International Journal of Technology and Innovation Management Education 1(1): 39-56.

Harnessing Change from Within: Proprietary Case Studies as Tools for Inducing Diagnosis and Stimulating Action

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Abstract. Case studies are widely used for educating managers. But they can also be a powerful tool for implementing change and for stimulating leadership and empowerment. This essay describes how the first author used case studies to drive a "choose to lead" program at Verizon, for large groups of managers. We show how to write proprietary (confidential) case studies for use in such programs and describe the five key principles for such studies. "Become who you are," Nietzsche counseled. We show how internal case studies can help companies, and their managers, become who they truly are and hope to become.

Keywords: case studies, leadership, change management.

1. Introduction

- How does a leader connect an essential corporate change initiative to the inner lives of the managers and employees who *are* the organization?

- How does a leader trying to, say, break down silos to create a more customer-focused organization actually get managers to stop clinging to their departmental boundaries?

- How does a manager suddenly faced with a changing market get people to understand that success is no longer about perfect execution but about rapid experimentation and learning? And how does he get them to act accordingly?

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1. Prepared for the eighth annual Global Forum on Business-Driven Action Learning and Executive Development, 20-23 May, 2003, Amsterdam, hosted by ABN Amro Bank and organized by the Global Executive Learning Network

Consider a small ice-breaking action-learning exercise we have used:

> You are John Akers, IBM chair. It is 1990. You have just made an all-time record profit of $5 billion. An angel whispers in your ear, “John, in just two years, in 1992, unless you take decisive action, you will announce from this same spot a record loss of $6 billion.”
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> What should you do? How can you induce change in an organization that perceives itself as highly successful and not in need of change?[2]

In this essay we describe a variant of action-learning: use of self-diagnostic case studies, meant for use only within the firm, division, team, or unit. Self-diagnostic case studies are tools for inducing change, revising strategy, and revamping organizational structure. They provide both executives and managers with very powerful motivation for changing behavior. For example, John Akers could have used self-diagnostic case studies to compel senior management to recognize the sweeping changes that were about to erupt in IBM's business environment, changes that would create huge losses. Senior managers would have come face to face with their explicit and implicit assumptions about the future and would have had to formulate their best response to the challenges the future could bring.

First we describe the fundamentals of the approach, then we illustrate how it works with examples from Verizon and other organizations. The cases we present represent a variety of change initiatives, including knitting together organizations after a merger and improving how employees treat one another by improving their level of discourse.

2. Self-Diagnostic Cases: The Power of Stories

There are many ways to induce change in organizations; the literature on change management is enormous. Metrics and incentives are useful for shifting behavior, but they have their limitations. So do whistle-stop tours by the CEO, corporate videos, internal newsletters, and posters in the cafeteria.

In *Leading Without Easy Answers,* change expert (and psychiatrist) Ronald Heifetz defines three types of medical problems: Type I (well-defined problem with an available solution), Type II (well-defined problem but no clear-cut solution), and Type III (“the problem definition is not clear-cut and technical fixes are not available”[3]). Most companies face Type III problems. Just as a patient must participate actively in psychotherapy, it is vital that managers themselves

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2. This exercise was suggested by Lester Thurow, the former dean of MIT’s Sloan School of Management.
3. Ronald Heifetz, *Leadership Without Easy Answers* (Cambridge, MA: Belknap, 1994), 75.

join actively in the diagnosis of an organization's problems and in shaping the learning and adaptive behavior needed to find a solution.

Our experience writing, teaching, and facilitating in corporations around the world tells us that one of the most effective ways to help people understand viscerally what change is needed – as well as how to accomplish that change – is through the vehicle of the custom-crafted case study.

This form of case study – written about a particular company for its own private use – captures the issues, the tensions, the drama, the suspense, the lurking dangers, the promise of rewards, the heroes, and the fallen angels of the company's own world. Properly written, the custom case or case series helps people to see clearly yet compassionately the need for change in their own organization. Why? Because a proprietary case study, much like group therapy, is all about uncovering *who we are now* – our attitudes, behaviors, and assumptions about the world – and who we need to be to succeed in a changing world.

The engaged participant can say, "The discovery is mine, the insights are mine, and the willingness to act differently, therefore, is mine. The priceless "aha!" in a successful case discussion is an abbreviation of the statement "I am part of this [type of] problem, AND I can see a way to fix it."[4]

"Case study" is just a stuffy way of saying "story". A case study is a particular kind of story: It always deals with a business situation and it is generally meant to be discussed in an open seminar of sorts rather than read late at night with a glass of warm milk. Stories are powerful and useful: Anthropologists, for example, learn about a culture by studying its mythology and folklore – which are collections of stories. And just as folktales permit the discussion of otherwise taboo subjects (unexpurgated versions of folktales deal with some quite frightening stuff, from child abandonment on down), case studies allow for the safe and productive exploration of issues that are otherwise not discussible in their cultures: politics, organizational barriers, distorted values, and the like. (See Exhibit 1)

A well-written case study is like any other dramatic story: It is a narrative intended both to instruct and amuse. It can be nonfiction, but more often it is a fictionalized account based on fact – with the names and certain details changed to protect the not-so-innocent – and it will contain all the twists, turns, uncertainties, and potential of real life.

The effectiveness of a case study lies in its very "story-ness". We identify with the struggle of the characters; they give us models of how to prevail. And if the case is well-written and strikes the proper chord with the audience, everyone will more likely remember and abide by its lesson, just as we learned at young age

4. See Shlomo Maital, Galit Gilan, and Sherry Cizin, "TIM-Technion Institute of Management: Action Learning In Israel," in Action Learning Worldwide, ed. Yury Boshyk, (London and New York: Macmillan, 2002), for a discussion of how experienced business coaches refrain from supplying answers to managers they are mentoring.

to tell it like it is through hearing *The Emperor's New Clothes* and we learned the value of building a strong foundation in life from the chubby protagonists of *The Three Little Pigs*.

Good cases do not preach their lesson; they guide their readers toward it and let the readers discover it on their own.[5] Stories about ourselves help us learn about ourselves. They are mirrors that reflect who and what we are, mirrors we normally choose not to look at. And they are prisms that help us separate out the spectrum of issues that form the white light of our own reality.

In the following section we share some of our own stories about corporate case studies that have proved useful to the enterprises that commissioned them. We also offer advice about developing and teaching your own case studies should you want to do so. We urge you to remember, however, that what we offer here is an approach, not a blueprint. Each situation is unique, with its own opportunities; we hope to equip you with guidelines, tips, techniques, and warnings about potential hazards.

3. The Verizon Story

In August 2001, the first author was given a remarkable opportunity: to help support the integration of U.S. telecommunications giants Bell Atlantic and GTE into Verizon following their merger. The success rate for business mergers and acquisitions is a dismal 30 percent. Put another way, fully 70 percent of all mergers and acquisitions in the United States over the past decade have destroyed more value than they have created. Bear in mind that this statistic was calculated before the techno-bubble crash.[6]

Verizon was determined to beat those odds. As it rolled out many important merger initiatives in 2001, its Domestic Telecom Business (a $64 billion business within Verizon) also put out to bid a core leadership program to be delivered throughout the enterprise between 2002 and 2004. The objective of the course: to translate Verizon's domestic telecom business model and business objectives into internalized leadership behaviors *that would inspire and enable members of the organization to work together better* to invent ever more effective solutions, to

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5. Michael J. Roberts explains the process in "Developing a Teaching Case", Harvard Business School Case no. 9-900-001.
6. These statistics come from a Conference Board study (New York: The Conference Board, 2001). Note also the following observations from "They Shopped – Now They've Dropped", an article that appeared in the 25 February 2002 issue of *Business Week* (p. 33): "According to a study by Bridgewater Associates Inc., the 20 companies with the greatest merger-and-acquisition activity over the past four years, a group that includes Cisco Systems (CSCO), AT&T (T), and even General Electric (GE), are now being punished by Wall Street. Through Feb. 4, their stocks were down an average 15% since the beginning of 2002, compared with a decline of 5% for the companies in the Standard & Poor's 500-stock index. . . . Bridgewater notes that of the most acquisitive companies, those who took on the heaviest debt loads to support their acquisitions were down more than 20% through Feb. 4."

focus more intensively on the customer, and to be more creative in meeting customers' evolving needs. Given the strategic issues facing Verizon in the U.S. telecommunications space, those goals made sense.

What also made sense was deciding to personalize the behaviors so that they would truly take root and flourish. After all, the point of the program was not to get people to follow orders better, but to boost their own individual initiative taking. Verizon needed leaders to stop relying solely on corporate structures and systems to organize what and how work got done; it wanted them to be able to recognize and surmount the inevitable limitations of any organizational structure. Above all, the main point was to get individuals to take more personal responsibility to act as leaders, to see opportunities no one else saw, and to persevere in making the difficult and unlikely happen.

We proposed a program consisting of three tightly linked parts. The first part was preparatory work on a proprietary website. The last part was six months of weekly post-class work delivered via the Web. In between was a three-day seminar organized around a core case series detailing the often dramatic, sometimes amusing, always essentially truth-to-life struggles of a Joe Every-Manager who overcomes any number of obstacles in a flawed, frustrating, but ultimately successful quest to harness the organization's powers to make the difficult happen. Along the way, our hero (or heroine – we wrote different series for each line of business, alternating "he" and "she" as leads) faced down many dragons: defining the *real* problem in all its complexity, organizing the team effort to solve it, tying the solution into the larger business context, persuading higher management to release rare and precious resources (people, money, endorsements), working across boundaries with any number of competing and unaligned objectives to find superlatively creative – even unheard of – solutions.

Now, after our program has been running for more than a year (and almost 4,000 Verizon managers and supervisors have participated in it) a third-party measurement firm has said that our efforts to instill new behaviors, especially with regard to improving communication and teamwork, integrating the former GTE and the former BA, boosting innovation and creativity, and empowering employees, have been very successful. (See Exhibit 2)

We believe that the case study is central to the effectiveness of our approach. Why? Because of the groans of recognition in the classroom when we asked participants after they had read a case study, "Gee, does this behavior or approach actually happen here? And can we talk about it?" Using the case as a launch pad, we could very quickly get into the issues that every manager faced – including the cultural and political ones that were typically taboo – because the story was close enough to home to be recognized yet not so immediate as to be threatening.

4. How to Write a Proprietary Case Study that Creates Change: Some Key Lessons

The Verizon story we just shared is a tale of case studies on steroids: It was a huge undertaking in scope, scale, and impact. Writing what ultimately ended up being 12 different series (the same essential story line varying in its vital particulars by line of business and level in the organization) was a Herculean task for a small team of case writers working in a limited time frame. We could have written one case study and called it "The Verizon Story" but we felt it essential to create situations as close as possible to those in which the people in the classroom found themselves every day. We wanted the case characters to be faced with similar opportunities and hobbled by similar constraints – and that meant varying our story by line of business. Thus, while teaching essentially the same lessons (for example, seek a variety of perspectives when framing a challenge), the particulars of the story changed to match the activities of each business unit, whether those activities were building the outside physical plant or meeting the complex telecom needs of a sophisticated medical-school complex.

The greatest compliment one can receive is to have a participant sidle up after a session and whisper furtively, "How did you ever find out that story? It was all absolutely true! But I had no idea that anyone was interviewing about it," when, of course, the story didn't come directly from the company but was simply a well-crafted tale that rings true for many.

We were able to pull off this feat of case engineering because we have had years of practice, and our principles were found sound in the process of developing the challenging Verizon series. Emboldened by this experience, we would like to share these guidelines with others in the people development business in the hope that they – you – can add this effective learning vehicle to an existing collection of tools and techniques.

• *Lesson One: To Create Positive Change, Use a Success Story*

Probably the greatest lesson we have learned in 14 years of writing case studies is that positive change is much more likely when the focus is on *success rather than failure.* Management educators often teach that you learn far more from failures than from successes. In some situations, this may be true. But when the objective is to induce change, you must heed the proven psychological principle that positive reinforcement (success) is far more powerful than negative reinforcement (failure).[7]

7. See Daniel Kahneman and Amos Tversky's article "On the Psychology of Prediction", *Psychological Review* 80 (1973): 237-51 for a study of why people believe negative reinforcement is more effective than positive, and why they are wrong.

We ourselves didn't recognize this truth at first. Like most people, we had been told that we learn best from our mistakes. But it's not so. Very important lessons can be brought home to us when we see the consequences of poor decisions or bad behavior, but devoting time and energy to what failed tends to drag us into a negative place. *Writing about success, tortured though the path may be to get to it, has us rooting for the protagonist as he or she struggles against obstacles and ultimately prevails.*

And there is an even more important reason to capture stories of success rather than failure that goes beyond the morale of the case writer, case reader, or classroom ambiance. It is tied to the notion of *positive deviance,*[8] the idea that even in the most difficult circumstances in any community, someone is finding solutions that are significantly better than the status quo. So long as our orientation is to find fault in ourselves, then we are likely to look outside ourselves for solutions. But if we deliberately seek answers from among our own midst, then we will find answers within. And if even one person or team can do it, then so can we all.

Presented with a positive story, we shift our efforts from *finding* ways that will work to *propagating* ways that will work. We amplify the success of the positive deviants who were insightful and courageous enough to break a new path. In a nutshell, given the choice, it is better to spend our time understanding what works than what doesn't. Edison worked day and night to find an appropriate filament for his light bulb. He failed continually. Eventually he tried an unconventional idea, carbonizing ordinary sewing thread, and found it worked. His creative out-of-the-box trial was more informative, and more hopeful, than plodding analyses of past mistakes.

Classroom discussion is not stimulated by the horror of watching the manager clutch the wheel of the doomed bus as it spins off the cliff. What grips the participants and motivates discussion is the creative tension in the false starts, near misses, and internal struggle of the protagonist as he or she works in new ways toward a solution. To use a literary analogy, the drama is in the struggle of man(ager) against man(ager), man(ager) against organization, and man(ager) against him- or herself. Joy and hope attend his or her ultimate victory. In our classes, people clap with genuine enthusiasm as the tide turns and the fictional project and its champion start to succeed.

8. See David Dorsey, "Positive Deviant", Fast Company 41 (December 2000): 284, about Jerry Sternin's efforts in Vietnam. Harvard Business School professor Robert Kaplan has written about "innovation action learning", in which field-based solutions to management problems are written up as cases, taught, improved, revised, and made into general, new techniques other companies can apply. His balanced score card is an example.

• *Lesson Two: Make the Case Fit the Course, Not the Other Way Round*

This is a lesson that we periodically forget, always to our chagrin and embarrassment.

Here is the principle: *Clearly articulate the lessons that you want the case to illustrate before you begin to research the story*. Do you want your class to understand how to meet a customer need better? Form a financial strategy? Work as a team? What theory do you want the case to support? Do you want to be able to teach the Seven S's, Kotter's Change Theory, or Myers-Briggs in the discussion? Only after answering these questions can the case writer begin his or her investigation, because only then will he or she know what kind of situation to investigate and what kinds of questions to ask. Now and then we have been pressured by the exigencies of time to develop a case study as the course itself is being developed, and the result is always a false start and a large amount of rewriting. Even worse is going "live" with a case that somehow misses the core teaching point and falls flat. Rushing the process is not worth the time it appears to save.

In the case of Verizon, we knew that they wanted to tell a story that would allow us to discuss the value to mid-level managers of deliberately seeking the big picture, soliciting multiple viewpoints, tying into the larger business need, and working across boundaries to find creative solutions. With that road map in mind, we could quickly sort through potential stories to find the most appropriate one to tell. Without that conceptual guide, our interview efforts could have gone in the wrong direction, and we could have ended up with a great story – for a different course.

Corollary 1: Test your hypothesis. You want to tell a story that allows you to teach points A, B, and C in the classroom discussion. Your hypothesis, then, is that a story you are investigating fits that need. If you realize it does not, move on. Pursuing a story that will not work is like buying a car that won't drive: a huge waste of resources and useless to boot. Saying no to a misguided start, by contrast, is like giving oneself a Christmas present.

Anyone who took shop in high school knows the value of measuring twice and cutting once. There is a parallel in case writing: interview and interview and interview until you start hearing the same things twice. Then you have done your proper due diligence. Falling short of that standard can result in a weak and superficial case.

Corollary 2: Rightsize it. Will you have one hour or one day in which to facilitate the case discussion? Obviously, that will dictate what the final case product looks like. Will participants have time to read and digest the case in advance, or will they be snatching twenty minutes over lunch to read it? There should be a match between the complexity of the case and the realities of reading and facilitating it.

And if the course already includes a lot of reading and classroom discussion, perhaps the case needs to take a new, creative form to "mix it up" for the participants.

A case study is a very flexible medium, so take advantage of its flexibility. A case can be a paragraph in length, or it can be 20 pages long with pages of supplemental exhibits. It all depends upon the need. The key question to ask is *How can this story help people to discover for themselves the points we want them to learn?* (See Exhibit 3)

In the Verizon program, we posted an initial case, which we called the backbone case, on the website for participants to read in advance of the seminar. This approach saved time during the course as the participants arrived on Day 1 already familiar with the global business issues, core business challenges, and case characters.

• *Lesson Three: Know the Organization, or Find a Guide*

There are two important distinctions between a case written for academic purposes (say, a Harvard Business School case study) and a customized proprietary case. First, with an academic case study, the case writer must assume that the students have no knowledge of the company, and therefore he or she needs to do extensive information gathering and context setting. The author of a proprietary case, on the other hand, can assume that everyone is quite familiar with the organization; the class will know more than the facilitator ever can about the culture and dynamics of the organization.

And that brings us to the second distinction between academic cases and proprietary ones: Proprietary cases face a much higher hurdle in terms of credibility. It is vital that the author capture the language and the spirit of the place as well as the facts. The role of the facilitator of the case, then, is not to "teach" it but, in a nonpartisan way, to draw out the sometimes difficult organizational realities and make people think.

The presence of the credibility hurdle is why, as outsiders, we always need an insider to act as interpreter. That person's understanding of who is who, how the organizational pieces fit together, even what the acronyms stand for is very important to ensuring that the case developer understands the business itself.

At the same time, the writer must retain his or her objectivity and not be led astray. Efforts can go astray for perfectly innocent reasons – for example, the author may not have realized what the case writing effort required. Or the author may have been led astray by someone with a hidden agenda. For example, someone may want to have the case written for political reasons that may not fit the educational objectives. The author needs a savvy and strong ally on the inside to protect the integrity of the case-writing process. The second author is working on a case study of an Intel design project that was cancelled. Was the case commissioned because those involved seek to prove the project should have continued? Or because there is a sincere desire to draw lessons and learn for the future? As it happens, evidence suggests that the latter is the case – but caution is always in order.

Corollary 1: To disguise or not to disguise? We once thought that it was important to use real names, dates, and places. After all, wasn't the point to develop more open, honest, and courageous organizations? But we were wrong. There is no point in making someone either a hero or a goat. Make a hero, and others will want to take him down. Create a goat, and a good person's career can be derailed. The best approach in most situations is what we call "fiction based on fact". Even if the story cleaves so closely to reality that a lot of people figure it out, they are still more willing to go along with the fiction if the names and places have been changed. Also, no real person's name is being bruited about the session room.

Disguising the story makes it easier to get to the facts. In the interviews, it is more possible to uncover the complexities of a sensitive issue if you promise that the final case will not feature real names, dates and places. We explain to interviewees that we want to hear the full story so that we understand everything, but we then let them review the draft of the case so they can remove anything that they are uncomfortable with. This approach generally works.

If this lesson is ignored, organizational politics can derail a perfectly good case. The first author once received a call from Norway on Christmas Eve pulling the plug on a particularly well-researched and truthful strategy implementation case that named names in a global pharmaceutical company. The case was scheduled to premiere in early January, but the plug was pulled when a senior VP in Europe, who had only gotten around the reading the case on holiday, decided that although he had agreed to the case in principle, he did not want the real story told. Only a great deal of revising and reviewing salvaged what we had naively thought would be a very successful, hard-hitting story.

• *Lesson Four: Value Ambiguity and Hope for Confusion*

The less clear the solution and the harder the struggle to find the right answer, *the more valuable the self-discovered learning.* When investigating the case, find out more than what happened. Also find out what *didn't* happen – the choices that were not made, the courses of action that were rejected (or simply neglected). The most interesting and useful cases present the decision makers with a host of alternatives but no clear answers. Above all, when the objective is helping people discover new values, behaviors, and attitudes that will create change in their organization, look for opportunities to show the clash of old with new, and understand how the protagonist managed to make the change.

A good example of this is a series of cases the first author wrote for a Wall Street firm that was earnestly trying to help its new hires navigate what it termed “the gray areas”. The firm wanted its ambitious young people to be aggressive, inventive, and creative while avoiding the ethical and legal pitfalls that were yawning ever wider in the industry. The solution that they hit upon was to commission cases that set up the complexities (and temptations!) of a variety of situations. The cases themselves were then facilitated by experienced and well-respected senior managers in banking, sales, and trading. These “old hands” shone light on the murky areas the novices had to deal with.

Corollary 1: Ask, What would famed film director Alfred Hitchcock do? Look for opportunities to increase the suspense in the case. Pay attention not just to the story, but also to where the turning points took place. Where were key choices made? What might have been? What opportunities were missed? A surprise can be a powerful component of a good case, just as it can be in a good Hitchcock movie.

• *Lesson Five: Good Writing Is Rewriting – With Others’ Input*

It is important to have others review the case, but do not invite too many people into the process. Vetting the case is a political process as well as a reporting process. It’s about making sure you got the story right. It’s also about making sure that it works for the organization.

5. Conclusion

Nietzsche urged his readers: “Become who you are.” This strange imperative appears nonsensical. Why should a person have to become who he or she already is?

For companies, the answer is clear. Companies cannot become who they are if those who lead them do not truly know, nor get the opportunity to explore, who their companies are. Under pressure from the competition, tight deadlines, “stretch” targets, analysts’ scrutiny, shareholders’ displeasure, and global uncertainty, few managers have the time for self-diagnosis – for exploring in depth and in utter honesty the company’s core values, set in the perspective of its history and focused on its future direction. Rarely do managers at senior levels have the luxury of prolonged introspection.

The approach we describe here uses self-diagnostic action-based case studies to help companies learn who they are as a key step in guiding and stimulating change. The process can be sweeping, in-depth and prolonged, as it was at Verizon, or brief and intense, as in our work with a start-up. The goal is the same

– build consensus for change on a solid base of self-knowledge and self-awareness, through narratives that communicate core values to everyone in the organization.

Company cultures, like human cultures, are defined by their myths and narratives. When the stories are well articulated, they become powerful drivers of action. A single strong story, when told and retold, can shape an organization's future success for a decade or more – as did the story of Raytheon CEO Bertram's hands-on test of a radar prototype (See Exhibit 1). Every Raytheon design engineer knew that story and acted on it. To paraphrase Nietzsche, that story helped Raytheon become Raytheon.

Effective organizational change is always change from within. Diagnostic cases, we have found, are powerful catalysts that promote that self-change.

Exhibit 1: Why Raytheon Radars Worked: "The Tales that Wag the Company"*

* Based on S. Maital, Global Reach, *Across the Board,* October 1992, 47-48.

If you visit a company to explore its history and culture, chances are that you'll hear about some critical event that brought major changes for the good. These war stories that tell how the company dealt with challenges are part of the lore of every business. They the are part of the oral tradition that managers and workers pass to their successors.

I had the pleasure of hearing Jay W. Forrester, emeritus professor and senior lecturer at MIT's Sloan School of Management, tell some of these stories. What follows is one from Raytheon's oral history, about an event that was decisive in Raytheon's quality control.

> The SG Radar, manufactured by Raytheon, was the first 10-cm microwave radar ever designed and produced. If you were to look at all American military electronics from World War II until now, I'm confident that from the standpoint of reliability, the SG radar – which is placed on destroyer masts to detect submarine periscopes – would be in the upper 10 percent and maybe even among the top 10 devices. Think about that – an absolutely new technology, everything about it unprecedented, and it's rolling out of production as a highly reliable piece of equipment. Every radar set Raytheon built for 10 years was built like that. In the eyes of the Navy, Raytheon could do no wrong.
>
> How does a company achieve such performance in a new field, in a factory that's being staffed by a flood of people coming in from all walks of life, with all kinds of backgrounds and attitudes? Against such organizational odds, how do you do it? A Raytheon story from World War II may tell us.
>
> Radars were made in the power-equipment division of Raytheon, which was headed up by a man named Bertram. He had been in a submarine crew in World War I. That gave him a keen appreciation of why you want your equipment to work. If it doesn't work, you don't come back up.
>
> A new radar set had been designed to the specifications of the Navy. A production prototype had been constructed, the Navy had approved it, it had passed all the required tests, and there wasn't anything left to do before going ahead with production, except to bring together some 15 people involved in various aspects of the project to see whether any detail had been overlooked.
>
> The production model was at the end of the room. Bertram came in and sat at the head of the table. It was the first time he'd seen the prototype. He looked at the radar, looked at the people, looked back at the radar, looked at the people – this went on for a minute or two, but it seemed like forever. Finally he got up out of his chair, walked over to the tall cabinet of electronics, and, using knobs and levers on the front as a ladder, climbed on to the top. Then, using other parts, he

climbed back down. Then he reached out and broke off two of the controls and said, ‘Take it away!’

He was on absolutely solid ground. He’d been a Navy boy. He knew that if they had to fix something in the overhead, they would use the radar in exactly that way. He could see that it wasn't going to stand up, and if it was that way on the outside, he could assume it was that way on the inside. He’d demonstrated that he meant it. No cutting corners, no saying ‘it should be different, but let it pass this time.’

That story, told and retold, gave Raytheon foolproof A-1 quality in its radar sets for the next ten years!

***Exhibit 2:* Outcome of the Verizon Project: *Choosing to Lead* (C2L)**

The goals of this project were to:

- Assess the effectiveness of C2L and make recommendations for its continuous improvement

- Determine the business impact of C2L and make recommendations to enhance that impact

- Estimate return on investment (ROI) generated by C2L

- Capture and share lessons learned from implementing C2L

- Conduct an assessment of the evolving learning and development needs of the intended audience for this program

Eighty-five percent of participants have taken action based on what they learned in the C2L session. Action categories include:

- Change in behavior toward team members

- Change in approach toward a project

- Increased participation during team meetings

- Sharing results of self-assessment instruments with colleagues

- Setting and fulfilling personal goals

Actions

The table below summarizes actions taken and planned by C2L participants.

Area	Actions Taken
Teambuilding	• Being more open-minded and tolerant when dealing with team members • Making an effort to meet with teammates in person more often instead of teleconferencing • Trying to apply the C2L team performance model to projects • Including team members in decision making • Encouraging the team to review and rethink where a project is going • Clarifying team roles and responsibilities • Asking team members to participate in self-assessment and then reviewing and discussing it
Communication	• Being more willing to listen and being more available • Voicing and contributing ideas more • Being more aware of the persona projected in e-mails or on the phone
Other	• Fulfilling personal goals (e.g., submitting an article, making time for administrative tasks, signing up for courses in a graduate program) • Reviewing their career ("putting themselves on the path to success")
Actions Planned	• Sharing the C2L team performance model, frames, and self-assessment instrument with their teams • Using the team performance model when building new teams • Emphasizing creative thinking and communication in a team • Voicing opinions in team meetings • Working on their styles • Meeting with direct reports individually

Impact

Although it is too early to measure the program's business impact in any significant way, the majority of the participants reported that they believe it will improve leadership skills, foster teambuilding, and improve cooperation and communication at Verizon. Virtually all participants (96 percent) believed that the program is a worthwhile investment that will have a positive return. Participants felt that the program will have even greater long-term impact if higher-level management encourages innovative thinking. The table below shows how participants summarized what they though would be the nature of the program's impact.

Area	The program will help by. . .
Attitude	• Changing the focus from personal to holistic • Reducing the “separate company” mentality (i.e., creating better integration of the former GTE and former Bell Atlantic) — enabling better teamwork • Changing employees’ attitude toward getting the job done — it doesn’t have to be “business as usual” • Improving morale — employees will feel cared for and do a better job
Empowerment	• Building a community of people who believe they have the power to improve and change themselves and their environment • Encouraging employees to know and use all the resources available • Promoting reliance on innovation and individual ideas to survive tough times • Increasing empowerment as decision making becomes a team process
Teambuilding	• Focusing on teambuilding, so that the bigger picture trickles down to all levels • Increasing the efficiency of teams by improving understanding, tolerance, and communication • Bringing people together and making them think about why others are different • Improving networking and interaction between people from different tracks but with similar problems

Exhibit 3: **"What Makes a Good Case?"***

*This exhibit is excerpted from Michael J. Roberts's "Developing a Teaching Case", Harvard Business School Case no. 9-900-001 (Boston: Harvard Business School Publishing, 2002).

A good case must pose an action question – a decision – and then permit the student to perform some piece of analysis that will shed light on the issues raised by this decision or problem. By forcing the students to focus on a specific situation, the case is intended to serve as a general lesson on how to approach problems of this type. . . .

What information should be in the case? *In order to ask the right questions, you have to know the theory*. . . . The case writer must have the following four things firmly in mind early in the case writing process:

- The issues the case will focus on. . . often thought of as the 'first paragraph'
- The analysis required to address those issues
- The data required by the students to address those issues satisfactorily
- Where can that data be obtained?

In the creation of a teaching case, distortions to the truth are knowingly made. Simplifications and distortions are frequently made to enhance the teaching value of the case – distortions that would be unthinkable in a piece of "research".