

Competitive Practices - A CASE STUDY

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CREATING EFFECTIVE CULTURAL ORGANIZATIONAL CHANGE FOR COMPETITIVE ADVANTAGE

INTRODUCTION

The purpose of *Competitive Practices* is to present in-depth case studies regarding effective and successful endeavors by human resource professionals from which their HR colleagues can learn and obtain ideas for possible application in their own organizations.

This *Competitive Practices* highlights one of the winners of the 2003 HR Leadership Awards of Greater Washington. Established in 2002, the HR Leadership Awards of Greater Washington recognize human

resource professionals who exemplify extraordinary leadership in their organizations and in the community. Human resource professionals from the Washington, D.C., area are nominated for their meaningful contributions to the ongoing development of the human resource profession.

Karen L. Meyer-Cain, Vice President of Human Resources at Avendra, LLC, in Rockville, Md., won the 2003 Small Commercial Award. She was selected for this award for her leadership at Avendra, a new joint venture in the hospitality field, and for the creation of the Associate Satisfaction Initiative—a highly successful program that transformed the organization's culture and resulted in significant financial benefits and strong employee morale.

This case study describes events leading to, and the results of, Avendra's Associate

Satisfaction Initiative—specifically, how and why the initiative was developed, its various components and its impact on Avendra today. The approach taken—the process and the results—could be described as “textbook organizational culture change:” get management support, assess the situation, gather data, consider the options, put programs in place and evaluate the results. However, what makes this case study stand out is not the unique approach but rather the fact that such an approach was carefully undertaken, strategically thought through with

the company's business goals in mind, well communicated, and the results were overwhelmingly positive. Without a doubt, the steadfast support of the Executive Team provided the foundation for a successful organizational change effort. Not all organizations take the time to research organizational issues in-depth and strategically set out to address them. The Avendra story

is an example of a highly successful organizational change effort.

PURPOSE OF THE SERIES

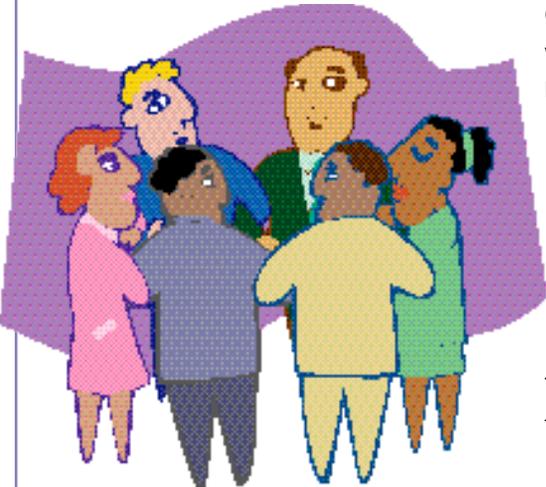
Competitive Practices looks at successful new practices presented as in-depth case studies on human resource issues. Supporting information by experts from research sources is highlighted.

HR LEADERSHIP AWARDS OF GREATER WASHINGTON

Launched in 2002, the HR Leadership Awards of Greater Washington recognize and honor exemplary leaders who have made significant contributions to their businesses and communities through the human resource profession throughout the greater Washington, D.C., area. There are four awards for Human Resource Excellence: Large Commercial, Small Commercial, Government and Nonprofit Organizations. There are also awards for Ethics and Community Service/Corporate Social Responsibility.

“Creating the culture you want and need is no longer an option. It is a business necessity.”

Source: Connors and Smith, 1999.



BACKGROUND

AVENDRA, LLC— QUALITY WITH A PERSONAL TOUCH

Located in Rockville, Md., Avendra was established on January 27, 2001, as a joint venture by Marriott International Inc., Hyatt Hotels Corporation, ClubCorp. USA, Inc., InterContinental Hotels Group and Fairmont Hotels & Resorts, leading organizations in their respective hospitality markets. A small startup company with employees in the United States and Canada (starting from 110 employees to 230 in just over a year), Avendra is one of the leading procurement services companies serving clients in the hospitality, club and related industries.

The company's mission, "we help hospitality customers buy the right products, at the right price, from the right distributor," along with the organization's values—People, Customers, Innovation, Collaboration and Impact—succinctly describe Avendra. Today, Avendra is the largest hospitality procurement services company in North America and the Caribbean.

VICE PRESIDENT OF HUMAN RESOURCES AT AVENDRA, LLC

One might not expect to find a seasoned HR professional such as Karen L. Meyer-Cain—with more than 25 years of experience—in the role of vice president of human resources in a new and relatively small organization. Meyer-Cain reports to the President and Chief Executive Officer at

Avendra. Her responsibilities include aligning the human resource strategies with the company's business strategies, planning and implementing key programs and processes in the areas of staffing, compensation, employee benefits, company culture, training and development, employee relations, communications, employment practices and procedures, and legal compliance.

AVENDRA'S CHALLENGE

As a relatively new and small organization, Avendra faced many challenges. One of the most pressing issues was the skyrocketing turnover—from 5% in 2001 to 23% in 2002. As noted in Figure 1, the company lacked alignment internally, as evidenced by poor employee morale, high turnover and a general lack of ownership by employees in their respective roles. Many of the employees had worked at the companies that created the joint venture, which were considerably larger than Avendra, with established policies, programs and work processes. In contrast, the workplace at Avendra was an entrepreneurial environment. Associates did not adjust to this change easily, thus the high turnover and poor employee morale.

In May 2002, the Executive Team met to discuss how to continue achieving top customer satisfaction in view of the 100% turnover increase, negative associate morale and feelings of overwork and stress. As Dennis M. Baker, President and CEO, stated, "It was clear from the beginning that

the success of our new business was very much dependent on our ability to determine and properly execute the right human resource strategies."

Signs of a Lack of Alignment

(FIGURE 1)

- People remain silent and don't voice their opinion when you call for a decision.
- You keep being surprised by the actions people take because they are inconsistent with the agreed-upon direction.
- You don't see tangible progress on an issue when by all rights you should be moving forward throughout the organization.
- In meetings, people keep bringing up issues that you thought were resolved.
- People complain, make excuses and blame others for lack of progress.
- You observe a lack of ownership and enthusiasm for implementing a course of action that has been set.
- People state that they disagree with a decision or a direction that has already been taken.

Source: *Journey to the Emerald City: Achieve a competitive edge by creating a culture of accountability*, by R. Connors and T. Smith, 1999, Paramus, NJ: Prentice Hall Press.

DEVELOPING THE PLAN

THE FIRST CRITICAL STEPS

The first critical step toward change is to realize the need for change. Once the Executive Team acknowledged the significant problems facing the organization, Karen Meyer-Cain worked closely with the group, facilitating the discussion about employee satisfaction.

The second critical step toward change is buy-in. The Executive Team agreed on a number of new programs that would reward associates for their accomplishments and would, in turn, reinforce employee behaviors that were supportive of the company's mission and business goals.

The third critical step is the creation of a goal. The Executive Team agreed to build a culture that provided and rewarded challenging work leading to personal accomplishments, business success and work/life balance, versus simply hard work, long hours and personal sacrifice.

A POWERFUL STRATEGY

With the Executive Team's support of new programs to address the company's low morale and resulting high employee turnover, all associates received a letter about the company's goal to build associate satisfaction by improving business processes that emphasize the quality of work output—not quantity of hours worked—and promote pride, value, growth and fun.

Once the strategy was officially set, Meyer-Cain's next step was to collect information that would allow her to create HR programs directly linked to the business objectives, while also effectively addressing associates' concerns. To learn what was really behind the low employee morale, Meyer-Cain gathered information through surveys, discussions with associates and management feedback. She probed to discover and better understand what motivating factors would keep people at the company and ultimately learned that the top associate concerns were 1) the lack of continuous learning; 2) the need for enhanced customer satisfaction; 3) the demand for cross-departmental teamwork (fewer silos); 4) the need for motivating rewards; and 5) the need for improved work/life balance.

Meyer-Cain developed a solid and empowering communication strategy grounded in the linkage between company objectives and associates' needs. The new human resource programs were designed to engage associates at a higher level than in the past and drive both internal and external customer satisfaction by ensuring that associates were happy, satisfied and therefore productive. Her approach was to design a change initiative that would include the major aspects of the human resource function—communication, benefits, employee relations, incentive programs, training and development, process improvements, and business practices. The result was the Associate Satisfaction Initiative.

THE ASSOCIATE SATISFACTION INITIATIVE

Meyer-Cain developed the Associate Satisfaction Initiative as the structure for change to address low morale and escalating turnover. As explained in Figure 2, there are a number of steps to create major change, and Meyer-Cain's plan is an excellent example of the eight-stage change process.

The Initiative was designed to build a workplace culture that would provide and reward challenging work and offer employees the satisfaction of personal accomplishments, a healthy work/life balance and business success. Comprised of a four-tier change management process, the Associate Satisfaction Initiative encompassed all affected areas to bring about a significant cultural transformational change as well as the specific programs to do so. The four sections outlined below formed the foundation of the Initiative, both in purpose and in action.

- 1) Develop:** established employee-oriented education, promoted career development, improved associate interaction and customer satisfaction, internal and external.
- 2) Communicate:** impacted all employees and departments, reflecting the business goals.
- 3) Celebrate:** provided formal acknowledgment (compensation and rewards) to employees for great work accomplished.
- 4) Balance:** addressed work/life balance issues and internal work resources to get work done more efficiently and effectively.

The Eight-Stage Process of Creating Major Change

(FIGURE 2)

- 1. ESTABLISHING A SENSE OF URGENCY**
 - Examining the market and competitive realities
 - Identifying and discussing crises, potential crises or major opportunities
- 2. CREATING THE GUIDING COALITION**
 - Putting together a group with enough power to lead the change
 - Getting the group to work together as a team
- 3. DEVELOPING A VISION AND STRATEGY**
 - Creating a vision to help direct the change effort
 - Developing strategies for achieving that vision
- 4. COMMUNICATING THE CHANGE VISION**
 - Using every vehicle possible to constantly communicate the new vision and strategies
 - Having the guiding coalition role model the behavior expected of employees
- 5. EMPOWERING BROAD-BASED ACTION**
 - Getting rid of obstacles
 - Changing systems or structures that undermine the change vision
 - Encouraging risk-taking and nontraditional ideas, activities and actions
- 6. GENERATING SHORT-TERM WINS**
 - Planning for visible improvements in performance, or “wins”
 - Creating those wins
 - Visibly recognizing and rewarding people who made wins possible
- 7. CONSOLIDATING GAINS AND PRODUCING MORE CHANGE**
 - Using increased credibility to change all systems, structures and policies that don't fit together and don't fit the transformation vision
 - Hiring, promoting and developing people who can implement the change vision
 - Reinvigorating the process with new projects, themes and change agents
- 8. INSTITUTIONALIZING NEW APPROACHES IN THE CULTURE**
 - Creating better performance through customer- and productivity-oriented behavior, more and better leadership, and more effective management
 - Articulating the connections between new behaviors and organizational success
 - Developing means to ensure leadership development and succession

Source: *Leading change*, by J. P. Kotter, 1996, Boston: Harvard Business School Press.

Meyer-Cain designed a logo based on the titles of the change strategy that illustrated the four themes—Develop, Communicate, Celebrate and Balance. This logo was used throughout the organization in different types of communications to emphasize the importance of the Initiative. It is also used today at Avendra as a symbol of the company's culture.

Finally, while the Associate Satisfaction Initiative was being developed, there was work to do in the HR department. Meyer-Cain spent many hours mentoring and coaching a very junior HR staff of four. She worked with the HR staff to set the department vision to support and satisfy associates as the HR customers, resulting in a professional and knowledgeable staff empowered to effectively administer the new programs. In addition, to underline the importance of ethics as a critical component of Avendra's new culture, the HR department wrote and implemented policies on ethical conduct, diversity and discrimination, and standard of conduct.

ACTIONS

COMMUNICATING THE STRATEGY

After the Associate Satisfaction Initiative was developed, the next step was to communicate the strategy and the upcoming programs to ensure that all employees understood the purpose and goals. Avendra's change management initiative

illustrates the breadth of transformation required to result in substantial cultural change. The Initiative was launched at a Town Meeting in September 2002, and associates' overall reaction was very positive.

Following the initial Town Meeting, HR department used a variety of communication vehicles, as listed below, to inform employees about programs being rolled out over the next few months:

- Town Hall meetings (includes remote field associates via webcast).
- "Discussions with Dennis"—breakfast with the CEO in an informal setting with a small group of employees, including remote field associates via phone.
- Informal updates via e-mail.
- Staff meeting flow-downs.
- Major program launches.
- Newsflashes on associate issues.
- Upward communication: electronic suggestion box, physical suggestion boxes at headquarters.
- *Insights* company newsletter.

In addition, posters, e-mails and giveaways, such as luggage tags with the Initiative logo, kept the programs fresh and uppermost in associates' minds. To break the "silo" mentality and encourage cross-departmental teamwork, employees were strongly encouraged to communicate with colleagues in other departments as well as with their field associates.

Once the programs were established, feedback from various sources was requested on a regular basis through the annual associate opinion survey (administered by a third party), training program evaluations, one-on-one discussions with associates and management feedback.

Changes were made in response to the feedback received. For example, Avendra now offers both an electronic and a physical suggestion box as not all associates work at headquarters. An additional soda machine and an ice machine were added to the commodities on-site. The Avendra Ambassador Program was developed for new hires to help new associates feel welcomed and fit more easily into the workplace culture.

CELEBRATING THE STRATEGY

Programs were established to address associates' key concerns while at the same time foster enthusiasm, promote behaviors and competencies that support Avendra's mission, and reward professionalism to successfully reach the organization's business goals. The concept of "celebration" and change is the backbone of programs such as Avendra University, social events, community activities, and Recognition and Rewards Program.

Avendra University

The Avendra University was established to provide continuous learning. This training and development initiative provides professional development to all associates and

includes self-assessments, personal career plans, 360-degree feedback and mentoring of new hires. One of the most successful programs in the Avendra University was "Who Moved My Cheese," a well-known intervention program that provides employees with the tools to understand and proactively deal with change.

Social Events

A social committee plans various events throughout the year. To help the social committee, each department selects an event to sponsor, providing additional much-needed volunteers. In addition, the president's assistant and the HR director serve as standing members of the social committee to ensure the programs keep going as the membership of the social committee changes over time. Some of the activities organized by the social committee in the past included the following:

- New-Hire Parties and Birthday Celebrations (on a quarterly basis).
- Bring Your Children to Work Day (April).
- Spring Breakfast (breakfast for all employees at headquarters in May).
- Summer Outing (a "play day" for everyone at headquarters; e.g., bus to Annapolis for a two-hour boat ride and crab feast).
- Chili Cook-Off (a contest for the best homemade chili).
- Fall Festival (Halloween celebration with costumes, desserts and prizes).
- Thanksgiving Potluck.
- Winter Holiday Party (a formal affair on a Saturday night).

Community Activities

Associates may participate in volunteer programs such as Habitat for Humanity and food drives during work hours.

Avendra's Recognition and Rewards Program

The Recognition and Rewards Program was designed to encourage and reward behaviors that would become the competencies necessary to support Avendra and, in turn, result in customer satisfaction. The types of accomplishments for which associates are rewarded are based on customer-centric thinking, out-of-the-box approaches and process improvements. The program is available to all full-time and part-time Avendra associates. Specifically, individuals are rewarded when they excel in the competencies listed below. These competencies are encouraged because they lead to customer satisfaction and achievement of Avendra's business goals.

- Adaptability/Flexibility
- Challenge and Growth
- Comfort With Ambiguity
- Commitment to Quality/Excellence
- Communication
- Customer Focus
- Industry Expertise
- Initiative and Impact
- Leadership
- Partnering
- Problem-Solving
- Professionalism
- Role-Specific Expertise
- Teamwork and Collaboration

Rewards for accomplishments range from \$100 to \$5,000 and include cash awards, team celebrations and Avendra equity units. Associates make their nominations by completing the Rewards and Recognition Nomination Form located on the company intranet. There are four award levels: Thank You, Excellent Teamwork, Major Accomplishment and Option Award.

THANK YOU:

Criteria: Individual or team achievement beyond normal job expectations.

Approval: Organization executive and HR.

Reward: American Express gift certificate worth \$100 or \$200.

EXCELLENT TEAMWORK:

Criteria: Excellent team accomplishment.

Approval: Organization executive and HR.

Reward: Time off (half-day) and a budget of \$25 for each team member for an outing such as lunch.

MAJOR ACCOMPLISHMENT:

Criteria: Excellent task or team leadership, innovation, performance or customer service, or breakthrough business result.

Approval: Organization executive, HR, Awards Committee and President (for awards above \$1,500).

Reward: \$500-\$5,000 (taxes apply).

OPTION AWARD:

Criteria: Marketing/business development breakthrough, major accomplishment affecting long-term Avendra priorities.

Approval: Organization executive, HR, Awards Committee and President (for awards of more than 250 units).

Reward: 50-1,000 unit options (Unit options are similar to stock options; Avendra is a privately-held company).

BALANCING THE STRATEGY

The fourth and final stage of the Associate Satisfaction Initiative was "balance." When the initial feedback was gathered, the workforce overall had concerns regarding long work hours and the resulting poor work/life balance. "Balance" as a strategy was based on the assumption that proper work/life balance is critical for productivity as well as success. Associates were encouraged to "work smart," share resources and be supportive of each other. The corresponding programs that were established to address work/life balance included personal time off, a company-day-away activity, social events and community activities. Departments are continually encouraged to celebrate their accomplishments.

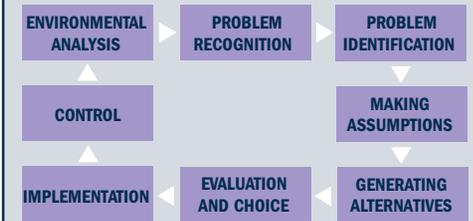
RESULTS

A COMPETITIVE ADVANTAGE

As a result of Avendra's Executive Team and Karen Meyer-Cain's leadership and creative problem-solving skills (see Figure 3), Avendra had an outstanding year in 2002. The effective Associate Satisfaction Initiative played a significant role in the organization's success and became the baseline of the company's culture.

The Creative Problem-Solving Process

(FIGURE 3)



Source: *101 creative problem solving techniques: The handbook of new ideas for business*, by J. M. Higgins, 1994, Winter Park, FL: The New Management Publishing Company.

The company achieved its goals and objectives, exceeding the Board's expectations, resulting in a significant competitive advantage, with the following results:

- Exceeded financial expectations:
 - Revenue 6% above forecast.
 - Net profit 57% above forecast.
 - Attracted major new customers (90 new accounts).
- Enhanced job skills via learning activities, as reflected in training evaluations (4.37 of the possible five points on effectiveness rating).
- Increased teamwork and improved morale with lower turnover in 2003 (7.8% annual), resulting in a more satisfied and stable workforce.
- Increased the number of associates from 110 to 227 in just over a year.
- Provided new goals, processes, rewards and fun opportunities for associates.
- Increased customer satisfaction.

When asked what improvements or changes she would have made to her original plan from the vantage point of looking back two years, Meyer-Cain noted that the sole feature she would have changed was getting a faster start on training and development programs. However, early in 2002 Avendra was still in the startup mode, and taking care of the basics—such as payroll and benefits—was the priority. Of the overall change initiative, it is the Rewards and Recognition Program of which she is most proud.

HR COMPETENCIES THAT MAKE THE DIFFERENCE

The success described in this case study was not a matter of luck. As described in Figure 4, leadership requires three essentials: 1) envisioning; 2) energizing; and 3) enabling. Working in HR in a small new company requires significant time, energy and attention to bring together all the team players. Drawing on her extensive professional experience, Meyer-Cain used her high-level HR competencies to create and develop the Associate Satisfaction Initiative, as seen in the examples below.

Leadership: Recognized the need for an overarching strategic approach versus a set of unlinked programs to move the company forward in achieving its goals.

Strong business partnership: Understood the business goals and the corresponding change management needed for a startup

and drove the link between programs and business success.

Consensus-building: Ensured that everyone's ideas and issues were heard, thus developing buy-in.

Creativity and communication: Created the “logo” and theme for the Associate Satisfaction Initiative.

Change management: Analyzed and reacted to the organization's business challenges, culture and need for change.

Risk-taking: Persevered in tough discussions with the Executive Team regarding new ideas and approaches and was flexible and willing to try new things.

Vision and focus: Articulated the strategic link between associate and customer satisfaction and drove the programs to recognize and reward behaviors leading to customer satisfaction.

Teamwork: Partnered with the Executive Team to successfully address associates' and business issues.

Interpersonal skills: Bounced concepts and approaches off internal and external resources, including HR associations.

Development of HR staff: Mentored and coached junior HR staff of four professionals to meet the needs of the organization.

Heroic Leadership: The Three Essentials

(FIGURE 4)

Envisioning: the ability to develop, articulate and communicate a clear vision of what the future will look like if change is successful.

Energizing: the ability to motivate large groups of people and infuse them with the leader's own sense of enthusiasm, excitement and confidence.

Enabling: the ability to figure out how to provide people with the necessary support—structures, processes, resources and rewards—and how to remove the obstacles standing in their way.

Source: “A Success Story: The Case of Lucent Technologies,” by D. A. Nadler, in *The Leader's Change Handbook: An Essential Guide to Setting Direction and Taking Action* (p. 23), J. A. Conger, G. M. Spreitzer, & E. E. Lawler III (Eds.), 1999, San Francisco: Jossey-Bass Publishers.

OPPORTUNITIES AND CHALLENGES

ADVICE FOR HR PROFESSIONALS

Creating effective behavioral change in an organization remains one of human resource's ongoing challenges in today's workplace. What is the thought process that will set the stage to achieve the

required results? Where is the starting place to determine the right steps to take? Meyer-Cain offers words of wisdom from her own experience. No matter what HR programs are on the table, her advice is to address the most essential issue: “When considering new programs in the workplace, human resource professionals must focus on the business case.” She recommends that HR practitioners ensure their employees feel included in the process rather than merely being told what to do.

To get more specific, human resource professionals should ask themselves, “What is the link between the HR themes and the business needs?” In addition, if they can answer the following four questions, HR professionals are on the right track:

1. **How will it impact the business?**
2. **Does HR understand what the employees want?**
3. **How will HR reach their goals?**
4. **What is the most appropriate vehicle to achieve buy-in to get there?**

AVENDRA TODAY

When asked about the visible impact of the Associate Satisfaction Initiative today, Karen Meyer-Cain explained that people like working at Avendra because of the positive organizational culture. Avendra is an organization where employees stay because their work allows them to learn and grow professionally, which is a highly valued commodity in today's workplace.

Currently Avendra is redefining the culture of the organization. Looking forward, the Executive Team and its direct reports met and developed a vision of the future culture desired for business success. Four teams were formed to address these areas: Aligning to Customers, Valuing Associates, Empowerment, and Rewards and Recognition. By using these teams, the goal is to develop solutions and to define how those solutions will further the organization.

Today, Avendra, LLC, is strong and robust and has met its profit goals each year since its launch in 2001. Focus and attention on customer and associate satisfaction is key, to be revisited and renewed each year to ensure these important strategies are aligned with business goals.

SHRM HR CONTENT VIEWPOINT

In the early days of mergers and acquisitions, organizational culture was not a component that received much attention, if any, in the due diligence process. Today, however, organizations are increasingly aware of the critical role that organizational culture plays in joint ventures. This *Competitive Practices* illustrates how important the element of culture is in a small joint venture company.

Avendra, LLC, had significant challenges as a startup organization. Not only was the organization newly formed, the purpose of the joint venture—in essence, to provide one-stop shopping for procurement in the

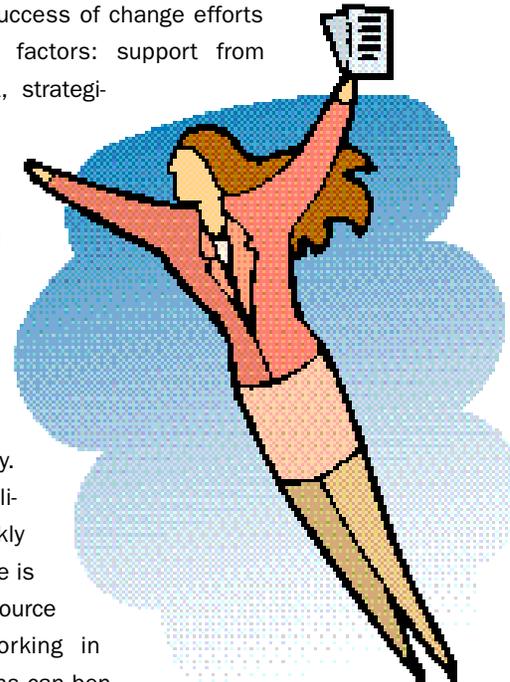
hospitality industry—was a new concept. As with many joint ventures, Avendra's workforce was made up of employees from different companies. The greatest challenge from a cultural viewpoint was that employees came from significantly larger organizations where cultures were well established and policies, practices and work processes were already developed.

There were, of course, risks. The primary risk was that if the management change initiative were not successful, the company might fold. Avendra was obligated to address its organizational culture challenge very quickly or join the long list of unsuccessful joint ventures. Clearly, one of Avendra's advantages was its size. As a small company that was hardly more than a year old, it was able to quickly maneuver without the impediment of established programs and entrenched employee expectations.

This *Competitive Practices* describes what may at first appear to be a deceptively simple change management initiative. However, Avendra's initiative was meticulously thought through, well-communicated and carefully rolled out to a workforce that exhibited an overall positive response to such a significant change. Avendra succeeded in quickly getting their associates "on the same page" and promptly provided them with tools to understand and deal with change. The approach applied in this case study is well-suited to a small organization. However, a similar organizational culture

change effort might not be successful in all work settings. For example, companies that have well-established processes, such as larger organizations, are often hampered by internal bureaucracy and silos.

Inherent in the success of change efforts are four critical factors: support from top management, strategically planned change, strong communication programs and solid evaluation processes to determine what worked, what did not and why. Having the flexibility to move quickly to address change is key. Human resource professionals working in small organizations can benefit from Avendra's "lessons learned," particularly regarding the critical components of listening to workforce concerns, establishing a clear and consistent strategy, consensus-building, buy-in and, most importantly, creating programs that are directly linked to the organization's mission, business objectives and goals.



RESOURCES

American Society for Training & Development (ASTD): www.astd.org

Books on Organizational Change:
www.argospress.com/Resources/business/books-organichang.htm

Center for the Study of Organizational Change (CSOC): http://web.missouri.edu/~csoc/about_the_center.html

Change Management Learning Center:
www.change-management.com

Harvard Business School Working Knowledge: Women Leaders and Organizational Change: <http://hbswk.hbs.edu/item.jhtml?id=3796&t=organizations>

National Archives and Records Administration (NARA)/Archives Library Information (ALIC):
www.archives.gov/research_room/alic/staff_resources/organizational_change_bibliography/balanced_scorecard.html

Overview of Organizational Change:
www.mapnp.org/library/org_chng/org_chng.htm

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