about half of Gen X'ers said yes. For those that did say they were unique there was little consensus about why they are distinctive. (9) | H | M |
| One reason Gen X'ers have trouble defining their own generational persona could be the they've rarely been doted on by the media, compared to Boomers and Millennials. (9) | H | M |
| Gen X'ers are savvy, skeptical and self-reliant. (9) | H | H |
| Gen X'ers are not into preening or pampering. (9) | H | H |
|  |  |  |
| **Baby Boomers** |  |  |
| According to the Pew Research Center, Baby Boomers are individuals that were born from 1946 through 1964. (6) | H | H |
| Almost exactly nine months after World War II ended, 'the cry of the baby was heard across the land.' More babies were born in 1946 than ever before. (10) | H | L |
| Boomers are team players and loyal. (7) | H | H |
| Boomers don't adapt as well as other generations. (7) | H | H |
| According to our Focus Group Summary, Baby Boomers would like traditional business attire in the workplace, while Millennials prefer causal wear. (8) | H | M |
| According to our Focus Group Summary, Baby Boomers are frustrated by the amount of Computer Based Training Thrivent requires while Gen X'ers and Millennials accept this requirement. (8) | H | H |
| According to our Focus Group Summary, Baby Boomers are concerned about their pension plans, other retirement benefits and affordable health care. (8) | H | M |
| Older Americans, who had postponed marriage and childbirth during the Great Depression and World War II, were joined in the nation's maternity wards by young adults who were eager to start families. (10) | H | L |
| Many people in the postwar era looked forward to having children because they were confident that the future would be one of comfort and prosperity. (10) | H | H |
| By 2030, about one in five Americans will be older than 65, and some experts believe that the aging of the population will place a strain on social welfare systems. (10) | H | L |
| In 1966, Time magazine declared that 'the Generation 25 and under' would be its 'Persons of the Year.' (10) | H | L |

**Appendix 2**

**Kiss Charts**

**Table 2.1 - Senior Management KISS Chart**

|  |  |  |  |
| --- | --- | --- | --- |
| **Know** | **Infer** | **So what should I do?** | **So what should I avoid?** |
| Deemed 12 managers 'ineffective communicators.' | Senior Management has determined that there is a single measure of communication that is successful. | Help Senior Management determine what type of Communication Approach they utilize and provide education about the approaches. | Avoid judgement. Allow Senior Management to self-identify their Communication Approach. |
| Hired a consultant to execute a seminar on 'Communicating for Managerial Effectiveness' for the 12 managers. | Senior Management is willing to invest in change for the organization. | Provide clear and concise guidelines and expectations via a partner agreement for the consulting work. | Avoid assumptions. One should not assume that the issue lies within the 12 Managers, exclusively. |
| If the seminar is successful, they will hire the consultant for a major contract. | Senior Management has already determined what 'success looks like.' | Ask what 'success looks like.' | Avoid creating conclusions in advance. Allow the Senior Management to reach conclusions through introspection. |

**Table 2.2 – Managers KISS Chart**

|  |  |  |  |
| --- | --- | --- | --- |
| **Know** | **Infer** | **So what should I do?** | **So what should I avoid?** |
| Unaware that Senior Management views them as 'ineffective communicators.' | The managers have not been told that they are 'ineffective communicators.' | Help managers determine what type of Communication Approach they utilize and provide education about the approaches. | Avoid judgement. Allow managers to self -identify their Communication Approach. |
| All under the age of 35 years old. | Belong to the Millennial generation. | Research Millennials and determine if there are themes that tend to be important to them. | Avoid stereotyping. There is a great deal of variation from one individual to another within a generational cohort. |
| Have college degrees. | Value education and knowledge. | Ask the managers how they feel their college degrees have helped them within this career. | Avoid assuming that the managers are effective managers simply because they have a college degree. |
| Have never participated in training about 'Communicating for Managerial Effectiveness.' | The software design firm has not offered this training in the past. | Research the types of training that the organization has provided. Research the types of trainings that the managers have actually participated in. | Avoid assuming that the organization has provided training. Avoid assuming that the managers have participated in trainings that were offered. |

**Table 2.3 - Vice-President KISS Chart**

|  |  |  |  |
| --- | --- | --- | --- |
| **Know** | **Infer** | **So what should I do?** | **So what should I avoid?** |
| Leads a software design firm with 500 employees. | He manages a diverse workforce. | Understand the career path he has taken in order to become the VP of an organization. | Avoid assuming that he is neither capable nor incapable of leading a design firm with 500 employees, due to his age. |
| Main contact for the consultant | Senior Management may see him as 'part of the problem,' 'part of the solution,' or someone that would follow the lead of Senior Management. | Help the Vice-President determine what type of Communication Approach he utilizes and provide education about the approaches. | Avoid judgement. Allow the Vice-President to self-identify his Communication Approach. |
| 28 years old | Belongs to the Millennial generation. | Research Millennials and determine if there are themes that tend to be important to them. | Avoid stereotyping. There is a great deal of variation from one individual to another within a generational cohort. |
| Seems introspective | He appreciates self-reflection and is aware of his thoughts and feelings. 'Deep thinker.' | Ask the VP to meet 1:1 prior to the seminar to better understand his thoughts and feelings about the current direction of the organization. | Avoid jumping to conclusions and interruption. Avoid setting the amount of time you feel is necessary - ask the VP to set the amount of time for the appointment. |
| Paintings by Claude Monet around his room | He appreciates 'Impressionism.' He may feel like the organization is a more like a sketch, or work in progress. | Compliment the paintings. Ask questions about why he chose those specific paintings to hang in his room. | Avoid assumptions. Perhaps the paintings were hanging in the room when he accepted his position and there is no symbolism present between him and the paintings. |
| Punctual | Appreciates concise time management. | Arrive early so that the appointment starts on time. At the end of the appointment, acknowledge that you 'want to be sensitive to the time.' Offer to schedule another appointment if that is necessary. | Avoid tardiness. Avoid going over the appointment end time. |

**Appendix 3**

**Metacomm Change Planning Worksheet**

**Table 3.1 – Audience Analysis**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Audiences** | **How will the group be impacted?** | **What are the channel preferences of the group?** | **What do group members know or think they know?** | **What will be the group's likely concerns or resistance points?** | **Communication objectives for the group.** |
| Senior Management | Senior Management will be required to utilize time and resources to implement change. | Group Meetings | They think that the 12 managers are 'ineffective communicators.' | "What do we do if this first seminar isn't successful?" What is our Plan B?" | Motivation and presentation of practical solutions that would fit this organization. |
| Managers | Managers will have to balance their time in order to dedicate resources to continuing education. | TBD | They think that they are satisfying their managerial duties. | "Why now?" "What is wrong with what we are doing?" | Motivation, open communication, and an opportunity to provide feedback |
| Vice-President | The VP will have to create a plan for the organization in order to provide continuing education to managers. | Face-to-Face | He knows that his Senior Management is not satisfied with the 12 identified managers and their communication styles. | "What will this cost?" "What is the required time commitment for training?" | Motivation, cost-effective, time-saving and credible solutions. |

**Appendix 4**

**Focus Group Survey Questions, Summary and Tables**

**Thrivent Financial Real Talk Focus Group**

There are 580 individuals within Thrivent Financial’s Young Professionals Network. We invited all Members and Allies, from both our Wisconsin and Minneapolis campus, together for a cross-generational event to share and learn about the challenges and opportunities employees are identifying within the workforce and how it relates to their generation and the generation of others. 283 employees participated. Of the individuals that participated, 55% were Millennials, 23% were Gen X’ers and 22% were Baby Boomers.

When employees entered the room, we asked them to take a colored post-it note that related to their generation. Each generation had a specific color. We didn’t tell them which generation they were, we allowed the participants to self-identify. However, we did have a guide on the screen for their reference, and utilized the Pew Research guidelines.

Millennials born 1980 – 1995 (Pink)

Gen X born 1965 – 1979 (Yellow)

Baby Boomers born 1946 – 1964 (Green)

Then, we presented three questions below:

|  |  |  |
| --- | --- | --- |
| 1. What is one change Thrivent has made in the last year and how has it impacted you in the workplace? | | |
| 1. What is one policy or process at Thrivent that surprises or frustrates you? Why? |  |  |
| 1. What benefits do you believe would increase your likelihood to choose or stay at Thrivent? | |  |

We had three easels in the room, each representing one of three questions. There was only one theme per post-it note and only one post-it note per participant allowed. We asked the employees to hang their post-it note on the corresponding question that they answered. We offered 40 minutes of discussion relating to their answers, compiled the data in the tables below, and presented a read-out of the data on October 24th, 2016.

Culture, Benefits and Flexible Work Options were the top three themes for all generations. Development was the most important theme for 17 of the Millennials while the Gen X’ers and Baby Boomers, each only had 3 individuals identifying development as their top priority. Baby Boomers and Gen X’ers mentioned the Facility and Environment in their comments, while Millennials mentioned themes such as Performance, Leadership and Voice.

(Source: Gruender, Laura and Joe Martins. Thrivent Young Professionals Real Talk Data. Thrivent Financial. 13 October 2016.)

**Table 4.1 – Pivot Data Summary**

157 Millennials, 65 Gen X’ers and 61 Baby Boomers answered one of the three questions on their post-it note. Each employee’s answer generated a theme. The themes are listed under each generation.

|  |  |
| --- | --- |
|  |  |
| **Row Labels** | **Response Count** |
| **Millennial** | **157** |
| **Culture** | **44** |
| **Benefits** | **32** |
| **Flexible Work Schedule** | **23** |
| **Development** | **17** |
| **Hiring/Promotions** | **15** |
| **Technology** | **7** |
| **Pay** | **5** |
| **Other** | **4** |
| **Communication** | **3** |
| **Performance** | **3** |
| **Communication** | **2** |
| **Leadership** | **1** |
| **Voice** | **1** |
| **Gen X** | **65** |
| **Culture** | **21** |
| **Flexible Work Schedule** | **18** |
| **Benefits** | **16** |
| **Technology** | **3** |
| **Development** | **3** |
| **Facility** | **1** |
| **Hiring/Promotions** | **1** |
| **Communication** | **1** |
| **Environment** | **1** |
| **Baby Boomer** | **61** |
| **Culture** | **22** |
| **Benefits** | **14** |
| **Flexible Work Schedule** | **9** |
| **Technology** | **7** |
| **Hiring/Promotions** | **4** |
| **Pay** | **2** |
| **Development** | **1** |
| **Environment** | **1** |
| **Facility** | **1** |
| **Grand Total** | **283** |

(Source: Gruender, Laura and Joe Martins. Thrivent Young Professionals Real Talk Data. Thrivent Financial. 13 October 2016.)

**Table 4.2 – Response Summary**

This table is very similar to the Pivot Data Summary. The Pivot Data Summary provides the number of employees that answered a question relating to a specific theme, per generation, while the Response Summary provides the percentage of employees that answered a question relating to a specific theme, per generation.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Response Count** | **Column Labels** |  |  |  |
| **Row Labels** | **Baby Boomer** | **Gen X** | **Millennial** | **Grand Total** |
| **What is one policy or process at Thrivent that surprises or frustrates you? Why?** | **100.00%** | **100.00%** | **100.00%** | **100.00%** |
| **Culture** | **34.78%** | **57.14%** | **28.89%** | **37.08%** |
| **Technology** | **26.09%** | **9.52%** | **15.56%** | **16.85%** |
| **Hiring/Promotions** | **13.04%** | **4.76%** | **24.44%** | **16.85%** |
| **Benefits** | **13.04%** | **4.76%** | **8.89%** | **8.99%** |
| **Flexible Work Schedule** | **4.35%** | **14.29%** | **6.67%** | **7.87%** |
| **Performance** | **0.00%** | **0.00%** | **4.44%** | **2.25%** |
| **Communication** | **0.00%** | **4.76%** | **2.22%** | **2.25%** |
| **Facility** | **4.35%** | **4.76%** | **0.00%** | **2.25%** |
| **Development** | **0.00%** | **0.00%** | **4.44%** | **2.25%** |
| **Pay** | **4.35%** | **0.00%** | **2.22%** | **2.25%** |
| **Voice** | **0.00%** | **0.00%** | **2.22%** | **1.12%** |
| **What is one change Thrivent has made in the last year and how has it impacted you in the workplace?** | **100.00%** | **100.00%** | **100.00%** | **100.00%** |
| **Culture** | **50.00%** | **30.00%** | **43.90%** | **41.98%** |
| **Benefits** | **20.00%** | **25.00%** | **17.07%** | **19.75%** |
| **Flexible Work Schedule** | **10.00%** | **25.00%** | **2.44%** | **9.88%** |
| **Development** | **5.00%** | **10.00%** | **12.20%** | **9.88%** |
| **Hiring/Promotions** | **5.00%** | **0.00%** | **7.32%** | **4.94%** |
| **(blank)** | **0.00%** | **0.00%** | **9.76%** | **4.94%** |
| **Technology** | **5.00%** | **5.00%** | **0.00%** | **2.47%** |
| **Environment** | **5.00%** | **5.00%** | **0.00%** | **2.47%** |
| **Communication** | **0.00%** | **0.00%** | **4.88%** | **2.47%** |
| **Communication** | **0.00%** | **0.00%** | **2.44%** | **1.23%** |
| **What benefits do you believe would increase your likelihood to choose or stay at Thrivent?** | **100.00%** | **100.00%** | **100.00%** | **100.00%** |
| **Benefits** | **38.89%** | **41.67%** | **29.58%** | **33.63%** |
| **Flexible Work Schedule** | **33.33%** | **41.67%** | **26.76%** | **30.97%** |
| **Culture** | **22.22%** | **12.50%** | **18.31%** | **17.70%** |
| **Development** | **0.00%** | **4.17%** | **14.08%** | **9.73%** |
| **Pay** | **5.56%** | **0.00%** | **5.63%** | **4.42%** |
| **Leadership** | **0.00%** | **0.00%** | **1.41%** | **0.88%** |
| **Performance** | **0.00%** | **0.00%** | **1.41%** | **0.88%** |
| **Communication** | **0.00%** | **0.00%** | **1.41%** | **0.88%** |
| **Hiring/Promotions** | **0.00%** | **0.00%** | **1.41%** | **0.88%** |

(Source: Gruender, Laura and Joe Martins. Thrivent Young Professionals Real Talk Data. Thrivent Financial. 13 October 2016.)

**Table 4.3 – Raw Responses**

Please note – there are spelling errors present within the Raw Responses below. These are the actual responses that employees offered. In order to preserve the data, the spelling errors have not been corrected. The Raw Responses were utilized to create the Pivot Data Summary. Each Raw Response was assigned a theme.

In relation to the Index Number on Table 1.2 – The responses for Index 1, relate to question 1 below, and so on. You will find that the Table is divided based on location. First, questions 1-3 are answered for the WI Campus and then questions 1-3 are answered for the MN Campus.

|  |  |  |
| --- | --- | --- |
| 1. What is one change Thrivent has made in the last year and how has it impacted you in the workplace? | | |
| 1. What is one policy or process at Thrivent that surprises or frustrates you? Why? |  |  |
| 1. What benefits do you believe would increase your likelihood to choose or stay at Thrivent? | |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Index** | **Response** | **Generation** | **Location** | **Theme** |
| 1 | Telecommuters & Working from Home. Flexibility | Baby Boomer | WI | Flexible Work Schedule |
| 1 | Health coach for Accountability | Millennial | WI | Benefits |
| 1 | YPN was launched. Helped me Network with other YPN. | Millennial | WI | Culture |
| 1 | No more "Good old boys network" | Gen X | WI | Culture |
| 1 | Consolidation of job titles. Makes it much harder to find the people you need to talk to! | Millennial | WI | Development |
| 1 | Removed one week of paid time off. It affected me because I take less personal days/ vacations in order to save time off just in case I get sick. | Millennial | WI | Benefits |
| 1 | Implemented YPN - Provided an opportunity to be involved with like employees | Millennial | WI | Culture |
| 1 | Policy Change - Dress Code - Freed up so much time | Gen X | WI | Culture |
| 1 | Introduction of EBRGs within Thrivent | Millennial | WI | Culture |
| 1 | Workday conversion - stripping away benefits | Millennial | WI | Benefits |
| 1 | Introduction of EBRGs - Given a voice to minority groups that I affiliate | Millennial | WI | Culture |
| 1 | Updated parking - Adjusted work schedule in an attempt to get a parking spot | Gen X | WI | Environment |
| 1 | For Thrivent Build trips - give 1 week of VTO | Millennial | WI | Culture |
| 1 | More focus and time on Cultural Competency. It's not all about race, involves many aspects | Gen X | WI | Culture |
| 1 | The Cultural Competence Classes are helping create an awareness for Yps as well as all employees around the value people of all generations bring to an organization. | Baby Boomer | WI | Culture |
| 1 | Can't Buy a week of PTO - and really needed extra time for family | Baby Boomer | WI | Benefits |
| 1 | Created YPN, YPN Events | Millennial | WI | Culture |
| 1 | Cultural Competency has made me much more aware of the differences in everyone. | Millennial | WI | Culture |
| 1 | Health Benefits decrease every year. No longer have benefits here. | Gen X | WI | Benefits |
| 1 | Changed Common Bond. Made me aware of all the "Flavors" of Christian | Baby Boomer | WI | Culture |
| 1 | Formation of this group | Baby Boomer | WI | Culture |
| 1 | Healthcare cost increase from individual to family. Big Dent in income | Millennial | WI | Benefits |
| 1 | Changes to departments / leadership. Underscores need to be well connected / networked | Millennial | WI | Development |
| 1 | Creating and implementing Workday for better career development | Gen X | WI | Development |
| 1 | Eliminated its community grant programs. It directly effects the non-profit I work with. | Millennial | WI | Culture |
| 1 | Dress Code - Much more casual, overall, noticed. Feel a bit out of place when dressed up. | Baby Boomer | WI | Culture |
| 1 | Flexible work options. Work on our time and at our own place of choice | Gen X | WI | Flexible Work Schedule |
| 1 | More flexible work options. E.g. work from home. Very Positive! | Baby Boomer | WI | Flexible Work Schedule |
| 1 | Software Upgrades - Peoplesoft, MIT, etc. b/c it impacts my day to day work | Millennial | WI | Culture |
| 1 | More acceptable to work remotely. For planning meetings and events I now need to consider remote employees so they do not feel excluded | Gen X | WI | Flexible Work Schedule |
| 1 | Purchase PTO. It was extra "cushion" and if I didn't need it - Paid me back | Gen X | WI | Benefits |
| 1 | Cultural Competency initiative has made me more open to other's input | Gen X | WI | Culture |
| 1 | Thrivent Town Halls - It is great to get a better picture of what is all going on in the Thrivent community | Millennial | WI | Communication |
| 1 | Hiring me as an intern, given me a better idea of where I want to go with my career | Millennial | WI | Development |
| 1 | Flexible hours - I greatly appreciate flexibility. I feel I work harder now, but I enjoy it. | Gen X | WI | Flexible Work Schedule |
| 1 | Heavy CBT Certifications. Frustrating - Code of Conduct, Info sec, etc. | Baby Boomer | WI | Hiring-Promotions |
| 1 | Flexibility to work flex hours to have work/life balance | Gen X | WI | Flexible Work Schedule |
| 1 | Benefits for interns. Doesn't directly impact me but will make Thrivent more attractive to interns should I need to hire one. | Baby Boomer | WI | Benefits |
| 1 | Creation / development of EBRGs. Creates a platform to discuss issues and move the cultural bar. | Millennial | WI | Culture |
| 1 | Focus on bringing more interns to Thrivent has helped ensure I get hired here. | Millennial | WI | Development |
| 1 | More Internal Conference Call #s | Gen X | WI | Technology |
| 1 | Diversity & inclusion helped me greatly in and out of work | Baby Boomer | WI | Culture |
| 1 | Thrivent Town Hall meetings | Millennial | WI | Communication |
| 1 | The implementation of YPN - love the happy hours and socializing. Gives me a better sense of belonging | Millennial | WI | Culture |
| 1 | Change in purchase PTO policy. I used it as a hedge if my children got sick and not a christmas account. Now I've had to more tightly monitor my PTO | Gen X | WI | Benefits |
| 1 | Allowing 5 additional VTO days to participate in any Thrivent Builds Worldwide trips (corp or member). This policy change allows me to live out my passion to serve others. | Baby Boomer | WI | Culture |
| 1 | Workday - Date / profile more public; time off requests easier | Baby Boomer | WI | Technology |
| 1 | Buy week of PTO | Baby Boomer | WI | Benefits |
| 1 | Open to Christian Market - Changed how I talk to others. More people know of us now vs. before | Baby Boomer | WI | Culture |
| 1 | Dress Code Change. It allows me to dress more casually when I Don't have an important meeting | Millennial | WI | Culture |
| 1 | The overall benefits are great at Thrivent | Baby Boomer | WI | Benefits |
| 1 | Diversity Training - Previously didn't think about differences from an age perspective and didn't feel "old". I do now and it has prompted me to think about where do I want to be the last 15 years of my career | Gen X | WI | Culture |
| 1 | Cultural Competency - Feeling more welcomed in the company | Millennial | WI | Culture |
| 1 | Repaving the parking lots in Appleton | Baby Boomer | WI | Environment |
| 1 | Flexible work schedules - Finally! We're (as a whole) catching up with what has worked for me for so long! | Gen X | WI | Flexible Work Schedule |
| 1 | Implementing the Cultural Competence initiative; has gotten me to be more introspective and aware of my own biases | Gen X | WI | Culture |
| 1 | Move to more flexible policies from HR | Gen X | WI | Benefits |
| 1 | D&I program: Involvement with ERG; maturing Culture Competence | Baby Boomer | WI | Culture |
| 1 | Creation of ERGs: Opportunity to learn and explore the outside comfort zone and increase self awareness | Baby Boomer | WI | Culture |
| 1 | Promoted more of a partnership with the field. It may not be new - but it feels like it has a bigger focus because of the current WIGs. Impacts me - creates opportunity to look for opportunities to connect and build relationships | Gen X | WI | Development |
| 1 | Reorganization - challenge to navigate new organization and units. Energy in new boss | Baby Boomer | WI | Development |
| 1 | Developed employee resource groups. Its given me the opportunity to network with people like myself and unlike myself | Millennial | WI | Culture |
| 1 | I was hired 2 months ago. Impact: Career | Millennial | WI | Hiring-Promotions |
| 1 | Thrivent has impacted me greatly as an inter. The opportunity to be hired after my second year of college gave me so many experiences and life lessons that will stick with me throughout my career. | Millennial | WI | Development |
| 2 | Nine day flex for exempt employees we have or should have a flexible schedule. Not sure why we need to have structure like nine day flex and create problems finding key resources every Friday. | Baby Boomer | WI | Flexible Work Schedule |
| 2 | With the move to workday, there is now historical pay info | Baby Boomer | WI | Technology |
| 2 | New hires are on a different track of learning for cultural competency courses Takes too long to get them through them all | Baby Boomer | WI | Hiring-Promotions |
| 2 | Employees work here who choose to not become a member or buy a product. Why work here if you don't believe in the org? | Baby Boomer | WI | Culture |
| 2 | No Dress code. There is very unprofessional attire. | Baby Boomer | WI | Culture |
| 2 | Only employees can use the gym. Why not family members too. | Baby Boomer | WI | Benefits |
| 2 | Need all T's crossed and I's dotted before moving forward on projects | Baby Boomer | WI | Culture |
| 2 | No annual cost of living raise when you are an excellent worker | Baby Boomer | WI | Pay |
| 2 | Christian music at Employee Town Hall meetings. Surprises and frustrates. | Baby Boomer | WI | Culture |
| 2 | Dress policy, or lack there of | Baby Boomer | WI | Culture |
| 2 | IM, AIM, and number of reorganizations | Baby Boomer | WI | Technology |
| 2 | Technology policies. Cloud computing, using cameras. Ect | Baby Boomer | WI | Technology |
| 2 | Always need to involve several people to make small things happen. Example: 1 hour schedule changes in contact center.Variation in Data and reporting mechanisms across different departments | Baby Boomer | WI | Culture |
| 2 | Hiring Process. Why we don't encourage promotions within a department to continue to build knowledge. | Baby Boomer | WI | Hiring-Promotions |
| 2 | Amount of money Thrivent is spending on cultural competency | Baby Boomer | WI | Culture |
| 2 | Being able to bank only 15 days of PTO | Baby Boomer | WI | Benefits |
| 2 | Dress Code | Baby Boomer | WI | Culture |
| 2 | BYOD and cell phone no longer covered | Baby Boomer | WI | Technology |
| 2 | It surpised me coming in how well employees are treated | Millennial | WI | Culture |
| 2 | Would like to know more about different areas at Thrivent. | Millennial | WI | Development |
| 2 | Getting security access for programs/data. Too many different forms/procedures no one good resource to find out what is needed | Millennial | WI | Technology |
| 2 | The process to getting access to proper software | Millennial | WI | Technology |
| 2 | The discount structure between employees an contractors. Or the fact that contractors seem to be outsiders | Millennial | WI | Culture |
| 2 | Too much hiring/promoting based on family/friends | Millennial | WI | Hiring-Promotions |
| 2 | The amount of documentation needed to get a small no impact change into production | Millennial | WI | Culture |
| 2 | The ability to advance your career (Move to manager, director, etc) withought some type of management experience. Hard to Advance | Millennial | WI | Hiring-Promotions |
| 2 | Change/Deploy process. Takes a long time and a lot of effort to deploy changes | Millennial | WI | Culture |
| 2 | The idea that tenure should decide promotions. | Millennial | WI | Hiring-Promotions |
| 2 | Thrivent doesn't hire for diversity as a criteria, but rather sees it as a side effect. Thrivent is passively seeking diversity rather than actively seeking diversity in workforce. | Millennial | WI | Culture |
| 2 | New ideas are solicited but I'm not sure they are ever truly considered | Millennial | WI | Voice |
| 2 | Work Day. Having to log daily hours as a non-exempt employee | Millennial | WI | Technology |
| 2 | Difficult to find out who is in what position or where to go for information without extensive personal Thrivent Network. Very difficult to acquire if you are new/haven't been here for 2+ years | Millennial | WI | Technology |
| 2 | Took away extra option to buy PTO | Millennial | WI | Benefits |
| 2 | Limiting salary and development opportunities by job title and not using discretion for individual talent | Millennial | WI | Hiring-Promotions |
| 2 | Process to obtain certain access are surprisingly difficult and frustrating | Millennial | WI | Technology |
| 2 | The neutrality policy. It is time to recognize that people have differences and respect each other | Millennial | WI | Culture |
| 2 | Change Management | Millennial | WI | Culture |
| 2 | People are very understanding of people working from home/flexible schedule | Millennial | WI | Flexible Work Schedule |
| 2 | Work from home surprises me in a good way. I love the freedom and flexibility | Millennial | WI | Flexible Work Schedule |
| 2 | Frustrated with occasional lack of communication about large scale projects like why is connect on hold? I'd like more info about the data center, or ino about other projects and don't know where to turn for info | Millennial | WI | Communication |
| 2 | Dress Code. It was surprising. I love flexibility and I appreciate it, but would like some guidelines and consistancy | Gen X | WI | Culture |
| 2 | Can't bring your own device | Gen X | WI | Technology |
| 2 | 48 hour challenge ticket rule when trouble shooting server issues with vendors that are not business critical | Gen X | WI | Culture |
| 2 | HRs reluctance to allow us to flex with more frequency | Gen X | WI | Flexible Work Schedule |
| 2 | Empowerment to front line staff comes across as weak. People aren't empowered to do what's right for members or field | Gen X | WI | Culture |
| 2 | Legal processes, risk adverse. Causes us to be slow to change | Gen X | WI | Culture |
| 2 | The time and money thrivent is spending on Cultural Competency | Gen X | WI | Culture |
| 2 | Not specific to Thrivent but financial industry regulations and always reacting to negative instead of focusing on development | Gen X | WI | Culture |
| 2 | Applying internally for new positions | Gen X | WI | Hiring-Promotions |
| 2 | Must work through centralized services (when have expertise to handle it yourself) | Gen X | WI | Culture |
| 2 | Long time frames in making decisions. Not willing to take a risk | Gen X | WI | Culture |
| 2 | The tightened security for applications and data and the process to get access | Gen X | WI | Technology |
| 2 | Badge in the Cafeteria | Gen X | WI | Communication |
| 2 | Garbage/recycling cans no long in all rooms | Gen X | WI | Facility |
| 2 | Dress Code. How lax some departments have become about attire | Gen X | WI | Culture |
| 2 | Nine day flex for exempt employees we have or should have a flexible schedule. Not sure why we need to have structure like nine day flex and create problems finding key resources every Friday. | Baby Boomer | WI | Flexible Work Schedule |
| 2 | With the move to workday, there is now historical pay info | Baby Boomer | WI | Technology |
| 3 | Something like American Family Insurance Ventures, supporting entreprenuership in the industry | Millennial | WI | Development |
| 3 | Field trips to the Mpls office to see the other office and understand how they work and what their culture is like | Millennial | WI | Development |
| 3 | Flexible Work schedule | Millennial | WI | Flexible Work Schedule |
| 3 | Ability to work from home | Millennial | WI | Flexible Work Schedule |
| 3 | The enablement to volunteer/give back via Thrivent Builds trips and VTO | Millennial | WI | Culture |
| 3 | On-site child care - this would get rid of a huge headache for me | Millennial | WI | Benefits |
| 3 | Continued payed intern events | Millennial | WI | Pay |
| 3 | Huge growth/learning opportunity | Millennial | WI | Development |
| 3 | The PTO will keep me here | Millennial | WI | Benefits |
| 3 | Student loan foregiveness/repayment option | Millennial | WI | Benefits |
| 3 | Flexible Work schedule | Millennial | WI | Flexible Work Schedule |
| 3 | Ability to work from home | Millennial | WI | Flexible Work Schedule |
| 3 | Great medical insurance | Millennial | WI | Benefits |
| 3 | Rewards for a healthy/active lifestyle | Millennial | WI | Benefits |
| 3 | Environment of Thrivent would keep me here. To be in a workplace that not only cares about your work, but truly cares about you as a person is very important to me | Millennial | WI | Culture |
| 3 | The wonderful balance of family and work life | Millennial | WI | Flexible Work Schedule |
| 3 | Working from home | Millennial | WI | Flexible Work Schedule |
| 3 | The ability to work from home | Millennial | WI | Flexible Work Schedule |
| 3 | Flexible Work schedule | Millennial | WI | Flexible Work Schedule |
| 3 | Vacation days | Millennial | WI | Benefits |
| 3 | Competetive wage | Millennial | WI | Pay |
| 3 | VTO | Millennial | WI | Culture |
| 3 | Thrivent is a non-profit and has a good mission to serve others | Millennial | WI | Culture |
| 3 | Flexible Work schedule | Millennial | WI | Flexible Work Schedule |
| 3 | More flexible work options | Millennial | WI | Flexible Work Schedule |
| 3 | Pension - not many other companies offer it | Millennial | WI | Benefits |
| 3 | Being family supportive company | Millennial | WI | Culture |
| 3 | Letting employees have VTO | Millennial | WI | Culture |
| 3 | Allowing people to have a say in generosity | Millennial | WI | Culture |
| 3 | Work/life balance, work to live not live to work | Millennial | WI | Flexible Work Schedule |
| 3 | Work/life balance | Millennial | WI | Flexible Work Schedule |
| 3 | Generous PTO | Millennial | WI | Benefits |
| 3 | Work/life balance | Millennial | WI | Flexible Work Schedule |
| 3 | Advancement opportunities, extremely important with our generation | Millennial | WI | Development |
| 3 | Changing leadership | Millennial | WI | Leadership |
| 3 | Slow way of thinking, need to be more progressive | Millennial | WI | Culture |
| 3 | PTO and flexible work schedules | Millennial | WI | Flexible Work Schedule |
| 3 | Higher pay | Millennial | WI | Pay |
| 3 | No dress code | Millennial | WI | Culture |
| 3 | Ability to work from home | Millennial | WI | Flexible Work Schedule |
| 3 | Clear development plan; example: if you do XY&Z you will be able to move up to the next position | Millennial | WI | Development |
| 3 | Add paternity leave | Millennial | WI | Benefits |
| 3 | Embracing new technology | Millennial | WI | Culture |
| 3 | Better pay - more comparable toThrivent's competitive companies | Millennial | WI | Pay |
| 3 | Flexible Work schedule - lets you have a family and a career | Millennial | WI | Flexible Work Schedule |
| 3 | Continued flexibility and promotion of work-life balance | Millennial | WI | Flexible Work Schedule |
| 3 | Allow full time employees to apply for internship positions - make internships feasible for FTE's | Millennial | WI | Development |
| 3 | Flexible scheduling and telecommuting | Baby Boomer | WI | Flexible Work Schedule |
| 3 | Paid fairly, respected and engaged - which is pretty much already happening | Baby Boomer | WI | Pay |
| 3 | Continued flex time | Baby Boomer | WI | Flexible Work Schedule |
| 3 | Health insurance | Baby Boomer | WI | Benefits |
| 3 | They have offered more work options. Work remotely, etc. | Baby Boomer | WI | Flexible Work Schedule |
| 3 | Too many to list of above all… being able to live out my values at work. Not having to compromise who I am for the business | Baby Boomer | WI | Culture |
| 3 | Flexible hours | Baby Boomer | WI | Flexible Work Schedule |
| 3 | Flexibility in work hours and ability to WFH - Family/life balance | Baby Boomer | WI | Flexible Work Schedule |
| 3 | Generous PTO | Baby Boomer | WI | Benefits |
| 3 | Flexibility | Baby Boomer | WI | Flexible Work Schedule |
| 3 | Defined benefit plan | Baby Boomer | WI | Benefits |
| 3 | Christian, caring environment | Baby Boomer | WI | Culture |
| 3 | Affordable health insurance | Baby Boomer | WI | Benefits |
| 3 | Thrivent choice/volunteerism; I enjoy giving back to our communities | Baby Boomer | WI | Culture |
| 3 | AAL pension plan | Baby Boomer | WI | Benefits |
| 3 | My age - couple years til retirement; good organization | Baby Boomer | WI | Benefits |
| 3 | Thrivent's mission | Baby Boomer | WI | Culture |
| 3 | Health insurance for retirees; reputation, retention, easier to recruit and right thing to do. | Baby Boomer | WI | Benefits |
| 3 | Ability to work from home when it works. It adds convenience and feels like the company trusts me more | Gen X | WI | Flexible Work Schedule |
| 3 | Tuition reimbursement - very greatful to have access to | Gen X | WI | Development |
| 3 | Flexibility | Gen X | WI | Flexible Work Schedule |
| 3 | Thrivent Builds! Action Teams! VTO! | Gen X | WI | Culture |
| 3 | Flexible work schedule! | Gen X | WI | Flexible Work Schedule |
| 3 | Employee Appreciation Events - get to engage w/ other Thrivent employees in a different atmosphere which builds networking | Gen X | WI | Benefits |
| 3 | 401K match, retirement benefits | Gen X | WI | Benefits |
| 3 | Flexible work schedule | Gen X | WI | Flexible Work Schedule |
| 3 | Health premium discounts for leading a healthy lifestyle - promotes active living and creates an environment of healthier more productive employees | Gen X | WI | Benefits |
| 3 | Flex time off - scheduling | Gen X | WI | Flexible Work Schedule |
| 3 | Additional Floating holiday | Gen X | WI | Benefits |
| 3 | Flexibility, culture, ethical nature - it resonated with my values | Gen X | WI | Flexible Work Schedule |
| 3 | Healthy lifestyle discounts | Gen X | WI | Benefits |
| 3 | Volunteerism/ VTO - giving back is part of my values and love that it's part of culture at my workplace | Gen X | WI | Culture |
| 3 | Everyone is so nice and willing to help | Gen X | WI | Culture |
| 3 | Flex w/ ability to work from home - helps maintain work/family balance | Gen X | WI | Flexible Work Schedule |
| 3 | Work/life balance - PTO | Gen X | WI | Benefits |
| 3 | The PTO/sick time policy and volunteer time is very generous | Gen X | WI | Benefits |
| 3 | Insurance | Gen X | WI | Benefits |
| 3 | Flex scheduling and telecommuting | Gen X | WI | Flexible Work Schedule |
| 3 | Work/life balance ability to work from home | Gen X | WI | Flexible Work Schedule |
| 3 | 401K match - I want to retire | Gen X | WI | Benefits |
| 3 | PTO - work/life balance | Gen X | WI | Benefits |
| 3 | Providing an environment with work/life balance | Gen X | WI | Flexible Work Schedule |
| 3 | Student loan foregiveness/repayment option | Millennial | WI | Benefits |
| 3 | Increased subsidy for healthy food choices and reduce subsidy for unhealthy foods | Millennial | WI | Benefits |
| 1 | Creation of ERBGs | Millennial | MN | Culture |
| 1 | Introducing employees to Thrivent Action Teams | Millennial | MN |  |
| 1 | Getting rid of ECG | Millennial | MN | Hiring -Promotions |
| 1 | Lack of clear vision with all the leadership changes… hard to stay engaged and excited with unclear vision and strategy | Millennial | MN | Culture |
| 1 | Reduction of number of job bands | Millennial | MN | Hiring -Promotions |
| 1 | ECO Credit elimination and new impark system… change mangagement was awful and really made commuting much harder | Millennial | MN | Benefits |
| 1 | 5 Extra VTO days awesome | Millennial | MN | Benefits |
| 1 | part-time telecommuting | Millennial | MN | Flexible Work Schedule |
| 1 | Product development generating great new products to support member needs- feeling confident in prodcut and support. | Millennial | MN |  |
| 1 | Potential for use of Talent Profiles in Workday | Millennial | MN |  |
| 1 | Parking change | Millennial | MN | Benefits |
| 1 | Bridgelines and VC culture is not good. New phone system unimpressive and need to step up to the plate for internal communication and collaboration | Millennial | MN | Communication |
| 1 | leadership changes taking too long… feel left in the dark | Millennial | MN |  |
| 1 | Restructuring time and lack of transparency in my department have been really frustrating and confusing | Millennial | MN | Culture |
| 1 | Metro Pass ordeal -- would have added 150% costs to commuting | Gen X | MN | Benefits |
| 1 | Committing to CC journey | Baby Boomer | MN | Culture |
| 1 | Race Real Talk | Millennial | MN | Culture |
| 2 | Onboarding - lack of contacts when starting of where to ask questions about certain things (ie. Box HR for HR questions, Box TSC for IT questions) | Millennial | MN | Hiring-Promotions |
| 2 | Outdated materials in Onboarding | Millennial | MN | Hiring-Promotions |
| 2 | Performance reviews are inconsistent across thrivent. | Millennial | MN | Performance |
| 2 | Development plans are inconsistent across thrivent. | Millennial | MN | Hiring-Promotions |
| 2 | Not enough focus on developing PEOPLE; instead, many are focused on developing the deliverables | Millennial | MN | Performance |
| 2 | Family members and friends are hired too often. Need to work on actual hiring the best, not just based off connections. | Millennial | MN | Hiring-Promotions |
| 2 | Pipeline for recent grads into roles | Millennial | MN | Development |
| 2 | Not a very collaborative work environment, often boring and isolating | Millennial | MN | Culture |
| 2 | Mentality of "\_\_\_\_ senior leader said to do this" does not encourage real innovation or problem solving within teams. | Millennial | MN | Culture |
| 2 | NEO-- need more opportunities to learn about what Thrivent actually does. | Millennial | MN | Hiring-Promotions |
| 2 | Consistent expectations for flexible work options and benefits | Millennial | MN | Flexible Work Schedule |
| 2 | Learn about products and services during onboarding | Millennial | MN | Hiring-Promotions |
| 2 | Frustrated that field employees don't get discount at lunch-- this is dividing! | Millennial | MN | Benefits |
| 2 | Need to have more fun and create a better culture to keep people engaged and happy. | Millennial | MN | Culture |
| 2 | Need better tools and software to improve productivity! There are so many tools out there! | Millennial | MN | Technology |
| 2 | Want to have more flexible work schedule | Gen X | MN | Flexible Work Schedule |
| 2 | Slow pace of change! | Millennial | MN | Culture |
| 2 | My field should be more financially supported as they start -- the comp provided can be discouraging and makes me feel not valued | Millennial | MN | Pay |
| 2 | Thrivent is very slow-- so much bureaucracy and layered decision making that it's hard to innovate | Millennial | MN | Culture |
| 2 | Lots of going down rabbit holes when trying to find out past learnings, need an aggregated place to store project info so we can better learn from the past | Millennial | MN | Technology |
| 2 | So many people with long tenure at Thrivent make it hard to "break in" as a new person/young person | Millennial | MN | Culture |
| 2 | Livelink | Baby Boomer | MN | Technology |
| 2 | Lack of paid leave | Baby Boomer | MN | Benefits |
| 2 | Contractors not being treated like employees | Millennial | MN | Benefits |
| 2 | Lack of paternal leave… sad! | Gen x | MN | Benefits |
| 2 | Frustrating that contractors don't get good any benefits or PTO or discount in the cafeteria. | Millennial | MN | Benefits |
| 2 | Need a mentorship program to partner with new hires | Baby Boomer | MN | Hiring-Promotions |
| 2 | IT has a mentorship onboarding program- Come on over to IT | Millennial | MN | Hiring-Promotions |
| 2 | Software data request process | Baby Boomer | MN | Technology |
| 2 | No composting | Baby Boomer | MN | Facility |
| 2 | People follow rules almost to the letter without questioning why the rule is even in place | Gen X | MN | Culture |
| 2 | Too much "we've always done it this way" which keeps us from exploring new ideas and being a more agile company | Gen X | MN | Culture |
| 3 | Paternity leave for new fathers | Millennial | MN | Benefits |
| 3 | rewards for healthy living - ie gym membership and step counts prizes etc. | Millennial | MN | Benefits |
| 3 | Grad school sponsorship/more education opportunities | Millennial | MN | Benefits |
| 3 | More open and exuberant office culture (snacks, beanbags, alterative workspaces) | Millennial | MN | Benefits |
| 3 | Internal career postings and recruiting at colleges | Millennial | MN | Hiring-Promotions |
| 3 | Greater flexbility to work remote | Millennial | MN | Flexible Work Schedule |
| 3 | Telecommuting | Millennial | MN | Flexible Work Schedule |
| 3 | Student loan contribution matching to accompany 401K! | Millennial | MN | Benefits |
| 3 | Better system to communicate with Appleton folks, contributing to more inclusive, rich collaboration | Millennial | MN | Communication |
| 3 | Tuition reimbursement-- not up to par with other companies!! | Millennial | MN | Benefits |
| 3 | Change culture… still too much judgement based on how many hours you are sitting at your desk. I don't like when people think I'm slacking when working from home or at a coffee shop or at late nights. | Millennial | MN | Culture |
| 3 | Unlimited PTO | Millennial | MN | Benefits |
| 3 | Student loan assistance | Millennial | MN | Benefits |
| 3 | Rotational programs to help develop rising talent and give exposure to larger number of high potential people. | Millennial | MN | Development |
| 3 | Higher pay based on performance not tenure | Millennial | MN | Performance |
| 3 | "Meet your leader" hours each quarter- add visibility to upper level leadership would help give people voice and let leaders periodically interact with the people doing the work | Millennial | MN | Development |
| 3 | Commuter discounts and other activities | Millennial | MN | Benefits |
| 3 | We need to dramatically inprove our ability to manage change-- the world is changing exponentially, we need to embrace and seek the new, not resist and sluggishly adopt it. | Millennial | MN | Culture |
| 3 | Discounts on everyday services (cell phones, etc) | Millennial | MN | Benefits |
| 3 | No dress code | Millennial | MN | Culture |
| 3 | Intentional, personalized development plans for each employee. | Millennial | MN | Development |
| 3 | Opportunities to do smaller projects outside of day job to get more exposure and develop different skills. | Millennial | MN | Development |

(Source: Gruender, Laura and Joe Martins. Thrivent Young Professionals Real Talk Data. Thrivent Financial. 13 October 2016.)

**Appendix 5**

**Key Audience Analysis Points**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ATTRIBUTES** | **VP** | **SM** | **CUSTOMER SERVICE MANAGERS** | **TRUTH / VALIDITY** |
| **MILLENNIALS** | YES, 28 years old | Under 35 years old | Under 35 years old | According to the Pew Research Center, Millennials were born from 1981 through 1997. (6) |
| **MOST IMPORTANT CORPORTATE BENEFITS** | Culture, Benefits, Flexible Work Options | Culture, Benefits, Flexible Work Options | Culture, Benefits, Flexible Work Options | Focus Group Results (Appendix 4) |
| **EDUCATION** | N/A | N/A | Management Degrees | Facts given in case |
| **CURRENT STATUS** | Supportive of Senior Managements observations to improve managers communication effectiveness | Identified 12 managers that are “ineffective communicators” | Are not aware they have been chosen as ineffective communicators | Facts from case |
| **COMMUNICATION OBJECTIVES** | Demonstrate to VP Introductory Seminar is key to the development and improvement of managers that will yield a high ROI. | Provide assurances the seminar will improve and offer credible, measurable solutions to the managers utilizing ineffective communications. | Describe various communication approaches, benefits of the training seminar, purpose and show via on-hands training how concepts and information will improve their ineffective communication skills related to their management roles. | Connecting objectives to the concerns of the audience helps lead to success of the seminar. |
| **COMMUNICATION AND MANAGEMENT APPROACHES** | Arrow ­­­\_\_\_  Circuit \_\_\_  Dance \_\_\_  Other \_\_\_ | Arrow ­­­\_\_\_  Circuit \_\_\_  Dance \_\_\_  Other \_\_\_ | Arrow ­­­\_\_\_  Circuit \_\_\_  Dance \_\_\_  Other \_\_\_ | We do not know existing management approaches for each management level. |
| **CHANNEL PREFERENCES** | Face to Face | Group Meetings/Face to Face | Face to Face | Rich communications involve more complex emotional variables. Rich channels such as Face to Face allow for rapid feedback and quick adaptation to employee /management concerns. |
| **RESISTANCE TO THE SEMINAR** | Future seminars will cease if this one is not considered successful | Concern seminar will be a failure. What is the next step if this happens? | 1)Resistant to constructive criticism  2)Will the seminar improve performance? | Will deem true based on measuring the outcome of the seminar |

**Appendix 6**

**Group Agendas**

**Agenda: October 6, 2016 – 8:30-9:30pm via Conference Call**

Present: Sarah Crowe, Laura Gruender and Sandy Sparacino

\*Overview of Case Study Project and Identify Case Study

\*Create a plan/outline to move forward with Case Study 2.1

\*Identify strengths and opportunities for development within the group. Divide project pieces accordingly, with the expectation of collaboration and constant contact/touchpoints throughout the semester.

\*Questions/Discussion, etc.

Next Steps:

\*Laura will email Professor Clampitt to notify him of our case selection and rationale.

\*Laura will send calendar invite for our next group conference call and update timeline

**Agenda: October 20, 2016 – 8-9pm via Conference Call**

Present: Sarah Crowe, Laura Gruender and Sandy Sparacino

\*Review outline

\*Discuss Research and Development of Case Study in order to move to Findings

\*Identify continuous improvement opportunities from R&D

\*Review Drill Down/Deep Dive group requirements/timeline

\*Questions/Discussion, etc.

Next Steps:

\*Laura will send calendar invite for our next group conference call and update timeline

**Agenda: November 9, 2016 – 8:30-9:30pm via Conference Call**

Present: Sarah Crowe, Laura Gruender and Sandy Sparacino

\*Review outline

\*Discuss Findings in order to move to Recommendations

\*Identify continuous improvement opportunities from Findings

\*Review Drill Down/Deep Dive group requirements/timeline for Chapter 10

\*Do we want to schedule another call the week of December 12th to finalize submission?

\*Questions/Discussion, etc.

Next Steps:

\*Laura will send calendar invite for our next group conference call and update timeline

\*Laura will review/submit Chapter 10 Drill Down/Deep Dive

\*Laura will schedule and send the final conference call invite and agenda for December 13th

**Agenda: December 1, 2016 – 8-9pm via Conference Call**

Present: Sarah Crowe and Laura Gruender

\*Review outline

\*Discuss Recommendations in order to move to final pieces of project.

\*Discuss Continuous Improvement - Recommendations

\*Next pieces of project:

Sandy - Summary/Conclusion and Cont. Improvement – Due Tuesday, December 6th

Sarah - Intro/Executive Summary – Due Sunday, December 11th

Laura - Group Agendas – Due one day after our final conference call

All - Case Study Proof-Read – December 12th-14th

Laura - Submit – December 14th

\*Questions/Discussion, etc.

Next Steps:

\*Laura confirm final conference call for December 13th

\*Laura sends email to Sandy in order to provide an update from tonight’s call

**Agenda: December 13, 2016 – 8-9pm via Conference Call**

Present: Sarah Crowe, Laura Gruender and Sandy Sparacino

\*Review Outline

\*Review Summary/Conclusion and Continuous Improvement

\*Review Intro and Executive Summary

\*Review Group Agendas

\*Proof-Read Case Study as a Group

\*Questions/Discussion, etc.

Next Steps:

\*Laura will submit Case Study on December 14th