



IDM 7510 (1.5 CH)
STRATEGIC LEADERSHIP &
MANAGING CHANGE
Winter 2009

INSTRUCTOR

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COURSE DESCRIPTION

An examination of the role of the manager as a change agent and processes associated with strategic vision and change. Analysis of factors affecting strategic decisions and how organizations adapt to their environment. Emphasis is upon the role of leaders: transformational leadership, charisma, organizational design and managing organizational culture change.

COURSE OBJECTIVE

To explore the leadership processes and strategies in change initiatives. This course will explore the change process and the role of leaders within multiple step models. Reviews of works by current prominent authors in the leadership field will serve as the content and will provide structure to the course. Authors include Collins/Porras, Welch, Kotter, Tichy, Kellerman, Drucker, Manz/Sims, Wheatley and others. The authors have been carefully chosen either as renown CEOs (e.g., Jack Welch) or academics who have bridged the academia/practitioner contexts.

LEARNING OUTCOMES

- Understand more about the concept of leadership.
- Consider the relationship between leadership and organizational performance.
- Define, distinguish between and understand the importance of “good” and “bad” leadership.
- Clarify the nature of strategic change.
- Understand the relationship between leadership and strategic change.
- Explore “Boundary” conditions of strategic leadership.
- Evaluate and reflect on personal style and behaviours within the context of leadership and strategic change.

COURSE MATERIALS

Previous experience and preparation of students through review of prior exposure to leadership articles/books/materials. A set of resource readings will be available as a course readings package from the U of M Bookstore, or available through University of Manitoba’s e-Library service. Following the schedule I have included instructions about how to access the resource and other articles from the “e-Library”. I have included the references and abstracts of the articles as an appendix to this outline.

LEARNING ASSESSMENT

The grading the course will be determined as follows:

Group participation and contribution	35%
General class participation and contribution	30%
Self assessment paper and analyses	35%

Cumulative Marks	Grade	GPA	Performance
90-100	A+	4.5	Excellent
80-89	A	4.0	Very Good
75-79	B+	3.5	Good
70-74	B	3.0	Satisfactory
65-69	C+	2.5	Marginal
60-64	C	2.0	Unsatisfactory
50-59	D	1.0	Unsatisfactory
Below 50	F	0.0	Unsatisfactory

SELF ASSESSMENT PAPER AND ANALYSES

The self assessment paper should be a personal analysis and personal development plan. The objective of the paper is to provide an assessment of your current leadership strengths and weaknesses and the development activities you need to undertake to strengthen your weaknesses to respond to a change scenario. This analysis should be taken within the context of a current, past or future change scenario. For the paper there will be a number of areas that can be included from the course as well as other information from outside the course. The “blue chip” feedback exercises will provide feedback from class members about your leadership behaviors, the criteria in class will provide characteristics that are valued in leaders, the change process models will provide frameworks that could be used in change efforts that you are currently or potentially involved in. Past experiences can be analyzed for weaknesses and changes that would be made if a similar situation arose, personal bests can be summarized to demonstrate areas of leadership strengths, etc. The change process should include definite plans about goals, objectives and feedback processes. The page limit for the paper is 10 pages. References, tables and appendices are not included in the page limit. The criteria for judging the papers will be on the thoroughness of the analysis and the level of development in the plans. The plans should include timelines and indicators of how change will be assessed. Students in the past have found some of the materials they have gathered from other training sessions valuable to include in their analyses. Papers are due by **February 9, 2009**. Papers must be dropped off, mailed or couriered to me.

PRE-READING ASSIGNMENT

1. GE Case
2. Articles that have been included in reading’s package (if time permits)
3. Other information on leadership and change – Bring your ideas and suggestions to the session. (Some summaries of books and articles have been provided for your information and review.)

DISABLED STUDENTS

Students are encouraged to contact Disability Services at 474-6213 or the instructor should special arrangements need to be made to meet course requirements.

COURSE CONDUCT

The course will be a highly interactive course that includes case studies, exercises, and films. Material from external sources will be integrated into the lectures and the discussion. Students will be provided with annotated bibliographic material to serve as source material to further their study on leadership and change. The course is organized as a leadership game where a CEO (Class Elected Overseer) will be selected by students through the experiential exercise/discussion process. The exercise will also serve as a feedback exercise for students to gain other's assessments of their leadership behaviors and characteristics.

Course Outline

Introduction: Introductory remarks, game instructions (Blue chip exercises) and formation of groups

Reading Materials/articles follow in annotated form. The articles marked with "*" will be included in the readings package.

Topic 1: Responsive organizations

Case: GE's Two-Decade Transformation: Jack Welch's Leadership
Reference Material: *Built to Last (Collins/Porras – Chapter 1)

Guideline to Case Preparation:

1. How has GE prepared for environmental changes?
2. What role did Welch's leadership approach play in the organizational changes?
3. What are the pros and cons of Welch's leadership approach?
4. What are GE's values and how have they facilitated/inhibited GE's performance?

Topic 2: Exploring Leadership Characteristics within Change Contexts –

Exercise – Leadership Characteristics (Kouzes and Posner), Change and development of criteria

Topic 3: Evaluation of the nature of leadership –

Exercise - Leadership statements (Various authors)

Topic 4: "Bad" leadership (Kellerman)

Exercise: Lessons from "Bad" leadership

Topic 5: The Change Context – Leadership styles

"Breaking the code of change" (Beers and Nohria)

Topic 6: Change Models

Discussion: Comparison of change models

Topic 7: Leadership and Change: The Trial case

Exercise: The Raw Materials Exercise

Topic 8: Probing further into the Change Models and Related concepts

Case Analysis: To be announced

Topic 9: Cautionary tales/Advice from the Seasoned Ranks/Review of the Research (*various articles are included)

Topic 10: Our CEO selection process – Final assessments

How to Access articles via University of Manitoba's "e-Library"

1. Go to U of M website: <http://umanitoba.ca>
2. Go to "The University" tab at the top of the page
3. Click on "Libraries" in the drop down menu
4. On the left hand menu click "e-Library"
5. Then at the top of the page, click on "Find Journal Articles"
6. Then click on "Databases A-Z"
7. You will then want letter "B"
8. Scroll down and click "Business Source Premier" in the list of databases
9. You will then be asked to enter your Library ID and PIN. Your library ID is your 7-digit student number and your PIN is your date of birth in format YYMMDD unless you have changed your PIN. Detailed instructions are given at this point should you need access help.
Once you are in the database, you will have drop down menu boxes to utilize in your search. If you want to do a search on a topic you may just type in keywords for the search. If you want to find one of the articles in the reference list you may click:
 - a. FIND: Harvard Business Review in "SO Publication"
 - b. And "author last name" in AU Author (if you stop here you will find all of the articles in the publication by the named author – if you want to restrict the search further you may fill in the second "and" box and perhaps type some of the keywords of the article name).
10. A list of articles by the author will appear (based on the constraints you have put on the search) – you can scan those articles and then click pdf for the pdf version of the article. When the pdf appears you may email, print or save the article.

Good Luck – once you have worked through it the first time you will have a wonderful source of current business, academic and other articles. Another good database for searches is "Proquest".

Annotated Bibliography for Leadership and Change – Selected articles from Harvard Business Review

Bennis, W.G. (2004). The seven ages of the leader. Harvard Business Review, January, 46-49.

Seven stages of leadership development are presented, generally coinciding with Shakespeare's seven ages of man: infant, schoolboy, lover, soldier, general, statesman and sage. The infant executive is a neophyte leader who generally has a mentor. The schoolboy is a stage of recognition of the intense scrutiny of everything about you from others and the need to learn how to manage those impressions. Emphasis is to be placed on first acts because those are the ones that create the first and most lasting impressions. The third stage, lover, the learning process of relationships with others and how to manage them, balancing friendships with professional relationships, establishing relationships with members of the team, etc. The fourth stage is the bearded soldier, - when the leader grows comfortable in the role and reach a stage where others need to nurture others whose star might shine as bright or brighter than their own. The fifth stage is the general stage where at the height of his/her career to not only allow people to speak but to listen to and hear the truth, minimizing the development of arrogance. Stage six is the statesman, the stage at which the leader's power begins to wane and the power begins to be transferred over to a new generation, the leader is focused on preparing to pass on his or her wisdom in the interest of the organization. The final and seventh stage is the sage, or the adoption of the role of a mentor, the development of valued relationships between the mentor and mentee – exchange of respect, perspectives, and experiences.

Bennis, W.G. & Thomas, R.J. (2002). Crucibles of leadership. Harvard Business Review, September, 39-45.

The article examines experiences that provide transformational experiences where individuals develop a new or altered sense of identity. Primary crucibles include a) learning from differences. When people immerse themselves in a different environment, or with different sets of relationships they learn more about themselves and their own attitudes and prejudices, b) prevailing over darkness – when a person experiences a particularly “dark experience” and survive it – there are usually some deep learning experiences that result, c) meeting great expectations – when a person experiences relationships with someone who has achieved great accomplishments and is willing to share those experiences. Sometimes the crucibles do not fit any easy set of definitions. Leaders who benefit from “crucible” experiences are those who find meaning in what might be a debilitating experience through the ability to engage others in shared meaning, by exercising a distinctive and compelling voice, a strong sense of integrity, and the possession of “adaptive capacity”. These characteristics indicate a certain degree of hardiness or “the perseverance and toughness that enable people to emerge from devastating circumstances without losing hope” (p. 45).

Farson, R. & Keyes, R. (2002). The failure-tolerant leader. Harvard Business Review, August, 65-71.

The basic premise of this article is that effective executives (leaders?) understand that failure is a prerequisite to invention and innovation. Common characteristics of failure-tolerant leaders include: 1. attempt to break down social and bureaucratic barriers that separate them and the people they work with, 2. engage at a personal level with the people they lead, 3. avoid giving praise or criticism but focus more on an analysis of situations, 4. openly admit their own mistakes and 5. try to diminish destructive competitiveness in their organizations. One of the keys is for failure-tolerant leaders to be able to distinguish between the kinds of mistakes that are necessary for the organization to advance and innovate and those that are a result of sloppiness. Distinguishing between these two can be determined through careful examination of the situations by determining answers to questions such as the design of the project (careless or conscientious), failure preventable with more research or consultation, collaborative or insufficient input from others, driven by organizational rather than personal goals, were projections honest or deceptive and were similar mistakes made repeatedly?

Goffee, R & Jones, G. (2000). Why should anyone be led by you? Harvard Business Review, September-October, 63-70.

The article summarizes four unexpected qualities in inspirational leaders:

1. They selectively show their weaknesses – they show some vulnerability but the weaknesses should not be fatal flaws. When weaknesses are shown leaders demonstrate approachability and humanity.
2. They rely heavily on intuition to gauge the appropriate timing and course of their actions. A number of inspirational leaders have well-honed intuitive abilities that influence their decisions and responses.
3. They manage employees with something we call tough empathy. Tough empathy is the ability to empathize passionately and realistically with people, but to maintain standards and focus in their relationships. They also care intensely about the work employees do.
4. They review their differences. Inspirational leaders tend to capitalize on what is unique about themselves – perhaps in their interests, mode of dress, personal characteristics, etc. Many times these differences serve a purpose of creating some distance between the leader and other employees in the organization.

*Goleman, D. (2000). Leadership that gets results. Harvard Business Review, March-April, 78-90. Also related to article Goleman, D. (1998, reprint of a 1995 article). What makes a leader? Harvard Business Review, January, 82-91.

Article reviews the four dimensions of emotional intelligence, see table below:

Self Awareness	Self-Management	Social Awareness	Social skill/Empathy
<ul style="list-style-type: none"> • Emotional self-awareness – the ability to read and understand your emotions as well as recognize their impact on work performance, relationships and the like • Accurate self-assessment – a realistic evaluation of your strengths and limitations • Self-confidence – a strong and positive sense of self-worth 	<ul style="list-style-type: none"> • Self-Control – the ability to keep disruptive emotions and impulses under control • Trustworthiness – a consistent display of honesty and integrity • Conscientiousness – the ability to manage yourself and your responsibilities • Adaptability – skill at adjusting to changing situations and overcoming obstacles • Achievement orientation – the drive to meet in internal standard of excellence • Initiative – a readiness to seize opportunities 	<ul style="list-style-type: none"> • Empathy – skill at sensing other people’s emotions, understanding their perspective, and taking an active interest in their concerns • Organizational awareness – the ability to read the currents of organizational life, build decision networks and navigate politics • Service orientation – the ability to recognize and meet customers’ needs 	<ul style="list-style-type: none"> • Visionary leadership – the ability to take charge and inspire with a compelling vision • Influence – the ability to wield a range of persuasive tactics • Developing others – the propensity to bolster the abilities of others through feedback and guidance • Communication – skill at listening and at sending clear, convincing and well-tuned messages • Change catalyst – proficiency in initiating new ideas and leading people in a new direction • Conflict management – the ability to de-escalate disagreements and orchestrate resolutions • Teamwork and collaboration – competence at promoting cooperation and building teams

The article further discusses 6 leadership types that have been derived from Goleman research – they include – 1. coercive leaders who demand immediate compliance, 2. authoritative leadership who mobilize people toward a vision, 3. Affiliative leaders who create emotional bonds and harmony, 4. democratic leadership who build consensus through participation, 5. pacesetter leaders who expect excellence and self-direction, and 6. coaching leader who develop people for the future. Goleman suggests that authoritative leaders are the most effective in most situations, affiliative, democratic and coaching leaders are second styles of effectiveness and coercive and pacesetter styles should be used sparingly. Effectiveness was determined by correlations of the leadership styles with the organization’s working climate (flexibility, responsibility, standards, rewards, clarity and commitment from Litwin and Stringer and McClelland). Each style is argued to have various strengths and weaknesses and Goleman

concludes that “Leaders who have mastered four or more especially the authoritative, democratic, affiliative and coaching styles have the best climate and business performance” (p. 87). Goleman also argues that while emotional intelligence is partly hereditary and partly developed through experience, that it can be learned and modified. Older people generally demonstrate more emotional intelligence than younger people.

*Goleman, D., Boyatzis, R. & McKee, A. (2001). Primal leadership: The hidden driver of great performance. Harvard Business Review, December, 43-51.

The article is based on the application of Goleman’s emotional intelligence framework to leadership. The basis tenets of the article are that the leader’s mood is transferred to subordinates. Leaders who have positive moods tend to lead to more successful performance and more positive mood states in subordinates. The emotional intelligence framework includes four components: self-awareness, self-management, social awareness and relationship management. A five-step process of self improvement is presented:

1. Who do I want to be? – visualization of yourself as an effective leader at some point in the future, example questions – What will you be doing? Where would she live? Who would be there? How would it feel?
2. Who am I now? Examine your leadership style as others do – difficult (because few people have the courage to tell the boss or a colleague what he or she is really like) and dangerous (information can hurt). Gain feedback from as many people as possible, and on an ongoing basis. Result needs to be the identification of areas of weakness (and strengths).
3. How do I get from here to there? - examples – put yourself in situations that require the needed skills and work on development of those skills, plans to address specific areas of weakness, developing cues for recognizing unproductive behavior patterns, and mentally rehearsing various contexts.
4. How do I make the change stick? - practice, rehearse until the new behavior becomes automatic, and the habitual behavior has replaced previous unproductive behavior patterns.
5. Who can help me? - the creation of a community of supporters, e.g., learning groups. Need to develop strong mutual trust relationships with people who can provide frank and honest feedback. Help from others is needed to provide a safe environment in which to practice new skills.

*Gosling, J. & Mintzberg, H. (2003). The five minds of a manager. Harvard Business Review, November, 54-63.

Gosling and Mintzberg review the five “minds” of the manager that has been used to structure an international collaborative MBA program between McGill in Canada, Lancaster University in England, the Indian Institute of Management in Bangalore, faculty members from Japan and Korea, and Insead in France. The five mindsets include: Managing self (the reflective mind-set), Managing organization (the analytic mindset), Managing context (the worldly mindset), Managing relationships (the collaborative mind-set), and Managing change (the action mind-set). All mind-sets are needed and vary in their importance at any one point.

*Hamm, J. (2006). The five message leaders must manage. Harvard Business Review, May, 115-123.

Hamm discusses how leaders can many times create havoc, fear, panic and distress in organizations by not carefully phrasing communications to employees. He focuses on five sets of messages that needs careful attention in manager/leader communications:

1. Organizational structure and hierarchy – definitional control of the organization structure, e.g., the organizational chart, and the impact of reorganization on that structure.
2. Financial results – unclear messages about focus on financial or short-term results may lead to ineffective, and inappropriate behaviors
3. The leader’s sense of his or her job – the leader needs to recognize the limits of his or her expertise and their own realm of responsibility and knowledge. “Effective leaders understand their role is to bring out the answers in others.” (p. 120)
4. Time management – the need to effectively manage time but not become a slave to time constraints, recognize when it is necessary to reorganize priorities to meet deadlines, the refocusing on efforts to do fewer things right and well rather than maintaining all of the original priorities/objectives.
5. Corporate culture – “healthy cultures are created and maintained by focusing on the right goals and creating the experience of winning in the marketplace” (p.122), employees buy into the culture and adopt a belief that they are part o an exciting future in the organization.

Effective communication and accurate messages should filter throughout the organization and thus become part of the overall accepted vision of the company’s goals, priorities and opportunities.

Harvard Business Review. (2004). Leading by feel. Harvard Business Review, January, 27-37.

Eighteen researchers and business leaders provide short summaries of their perceptions about managing with emotional intelligence. Mayer (and Salovey) were the originators of the concept of emotional intelligence. Mayer provides the scientific definition which is the ability to accurately perceive your own and others’ emotions; to understand the signals that emotions send about relationships; and to manage your own and others’ emotions – It does not necessary=. He indicates that the “jury is still out on how important self-awareness is to successful leadership, In fact, too much self- awareness can reduce self-esteem, which is often a crucial component of great leadership” (p.28). Most of the other authors support the idea of components of emotional intelligence in particular the aspect of self awareness.

Heifetz, R.A. & Laurie, D.L. (2001, reprint of 1997 article). The work of leadership. Harvard Business Review, December, 131-140.

These authors coined the term “adaptive challenges” to signify “changes in societies, markets, customers, competition, and technology around the globe [that is] forcing organizations to clarify their values, develop new strategies, and learn new ways of operating” (p. 132). These authors, as others indicate that effecting change in organizations by mobilizing people to do adaptive work is many times the toughest task for leaders. Organizations are forced into adaptive work when deeply held beliefs are challenged, when the values that are related to an organization’s success are challenged and when competing but legitimate perspectives emerge. Six principles were identified for leading adaptive work: 1. “Getting on the balcony” – viewing the issues, patterns, relationships from a distance to understand more of the complete picture of the organizations; 2. identifying the adaptive challenge – need to canvas the organization to determine some of the adaptive challenges and identify the overriding strategy and objectives; 3. Regulate distress – the need to strike a delicate balance between people feeling the need to

change and feeling overwhelmed by change, similarly for the leader – the need to raise the tough questions without getting too anxious; 4. Maintain disciplined attention – ability to harness the diversity of opinions, skills, knowledge and abilities to address the adaptive challenges while maintaining focus; 5. Give the work back to the people – ensure that people gain and retain responsibility for coming up with solutions to the challenges – not complacent followers of leader directives; and 6. Protect voices of leadership from below – giving a voice to all people is the foundation of an organization that is willing to experiment and learn. The final part of the article provides an illustration of how KPMG Netherlands approached some adaptive challenges.

*Kellerman, B. (2004). Leadership: Warts and all. Harvard Business Review, January, 40-45.

The basic lesson/argument in this article is that we have as much to learn for people we would regard as bad examples as we do from good examples. Historically many leaders were not blemish-free. Machiavelli for example argued that the only truly bad leadership is weak leadership, that some leaders need to use force to hold personal power and to maintain power. Checks and balances are developed in recognition that leadership can go out of control and should be constrained. The critique suggests that too much emphasis in recent times is on “good” leaders which Kellerman argues are much rarer than “bad” leaders. “Scholars should remind us that leadership is not a moral concept. Leaders are like the rest of us: trustworthy and deceitful, cowardly and brave, greedy and generous. To assume that all good leaders are good people is to be willfully blind to the reality of the human condition, and it severely limits our scope for becoming more effective at leadership” (p.45).

*Khurana, R. (2002). The curse of the superstar CEO. Harvard Business Review, September, 60-66.

Khurana questions the positive impacts of charismatic leadership in organizations. A number of reasons are cited for problems with “quasi-religious” beliefs in the powers of charismatic leaders. 1. “faith exaggerates the impact that CEOs have on companies” (p.62)– presents evidence to suggest there is a “lack of conclusive evidence linking leadership to organizational performance” (p.63), and that charismatic leaders are most often sought during times of crisis; 2. “the idea that CEOs must have charisma leads companies to overlook many promising candidates and to consider others who are unsuited for the job” (p. 62) – has led to ineffective selection processes in many organizations where specific needed skill sets are overlooked with an overweighting of charismatic factors and 3. “charismatic leaders can destabilize organizations in dangerous ways”. Charismatic leadership as desired traits is a recent phenomenon, born out of 1980s, prior to that period “corporate statesmen” were more common corporate leaders – many times lead organizations boldly into new directions with loyal followers who do not effectively critique the moves. There is also a tendency for charismatic leaders to “rebel against all checks on their power and dismiss the rules and norms that apply to others...they can exploit the irrational desires of their followers” (p. 66). Major suggestion is to replace some of the faith in charismatic leaders with justified decision-making processes.

*Kotter, J.P. (2001, reprint of 1990 article). What leaders really do. Harvard Business Review, December, 85-97.

This article contrasts leadership with management and argues that both are needed for effective organizational performance. Argues that leadership is not charisma nor the province of a few, nor does it replace management or is it more critical than management. Management is focused on coping with complexity and leadership is about coping with change. As environments require more change the demand for leadership is increased. Both require deciding “what needs to be done, creating networks of

people and relationships that can accomplish an agenda, and then trying to ensure that those people actually do the job” (p. 86). See table below:

Task/Function	Management	Leadership
What needs to be done?	<u>Planning and budgeting</u> – setting targets and goals for the future, establishing steps for achieving those targets, allocating resources to accomplish plans	<u>Setting a direction</u> - developing a vision for the future and develop strategies needed to achieve that vision
Creation of networks of people and relationships that can accomplish and agenda	<u>Organizing and staffing</u> – creation of an organizational structure and set of jobs for accomplishing plan requirements, staffing the jobs with qualified individuals, communicating the plan to those people, delegating responsibility for carrying out the plan and devising systems to monitor implementation	<u>Aligning people</u> – communicating new direction to those who can create coalitions that understand the vision and are committed to it’s achievement
Ensure people do the job	<u>Controlling and problem-solving</u> – monitoring results vs the plan in some detail, identifying deviations, planning and organizing to solve the problems	<u>Motivating and inspiring</u> – keeping people moving in the right direction, by appealing to basic needs, values and emotions

The article then provides more detail, and short case examples about all of the processes identified as important for both management and leadership. Conclusions focus on the need to develop leadership talent in organizations from the early point in junior employees’ careers.

Maccoby, M. (2004). The power of transference. Harvard Business Review, September, 77-85.

Transference is the transfer of traits and experiences from the past to current people and situations. For example, when people expect their leaders/bosses to act as their parents might have acted. Transference may happen where the individuals are expected to act as their fathers might have acted, the mother and of siblings. Transference can lead to both positive and negative outcomes. Negative outcomes can result when the expectations lead to unreasonable expectations and behavior. Positive outcomes can result when people can come to terms with the transference and learn from the realizations.

*Porter, M.E., Lorsch, J.W. & Nohria, N. (2004). Seven surprises for new CEOs. Harvard Business Review, October, 63-72.

These authors summarize seven surprises that were noted by executives who attended Harvard’s program to develop new CEOs. They are:

1. You can’t run the company – volume and intensity of demands require significant amounts of time which leave little time without careful planning and control to deal with major company issues. Indicators of problems include too many meetings, involvement in too many tactical decisions, and too many days where you feel like you have lost control of your time.
2. Giving orders is very costly – while there is considerable power in the position the use of the power can have severe consequences. Examples include where staff have spent considerable time and resources developing a project and the CEO stops it then there can be significant demoralization of staff. Signs include: the CEO is a bottleneck in getting ideas implemented,

- employees are constantly seeking your counsel before acting on decisions, CEO name is being used to endorse decisions/project ideas.
3. It is hard to know what is really going on – when in a CEO position it is difficult to get accurate information, employees tend to tell the CEO what he/she wants to hear, are fearful and do not want to reveal mistakes or evidence of poor decisions, etc. Evidence of problems in this area include surprises about information, learning about events after they have happened, hear concerns through grapevine rather than directly.
 4. You are always sending a message – CEO words and actions are carefully scrutinized so offhand or remarks not carefully considered can have significant negative effects on the organizational members. Warning signs include stories about CEO behavior that are circulated amongst employees, and people around the CEO continually trying to anticipate likes and dislikes.
 5. You are not the boss – the CEO reports to the Board and thus has to be in tune with the Board and manage Board perceptions. The CEO may be in trouble if the person doesn't know where he./she stands with the board members, the roles and responsibilities of board members and management is not clear, and the discussions in board meetings are limited mostly to reporting on results and management decisions, rather than fruitful and meaningful discussions.
 6. Pleasing shareholders is not the goal – pleasing shareholders tends to be a short run action and shareholders are an unstable and somewhat unpredictable group. Problems in this area are indicated by executives and board members who judge actions by their effect on the stock price, analysts who don't understand why risky decisions might be taken to improve the long-run health of the organization, and management incentives disproportionately tied to the stock price.
 7. You are still only human (not superhuman) – when the CEO tends to focus too much on self rather than the company. Evidence that the balance is not right is when interviews are about the CEO as a person rather than the company, lifestyle choices are more lavish than other top executives, and when activities on almost all focused on the company.

BREAKING THE CODE OF CHANGE

Michael Beer & Nitin Nohria

Summary by Deirdre McCaughey

This book is a 2000 HBR compendium of articles on based on a HBR research conference (1998) entitled “Breaking the Code of Change”. It is not one specific model, rather it is a series of articles on managing change. It brought together 50 scholars, 25 consultants, and 6 CEOs to discuss the main topic of “how do I go about managing change effectively?” The general organization of day one focused on a discussion of 3 HBR cases involving major corporations managing major change. The second day was devoted to best practices for approaches to change, and the final day was approaches to researching organizational change. This book reflects that debate.

Because there is so many topics, I have put together a general topic summary of the book on the assumption it would hold better value for you to see that rather than a 2-3 page summary which will not do the book justice (I will put it on your desk, it is out on my library card). The author list includes Van de Ven, Argyris, Weick, Conger, Galbraith, etc, etc. A quick summary is as follows:

- The introductory chapter is broken into defining 2 underlying theories of change:
 - Theory E – economic value-driven change
 - Theory O – organizational capability-driven change
- The remainder of the book is broken down into 7 sections, each consisting of 2 papers presenting the opposite sides of the debate and a chapter by a moderator that presents a synthesis.

Here is the book breakdown:

- Introduction
 - Resolving the tension between theories E and O of change
- Section 1, The Purpose of Change
 - Value maximization and the corporate objective function
 - The puzzles and paradoxes of how living companies create wealth
 - The purpose of change
- Section 2, Leadership of Change
 - Effective change begins at the top
 - Leadership of change
 - Embracing paradox: Top-down versus participative management of organizational change
- Section 3, Focus of Change
 - The role of formal structures and processes
 - Changing structures is not enough
 - Initiating change: The anatomy of structure as a starting point
- Section 4, Planning of Change
 - Rebuilding behavioural context
 - Emergent change as a universal in organizations
 - Linking change processes to outcomes
- Section 5, Motivation for Change
 - Compensation, incentives, and organizational change
 - Compensation: A troublesome lead system in organizations
 - Pay system change: Lag, lead or both?

- Section 6, Consultants' Role in Change
 - Human performance that increases business performance
 - Rapid-cycle success versus titanics
 - Accelerated organizational transformation
- Section 7, Research on Change
 - Professional science for a professional school
 - The relevance of actionable knowledge for breaking the code
 - Research that will break the code of change
- Conclusion
 - Breaking the code of change

DEEP CHANGE: DISCOVERING THE LEADER WITHIN

Robert E. Quinn

Summary by Deirdre McCaughey

**The tone of the book is very much in the self-help genre - no specific leadership or change model.

- This book's purpose is to the process of transformation that leads to deep change in oneself and the systems around them and is premised on the notion that anyone person can change the larger system of organization in which they find themselves.
- "In a world of constant change, everyone is confronted with the dilemma of deep change or slow death".
- Deep change is about acquiring new behaviours and thinking, major changes in one's actions and risk taking and the idea of surrendering control.

1) Deep Change

- Deep change can occur at both the organizational and the personal level.
- At the organizational level, a misalignment between internal and external reality creates the need for a deep change or slow death will occur. Change of this magnitude involves risk taking, the need to learn new ways and ideas, and greater creativity.
- At the personal level, deep change stems from a need to align personal values, goals, and knowledge with the changing external reality – frequently, a fundamental change in one's rules, assumptions, and theories about oneself require changing to meet this reality.
- These two levels of change are interrelated as globally driven organizational change often drives a pressure for individual change. However, there is also a bottom up model of change that is driven by the need to create a new self. This is an "out of your comfort zone activity" – you change the world only by changing yourself.
- The common characteristics of slow death at the organizational level include:
 - Pervasiveness of the mentality that deep change is not needed, don't rock the boat.
 - The choice of decision makers to ignore change signals and invest time in other ineffective activities, to allow self-interests to triumph over collective responsibilities.
 - The tendency to ignore the critical issues, preventing visionary leadership from leading change.
 - Burnout
- There are 3 strategies to confront slow death at the personal level:
 - "Peace and Pay" which translates to don't rock the boat, keep your head down"
 - "Active Exit" which is are self-orientated strategies to managing the stress of needed change, such as change jobs, careers, plan for departing.
 - "Deep Change"

2) Personal Change

- Fear of change often leads individuals to believe the needed change is "out there" it is others that need to change.
- Change does not succeed if individual views change as a checklist of behaviours to follow, or if they are told what they need to do or if they are forced to do so.
- The framework for change requires one to engage and resolve problems, step outside of themselves and be reinvented, and realign to the surrounding environment Embrace uncertainty.
- Maintaining one's vitality is a key step to preventing slow death – monitor signs and change directions when vitality wanes and deep change is required.

- Argues that often individuals are caught in a cycle of “task pursuit”. The paradox of responding to pressure by single-minded pursuit of tasks at the expense of having time to make changes, discover meaning, and maintain one’s vitality.
- Having new perspectives is often blocked by barriers such as previous paths that have led to successes becoming engrained in how one thinks and acts. Often examining one’s underlying worldview and its synchronicity with the external world is a good starting place.
- Requires acceptance that the path of change is difficult yet needed because the slow death path is also difficult. Confrontation of one’s insecurities of change will lead to empowerment to make needed change and create a vision that provided the confidence to pursue change.

3) Changing the Organization

- Discover and identify coalitions within the organization and pursue change both from within and externally with these coalitions through influence tactics.
- Accept that change barriers are often generated by the individual within the organization, thereby leading back to the need to identify the “power of one” as a source of change.
- Realize that success often creates roles and paradigms that become an engine of failure, personal transformation is blocked.
- Creates paradigms of technical competence (when one is judged by their technical competence) and political transaction (when one is concerned with personal survival and success ion the workplace). Both of which lead to engrained behaviours that fail to change with external reality.
- Great change requires leaders, who are visionary, are internally driven, and seek to transform the organization for last change. Their chief motivation is the realization of their vision, a transformational perspective for the organization.
- Finding the vision, stems from dialogue with employees and helps create the discipline to make deep change
- Adopt excellence as standard and pursue it in all activities.
- Pressures for conformity are great; they are rooted in a bureaucratic culture, potential for conflict throughout the organization, and lack of time to time to make changes. Strategies to combat this involve adopting mechanisms to drive personal empowerment.
- Empowerment must begin within by confronting difficult questions about oneself and how to achieve meaning, sense of competence, confidence, self-determination, and influence.
- Goal is to see mangers shift to becoming transformational leaders.
- Acceptance that risk is inherent in change and will be a part of the process
- Transformation can become routinized if leaders allow for phases of uncertainty, failure, experimentation, synergy, and mastery.
- Strategies and interventions use by Fortune 500 companies to create change include:
 - Design an intervention to promote change
 - Conduct a diagnoses of the organization’s culture and clarify what is means
 - Create a focus on behaviours that are occurring rather than desired in order to make people aware of their actions and provide evidence of needed change .
 - Allow “undiscussable” topics (sacred cows) to be aired and addressed

FUSION LEADERSHIP
Richard L. Daft & Robert Lengel
Summary by Deirdre McCaughey

The purpose of this book is to describe organizational leadership by reference to the principals of fusion (joining together). There is a couple of overlay diagrams of the overall “fusion process” that I will copy for you and put in your mail slot.

- **Part One: The Promise of Fusion**

Describes how traditional hierarchies have surprised individual qualities and how fusion awakens personal, subtle forces that can transform a company.

- *Fusion Leadership*: subtle forces that serve to help managers and organizations transcend conventional thinking, break out of traditional constraints, and overcome the boundaries between the organization and the individual. It is about coming together, creating connections and partnerships while reducing barriers and achieving a sense of unity. It relies on personal forces rather than organizational forces and creates an empowered, energized, and self-adapting organization.
- *Breaking with the Past*: the ability to overcome the strong forces within organizations that are habits from a combination of misleading experiences and a desire for stability and certainty. The fusion leader can recognize complexity, rely on subtle forces, pursue fusion via a common mission and values, and adapt to the changing environment.

- **Part Two: Unlocking Subtle Forces through Personal Fusion**

Personal fusion unites the physical, mental, emotional, and spiritual qualities that together create an individual with a capacity to lead others. It requires seeking and acknowledgement of one’s inner self and allowing one’s subtle gifts, potentials, and passions to lead organizational change and improvement. The formula for achieving personal fusion is:

Personal fusion = Knowledge (interior and exterior self) x Will x Action

Explains the interior self and challenges one to unlock the 6 subtle forces of fusion leadership.

- *Mindfulness*: included independent thinking, personal creativity, an open mind that welcomes novel and unusual ideas, and the ability to think outside of the box.
- *Vision*: the higher purpose toward which people work that provides meaning and inspiration for their collaborative efforts.
- *Heart*: represents caring and compassion, the positive feeling and emotions that underlie connections and relationships in the workplace.
- *Communication*: the act of symbolically influencing others with respect to vision, values, and emotions. Subtle communication with others that involves listening and discernment.
- *Courage*: the motivation to step outside the traditional boundary and comfort zone, to take risks, to take the lead, to be a nonconformist, to stand up for something, and to be willing to make mistakes as a way to learn and grow.
- *Integrity*: is honesty, trust, and service to others, which means going beyond “me, me, me” to give something to the team and organization.

- **Part Three: Unlocking Subtle Forces through Organizational Fusion**

Describes transformational technologies that catalyze fundamental change in large organizations.

- *Organizational Fusion*: grows from sustained organizational conversations about breaking down boundaries. Failure or crises can awaken individuals with a call to action, thus a breakdown triggers a breakthrough. People do not like to be controlled, so they must be emotionally involved in the process, have a link to their own personal dreams, and feel they are cared about by their coach/mentor. Because change is the outcome of risk taking and

experiment, a leader must modify conditions to allow change to occur and ensure individuals are challenged by the difficulty of the task in order to gain their best performance.

- *Fusion Principles:* The formula for fusion is as follows:

Organizational fusion = Microcosm x Connection (between individuals) x

Dissatisfaction (with existing situation) x Vision (of a better picture) x Action (a clearly defined “how-to” plan)

The most important principles underlying organizational fusion are the following:

- Requires a representative microcosm of the whole organizational system
- As an egalitarian event, failure structures must be removed
- Conventional managers must be willing to surrender control
- Since the event brings people together, the wisdom of the group is important to explore
- Allow individual to express their subtle fusion forces
- Allow for changes to both the culture and the operating systems
- Allow for employee-generated changes to occur

Conclusion

Lasting outcomes of fusion include emotional bonding and a new mindset or paradigm about leadership and how the organization achieves its objectives. Positive outcomes include:

- The mindset of participants is expanded
- Each person is imprinted with the enduring vision of the organization’s future and his/her place within it.
- Emotional connections are deeper than ever before.
- Each person is now a leader, taking personal responsibility for the success of the organization.
- A shift has occurred from the paradigm of hierarchal control to one of partnership.
- Action has become the overriding imperative.

GOOD TO GREAT: WHY SOME COMPANIES MAKE THE LEAP...AND OTHERS DON'T

Jim Collins

Summary by Deirdre McCaughey

** This book has a complicated diagram for their model that I will photocopy and put with your leadership articles – it should make the concepts more clear.

- Presents a model of transformation of companies from “good to great”
- Based on extensive research of US companies over a 15-year period measuring the organization’s stock market returns to general market returns in order to empirically demonstrate good to great .
- Created great companies list and comparative companies list in order to eliminate market and external variances as a source of the greatness transformation (28 companies in all)
- Further supported by qualitative and quantitative analyses involving interviews with executives of the great companies, articles and information on the identified companies, and team analyses of topics such as executive compensation, hiring and layoff practices, business strategy, corporate culture etc.
- Argued by the author as essentially grounded research – started a theoretical and use the data to develop the concept and theories within the book.

“The Black Box of Transformation From Good Results to Great Results”

- Transformation is process of build-up followed by breakthrough
- Occurs in three broad stages: disciplined people, disciplined thought, and disciplined action.
- Each of the three stages has two key concepts as follows:
 - Disciplined people: Level 5 Leadership and First Who ...Then What
 - Disciplined thought: Confront the Brutal Facts and Hedgehog Concept
 - Disciplined action: Culture of Discipline and Technology Accelerators
- The model process is captured within a “gestalt” of the process of going from good to great, referred to as the “Flywheel”

1) Build-Up

A) Disciplined People

- a. *Level 5 Leadership*: Tend to be self-effacing, quiet, reserved leaders with paradoxical blend of “personal humility” and “professional will”. Tend to exhibit compelling modesty, set up their successors to maintain the company’s success after their departure, and exhibit an unwavering resolve to take the steps required to achieve the goals the organization requires and sustained results. Often states success is a product of the external environment and failure is reflective of the leader themselves. Critical of celebrity and larger than life CEOs as not being successful or effective in the study
- b. *First Who ...Then What*: Goal is get the “right people on the bus, the wrong ones off the bus, and the right people in the right seats”. Summarized as the *right* people are you strongest asset; the right person has the character traits and innate capabilities to get the job done rather than the specific KSAs. The determination to get the right people first before determining what is the right path to take. Demonstrates a rigorous approach to all business “people dealings” – rather than hire the wrong person keep looking, make people changes when you need to and not delay the action, and put the best people on the biggest opportunities rather than the biggest problems. Encourages honest debate among the team to seek the best answers. Executive compensation not shown in this study to be a predictor of organization performance.

B) Disciplined Thought

- a. *Confront the Brutal Facts (Yet Never Lose Faith)*: Retain unwavering faith that you can and will prevail regardless of the difficulties at the same time as having the discipline to confront the most basic facts of the business's reality. Sets an environment where the truth is heard by leading discussions with questions, engaging in dialogue and debate, and conducting outcomes autopsies without blame. Uses the expression "Stockdale Paradox" to capture this concept – so name for Vietnam POW who lead the "resistant behaviour and accept the bleak reality view" for American GIs at the Hanoi Hilton. Argues that charisma can be a liability, that leadership does not start with a vision, and that people do not need to be motivated if the leader does not de-motivate by ignoring the brutal reality.

2) **Breakthrough**

B) Disciplined Thought

- b. *Hedgehog Concept (Simplicity Within the Three Circles)*: the ability to determine what the organization can be the best at" (not the core competency, but what they CAN be the best at). Captured within the centre of an overlap of three circles of understanding:
- What you can and cannot be best at in the world
 - What drives your economic engine, what is the most appropriate denominator to determine economic performance (i.e. profit \$ per customer versus \$ per location)
 - What are you deeply passionate about

Support of the "hedgehog" concept should be maintained by an informal "Council" the asks questions, engages in dialogue and debate, makes executive decisions, and conducts autopsies and analyses – all guided by the hedgehog concept. Findings suggest this takes about 4 years to occur.

C) Disciplined Action

- a. *Culture of Discipline*: Combination of a culture of disciplined behaviour with an ethic of entrepreneurialship greats great performance. When one has disciplined people, thought, and action there is no need for hierarchy, bureaucracy, and excess controls. Give employees freedom and responsibility to function within a framework supported by a culture of discipline rather than a tyrannical boss/CEO. Ensure the culture has fanatical commitment to the hedgehog (HH) concept. Create a "stop-do" list to ensure focus on the HH concept.
- b. *Technology Accelerators*: The use of carefully selected technology as an aid or accelerator of momentum towards the hedgehog concept not as a driver of transformation. Avoidance of a technology trap in which the organization blindly changes directions to pursue technological changes in the market. Evidence suggests that technology is neither the source of success nor decline of organizations.

The Concept of the Fly Wheel

- All good to great transformations are not overnight occurrences; they are a product of relentlessly pursuing a direction to build a momentum (hence the pushing a flywheel analogy) that creates the breakthrough allowing for the transformation of good to great. States there are no grand programs, solitary action, killer innovation etc that is the source of the success. It comes from years of slow build-up that eventual creates the momentum for the transformation. Flywheel effect sees steps forward towards the HH concept, accumulation of visible results, people becoming energized by the results and even greater momentum being created leading back to further movement towards the HH

concept. The alternative “doom loop” is the lack of success, followed by reactions without analyses, new directions or fads being pursued, lack of build-up and further poor results.

LEADING IN AN UPSIDE-DOWN WORLD : NEW CANADIAN PERSPECTIVES ON LEADERSHIP

Patrick Boyer

Summary by Deirdre McCaughey

This book is a collection of articles from presenters at Canadian leadership conference in 2002 entitled “Leading in an Upside-Down World”. It is an exploration of perspectives regarding our changing world and how both the status quo and our perceptions have changed dramatically in recent years. Paul Martin has written the intro, the book has a decidedly Canadian flair to it, and many of the articles are sociological in nature.

The chapter titles and brief summaries are as follows:

- **Leading in a World Turned Upside Down**
 - Because the context of our world has changed so dramatically, expectations and demands for leadership must also change. It is difficult to recognize leadership today because of these changes.
- **Where Have all the Leaders Gone?**
 - Speaks to the changing Canadian values and apparent vacuum of leadership - calls for a leadership renaissance to develop new values-informed leaders in our country.
- **The Recognition of Leadership in Practice**
 - Essay on the need to recognize and encourage the potential leadership values that exist in all individuals – argues leadership is a journey not a destination.
- **New Ways of Looking for Leadership**
 - The discovery of leadership and leaders within one’s community, suggests everyone has the potential and/or capacity to be a leader. A new way of defining leadership.
- **Innovation and Leadership Commitment in Canada**
 - The rapidly changing world is too complex for single individual to make all strategic decisions, as a society we must focus on innovation, gain greater value from knowledge, and effect positive change.
- **Leadership Success in the Context of Diversity**
 - Due to the changing face of Canadian labour force, greater women and ethnic minorities, greater attention to diversity is needed in order to be more effective leaders.
- **Leadership Challenge in the Crossover Points**
 - Essay on the transition of leading from a for-profit to a non-profit organization and how this environment fosters learning the attributes of leadership.
- **Development of Leadership as the Pre-Eminent People Skill**
 - Leadership is a dynamic process that emerges and grows. It is value-driven and must be personal and it is the most difficult skill to learn and develop in any organization.
- **Leading With New Ideas in Existing Organizations**
 - Looks at the obstacles that block the transformation of leadership skills into practice and the challenge of developing transformative leadership.
- **Young Leaders Moving from Campus to Workplace**
 - Presents a model of general skills “The Bases of Competence”, that university graduates need for success in changing workplaces.
- **Young Canadians Leaders in a World of Opportunities**
 - Examines the face of young future Canadian leaders and the programs and projects needed to support their development.
- **Leadership for Work-Life Integration**
 - How to lead work-life balance in organizations.

- **Recognizing Leadership Through Different Perspectives**
 - Argues that the best method to evaluate the new forms of leadership is through a multi-disciplinary lens using interdisciplinary knowledge.
- **Observing and Measuring Leadership**
 - Defining leadership as a skill, the author outlines different mechanisms by which to measure leadership success (self-awareness, self-analysis, verbal and non-verbal clues etc)
- **Leadership in the Changing Agricultural Environment**
 - Leadership has become more difficult with increasing complexity, technological advancements, and flatter organizational structures.
- **New Leadership in a Global Village**
 - This essay considers what is effective leadership outside of national boundaries and how said leadership will impact the developing nations of the world.
- **One World, Many Ways to Lead It**
 - A summary chapter that highlights different models of leadership (top-down, model of human rights model of the law, etc) and suggest that the concepts of leadership and its practise are larger than a single definition of what is leadership. Final conclusion is that there are many ways to lead.

MAKING STRATEGY WORK: LEADING EFFECTIVE EXECUTION AND CHANGE

Lawrence G. Hrebiniak

Summary by Deirdre McCaughey

Book is very strategy-focused, more of an overview of how to get strategy working than an overview of leadership skills (beyond leading strategy). No clear model, specific identified, just a number of strategy → structure generic models that are tweaked to match the points in the text.

- Premise of the book is built on the notion that execution of strategy is the greatest challenge facing businesses today. The process of execution is the key to strategic success and is most frequently blocked by obstacles such as:
 - Managers are trained to plan not execute
 - Often lower level employees are given responsibility for execution
- Planning and execution occur as independent tasks although they should be interrelated. Execution takes longer than formulation; it is a process that requires many, more people than formulation.

The key to successful execution of a strategy lays in the following 9 areas:

1. Developing a behaviour, action model to guide execution of decisions and actions. The model must emphasize what to do, when, why, and in what order. No one model is perfect or all-inclusive. Key components in defining strategy execution include decisions about strategy, structure, coordination, information, sharing, incentives, and controls. Execution decisions take place within an organizational context, which includes aspects of power, culture, leadership and the ability to manage change. Understanding how these interactions influence execution is a key requirement to success.
2. Understanding and acknowledging that the manner in which strategy is created affects the execution of the strategy – bad strategy begets bad execution and poor outcomes. It means to define the competitive arena in which the organization will compete and to plan at both the corporate and business level units. Integration of corporate and business goals, performance metrics, and communications are vital to the integration of joint strategies. Long term strategic goals must be translated in to short term objectives in order to execute successfully. Finally, ensure development of the required KSAs of all organizational resources in order to ensure competency to carry out the execution.
3. Ability to successfully manage change and the culture of change effectively. Reducing resistance to new ideas, discovering new ways to manage execution, and knowing the changes brought on by execution can influence its success. Execution usually dictates change in key organizational factors such as strategy, structure, coordination mechanisms, short-term performance measures, incentives, and controls. Success in change management can be enhanced by accurately assessing the size and content of change required, determining the time needed and the steps required to execute it in addition to clarifying responsibilities and seething up controls to monitor performance. Complex change is difficult and problematic, pursue sequential change whenever possible.

4. Understanding how power and/or influence can be used for execution success. Execution programs cannot contradict the existing organizational power structure. Realizing power reflects strategy, structure, and critical dependencies as well as individual power. Be aware that uneven distribution of resources and scarcity creates power differences among units. Social influence and coalitions can also exercise power in manners unintended that thwart execution. Therefore, ensure execution methods and plans provide clear, measurable, and value-added results. Power and social influence must be used (by those who hold it) to further the strategic goals and execution of the organization.
5. Developing organizational structures that foster information sharing, coordination, and clear accountability. This is especially critical in geographically dispersed organizations and global organizations. Managers must be motivated to share information and work as well as coordinate activities. Ensure there is a synergy between the organization's structure (i.e. purpose vs. process) and its strategy and the degree of centralization (or decentralization) and the strategy in order to achieve the execution desired.
6. Developing effective controls and feedback mechanisms. It is critical to establish clear lines of responsibility and accountability for the execution process; decisions and actions must be unambiguous and understood by all managers. Determine what is the type or degree of interdependence that must occur within the organization among the departments and units. Utilize both formal and informal methods to foster communication, information sharing, and knowledge transfer. Use incentives (ensure they are the right ones that reward the right behaviour) that motivate employees and are tied to short-term strategic objectives. Use controls to provide feedback, reinforce execution methods, provide a corrective mechanism, and facilitate learning and change. Ensure your feedback mechanism is "brutally honest" and prevents information sanitizing or filtering.
7. Knowing how to create an "execution-supportive" culture. This means the culture must be one of achievement, discipline, and ownership. Steps involved in the successful management of a culture of change:
 - Reasons for the change must be clear, compelling, and agreed upon by all key players
 - Focus on changing behaviour not on directly changing the culture
 - Effective communication is vital to cultural change
 - Adequate effort must be expended to reduce resistance to change
 - Be wary of trying to pursue change at excessive speeds
8. Exercising execution-biased leadership – it must serve to motivate ownership and commitment as well as drive the organization to execution success. A comprehensive analysis of execution steps and decisions is the hallmark of execution-biased leadership. Leaders need to set the example of consistent behaviour that subordinates can reference and ensure appropriate use of performance feedback mechanisms to reward the performers and identify the problems.
9. Because strategy execution supports organizational change and adaptation, mechanisms must be evoked to seek feedback about performance in order to fine-tune the strategy, its objectives, and its execution. Understanding how to manage feedback, strategy reviews and change is vital to strategy execution. Strategic reviews foster discussion, clarify corporate objectives, and business strategies, help meet execution related objectives, allow leaders to test their people, and facilitate organizational change and learning.

POWER UP: TRANSFORMING ORGANIZATIONS THROUGH SHARED LEADERSHIP

David L. Bradford & Allan R. Cohen

Summary by Deirdre McCaughey

**This book does not have a model or framework per say, it is mostly a “how-to and why” book to change one’s leadership style.

- Book is a “new” leadership view that extends beyond their 1st book “Managing for Excellence”
- Many of the concepts remain similar with updating to reflect the more “global leadership role”
- Old world view of managers exists as “heroic leadership”, a mind set that sees a manager/leader (used interchangeably) as:
 - Knowing more than all others
 - Having greater technical knowledge than subordinates
 - Able to solve problems fastest
 - Takes primary responsibility for everything within dept.
- Authors argue this is an outdated and ineffective behaviour model for managers, although it can be effective in stable industries with minimal change and/or turbulence.

A) The Old and New Worlds of Leadership (basic mind sets of heroic leadership)

- Argues the old behaviours flourish, as a result of leadership traps that encourage the manager to continue being in charge of everything as their subordinates view them as having full responsibility for outcomes.
- New world/mind-set sees everyone as responsible as the leader and staff create:
 - A tangible vision for the unit and a setting in which shared responsibility can exist
 - Shared agreement about purpose and direction as well as shared responsibility for outcomes
 - Experience greater degree of mutual influence to attain results
- Everyone is viewed as a leader and the manager’s job is to build a strong team, which can facilitate the responsibilities outlined above.
- Employees new roles under this leadership vision include:
 - Delivering on their sub area’s obligations and commitments
 - Sharing relevant info accurately
 - Initiate ideas and suggestions about areas for which they are responsible
 - Support their colleagues
- This fundamentally changes a manager’s functions, such as delegation, control, performance evaluations, and staffing.
- The greatest unfounded concerns managers have about this style of management is:
 - Fear that subordinates will not take the larger perspective.
 - Concern that individual’s might not operate as a mature, cohesive group.
 - Concern about their ability to operate with each other in ways that are direct, honest, and constructive.
 - Fear of losing control and risking poor unit performance.
 - Idea that said behaviour will make the manager more vulnerable
 - Possibility that it may lead to an increase of conflict within the unit and a discomfort with openly disagreeing with others.
- Behaviours the leader can enact to make the transition to the new mind set include:
 - Ensure the leadership approach is situationally appropriate
 - That team members are capable of meeting the challenge
 - Resolve ambivalence by testing ideas with peers.
 - Require the support from “up-above”

- Behaviours the subordinates can enact to make the transition to the new mind set include:
 - Ask the leader questions, gain information.
 - Admit vulnerability and own their ambivalence.
 - Demonstrate understanding and sympathy for the leader's ambivalence.
 - Inquire about inconsistent behaviour of the leader.
 - Show the positive consequences of blocking conflict.
 - Demonstrates own enthusiasm.
 - Push resistant colleagues to partake.
 - Suggest ways in which to collect data about the work processes to foster dialogue.

B) The Three Elements of Post-Heroic Leadership

1) Building a Shared-Responsibility Team

- Focus on building a team versus a group (whose sum does not exceed its parts)
- Change role expectations about responsibility; ensure shared and interactive responsibility
- Involve team members in resolving big issues and future strategic planning
- Engage in decision making and problem solving styles that are appropriate and relevant for the situation.
- Work through the stages of group development to pursue goal of full collaboration on group issues, relationships, goal understanding and acceptance, decision making, information sharing etc, etc.

2) Creating a Commitment to a Tangible Vision

- There needs to be a tangible vision that gives subordinates a view of the core purpose of the organization/unit – must include values and beliefs.
- Tangible vision can be either task-based (the work of the unit) or organization-based (how the unit will operate). Post heroic leadership requires both components in order to ensure a plan for how work is to be conducted and how people are to be treated.
- Formulation of the vision should involve the following key steps:
 - a. Ensure high involvement of team members at the beginning.
 - b. Connect the vision to the tasks the team completes.
 - c. Ensure vision is compatible with the organization's wider visions.
 - d. Link the vision to the hopes and goals of the team members – aids in internalization of the vision.
 - e. Requires clarity (about its meaning), consensus (as to its implications), and commitment (to use the tangible vision).
 - f. Sustain the vision and embed it by:
 - i. Using it as a decision-making guide
 - ii. Performing symbolic acts that support it, "Walk the Talk"
 - iii. Bring constant and regular attention to it
 - iv. Ensure there are periodic adjustments to it to ensure its relevance in a changing business world.

- 3) Enhancing Power through Mutual influence
 - Post-heroic leadership is about “powering up” or increasing the total power of every individual, unit and the entire organization.
 - Recognition that influence serves as source of power and that mutual influence is created more total power because:
 - a. Increasing the influence of others increases one’s own influence.
 - b. Enhances and increase honest communications and creates higher quality decisions.
 - c. Engenders greater commitment and increased responsibility.
 - d. Increases member-to-member influence.
 - e. Enhances effectiveness outside one’s unit.
 - Ways for managers to foster mutual influence:
 - a. Actively support the new contract/behaviours as with appropriate actions
 - b. Positively acknowledge when you are being influenced

C) Establishing a Shared Responsibility System

- 1) Launching Change
 - Anticipate resistance
 - Be persistent and flexible
 - Hold up the exciting vision of what is possible once change occurs
 - Identify clear pathways
 - Align practices and pathways with desired outcomes
 - Assess readiness for change (is it appropriate and do people see the need)
 - Get the boss on side, by acknowledging their concerns and link the plan to the organizations goals and values.
 - Ensure team members are involved by surfacing their concerns and showing support for the leader.
- 2) Moving the Change Forward
 - Return to the early stages of group development to build commitment
 - Clearly state and reinforce expectations of what team should be like
 - Demonstrate leader commitment to new post-heroic Directly help members become committed to the group
- 3) Addressing Conflict
 - Deal with task, personal and role conflicts separately
 - Examine fundamental sources of conflict and determine ways in which future repetitions can be avoided
- 4) Achieving Collaboration
 - Encourage individual differentiation of each team member
 - Push team into new territory with regard to interactions, establish critical, strategic tasks involving team member interdependence
 - Preserve a role for the leader; ongoing building of the team, enhancement of shared relationships and responsibilities and development of team members.

**THE APPRECIATIVE INQUIRY SUMMIT:
A PRACTITIONER'S GUIDE FOR LEADING LARGE-GROUP CHANGE**
James Ludema, Diana Whitney, Bernard Mohr, and Thomas Griffen
Summary by Deirdre McCaughey

This book is a framework for understanding and applying the Appreciate Inquiry Summit (AI) as a methodology for positive change. It serves to provide a guide to plan, design, and facilitate AI summits. AI summits serve to gather a critical mass of stakeholders from a specific industry or organization with the goal of seeking ways to change collective patterns to bring out the best in one's organization and their "interhuman capacity". It acts as a template and a catalyst for change action.

1. The factors attributed to AI summit that make them successful include:
2. They are a quicker way of accelerating change
3. They build organizational confidence
4. They provide immediate and broad access to information
5. They promote a "total organization mindset"
6. They result in inspired action
7. They provide the means by which to sustain positive change

The five sections of the book are broken up as follows:

Part 1: Understanding the AI Summit

The AI process involves a 4-D Cycle: Discovery (appreciate the best of what is), Dream (imagine what could be), Design (determine what should be), and Destiny (create what will be). It is a large group summit methodology that has the following common features: an importance for getting the whole system into the room, a focus on the future, a dialogue-voice-search for a common ground, and a commitment to self-management.

Part 2: Before the Summit

Key activities include:

- Sponsoring the summit - getting those on board who are integral to summit successes and buy-in as well as participants from all levels of the organization.
- Forming a planning team – these are the individuals who are responsible to carry out the AI process from start to finish. Should be a diverse group with representatives from all stakeholder groups.
- Defining the summit task - this is the most important activities of preparing for a summit, the defining of a clear, relevant, and compelling task
- Selecting participants – ideally the entire organization and its value chain members participate, but if size is an issue then a representative group is also appropriate.
- Creating a summit design - With the planning team, a customized design for the summit must be laid out in order to make the summit fit their organization's unique situation and context. Oftener result of rich and engaging conversations.

Part 3: During the Summit

Key activities include:

- Day 1- Discovery: what are the many facets of the organization's "positive core". Involves setting the task focus, conducting appreciative interviews, identifying who we are at our best, outline positive core map, and begin a continuity search.
- Day 2 – Dream: this is the "envisionment" of the organization's greatest potential for positive influence and impact in the world. Utilize activities such as creative dreaming, opportunity mapping, and consensus visioning.

- Day 3- Design: the focus on creating an organization in which the positive change core is alive in all of the strategies, processes, systems, decisions, and collaborations of the organization. Activities involve creation of the organizational design architecture, selection of high-impact organizational design elements, and crafting provocative propositions for each organizational design element.
- Day 4 – Destiny: this day serves to be an invitation to action, to work on the specifics of what will be done through personal and group initiatives and self-organization. Activities in this stage include generation of possible actions, selection of inspired actions, formation of innovation teams, and large group closing activities.

Part 4: After the Summit

Key activities include:

- Communicating the outcomes and developing supporting for the innovation teams,
- A decision to expand the organization’s use of appreciate inquiry by initiating AI training, a positive change network, or new applications of AI... thereby embarking on a second-wave of AI inquiry.
- The Ai Summit engages the whole organization in inquiry and dialogue in order to create a more desirable future. Before, during, and after the Summit, it must be ensured that conditions exist for equal, open, and committed participation in order to generate enthusiasm and inspired action.

Conditions for AI Summit Success

- A relevant, clear, and compelling task
- An unconditional focus on the positive
- Robust planning
- The whole system in the room, the whole time,
- Commitment to support success of decisions and outcomes
- A healthy physical and relational space
- Minimal and mindful facilitation
- Begin with appreciate interviews
- Flow through a AI 4-D Cycle
- Create a narrative-rich environment.

Part 5: Appendix

Within the Appendix, a sample participant workbook is included with a number of practical tools and worksheets that can be used or adapted for one’s own AI applications.

THE ESSENTIAL DRUCKER: SELECTIONS FROM THE MANAGEMENT WORKS OF PETER DRUCKER

Peter F Drucker

Summary by Deirdre McCaughey

This book captures key selections from Drucker's books on management in the last 60 years. Its purpose is to offer "a coherent and comprehensive introduction to management" and to "provide interested readers with an overview of his writings" in order to answer the question as to where does one start to read Drucker. It is broken down into 3 sections, each with short articles on topics of relevance to the sections (26 in all). Here is a brief summary:

1. Management

- *Management as Social Function and Liberal Art*
Management is a "liberal art": liberal because it deals with the fundamentals of knowledge, self-knowledge, wisdom, and leadership and art because it is concerned with practice and application.
- *The Dimensions of Management*
To fulfill a specific mission putting economic performance 1st. To make work productive and the worker effective. To manage the social impacts and responsibilities of the enterprise.
- *The Purpose and Objectives of a Business*
To create a customer, the business has 2 basic functions: marketing and innovation. These functions create objectives in the following key areas: HR, financial resources, physical resources, productivity, social responsibility, and profit requirements.
- *What the Nonprofits are Teaching Business*
They are creating new bonds in communities, commitments to citizenship and social responsibility, and to values. Setting a standard for managing the knowledge worker and their productivity that is reflective of superior management behaviours such as MBO, continuous learning, high demands, and self-control.
- *Social Impacts and Social Problems*
Social responsibilities arise in 2 areas: what an institution does for society and what an institution does to society. Managers must acknowledge and demonstrate ethical responsibility while seeking to maximize profits.
- *Management's New Paradigms*
Basic assumptions about reality are the paradigms of management yet a select group of people determine what a discipline assumes to be reality. Management is both a discipline and a practice and its scope is "operational", being focused on results and performance.
- *The Information Executives Need Today*
Information that will challenge an organization's stogy, information on the environment, and the location of major threats and opportunities. Information should be used as a measurement to base future actions and evaluate what has already happened.
- *Management by Objective and Self-Control*
All employees contribute to the organization so all must be pursuing a common goal, the success of the organization. Articulated through both long and short-term objectives and considerations. This allows one to evaluate themselves on their contribution to the achievement of the organization's goals – this is self-control.
- *Picking People – the Basic Rules*
If a person does not do the required job, you have picked the wrong person - it is your mistake. An employee has a right to a competent manger/leader. People decisions are the most important decisions executives make. Don't give new people major assignments.

- *The Entrepreneurial Business*
Entrepreneurialism is not natural, creative, or spontaneous – it is hard work. It requires an environment that consistently strives for innovation and a mind set that views entrepreneurialism as a duty and discipline; it must be practiced and worked at.
- *The New Venture*
A new venture is an idea, it may be sales, product, service but it is not a “business” – it must develop into a business for it to be successful. It requires a focus on the market, financial foresight and planning, a top management team, and a founding entrepreneur.
- *Entrepreneurial Strategies*
4 strategies are “being fustest with the mostest”, “hitting them where they ain’t”, finding and occupying an ecological niche, and changing the economic characteristics of a product, market, or an industry.

2. The Individual

- *Effectiveness Must be Learned*
Effectiveness is the job function of a knowledge worker: intelligence, imagination, and knowledge are essential resources but effectiveness converts them into results.
- *Focus on Contribution*
The focus on one’s own contribution supplies the 4 basic requirements of effective human relations: communications, teamwork, self-development, and the development of others.
- *Know your Strengths and Values*
This is learning to manage yourself – place oneself where you can make the greatest contribution and learn to develop oneself.
- *Know your Time*
Effective knowledge workers start not with their tasks but with their time- they attempt to manage their time to cut back on unproductive demands on their time.
- *Effective Decisions*
Being able to distinguish when a decision should be made on principle and when it should be made on the merits of the situation. Knowing what a decision is really all about and what realities it has to satisfy.
- *Functioning Communications*
The 4 fundamental of communication are: communication is perception, it is expectation, it makes demands, and communication and information are different.
- *Leadership at Work*
Leadership is a means and it is not dependent on charisma - there are no leadership qualities or personalities. Leadership is: hard work, it is responsibility and it requires trust to be earned from one’s subordinates.
- *Principals of Innovation*
Innovation is practice – it requires the following 5 things. Purposeful, analyses of opportunities, seek it as conceptual and perceptual, must be focused, it starts small, and requires leadership.
- *The Second Half of your Life*
Answers the question of what to do with the 2nd half of one’s life. 1. Start a 2nd and different career, 2. Develop a parallel career, and 3. Start another career in an area of expertise in a non-profit activity.
- *The Educated Person*
Knowledge is embodied in a person, carried by the person, created, augmented, or improved by a person, applied by a person, taught and passed on by a person, and used or misused by a person. Therefore the shift to a knowledge society puts the knowledgeable person at the centre.

3. Society

- *A Century of Social Transformation – Emergence of Knowledge Society*
The significant events of this past century have resulted in the development of free-market countries, workforce, politics, and society that are fundamentally different than previous centuries.
- *The Coming of Entrepreneurial Society*
“Every generation needs a new revolution” and it is argued that entrepreneurship is that revolution – it is needed in the society as a whole, the economy, in public-service institutions, and in business.
- *Citizenship through the Social Sector*
The social needs will cause growth in two areas: 1. The need to help those who are in need of assistance and 2. The need to establish services aimed at changing the community and changing the people within the community.
- *From Analysis to Perception – The New Worldview*
With the advent of the computer information has become the new organizing principle of production – thus ushering a new basic civilization.

**THE FUTURE OF LEADERSHIP:
TODAY'S TOP LEADERSHIP THINKERS SPEAK TO TOMORROW'S LEADERS**
Warren Bennis, Gretchen Spreitzer, Thomas Cummings
Summary by Deirdre McCaughey

This book is a volume of essays that stemmed from a 2000 conference celebrating the career of Warren Bennis. Because this is a collection of essays, I will put it on your desk in case you want to refer to any one essay or all of them in general. Authors include Kerr, Wicks, Posner, Slater, Peters, etc. The following is a brief summary of the sections and chapters.

Part One: Setting the Stage for the Future

- **The Future has no Shelf Life**
Bennis provides general introduction to the future of leadership and identifies the challenges he sees as issues future leaders will face, need to understand and be able to resolve.
- **The Era of Human capital has Finally Arrived**
The key technological, political, and economic changes that have combine to make human capital a critical and universally acknowledged element in the effectiveness and competitiveness of most organizations.

Part Two: The Organizations of the Future

- **A World of Fleas and Elephants**
The existing organizational landscape consists of large efficiency-driven firms and small innovative start-up and professional firms. The coming proliferation of the small firms will provide new leadership challenges, skill sets, and leadership types.
- **Knowledge Work and the Future of Management**
Future organization will be increasingly populated by knowledge workers who require a different kind of leadership than traditionally found in organizations.
- **Boundaryless**
Organizations of the future will increasingly face problems of differentiation among employees, customers, products, and the competitive environment. Thus boundaryless organizations may have advantages to excelling in these situations.
- **Trust Me on This**
Future organizations will rely less on formal mechanisms of control and hierarchies and more on trust among members, requiring supports that create, engender, and support trust.

Part Three: the Leader of the Future

- **Bringing Leadership Lessons from the Past into the Future**
Some leadership lessons of the past will need to be carried forward into the future (leadership is everyone's business, it is a relationship, it starts with action, and it requires self-development).
- **Leadership as the Legitimization of Doubt**
Because the future will be quite "unknowable", sense making rather than decision making will become a central skill for tomorrow's leaders. Provides members with a common sense of direction
- **Leading Yourself**
In tomorrow's flatter, leaner organization, leaders will be required to function more democratically and with greater flexibility. Thus one will need to have a greater understanding of oneself and an ability to manage one's own behaviour.
- **The Context of Creativity**
Competitive environments require constant changing to adjust to the environment – successful leaders must create a context for creativity that allows best ideas to flow forth to facilitate change.

- **Why do we Tolerate Bad Leaders?**
Bad leaders provide a sense of security to their team members in times of uncertainty and change. Employees must be freed from this external dependency by discovering the leader within themselves.
- **The Evolving Role of Executive Leadership**
Future leaders will need to share leadership with others, need to lead across generations, and meet the demands of a global environment in order for their leadership role to evolve.
- **When Leadership is an Organizational Trait**
Leadership can be an institutionalized capacity – organizations can build leadership tasks and responsibilities into their systems, practices, and cultures. This would serve to greatly expand the leadership capacity within an organization.

Part Four: How Leaders Stay on Top of Their game

- **Just say Yes!**
Tom Peter's personal account of how to stay energized as a leader. Also identifies a number of his personal traits and motives that aid in keeping inn driving forward.
- **Heroic Leadership's Greatest Battle**
The sustaining power of leaders should be measured by both how they handle success and how they respond to adversity. Resiliency in the face of adversity can develop and grow leaders.

Part Five: Insights from Young Leaders

- **Where the Leaders Are**
An argument that the best way to secure a healthy future for our political, social, and business institutions is to engage youth directly in the dialogue and practice of leadership.
- **Seeking a New World**
Leadership must be considered from a generational perspective – this chapter considers how Gen Xers are developing a servant model of leadership that emphasizes service and involvement at the community level.

Part Six: Some Closing Thoughts

- **The Leadership Challenges of the Next Generation**
The linkage of the book contents to the future of leadership and the implications for and of these potential changes.



ACADEMIC INTEGRITY

I.H. Asper School of Business—Faculty of Management, The University of Manitoba

It is critical to the reputation of the I. H. Asper School of Business and of our degrees that everyone associated with our faculty behaves with the highest academic integrity. As the faculty that helps create business and government leaders, we have a special obligation to ensure that our ethical standards are beyond reproach. Any dishonesty in our academic transactions violates this trust. The University of Manitoba Graduate Calendar addresses the issue of academic dishonesty under the heading “Plagiarism and Cheating.” Specifically, acts of academic dishonesty include, but are not limited to:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words
- duplicating a table, graph or diagram, in whole or in part, without referencing the source
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communications, ideas from a verbal presentation) without referencing the source
- copying the answers of another student in any test, examination, or take-home assignment
- providing answers to another student in any test, examination, or take-home assignment
- taking any unauthorized materials into an examination or term test (crib notes)
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination
- stealing or mutilating library materials
- accessing tests prior to the time and date of the sitting
- changing name or answer(s) on a test after that test has been graded and returned
- submitting the same paper or portions thereof for more than one assignment, without discussions with the instructors involved.

Many courses in the I. H. Asper School of Business require group projects. Students should be aware that group projects are subject to the same rules regarding academic dishonesty. Because of the unique nature of group projects, all group members should exercise special care to insure that the group project does not violate the policy on Academic Integrity. Should a violation occur, group members are jointly accountable unless the violation can be attributed to a specific individual(s).

Some courses, while not requiring group projects, encourage students to work together in groups (or at least do not prohibit it) before submitting individual assignments. Students are encouraged to discuss this issue as it related to academic integrity with their instructor to avoid violating this policy.

In the I. H. Asper School of Business, all suspected cases of academic dishonesty are passed to the Dean’s office in order to ensure consistency of treatment.



STUDENT IDENTIFICATION: (PLEASE PRINT CLEARLY)

_____	_____	_____	_____
Last Name	First Name	Middle Initial	U of M Student Identification Number
_____		_____	
Course #		Instructor Name	
_____		_____	
Student's Signature		Date	

TO BE COMPLETED BY THE ATTENDING PHYSICIAN: (after the above section is completed)
(PLEASE PRINT CLEARLY)

_____	_____	_____
Physician's Last Name	Physician's First Name	Middle Initial
_____	_____	_____
Street Address	City, Province	Postal Code
_____	_____	
Telephone Number	Fax Number	
<p>To the attention of the physician: Your evaluation of the student's condition is being used for the purpose of determining whether or not the student has a <u>valid reason</u> to miss an important <u>exam</u> or <u>assignment</u>. <u>Your professional evaluation is necessary to ensure that only valid cases are excused.</u></p> <p>I certify that the nature of the student's condition is severe enough to prevent the student from taking an exam or completing an assignment. If requested, my associates or I will verify for the above named instructor/administrator that this information is accurate.</p> <p>The student's condition will likely span the following dates:</p>		
_____	until	_____
(Indicate start date)		(Indicate end date)
_____		_____
Physician's Signature		Date

NOTES TO PHYSICIAN:

- Please make a note in the student/patient's file indicating that the student has given the above named instructor/administrator permission to verify with you, your staff, or your colleagues, that the information contained on this form is correct. Thank you for your professional evaluation of this student's condition.
- **PLEASE ATTACH THIS FORM TO YOUR REGULAR OFFICE STATIONERY THAT INDICATES THE STUDENT VISITED YOUR OFFICE.**

NOTES TO STUDENT:

- The use of this form is at the option of the student. However, in order to obtain an excused absence for an assignment or exam the student must obtain a doctor's certification that the student's condition is severe enough to prevent the student from taking the exam or completing the assignment.
- It is **NOT SUFFICIENT** to provide a note that only indicates the student visited the doctor's office.



N. Sue Bruning

Department of Business Administration

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N. Sue Bruning, Ph.D. is a Professor of Business Administration at the I.H. Asper School of Business at the University of Manitoba in Canada. Her teaching and research specialties are in a number of areas of organizational behaviour including diversity, leadership, organizational change, teamwork, expatriation, workplace aggression, psychological contracts and healthy organizations. She (with other colleagues) has received a number of major federal grants from both US and Canadian sources that have covered topics such as stress management strategies, expatriation processes and the impact of healthy organizations policies and practices. She has worked closely with a number of organizations on research and training activities, including General Electric, Alcatel, City of Winnipeg, Ducks Unlimited, Standard Aero, etc. Her professional activities include Past President of the Administrative Sciences Association of Canada (ASAC) and current President of the International Federation of Scholarly Associations of Management (IFSAM). She was the Department Head of her academic department, from 2000 until 2005 before deciding to return to an academic research and teaching position. She has published an introductory organizational behaviour textbook (with coauthors) and has presented over 100 papers at academic conferences and published over 40 research articles. She is currently coauthoring a book on the management of health and safety in organizations with Paul Gallina and David Halton. Dr. Bruning has taught courses and made presentations at a number of universities in various countries, including: USA, Canada, Finland, Switzerland, Australia, Singapore, China, Malaysia, and Germany.