

Running head: BUSINESS DISCOVERY MODEL ASSESSMENT

Assessing the Business Discovery and Redesign Model (BDRM)©

as applied to

Expert Technologies Corporation and beyond

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### Abstract

This project is a qualitative research analysis of five semi-structured interviews and was conducted with participants of a Business Discovery and Redesign workshop, performed at Expert Technologies Corporation, in Raleigh, NC. The model incorporated elements of traditional strategic planning, organizational development, and deployed appreciative inquiry questioning techniques. The research reported on the model's effectiveness to assist ETC and other small businesses launch a new strategic business platform. The findings reflect that a fresh approach to strategic planning and the participatory nature of the model created a high level of discovery, value-setting, and optimism for ETC. The workshop did not result in a complete comprehensive strategic plan, which has implications for future research and practice in related areas of strategic planning in a small business setting.

**Key words:** Strategic Planning, Organizational Development, Appreciative Inquiry, Small Business, Qualitative Research

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## INTRODUCTION

### *Overview of the Topic*

Expert Technologies Corporation (ETC) is a minority, woman-owned business enterprise headquartered in Raleigh, NC, founded in 2000. ETC was established to deliver project management, process management, Information Technology (IT), Voice-over-Internet-Protocol (VoIP), and staffing solutions services (Expert Technologies Corporation, 2001, p.1). I was hired as a Senior Program Manager for ETC, joining their small team of four owners. Over the past six years, ETC worked closely with one client, The All-Star Group Companies (All-Star) in Baltimore, MD. The relationship with All-Star has consumed all of ETC's personnel and resources, which left little time for ETC to grow or diversify its business with other clients or services. In the fall of 2007, Mr. Brad Botts, ETC's Vice President of Business Development, requested that I develop and deliver a strategic planning workshop to assist the team members with clarifying their business capabilities and helping them set new objectives to expand ETC's business.

To fulfill the request for the strategic planning workshop, I developed a customized Business Discovery and Redesign Model (BDRM)© by combining three elements: strategic planning (SP) to use as the foundation of the model; organizational development (OD) to apply a holistic and participatory perspective to the discovery phase of the process; and appreciative inquiry (AI) to employ a positive, reflective style of framing questions that was used during the workshop and the research portion of the project. I placed the highest level of importance on conducting and assessing a workshop that would explore a new strategic direction of growth and diversification of ETC's business, but I was also interested in evaluating the model to see if it was a process

method that could be applied to other small businesses to help overcome similar challenges and secure a fresh, sustainable direction.

*Statement of the Problem*

ETC is a small, unique firm, comprised of four owners and two workers. We have a long history of teaming on special projects intermittently for over thirty years. This breadth of experience provides a strong foundation for ETC to deliver professional services to our clients efficiently. We share a great deal of respect and appreciation for one another. ETC was fortunate to secure a contract with All-Star to provide it with operations and program management services over the last six years. While the revenues were strong for ETC, the All-Star relationship placed large demands on ETC and limited its ability to continually plan strategically for future success. Within the last few years, ETC's business growth had become stagnant and it lacked the ability to focus on new and desired services. The lack of diversification put ETC in a risky position because if All-Star were to falter, ETC would be without a source of steady revenue. Research showed that diversification is a common challenge for small, growing businesses. The Wall Street Journal noted (Bailey, 2002),

So many big companies have gone from boom to basket case so rapidly that some small firms have found that their best customers overnight have become their biggest problems. And it's a further reminder that when a small company relies on just a handful of large customers, the all-you-egg-in-one-basket strategy can backfire in a big way. (p. B5)

ETC desired to overcome its vulnerability by minimizing the risk of losses and to find new strategies for applying its core talents, skills and resources into a broader client base.

Due to the nature of the research project, I felt it was best to look at the problem from the owner's viewpoint. When I queried Mr. Brad Botts for a description of the business problem ETC was facing, he replied:

I feel that it is necessary to develop a new strategic plan for ETC for two reasons (1) our existing business is stagnant and we have not been successful at expanding beyond our primary client; and (2) our last experiment to try to gain entry into the networking and technology markets failed. Because of these two facts and our desire to expand our client base and business beyond what it is today causes us to need a new and fresh strategic direction. (personal communication, July 27, 2007)

It was helpful to receive his support and to get clarity on his vision for the redesign. Brad stated that a key desire was a fresh direction, and it was my task to develop and deliver a model that was truly innovative and would help the owners take a new look at their business.

As I learned in my research, organizations that engage in strategic planning and management generally outperform those that do not. "The attainment of an appropriate match or fit between an organization's environment and its strategy, structure, and processes has positive effects on the organization's performance" (Hunger & Wheelen, 2002, p. 4). Without this alignment, ETC was operating without security for its current business and without a roadmap for the future.

Through my research, I found that ETC was not alone in its lack of a sound strategic plan.

According to Olsen (2007):

- 95% of a typical workforce does not understand its company's organizational strategy
- 90% of organizations fail to execute their strategies successfully
- 86% of executive teams spend less than one hour per month discussing strategy
- 60% of organizations do not link strategy to budgeting. (p. 11)

These statistics demonstrated the importance of helping ETC clarify its organizational strategies and to lead it toward a new set of goals for the future success. Without an effective workshop its state of business would not only be unchanged, but also it would be continually challenged to find time to focus on strategic planning. And, without proper execution of the workshop, a persistent state of vulnerability would continue and the business would have no strategy for growth. ETC desired a process that would help it redefine, plan and grow the business, and it was imperative that I deliver a workshop that would help achieve the level of success ETC desired.

### *Purpose of the Research*

The purpose of the research was to validate the effectiveness of a strategic planning workshop conducted to assist ETC in finding a new plan for growth and diversification. To assess the effectiveness of the workshop I needed to understand the elements of strategic planning and to find a method for assessing if the team members felt the workshop was valuable to their organization. Just delivering a well organized workshop was not good enough. It was necessary to assess if the model delivered a fresh approach to strategic planning and if the outcome provided ETC's management team with the solution it desired.

My research began by exploring traditional strategic planning to find a model that would fit the needs of ETC. It was difficult to find a model that would help this organization with its search for new goals and objectives because most models were of a traditional nature, lacked the specificity needed for a small business, and did not offer a fresh and innovative approach. Additional research was warranted to explore a blend of strategies and theories that could be combined into a customized strategic planning model. Research showed that a small organization would benefit by adding OD--a holistic strategic planning perspective--and that this

approach would engage all participants and would promote flexible and evolutionary organizational goals. Adding the element of deeper analysis into the model appeared to be a good fit. Having worked with AI in the past, I was familiar with the personal reflection that can occur with this style of framing for the questions, and I felt that AI would be a useful tool for the workshop and the follow-up research questions. AI offered a fresh and innovative element to the model and I expected the results of the questions to be more personal and values-based. By combining all elements of the research, I developed a customized business discovery and redesign workshop model to be delivered to ETC. The purpose of this research was to answer the question “Was the workshop effective to help ETC explore a new strategic direction and design, and can this model be successfully applied to other small businesses with similar challenges and goals?” The scope of this paper covers the research conducted and concepts applied to the development of the BDRM, the setting and occurrences during the workshop, and the research administered after the workshop to collect the data used for the findings. It was my objective to disclose, through research, the applicability of this model used to help ETC and other small businesses find fresh, strategic direction and sustainable success.

### *Significance of the Research*

My research project assessed the effectiveness of the model’s application of ETC’s workshop and I was equally interested in identifying whether the strategic planning model could bring added benefit to other small organizations with similar challenges and desires.

As I developed this BDRM, I found that the compilation of strategies and tools was unique and unfounded in any of the research I explored. Most strategic planning material was developed with larger and more robust businesses in mind. The significance of my model is that it was customized specifically for ETC and served as a prototype for testing if it were to be

useful for other small businesses. The research was significant to resolve if the workshop design and delivery answered the needs of ETC and if the workshop participants felt it was a model that would be beneficial to other organizations. The opportunity to create a new business model was exciting and would fill a void in current strategic planning models by creating a fresh, simple process that would yield success for a small, eager organization – like ETC.

Prior to the research, Mr. Brad Botts stated, “I am confident that Joey will reveal and provide us with a combination to unlock our collective potentials and propel ETC into new and exciting opportunities” (personal communication, July 27, 2007). It was my goal to satisfy his request and develop a model that would bring success for ETC and beyond.

### *Research Objectives*

The following research objectives were used as the basis for this research:

- Provide assessments from workshop participants with the objective of obtaining an analysis of the effectiveness of the workshop;
- Identify themes from the data collection that were most notable;
- Identify areas for improving the model for its use in future small business workshops.

As stated by Peter Senge (1996), “there are no simple causes and no simple fixes for societal or organizational challenges. Significant change will require imagination, perseverance, dialogue, deep caring, and a willingness to change on the part of millions of people” (p. 4). This research launched the beginning of significant change for ETC.

## REVIEW OF RELATED LITERATURE

### *Literature Review Overview*

My research sought to discover a better understanding of the three components of my BDRM – strategic planning, organizational development, and appreciative inquiry. As expected with any business model, there is endless material relating to strategic plans, organizational change, strategic planning, change management, organizational development, and many other topics related to my research theme. In addition to researching the three separate components, I reviewed literature that merged the three, to better understand their complexities and the ability for them to work in a cohesive manner for a robust business redesign and discovery model.

### *Strategic Planning, Organizational Development, and Appreciative Inquiry Overview*

Throughout the research, I found a variety of descriptions for the terms strategic plan and strategic planning. Strategic planning was commonly viewed as a “flexible and adaptive approach” to envision the future and adopt strategies to achieve a particular vision (Barry, 1998, p. 32). As noted by Erica Olsen (2007), a good strategic plan reflects the values of the organization; inspires change and revision in products, targets markets, and clearly defines the criteria for achieving success. She adds that it also assists everyone in daily decision making. All descriptions included the same basic message that a strategic plan properly allocates resources and capabilities; aims to achieve a vision of the future; and adjusts with the dynamics of the business and the business world.

The framework for a strategic plan typically includes three main elements of analysis: the current status of the company; the desired future of the company and schedule of events to guide the execution of the plan. These elements are detailed later in my research.

Research also revealed a variety of models and perspectives relating to Organizational Development (OD) and its use in business. As Chris Worley stated,

Although there are more than a dozen definitions of OD, most suggest that it concerns system-wide planned change, uses behavioral science interventions, targets human and social processes or organizations (specifically the belief systems of individuals, work groups, or culture), and intends to build the capacity to adapt and renew organizations.

(Wheatley, Tannenbaum, Griffin & Quade [Wheatley et al.], 2003, p. 5)

Brown and Harvey (2006), describe OD as “an emerging discipline” aimed at improving the effectiveness of the organization and its members by means of a systematic change program (p. 4). OD comprises long-range focus and processes aimed at improving an organization’s performance by changing its problem-solving and sustaining ability and by involving the entire organization or a large part of it. The integration of an OD perspective into a strategic planning process helps to focus the alignment of strategy and structure and “explores the impact of those relationships on current performance” (Worley, Hitchin & Ross [Worley et al.], 1996, p. 3).

Appreciative Inquiry (AI) is an organizational development process that engages individuals within an organizational system to reflect on positive experiences and to build new perspectives. AI is a particular way of asking or framing questions that elicit participants to envision the future, based on the positive reflections of the past. Since the late 1980s, Appreciative Inquiry has been used in a wide variety of organizations and for many different purposes, including strategic planning, culture transformation, increasing customer satisfaction, organization redesign, and leadership development. Preskill and Catsambas (2006) state,

Appreciative Inquiry is a group process that inquires into, identifies, and further develops the best of ‘what is’ in organizations in order to create a better future. Often used as an

organizational development approach to large-scale change, it is a means for addressing issues, challenges, changes, and concerns of an organization in ways that build on the successful, effective and energizing experiences of its members. (p. 1)

Research showed that while AI principles and practices are drawn from a variety of disciplines, together they suggest that when people ask affirmative questions, reflect on and share past successful experiences and use strengths-based language, they will have more energy, hope, and excitement about creating their desired future. Each question is based on the affirmative and invites reflection, inquiry and innovation.

*Origins of Strategic Planning, Organizational Development, and Appreciative Inquiry*

*Early Discoveries*

My research found that many environmental, technological, and economical factors have influenced what we now know as strategic planning or organizational development practices. “Since humans first walked on earth, they have had to form teams and organize work to survive, develop and prosper” (Floyd, 2002, p. 12). Communities and civilizations have experienced rise and fall, demonstrating that cycles and change are a part of human existence. In the early twentieth century, theorists began looking at these cycles of change and many management thinkers evolved. This early approach was very scientific and their analysis of management and work was very mechanistic. Early pioneers of strategic thinking – as we know it today – began to look at management from a more humanistic viewpoint and introduced a social model of organizational behavior. Floyd states, “Much of the work and many of the ideas produced in this period are still prevalent today, having influenced the thinking and laid the foundation for the field” (p. 13).

### *Changing Philosophies*

In the 1960s, leading academics and thinkers began developing new fields in the areas of sociology, psychology, leadership, management, and work. Additionally, more formal organizations, systems, strategies, and structures were developed. “The idea of strategic planning started to become a more common and formalized process, with planning horizons of 10 years because of the relatively slow rates of change in the environment” (Floyd, 2002, p. 14). By the late 1970s, the oil crises and economic fluctuations highlighted the deficiencies in the current models and necessitated the need for new techniques to assist management teams in their ability to react quickly to business changes. OD was created to view the organization as a whole and to provide a more in-depth look into organizations and techniques, scenario planning methods, structure, roles, functions, strategy development, and implementation. As stated by Judith H. Katz, “OD is deeply rooted in a set of values and principles of change, social justice, equality and participation” (Wheatley et al., 2003, p. 11).

### *Quality Initiative*

Research showed that another key development in strategic planning was the advancement of the Quality revolution perceived by W. Edwards Deming. Deming was considered the father of the quality movement and strongly influenced Japan in post World War II with his quality initiative. In 1982 Deming published “*Out of the Crisis*” identifying 14 points for management which, when applied, enabled Japanese improvement in manufacturing efficiencies (W. Edwards Deming Institute, 2000, p. 5).

Deming urged companies to concentrate on constant improvements, improved efficiency and doing it right the first time. Since the 1930s, Deming was interested in using statistics as a tool to achieve better quality control. Essentially, his idea was to record the number

of product defects, analyze why they happened, institute changes, then record how much quality improved, and to keep refining the process until it is done right. (Magnier, 1999, p. 2)

Deming's focus on quality and statistical techniques were met with great success and seeing the growing quality achievements he brought to the businesses of Japan, his ideas were re-imported back into the U.S. Companies analyzed their organizations at a deeper level and began looking at the cultural aspects of their business. The quality initiative had a profound impact on management and the assessment of performance and processes.

### *Technological Influence*

In the 1980s technology added a new and growing dimension to the management practices. Hardware and software applications required more planning and implementation for organizations, and the rate of change hugely increased. Companies soon found their need for a faster response to change was needed. Projects ranged from large-scale IT systems implementation, PC deployment, and integration of the Internet. Technology introduced a new element, not only in technical developments, but also in the speed of deployment of the new designs and functions. Organizations were suddenly faced with a new--internal and external--facet of their businesses that had a huge impact and created a fast-changing environment.

### *Evolution of Business Strategies*

Research demonstrated that the evolution of the business world has been the primary driver in the development of strategic planning and organizational development. The factors that drove this evolution were:

- an increased pressure on organizations to change faster and meet challenges of globalization, changing customer needs, increased competition, changes in regulations and technological developments;
- an adoption of the concept that the human and social component of organizations played a large role in impacting change;
- an understanding that various aspects of change were connected, and making decisions grew more complex due to the significance changes had on the entire organization.

#### *Accelerated Change and the Introduction of Organizational Development*

The impact of accelerated change was critical to the evolution of strategic planning to the model we know today. The traditional model of strategic planning was newly perceived to be “too bureaucratic, too measurement driven, and too incremental to ensure that organizations flourish in the torrent of technological, lifestyle, economic demographic and political change today” (Goho & Webb, 2003, p. 379). Brown and Harvey (2006) state that there are three main factors underlying the emergence of OD: “The need for new organizational forms, the focus on cultural change, and the increase in social awareness” (p. 7). It is the changing business environment that has driven the need for an OD perspective in the strategic planning process.

#### *Appreciative Inquiry Discovery*

Appreciative Inquiry was developed by David Cooperrider when he was student at Case Western Reserve University in 1980. The AI approach was born out of his doctoral work, while Cooperrider was performing research based on the question, “What’s wrong with the human side of the organization?” (Watkins & Mohr, 2001, p. 15). Upon conducting his interviews, he was amazed by the level of positive cooperation and innovation in the organization where he performed his research. He found that when he asked questions that helped the interviewees

focus on past successes, their level of energy and enthusiasm was far greater than when he led the interview with problem-focused questions. From this observation, he switched his focus and began analyzing the successes of the organization that he was studying. He labeled this style of questioning as Appreciative Inquiry, and used it as only a footnote in his final report, but quickly the organization saw the value and desired the use of AI as an organizational practice. In his completed doctoral dissertation, Cooperrider presented a set of AI principles, AI logic, and founded the AI phrases Discovery, Dream, Design, Destiny (Preskill & Catsambas, 2006). As the popularity of AI practices spread during the 1980s, facilitators and practitioners began holding AI workshops throughout the world.

*Elements of the Business Discovery and Redesign Model©*

*Strategic Planning*

According to many theories, strategic planning has the following three questions:

1. Where are we today?
2. Where do we need to be...today, tomorrow, next year, three years, etc.?
3. How do we get there?

These elements are described below.

Answering the question of where are we today, a company needs to assess its current market, market share, competitive advantages and values. A market analysis is typically compiled to assess the organization's product or service offerings, their market share, and their competitors. This is a critical analysis to assess why the organization is in business and how it is performing in its industry. Additionally, a key component of this assessment is to determine the extent, capability, and utilization of organizational resources. A values statement is developed by exploring the core values that guide the organization on a daily basis. The values can often be

attained by looking at the principles that drive daily decisions and by assessing the organizations' commitments.

Learning what the company plans to achieve typically explains where the company needs to be in the future. This is often where the organization will develop its mission and vision statements and a set of sustainable competitive advantages. An organization's mission is its core purpose, or the reason for its existence. A well-conceived mission statement defines the fundamental, unique purpose that sets a company apart from other firms of its type and identifies the scope of the company operations in terms of products including services offered and the markets served (Hunger & Wheelen, 2002). The vision statement explains where the company is headed and what the organization will look like in the future. Often it includes a "purposeful action plan" (Olsen, 2007, p. 110). The organization will need to define its superiority in knowledge and skills, its specialties compared to its competitors and its niche in the marketplace. It will also need to assess the capabilities of its resources on hand or those that must be obtained.

The final question of how do we get there is solved by building on the set of objectives and creating a set of strategies or plans that will help the company achieve the goals set by its objectives. "Knowing you'll reach your vision is the meat of your strategic plan, but it's also the most time consuming" (Olsen, 2007, p. 39). Elements of this phase include connecting your mission to your vision, through strategic objectives. Strategic objectives are long-term, continuous strategic tasks that will be performed to achieve the vision. A solid strategy will help determine how the company will get there and typically includes short-term goals and action items. "Objectives are the end result of planned activity. The achievement of corporate objectives should result in the fulfillment of the corporation's mission" (Hunger & Wheelen,

2002, p. 6). The final element within this phase is establishing a measurement tool to track the progress of the plan and to place timelines on the goals to ensure the plan is on schedule.

Traditional elements of a strategic plan all share a general outline of an assessment of the current status of the organization, including strengths and capabilities; an exploration and creation of a vision for future accomplishments, including objectives and goals; and an implementation plan ensuring that the objectives and goals are met, including measurement tools and timelines. As noted by James C. McDavid and Laura R. L. Hawthorn (2006):

Although strategic planning is widely accepted as sound management practice, it is essentially a set of tools that create normative goals for an organization. These goals are statements of what is desirable, what the organization ought to do, and hence, what the members of the organization ought to strive to do. (p. 67)

### *Organizational Development*

OD can play an instrumental role in helping the strategic process become more fluid and evolving, rather than just a one-time snapshot of the business and a single attempt at goal setting. The OD perspective also has its own set of elements. Bob Tannenbaum (Wheatley et al., 2003) states that for years, the field of OD has been identified by basic qualities: it has increasingly focused on human systems at all levels; its basic concern is with systems change; and its practitioners have been guided by humanistic values. These elements are slightly different from strategic planning due to its focus on humanistic values and participative approach. The basic characteristics of OD are the following: change, collaboration, performance, humanistic, systems and scientific. According to Brown and Harvey (2006),

There are many OD techniques, and any individual using OD may rely on one or a combination of approaches. Regardless of the method selected, the objectives are to

work from an overall organization perspective, thus increasing the ability of the ‘whole’ to respond to a changing environment. (p. 4)

### *Appreciative Inquiry*

AI is founded on the basis that the framing of the questions are more important than the answers. Using a positive, collaborative and innovate process, AI begins with intentionally different questions than are typically asked during a probing or brainstorming session. As proven by Cooperrider, the founder of AI, questions are fateful and can alter a conversation simply by the shaping of the questions. AI has eight principles that serve as the foundation for the questioning approach. Cooperrider identified the first five principles in his original work, and later the other three were added by other AI practitioners. The eight principles include: constructionist, simultaneity, poetic, anticipatory, positive, wholeness, enactment and free choice. Although complex in their descriptions, Sue Annis Hammond (1996) summarized the principles by stating:

- In every society, organization, or group, something works.
- What we focus on becomes our reality.
- Reality is created in the moment, and there are multiple realities.
- The act of asking questions of an organization or group influences the group in some way.
- People have more confidence and comfort to journey to the future (the unknown) when they carry forward parts of the past (the known).
- If we carry parts of the past forward, they should be what are best about the past.
- It is important to value differences.
- The language we use creates our reality. (pp. 20-21)

These principles focus on the effects of positive image and positive thinking. From these principles, the 4-D Model was designed to describe each phase of the AI process. Originally, Cooperrider and his colleagues labeled the phases Discovery, Dream, Discovery, and Destiny. These labels have also been adapted by other AI practitioners, choosing to use a different naming scheme that they felt were more descriptive of the four AI phases. For purposes of this research, I will refer to the phases as Preskill and Catsambas (2006) noted:

Inquire: Appreciating the best of what is. This phase focuses on positive reflection of peak experiences. Storytelling and reflection is a large part of this phase of the process. ‘The power of the stories is in the ability to remind us of what success looked like and felt like – to relive the event and the feelings it generated: to remember that we can be successful, things can work, and that we have the capacity to bring life and energy to our work’.

Imagine: What might be? This phase helps participants to develop an understanding of their vision for the future of the program or organization. There is a lot of use of imagery for this phase and, along with envisioning the future accomplishments and successes by the participants, this phase can even include drawing and other creative means of tapping into the imagination of the team. ‘It is important to select a point in the future that is far enough away that people are able to be daring but close enough so that they can see it as a future that builds directly on the actions of the present’.

Innovate: ‘It is during the innovate phase that the participants’ past successes and visions for the future become concrete actionable possibilities -it is when participants recognize how change can occur and what needs to happen to make it a reality.’ This is the phase where participants are able to solidify visions and begin planning for their future. Action

plans and clear objectives are the result of this phase. Often, this is the most difficult portion of the endeavor.

Implement: This is the taking-action portion of the process. The participants will begin to make plans for how they can make their innovative discoveries a reality for the organization. While action is occurring, the process of AI is not complete. In fact, ‘most proponents of Appreciative Inquiry suggest that it is critical to keep the conversation going even after an inquiry has been completed.’ It is a time to celebrate the work that has been accomplished, but it is also a time to plan for continual follow-up and a revisit of the program. (pp. 15-26)

AI incorporates many types of conversations and enhances a team’s sense of connection with the participant’s work, their colleagues, and the organization. Storytelling helps them gain confidence, and think and act more creatively to seek change that brings “satisfaction, hope, and joy to work. As a result, the organization becomes more open to becoming a learning organization that is better able to respond to continuous internal and external changes more quickly and successfully” (Preskill & Catsambas, 2006, p. 33).

### *Blending of the Elements*

Strategic planning has been a process that has been used for years in helping organizations focus their efforts and design an action plan for their future accomplishments. As previously covered, OD is an added layer of inquiry and discovery that looks at the organization from a much more humanistic viewpoint and takes into account more factors than a traditional strategic plan. Using an AI technique to elicit a positive-based response, adds a deeper level of inquiry into the process of discovery. The BDRM, using a combination of the three elements, was developed to enhance the strategic planning process and provide a platform for success.

Very little research addressed a combination of the three elements. The literature noted that much of what was once viewed as traditional strategic planning has become mainstream, and many of the practices of OD have also become fairly common in the business world. One mention of this concept was stated by Chris Worley (Wheatley et al., 2003):

Many of the techniques and interventions invented and practiced by OD professionals have been 'mainstream.' Team building is as prevalent in organizations as budget planning. Organization surveys, feedback, and problem-solving meetings are considered a normal part of organization life. The issues and interventions that were once closely identified with organization development are now part of traditional business practice. (p. 6)

From the limitations of the research, it became evident that the BDRM may truly be unique and new to the business world.

### *Lessons Learned*

The threads of many common themes run through the research of strategic planning, organizational development and appreciative inquiry. Many of the approaches and techniques used in the past have proven successful and some have failed. It was important to look at these successes and pitfalls to integrate the lessons learned into the development of the model. The following is a summary of the common lessons learned:

#### *Participation*

The question of whom to involve in the development of change within an organization has long been a challenge for change managers. Traditional methods used input from only upper management and had little to no participation from other staff or team members. Management was also very quick to make decisions, and implementation was a lengthy process. This model

did not result in great success because participation was not felt by the rest of the organization; therefore, it was difficult to get agreement and support from the staff. This model presented a view of management as being autocratic and created a bigger issue of dissention within the organization. Additionally, it limited the scope of the input, which negatively impacted the level of support within the organization.

Research showed that a large number of strategists believe in “getting more people involved and a broader mix of levels to be engaged and contributing to the strategic formulation process” (Floyd, 2002, p. 45). Theorists agree that by involving people at all levels of the organization, the change manager is able to collect a broader base of ideas and can also attain more support throughout the company. Peter Senge (1990) suggests, “We each have our own way of seeing the larger vision” (p. 212). Similarly, gaining input and perspectives from a broader range of individuals, helps to diversify the results of the findings and provides a greater degree of planning, tolerance, and flexibility. Research revealed that participation also helps to achieve a greater level of commitment by the stakeholders, which is helpful for implementation and sustained benefits (Worley et al., 1996). By engaging all individuals, it reveals the importance of treating individuals with understanding, respect and acknowledging the power of the individual. It is anticipated that this inclusion and broadening of the sphere of individuals included in the process of change will enhance a company’s shared vision (Floyd, 2002). Although inclusion may require more time for discussion, debate and consensus, the real advantage of this approach is that having achieved a shared focus of the future, the time to implement is reduced significantly because there is much less resistance and fewer surprises once implementation starts.

OD emphasizes participation and involvement of organization members in all phases of the process. As Kathleen Dannemiller states (Wheatley et al., 2003),

The driving force of my personal work in organization development has been to help every voice heard. How we do that is always different, but for me the method has been to work with microcosms of the organizations, get them listening to each other in a way that brings out each person's truth and accepts it as truth, then combine yearnings of everyone into a compelling vision of where we need to be going together, and then to come up with our own answers as to what will get us there. Probably the most important truths for me are encapsulated in that statement: Let every voice be heard and each person's truth be true. (p. 10)

Using a collaborative approach is stressed with OD and encourages involvement and participation of the organization members most affected by the changes. Supporting this OD philosophy, AI is a participatory experience that relies on the input of all individuals. AI uniquely focuses on being highly participative to stimulate vision and creativity, and to accelerate change. Supporters of AI hail the inclusive process because it generates an opportunity for people to be heard, and it enables them to be positive, dream, and contribute.

#### *Whole-System Analysis*

Research also revealed that strategic planning and redesigns of organizations were at one-time heavily focused on implementing change based solely on the financial status of the organization, with little to no regard for the social or individual contribution to the business. Change managers looked at financial statements, Return on Investment (ROI) reports, etc., and made decisions based on financial data alone. Without looking at the whole picture--people and processes--chances at a successful change were limited, and support for the plan was weak. Financial data

is an important part of an organization's analysis, but other prominent and underlying factors play critical roles. Overlooking these key points is viewed as a pitfall.

Another downfall was when change managers relied on bad information or no information which resulted from untested assumptions and hunches. This led an organization to make decisions on what might be occurring within the organization, rather than taking the time to clearly understand the real issues. Equally as concerning, was when change managers ignored what the plan revealed. While many companies did the research and investigation, change managers were not willing to look at the results realistically because the outcomes were not anticipated.

The use of organizational development to provide a more holistic approach to the diagnosis phase is valuable to ensure a whole-system approach. Identification of areas of improvement is critical in the data-gathering phase, and it must include more than just a financial snapshot. By incorporating an OD perspective, the analysis of "structure, administration, interaction, procedures, interfaces and other essential elements of the client system" are reviewed (Brown & Harvey, 2006, p. 127). OD relies on valid information about all elements of the problem or organization through two primary areas of analysis: the components of the organization (divisions, departments, products, and the relationships between them) and; the organization processes (communication networks, team problem solving, decision making, leadership styles, goal-setting methods, and the management of conflict). A systematic approach to understanding and describing the present state of the organization will help to find the underlying issues and lead to the selection of a more effective change strategy.

The AI process ensures a complete analysis of all of the organization data. While AI focuses on positive reflection and storytelling, it is not unwilling to look at the problems that also exist in

an organization. Issues and challenges are not ignored or denied in the process. The purpose of AI is to change the focus of the language and focus from “one of deficits to one of hope and possibilities based on what has worked in the past” (Preskill & Catsambas, 2006, p.26). AI opens the creative minds of the participants and helps to find data and experiences that are outside of the normal line of probing. The traditional problem-solving approach may be effective in some contexts, but AI’s approach helps participants to look at their experience in particular areas and discover the times and occurrences when things were going well. According to Preskill and Catsambas, “Appreciative Inquiry takes a whole-systems approach in which it perceives the context as a dynamic set of relationships and flows of information and resources” (p. 45).

### *Purposeful Planning*

With the wave of strategic planning activity during the 1980s, organizations lacked the ability to carve out their individualized ideas and relied too heavily on off-the-shelf strategic planning models and plans. Planners took advantage of this opportunity, and began selling their services to handle a myriad of issues and challenges for companies. Sometimes this overzealous industry found itself planning for the sake of planning. This often resulted in poor decision making and feeble execution. Companies did not put enough time into strategic planning, the jobs were rushed, and the finished product lacked clarity. J. David Hunger and Tom Wheelen (2002) agreed that too many decisions were being made with poorly planned changes in mind. “They cannot make decisions based on long-standing rules, historical policies, or simple extrapolations of current trends. Instead, they must look to the future as they plan organization-wide objectives, initiate strategy and set policies” (p. 2).

Part of purposeful planning is associated with understanding the most common reasons for organizational change. Research showed that the causes or reasons for developing a strategic plan are practically limitless but can be arranged into four basic categories: a transition into a global economy; industry, market or competitive changes; poor organization or business performance; and internal or stakeholder initiatives. As noted by Worley et al. (1996), poor performance within an organization was the most common catalyst for change, whereas high performance is an inhibitor to change. Research showed that change within a low-performing organization can be more difficult because the resources required for change are not available or not afforded.

OD and AI are both structured to develop an organizational climate that is appropriate to the organization's mission and members. OD seeks to open the lines of communication to promote interacting, relating and problem solving in a comfortable and open environment. Analysis and probing are conducted with a planned systematic approach.

#### *Summary*

A valuable element of research was to heighten a thorough understanding of the three components – strategic planning, organizational development and appreciative inquiry. The literature provided a look at the historical development of the philosophies and techniques and valuable lessons learned. By researching these topics, their complexities, similarities and differences, I had the information to move forward with developing the methodology section that would focus on the assessment of the model.

## METHODOLOGY

My project was to assess the effectiveness of the customized BDRM that was developed to meet the needs of ETC, in its effort to establish a new direction for the business. The model combines traditional strategic planning processes with an emphasis on using organizational development practices. The workshop and research questions were framed using appreciative inquiry techniques. ETC, which is the participating organization for the workshop, consists of four owners and two employees (see Appendix A, organizational chart). The primary owners are women and while they play a critical role in the leadership and strategic direction of the organization, their daily efforts are spent primarily outside of the business. The other owners are the major decision makers in the organization and drive the day-to-day operations. The two employees are Program Managers and were not owners at the time of this research project.

To fully comprehend the methodology, the findings and their relevance to the research, it is important to be familiar with the workshop and some of the elements. The workshop was conducted in Raleigh, NC in early November 2007. The participants were introduced to a basic overview of strategic planning and organizational development, and emphasized the goal of helping them develop a new business strategy and direction. Appreciative inquiry concepts and philosophies were explained and an ice-breaking exercise was used to demonstrate the ease in which AI framed questions can result in very meaningful reflections. The workshop questions helped the participants to ponder and share their individual values, goals, and desires for the organization. Participants were encouraged to take notes, and retell the stories and input what they heard from others in the workshop. Ideas were written on the whiteboard and were collectively formed into corporate values and goals. The model featured equal occasions for all

members to participate and offered learning opportunities for the individuals as well as a method to develop organizational goals and objectives.

In order to collect sufficient data to gain the most valid insight into the participant's viewpoints of the workshop, I selected a qualitative research method. I received permission from ETC to perform the research project, including involving the owners and employees in the process. I conducted interviews with the five workshop participants. Furthermore, I used AI-framed questions to engage the participants in personal, in-depth interviews to gain personal reflection of their experiences in the workshop. The questions were posed to the participants two weeks following the workshop to allow an opportunity for the members to ponder the experience before posing their answers. By using a personal interview scheme, I was able to capture individual perspectives and private recollections that added to the overall assessment of the workshop and soundness of the research.

### *Method*

I selected to use a qualitative research design because it offered a framework that best fit my research task. Qualitative research is a study method of social or human problems with the intent to answer a problem or question or to gain a new insight. Qualitative research looks at the human aspects that drive decisions, perceptions, beliefs, etc. and takes those phenomena and tries to find trends and summaries, based on the human lived experience. The inner human layers that are difficult to count, measure or capture, are explored, examined and better understood by using this approach. As noted by Catherine Marshall and Gretchen B. Rossman (2006), qualitative research “is a broad approach to the study of social phenomena. Its various genres are naturalistic, interpretive, and increasingly critical, and they draw on multiple methods of inquiry” (p. 2). It is the essence of the human, lived experience that is valued within qualitative research.

The customized BDRM is unique and I was interested in learning if it is a good fit for ETC and other small businesses with similar interests. For this reason, it was the scheme that was best aligned with my project.

### *Research Approach*

Qualitative research can be categorized into different types or approaches. All approaches include a level of inquiry and data collection in a natural setting, but it was important for me to define my approach to ensure that my data was collected, analyzed and interpreted appropriately. The research approach that I selected to use for this project was a basic interpretative approach, using in-depth individual, narrative interviews. A basic interpretative qualitative approach “is used when the goal of the researcher is to understand how participants make meaning of a situation or phenomenon” (Imel, Kerka & Wonacott [Imel et al.], 2002, p. 4). This approach allowed me to serve as the filter of the data to draw the meaning, “using inductive strategies with a descriptive outcome” (Imel et.al, p. 4). Additionally, this approach allowed me to collect the data, building on the theories and concepts uncovered during the interviews. By incorporating a descriptive inquiry facet to the basic approach, I was able to integrate narrative accounts from the participants (Creswell, 2003). It provided a complex textual description of the participants’ experience in the workshop and helped to identify intangible factors that may not have been apparent otherwise. Through this approach, I gained additional data about the model’s applicability to other small businesses, by allowing the participants to freely tell their stories in an open dialogue.

I considered other methods, including case-study and phenomenological research. Case study explores an in depth program, “an event, an activity, a process, or one or more individuals” (Creswell, 2003, p. 15), but is bound by a specific time and activity. This seemed closely related

to the type of research I selected for my project, but it was too specific and the time constraint would not suffice for the reflective nature of my narrative inquiry. Equally, phenomenological research, seemed similarly related to my project, but it “involves studying a small number of subjects through extensive and prolonged engagement to develop patterns and relationships of meaning” (Creswell, p. 15). While phenomenology was a possibility, it still did not supply a method of study that offered the level of depth into the viewpoints of the participants that I was searching for in my research because it focused too heavily on the patterns and relationships, not the individual’s account of an experience.

By using a basic interpretative approach, with a narrative style of inquiry it helped to “add depth and evocative illustration” to my qualitative study (Marshall & Rossman, 2006, pp. 116 - 117). As Marshall and Rossman suggest, these methods “should always be used with the understanding that observation and interviewing are the primary data collection methods for discovering context-laden patterns and understandings” (p. 114). Research showed that this method would be valuable in capturing the depth and personal perspectives, opinions, and insights that were necessary to fully evaluate the effectiveness of the workshop and its applicability for other small businesses.

### *Research Design*

For this research project, I employed a methodology that included individual, narrative in-depth interviews. Upon completion of the business discovery and redesign workshop, I individually interviewed the five participants to collect data regarding their experiences during the workshop and explored their perspectives for future application of the workshop in other business settings. I arranged for the data collection to occur two weeks after the workshop to allow time for reflection on the experience and for the participants to develop a thorough

assessment. The questions for the interviews were framed using an AI style, which were open-ended in a semi-structured environment. This approach let all voices be heard, recorded, and assessed as part of this research project.

### *Data Collection*

#### *Population*

*Criteria for selection.* The criterion for selecting the participants for the individual interviews was that they must be participants at the business discovery and redesign workshop, which was conducted at ETC's facility. The BDRM was created with ETC in mind, and it seemed a natural criterion to use the members of ETC's team as the participants for the individual interviews. Using these participants helped me to capture the data that I needed to assess the model and its application. According to Marshall and Rossman, (2006), "decisions about sampling people and events are made concurrently with decisions about the specific data collection methods to be used and should be thought-through in advance" (p. 65). All five members of ETC's team were present during the entire workshop. They were not selected based on race, gender, or age.

*Process for sample selection.* When I selected the participants for my data collection, I used the convenience style of sampling. Since ETC is a small organization, I had a prime opportunity to include all workshop participants in the field of study.

#### *Instruments*

*Demographic survey.* In addition to the individual interviews, I developed a demographic survey to impart an additional set of data about the participant's profiles. The demographic profile survey allowed me to ask the participants a list of questions that pertained to their level of education, years of employment, and their knowledge of strategic planning,

organizational development, and appreciative inquiry. It offered new data that might not otherwise be known from my daily interactions with the participants or through the individual interviews. It was helpful for me to incorporate this data into my overall analysis. I developed a Participant Inventory Form (see Appendix B) that each participant completed, prior to the individual interviews. According to Sharan B. Merriam and Edwin L. Simpson (2000), “In addition to the basic criteria for developing questions – focus, clarity, and supplying appropriate alternatives – it is important to be aware of the general socioeconomic cultural backgrounds of participants” (p. 148). The data from these forms was transcribed and added to the Demographic Profile, Table 1.

*Interview schedule.* I developed a list of open-ended, AI framed questions (see Appendix C) used for the individual, narrative interviews. The questions were sent two-weeks following the workshop to allow time for the participants to ponder their experience and develop a strong recollection of the workshop components, occurrences, perceptions, etc. It was my intent that these interview questions would create a medium where the participants could express their viewpoints and analysis of the workshop to include their recommendations for improvement of the model to better suit other small businesses. By allowing two-weeks of time to pass, I felt it provided enough time for reflection, but not too much time to forget the details of the event.

#### *Setting of the Individual Interviews*

The research participants all lived and worked in Raleigh, NC, which placed them a far distance from me in Anchorage, AK. I traveled to Raleigh, NC to conduct the workshop, but all of my research was completed from my Anchorage, AK location. Prior to the start of the interview phase of the research, I distributed the Informed Consent Forms (see Appendix D), via

email, to each participant. I requested that they be reviewed, and if agreeable, signed by each participant and return to me, via a scan and email method. The Informed Consent Forms notified each participant with a general statement about my research project, and advised them that participation was voluntary. Additionally, I alerted them that their identity would be held in confidence, even if the research resulted in publication. I received signed, Informed Consent Forms from all participants prior to the start of the interview phase.

Additionally, I distributed the Participant Inventory Form (see Appendix B), via email, to each participant. I requested that the form be reviewed, completed and signed by each participant; then sent back to me with their individual interview responses.

Participants for the individual interviews were contacted, via email, on an individual basis, throughout the interview phase of the research. Approximately two weeks after the completion of the workshop, I distributed the Individual Interview Questions (see Appendix C) to each participant, via email, with a set of instructions noting that they had one week for completion. I encouraged the participants to consider each question carefully and to provide a written response with as much detail as possible. Since I was remote from the participants, it was more effective to use a written format for their answers. This method of interviewing presented the participants with a comfortable, non-intrusive setting to review the questions, consider their answers and develop their response to the questions. Additionally, it allowed for ease in my transcription, since their answers were presented in written format.

Approximately one week from the time of distribution, I received all of the written responses to the interview questions and the Participant Inventory forms.

### *Confidentiality*

The process I used to ensure confidentiality was to assign each participant an anonymous title (A, B, C, etc.) so that names and identities were concealed. All data collected during the individual interviews was transcribed and maintained by me and held in confidential status. At the conclusion of the research, I destroyed and erased all material (emails, notes, etc.) that identified individual participants. The final research document is maintained at the Alaska Pacific University business office and a copy is also in my possession.

### *Participant Profiles*

The following is a list of participants and the information documented in the Participant Inventory Form (see Appendix B).

- Participant A: 60+ year old female, employee/owner eight years; high school graduate with no SP, OD or AI experience.
- Participant B: 40-49 year old male, employee for three years; college graduate with a Bachelors degree with no SP, OD or AI experience.
- Participant C: 40-49 year old female, employee/owner six years; college graduate with a Bachelors degree with some SP and OD experience; and no AI experience.
- Participant D: 40-49 year male, employee/owner six years; college graduate with a Masters degree with some SP and OD experience; and no AI experience.
- Participant E: 60+ year old female, employee/owner seven years; high school graduate with no SP, OD or AI experience.

### *Researcher Statement*

I am employed by ETC, as a full-time Senior Program Manager. At the start of this research project, I had worked for ETC for over six years and had known the owners and members of the

team for more than 25 years. We have a longstanding respect for one another and have a close friendship. I was honored to be entrusted with the responsibility to help ETC with this business discovery phase and to help the organization with a redesign to create new strategies for future success. It was my intention to do my very best to develop and deploy a model that would bring about change using a fresh and unique approach.

Although I was an employee of ETC, my role for this project was strictly as a researcher and facilitator of the workshop. I considered being a participant at the workshop, but I did not feel that it would be beneficial for me to mix my roles. It was more important, as a facilitator, for me to be objective and to keep the workshop on task and to help draw the creative thoughts and ideas from the participants. Although I was not able to add my personal opinions and inputs to the workshop, I was dedicated to the project, and thus opted to forego my involvement on a participatory level. I was secure, knowing that the management team would develop a new focus that would be dynamic and inclusive of my talents and skills. Once the workshop and follow-up interviews were complete, I returned to my role as an active contributor to the organization and joined in the planning and implementation phases.

I have biases in the areas of strategic planning, organizational development, and appreciative inquiry. Prior to my literature review, I viewed strategic planning as a process that was well founded and could provide a good starting point for this project, but I felt it was too static, which is why I chose to include an OD perspective. I had completed a course in OD and its application to a small business seemed to be a good fit. I was committed to using an OD approach for this project, knowing the importance it could bring to helping an organization tackle change. Additionally, I knew that this project would allow me to gain a deeper understanding of the perspective and experience of using it in a live setting. I had also participated in an AI exercise

and learned, first-hand, the value that AI framed questions can bring to a problem-solving process. I felt that AI would be a new approach to strategic planning that members of ETC's staff would embrace. I searched for research where these three perspectives were used in a small business environment, and I could not find any information.

My bias is that I believed this was a unique model that would provide great success during the workshop and would help ETC meet its refocus goals. I also believed that it could be applied to other small organizations that are looking for an innovative process to help them discover new strategies for future success. I approached this research as objectively as possible and I thoroughly enjoyed the entire process.

#### *Data Analysis Procedures*

To analyze the data collected during my research, my goal was to “bring order, structure and interpretation to a mass of collected data” (Marshall & Rossman, 2006, p. 154). This was the most challenging component of my research since there was not a set direction for this analysis. I developed procedures to address the data as objectively as possible and to find the themes that resided within the participants' contributions. To perform this task, I used the Data Collection Summary Form (see Appendix E). This form aided in the organization of the data to help me explore the topics and common elements of the data collected from the individual transcripts. To conduct the analysis, I used the following protocol:

- (1) I read and re-read the transcripts from the individual interviews. I read them first, in order to become familiar with the data provided by the participants. As I read through the transcripts, I made notes in the left-hand margin to begin to find similarities and differences in the data.
- (2) I created a Data Collection Summary Form (see Appendix E) and transferred the transcript data, noting a separate column for each participant's interview notes.

- (3) Using the Data Collection Summary Form (see Appendix E), I read the transcripts again to find similarities and differences in the data, using a color coding scheme that is broadly consistent for all types of interviews. This was extremely helpful to uncover multiple themes and determine which ones were the most prominent and provided the most supporting data.
- (4) Next, I paired down the themes to a manageable number (six or fewer) and found quotes from the participants that were helpful to support my understanding and findings.

### *Validity and Reliability*

According to Marshall and Rossman (2006), my research needed be checked for proof of credibility and trustworthiness (p. 200). To do so, they suggested four tests; credibility of my findings; transferability of my findings to a new setting; the ability for my test results to be replicated; and a true representation of the participants' views. I addressed these criteria for the validity and reliability of my research project below.

#### *Credibility of Findings*

My research was conducted with the primary interest in evaluating the effectiveness of the BDRM, as presented in the ETC workshop and assessing the model's applicability to other small businesses. I developed my project purpose and overview in advance to set the parameters for the research project. I researched the topic to learn about strategic planning, organizational development, and appreciative inquiry to become more familiar with the elements selected for the model. I presented my research methodology to the Institutional Review Board (IRB), at Alaska Pacific University, to ensure that my research was reviewed using an external review process. I received the IRB's approval prior to the start of my research. Care was taken to select appropriate participants, create a sound process for conducting interviews, and to transcribe the data. I sent a copy of each transcript back to each participant for their review and to ensure that

my transcription was accurate and complete. My conclusions and discussions were compared to the literature review for additional credibility.

### *Transferability*

These findings are applicable and useful to other groups or people in different settings. If I applied the same criteria of research to a different set of people, I believe the process could be easily transferred to another organization, but I would not expect the same outcome of values, mission, objectives, or action items. Each organization may have its own strategies that result from the workshop and the research, but the process can be easily transferred to another group of people. I learned enough about the topic and used participants that reflected a mix that could be replicated again in a new group of participants or organizations.

### *Test Replication*

Based on the data provided in this research paper, my tests could be reproduced with a different group of people if I replicated the criteria of the selection of the participants, the demographics, questions asked, and the thematic elements of the research process.

### *True Representation of Participants' Viewpoints*

The interpretations made during this research process make sense and could be replicated by someone else analyzing the same data. Research conclusions are drawn based on analysis of the research using a qualified analytical process. I limited my bias by stating my viewpoints on my topic and participants in the Researcher Statement section.

Limiting subjectivity and documenting the process for data collection and analysis helped provide assurance that validity and credibility are encompassed in this research task.

Additionally, by using multiple sources of data it helped to validate the findings from the

individual interviews. A cross analysis of all sources assisted in the corroboration of my research findings.

## FINDINGS

The purpose of this research was to determine the effectiveness of the BDRM and to identify whether or not the model would be applicable for other small businesses. A total of five interviews were conducted with all participants from the workshop. A demographic profile for each participant is noted in Table 1.

Table 1  
*Demographic Profile Table*

	Participant A	Participant B	Participant C	Participant D	Participant E
Age	60+	40-49	40-49	40-49	60+
Gender	M	M	F	M	F
Number of years employed by ETC	8	3	6	6	7
Highest level of education	High School	Bachelors	Bachelors	Masters	High School
Experience with strategic planning and OD	None	None	Some	Some	None
Experience with AI	None	None	None	None	None

The following is a general discussion of the five main themes found during my research project. The discovery and analysis of the themes is a result of finding similarities in the accounts and opinions of the participants in my research. This analysis shares the themes and elements, along with pointing out possible areas for future research, using excerpts from the transcripts to support the findings. The themes are summarized in Table 2.

Table 2  
*Findings Theme Summary*

New Approach to Strategic Planning	The workshop model offered a new approach to strategic planning that featured activities and insights that the participants had not experienced in prior planning sessions.
Value of Participation in the Discussions	The element of participation was a resounding theme. It allowed the participants to contribute, to feel valued and to be heard.
Learning from Others through Active Listening and Personal Reflection	The role of active listening and deep reflection allowed the participants to learn more about themselves and others during the workshop.
Renewed Commitment to Self, the Team and the Organization	Participation in the workshop resulted in a renewed sense of understanding and commitment amongst the individuals, the team and the organization.
Critique for Using the Model in other Small Businesses Settings	The time allotted for the workshop was too short. Additional time and activities would be helpful in the future use of the model for other small businesses.

*Analysis of Findings**New Approach to Strategic Planning*

Participants expressed that this model offered a new approach to strategic planning, featuring activities and insights they had not experienced in prior planning sessions. Many of the participants expressed excitement and a renewed interest in the format of the model. They shared that they enjoyed a fresh approach to strategic planning, and they felt this model allowed them to explore new ideas in a comfortable setting. When asked to recall a time in the workshop when the participants felt the workshop was working well, Participant C stated:

At the beginning of the workshop when you asked us to split into teams and then tell a story about an experience. That was when I knew this would be a different kind of strategic planning session, and it peaked [sic] my interest.

The participants agreed that the exercise at the beginning of the workshop helped set the stage for the format and flow of the rest of the day. This exercise helped them to understand the type of questioning and reflection that would be included in the model. Participant D noted:

I enjoyed the exercise where we were broken up into two groups and to recall a vacation. The first group was asked to describe the vacation in a pro-con type format where the other group was asked to describe the vacation listing only the best experiences during the vacation. When we were asked to describe our experiences to the other group, it showed that it really does matter how a question is phrased to the type answer you will get.

During the workshop, the team members also found that the new approach helped them to feel optimistic and hopeful for the discussions would bring about change for ETC. Participant E found the tools used during the workshop were also helpful for some challenges within his personal life. He stated:

The design of the model very effectively pulled everyone into serious discussions, brainstorming, ideas and planning. All the skills learned from participation in the workshop will be helpful in other situations and I have had an occasion to use them in a personal situation facing me and my family.

Participant B said:

I very much enjoyed the way the model was presented. It made all of the participants come together and analyze the opportunities which lay ahead but also brought out the challenges that must be overcome in order to become successful. I very much intend to use this approach in future discussions with team mates or in my personal life.

It was evident in the findings that all the participants understood the expectations of the model and felt certain that it was going to provide them with an opportunity to discover something new about themselves, others and the organization. Participant C summed it up by adding:

I like the Collective Model as it made it easier to relate to. It was not a dry session like most strategic planning sessions are.

#### *Value of Participation in the Discussions*

Participants felt that the elements of participation and inclusion were successful components of the model. Workshop members used the term “participation” commonly throughout the transcripts and noted it as a key highlight of the workshop. They felt that participation allowed them to feel valuable to the discussion and provided a method for being included in the session. They recalled their enthusiasm experienced during the workshop. Noting her excitement,

Participant E stated:

I thought all of the activities worked well to promote new ideas and good discussion making it exciting. I liked how it was geared to get everyone to participate, and that made it effective.

Participant A added:

I feel that my sharing of present and past, positive experiences added value to the workshop.

In addition to their ease of participation, they also expressed an emotion of feeling valued and appreciated by others in the group. They expressed a high level of comfort and acknowledged

that the forum encouraged them to contribute to the discussions and to learn from others.

Participant E summed up his experience by saying:

The value I contributed to the workshop was being there and actively participating with the other owners. I valued and learned from each person's input, ideas, discussion, stories, etc.

Participant C discussed the reluctance she had in the past to open up, yet her willingness to do so in the workshop setting. She spoke candidly by stating:

I was glad I had the guts to open up and talk honestly about this topic to the group. While [Participant D] knew I was uneasy, I had never brought it up to everyone."

The participants also expressed that participation helped to increase their level of commitment to the workshop and to finding new goals for the organization. Participant D added:

I thought the model is a very effective tool for extracting values, strengths, weaknesses, and opportunities in a way that allows for active participation by all parties. This method ensures participation and commitment of the participants in a way that truly explores the culture and value of the organization from the collective values of the company's leadership.

Participation also played a role in helping the participants feel that their input was validated by others. They felt that their ideas and contributions were heard by others. Participant A stated:

Those experiences, as well as everyone else's, helped to generate a feeling of togetherness and well being shared by all concerned.

As well, as Participant C who noted:

It was nice to be validated by [Participant E] and then to be 'heard' by the guys.

Participant B added that along with validation, he recalled that his contribution may have also added an element of persuasiveness. He stated:

Letting people hear some of my points of view on key topics may have changed some of the other participants' way of thinking.

*Learning From Others Through Active Listening and Personal Reflection*

A common element in many of the transcripts was that active listening played a large role in their ability to learn new ideas and gain new insights into the values and opinions of others. They also expressed an appreciation for the use of reflection and retelling of stories to reveal some deeper personal beliefs. The merit of active listening was expressed by Participant D when he noted:

I think the workshop caused everyone to practice active listening because we were required to take notes while others were talking and we were looking for specific words or phrases that the speaker used. This ensured that everyone listened intently to everyone else plus, as we reflected and discussed each other's stories more perspectives came out of these discussions.

Active listening also encouraged the team to hear their own contributions be retold during group discussions, which supported their confidence in knowing that their input had meaning for others. Participant E added:

We were all taking notes and I noticed when my points were brought up by others during discussions.

The participants found that listening to others allowed them to learn more and apply what was learned to activities later in the workshop. Participant B supported this finding even though it had been awhile since he had practiced active listening. He expressed:

I think we were all well heard. I thought it was enlightening to hear each person talking about themselves. It was obvious that others were paying attention by actively listening; taking notes and then reflecting back to various points in later conversations.

Active listening played an important role in helping the participants gain new insight on topics that were relevant to the business strategies being discussed. It also demonstrated that they found value in receiving information from others as much as their own contributions.

Participant E recalled:

It was a good experience for all of the owners to share in the discussions together and hear each other's input and ideas. I can say that all participants learned new things about each other during the workshop.

Along with the active listening component of the workshop, participants noted the value of personal reflection and the retelling of experiences. Reflection is a key component of AI, and the findings demonstrated that it was common that the recalling of feelings, events and experiences helped the group to learn more about one another and gain knowledge that was important to provide a strong basis for ETC's new plan. Participant A summed up the frequent theme of reflection by stating:

I felt that the entire workshop went well, starting with the exercise describing a memorable vacation. This was definitely an ice breaker and got the thinking process going. But, the exercise where each person described what they value the most in regards to themselves and the organization worked really well. I felt it was effective because it revealed things about each other that were not evident before. It was refreshing to see how we all can meld together to make our company successful.

Participant A also added:

I thought every topic was relevant to my work for ETC. It made me think hard about the job I'm doing and reflect on ways to improve not only myself, but the company also.

Participant D noted that the reflection and recalling of experiences added a level of positive energy. He remembered:

I think there was a lot of value in the stories that we each recalled and the positive energy these stories evoked.

### *Renewed Commitment to Self, the Team and the Organization*

Taking part in the workshop resulted in a renewed sense of understanding and commitment to the individuals, the team and the organization. This new commitment was expressed in many ways throughout the transcripts. The participants shared that they felt that this process gave them a fresh look at themselves and others to better understand the meaning and foundation of ETC and its goals for the future. Participant A recalled that the model was effective in helping

him to explore the goals and values of ETC through open discussion and participation. He recalled:

It [the workshop model] definitely encourages thought and commitment from all parties involved. The values of the owners and employees were very evident based on the outcome of the session.

Participant D added:

I recall the exercise where each person described what they valued the most about themselves, the organization, and their work in the field. It helped me to understand that each person has unique skills and strengths and this diversity is what makes the foundation for our company strong. It was effective because each person discussed their values at a personal level and this was exciting, inspiring and very effective because it caused me to realize that our company's values are made up of our collective values.

The workshop allowed each participant to gain a better understanding of the complexities of strategic planning and learn the depth of information that is required to set goals for future success. This was expressed by Participant B as:

The entire session really made me understand the process that organizations must go through from time to time. It is not just a matter of stating what the direction for the company will take as there are cause and effect issues that must be resolved during the entire process.

The workshop allowed the participants to look within themselves and the business to understand the role that they played in forming a new strategic direction for ETC. Participant E expressed a level of excitement in working through the business redesign. She shared:

As an owner, the part of the workshop on Strategic Planning Elements was exciting and interesting as we discussed ideas for setting new goals for the company.

And, Participant D shared his level of commitment and enthusiasm by stating:

I felt that all of the topics were extremely relevant to my work with ETC because as an owner, senior manager, and a decision maker I am responsible for setting the strategic direction for the company and ensuring that we stay on course to achieve our strategic goals.

It was common throughout the findings for the participants to share their renewed commitment to the organization. Participant A summed it up by adding:

It's so easy to disregard, or forget, doing the things that make a company successful. But, when I think about the comments regarding team spirit and commitment from every person in the room, it brings me back to the task at hand.

*Critique for Using the Model in Other Small Businesses Settings*

When asked to provide input for the future use of the model for other small business strategic planning sessions, there was consensus that the structure of the workshop needed some rework. While they felt that the model, activities and outcome were extremely valuable, they all felt that the time was too short, and all future workshops should be spread over several days to get the full impact of the session. Participants felt that more time could have been spent on additional activities and breakout sessions, with Participant D adding that homework could be assigned. He stated:

One day is too intense for the workshop to be effective. I would recommend at least two days for the seminar so that people have a chance to absorb and reflect on the day's activities; there could even be a group assignment for the evening to prepare for the next day's session.

It was agreed that a two- or three-day session should be proposed for future use of the model. Additionally, the shortened timeframe of the workshop did not permit the completion of the strategic plan, and many participants expressed a need to see it finalized in future sessions.

Participant C noted:

I would also capture the next steps and roles and responsibilities for those next steps before the workshop is over.

She also added that she would like to see a large workspace and a printable whiteboard. The findings showed consensus in the effectiveness of the workshop but a need for some additional

time spent on the activities to allow time for reflection on the new insights gained. Participant A summed it up by stating:

I would like for the final result of the workshop to include a viable, working strategic plan that would also include an accepted vision and mission statement. We would then be able to 'hit the ground running' as we progress to the next step of making ETC a successful company.

## DISCUSSION AND CONCLUSION

In the preceding analysis I identified the common themes that were found in my interviews with the participants of the workshop. Using the interpretative nature of qualitative inquiry, I gathered the participants perspectives and used the data analysis methods discussed earlier to produce a synopsis of their input. By using an AI style of framing the interview questions, I was able to capture the data that pertained to the question, but I also encouraged the workshop participants to use reflective thinking to derive their answers. Their answers were commonly similar and where diversity was found, it was minimally unique. From this study, I determined that the BDRM used during the ETC workshop was effective for helping ETC to begin the process of strategic planning with the intent to redesign the focus of the business and expand its client base, but it fell short in bringing closure to the plan. The time allotted for the workshop was limited, and this greatly impacted the ability for ETC to develop a complete strategy for the organization. A comprehensive plan--including a vision, mission and strategic objectives--was needed as an outcome of the workshop, and it did not achieve this goal, in its entirety. While the model was found to be highly effective, the ability to help ETC develop a whole plan was not attained. The need for an inclusive plan is supported in the literature review and sustained in the data I collected. Worley et al., (1996) noted,

Strategic management requires persistent leadership. This is particularly true for changes that require perseverance and cover a long time frame. Without someone expressly responsible for watching over the strategic effort and keeping it going, it is likely to take a back seat to short-term demands. The strategic leader must continuously shepherd the process and ensure other leaders do likewise. (p. 131)

It will be essential for the management team to continue to champion the charge to ensure that the BDRM is completed and their success is realized.

Organizational Development played a key, value-added role in the strategic planning process for the ETC workshop. As stated by Worley et al., (1996), “when a firm incorporates the OD perspective into the strategic management process, a more integrated approach to strategic change results” (p. 10). Traditional approaches to strategic planning are focused on content. By incorporating the OD perspective into the model, I was able to capture the essence of the values and opinions of the individuals. In a small business setting, the individuals play a larger role, and it proved effective to use an OD influence on the overall concept of the model. OD helped the participants become more familiar with one another and to plan and to predict how the changes to the organization would be attained. Prior to the workshop, they understood what needed to change but were limited with finding the time and the model to work through a planning session. The workshop supplied the participants with an instrument to familiarize them with the values, knowledge, requirements and passions of each individual that will process the change. As Worley et al., (1996) summarized, adding an OD perspective clearly provides a dramatic shift in the firm’s environment, but through a reality-based “highly participative process that is owned by the various stakeholders” (p.17). The use of OD within the ETC model was highly successful and will be a requirement for future sessions and workshops with other small businesses.

I am also thrilled to surmise that the utilization of the framing techniques of AI provided an ideal framework for the workshop promoting a high level of participation, reflection, appreciation, and renewed commitment to the organization. There was stark consensus amongst the participants that the fresh approach to strategic planning was a welcomed change to the

methods they had previously used. This was consistent with my goal for the session and validated that the integration of these strategies helped move them from a blank slate to a point of clearly identifying ETC's new direction. As noted by Cooperrider (2001),

AI deliberately seeks to discover people's exceptionality – their unique gifts, strengths, and qualities. It actively searches and recognizes people for their specialties – their essential contributions and achievements. And it is based on principles of equality of voice – everyone is asked to speak about their vision of the true, the good and the possible. Appreciative Inquiry builds momentum and success because it believes in people. It really is an invitation to a positive revolution. Its goal is to discover in all human beings the exceptional and the essential. Its goal is to create organizations that are in full voice! (p. 12)

I believe that AI helped to open up a meaningful dialogue between all team members, and while it is possible that similar information could have been obtained using non-AI worded questions, this style helped make it easier for the participants to thoughtfully and openly share what had worked for them in the past and what they hoped for the future. When speaking about personal values and desires, AI clearly helped provide a comfortable setting that resulted in a higher quality of data. Using AI offered freshness and a new basis for gathering information that I had hoped to attain. It was truly exciting for me to see my plan for an innovative approach prove to be so valuable for ETC. This research validated that using AI questions during the workshop must be preserved for future sessions with ETC and other small businesses. Because of the profound impact on the participants and the outcome of the workshop, AI must be put into practice in future sessions.

Consistent with the data, it was evident that the time allotted for the workshop was not enough. While there was a great amount of information presented, discussed and documented, the process lacked optimum quality by being rushed and squeezed into a one-day session. The process takes time for thoughts to emerge, to be shared and be recorded and a full spectrum of time was not afforded in such a short timeframe. To accept this argument, I believe the workshop fell short of being totally successful because a comprehensive strategic plan was not developed during the workshop. At the conclusion of the day, there was no opportunity to put closure on the plan, assign responsibilities or even revel in the success of the day's accomplishments. There is clearly an opportunity to improve the workshop by ensuring more time is afforded for the process and that a final product is developed during the session. It was difficult to ascertain how much time would be needed for this small group. It would be helpful to do further analysis of credible material to establish a more suitable timeframe and pace for the workshop. It seems reasonable to think that if more time were afforded and a steady pace of activities were achieved, the workshop would have resulted in higher quality output.

Along with the shortened timeframe for the session, there were some underlying personal concerns that a few members of the team were dealing with. Two of the participants were diagnosed and were receiving treatments for a significant health condition during the time of the workshop and the interview questioning period. I believe that this impacted the overall intent of the endeavor and limited the study. While it is extremely unfortunate and unpredictable, it was untimely in respect to the study. This was especially true since the group is so small and intimate, so the concern for the individuals was heavy amongst the team. My attention was also diverted to concern for their health and well-being, but I knew that staying on task with the project was one of the most helpful things I could do for the individuals and the organization.

After all, if ETC was able to diversify its business into new, more meaningful services, it will relieve the stress and concern for future stability and success in the market. Helping ETC achieve this goal, even during a time of extreme distraction, seemed the best way to spend our time together. During the workshop I believe that everyone stayed on task and put forth his or her very best effort to fulfill the activities of the workshop and provide answers for the interviews, but it did shorten our time together and added an element of distraction during the process.

### *Conclusion*

I was pleased to learn that this process helped to bring this group closer together and to know that I played a vital role in this accomplishment. We are friends, family, and have a very loving relationship within the group, and this process provided a tool for the members to take a deeper look at why we are teamed together and explore the roles that each team member plays in ETC's success. There are clear leaders within the group, and this process helped to level the input and derive equal contributions from all of the members. I believe that everyone gained a higher level of understanding and respect for one another by learning what is significant and meaningful in his or her life and the lives of others. Leveling the input created a unified basis for the strategic plan. I was especially pleased to see the two owners be on par with the more vocal team members and contribute in a very effective manner. All of the team members have a stake in the success of ETC, and it was helpful to witness the strengthening of the team through the process of the session.

There is clearly an opportunity to learn more about strategic planning, organizational development, appreciative inquiry, and all of the components involved in establishing a new model to be used in a small business setting. While this research spanned the realm of the

literature and studies on the three components, further research could be attained to find their uses in small business settings. In particular, focusing on the methods used to derive a quality strategic plan, while understanding the limited time, scope and input that a small business can allocate to the session would be helpful. Also, keeping in mind that resources are limited with a small business might garner additional research in the area of maximizing the resources to accomplish the new tasks. Because the pace of the workshop is an important component, it would be helpful to learn more about what flow of activities is effective in a small setting. It is important to engage the participants fully in the material, within the proper timeframe and with a delivery pace that is suitable for a small team of business owners. This additional research would be helpful for future delivery of the model to ensure that the time used is effective and will result in a finished product.

Another limitation of this research is the inability to see the action that will occur following the workshop. This was not action research, because I did not plan to capture the follow-up activities and achievements that will result from the plans set in motion during the workshop. To recognize, once again, that strategic planning is not a one-time event that will carry an organization forever forward. While ETC will need to complete the initial strategic plan, and this research fell short of accomplishing that task, it is also extremely important to note that the act of strategic planning, using an OD perspective is an evolution, not a one-time experience. As noted by James Goho and Ken Webb (2003), an

overall strategy for an organization is always in development, always changing, always moving further into the future, based on a sense of the past and a sense of the dynamics in the world and the possibilities offered by the external and internal environment. (pp. 378-379)

While the research is complete, the task of strategic planning for ETC will progress, and I will take a personal interest in helping the owners continue to evaluate the business and find meaningful objectives in search of continued, sustainable success.

At the start of this research process, my intent was to help guide ETC toward a more robust, diverse, and sustainable strategic plan. It was a self-serving task, since ETC's success would ultimately provide more stability and security for my position within the company. As the project ensued, I became more committed to not only finding an effective model, but also finding one that would "wow" or impress the participants by using a new and fresh approach. Although the workshop fell short of resulting in a comprehensive plan, I believe that the model was a refreshing approach, and many benefits were achieved that were not foreseen by me or the participants. ETC is actively working toward completing the tasks that need to be finalized for a true strategic plan, but since the workshop I have felt a strengthening of the relationships amongst the team and an added appreciation. I believe that this workshop allowed all team members not only to have a voice but also to stake a claim to the business and its success. While the health concerns of the owners are of utmost concern and attention right now, I have a full trust that the strategic planning process will be completed within 2008.

It has been a very significant and meaningful experience for me to be a part of this drive for ETC. As previously mentioned, I have been employed by ETC for the past six years and have had the pleasure of working with the team members over the past 25 years. Our friendship and respect runs deep. The workshop and research were completed in November 2007. In December, I received a letter from ETC, stating that they had voted to include me as a partner in the company. As noted by the owners,

It is with great pride and pleasure that the Board of Directors of Expert Technologies Corporation inform you that you are now a partner in the company. The motion to include you as an owner was raised at this year's annual meeting and the Board voted unanimously to issue you 500 share of common stock (approximately 7% of the current issues shares of stock). The decision was made because of your hard work, dedication, and commitment to Expert Technologies that is recognized and greatly appreciated by each of the Board members. (B. Botts, S. Botts, K. McClung & S. McClung, personal communications, December 25, 2007)

I know that my performance over the last six years was instrumental in setting the stage for this invitation; I also feel it is a direct result of the workshop and my role as developer, researcher, facilitator, and champion. I am extremely honored and pleased to accept their invitation and look forward to helping bring closure to the initial strategic plan for ETC and to participate in the success of the business. A core competency that was recognized during the workshop was ETC's collective ability to provide management consulting services. Along with this invitation for ownership in the business, the owners also encouraged me to take the model that was presented during the workshop and find ways to market it to other small businesses. By using the lessons learned from this research and securing additional data, I believe this model will serve as an excellent basis for a workshop to be marketed to other small businesses with similar challenges.

Peter Senge (1999) noted so eloquently, "change can only be initiated by small groups of thoughtful leaders who truly desire to build an organization where people are committed to a larger purpose and to thinking for themselves" (p. 8). I trust that ETC is dedicated to this change, and the team members truly desire to take the results of the workshop and continue on

the road to diversification and sustained success. Equally, I believe that there are other small businesses facing similar challenges that can greatly benefit from the lessons learned within this research project.

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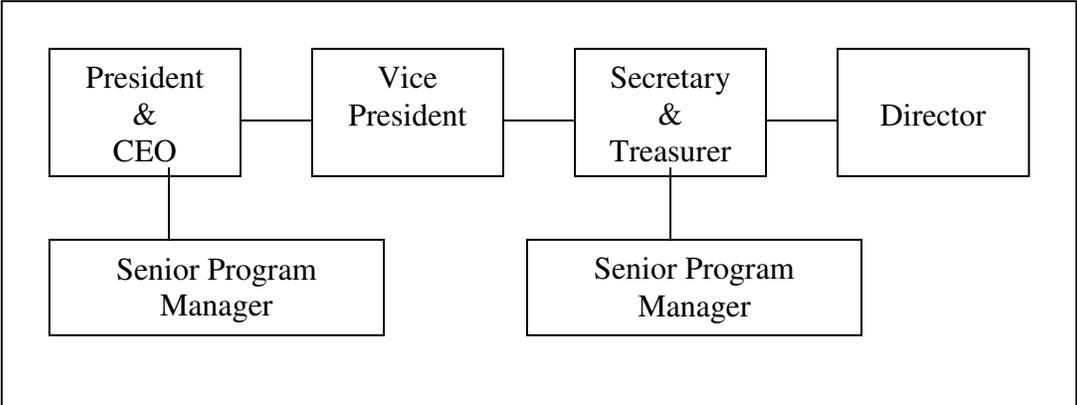
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Appendix A

Expert Technologies Corporation (ETC) Organizational Chart



Appendix B

Participant Inventory Form

The following questionnaire is designed to provide information about participants of my research. Such information is helpful for me to incorporate in the analysis of the transcripts. Please answer the following questions and return this form to Joey A. Fowkes prior to answering the research questions. Thank you for your contribution to my research project.

Age Group (please circle one): 18 – 29   30 – 39   40 – 49   50 – 59   60 and Above

Gender:            M   F

Number of years employed by ETC: \_\_\_\_\_

Highest Level of Education: \_\_\_\_\_

Have you ever participated in a strategic planning or organizational development session?

Yes    No

Do you have knowledge or experience using the appreciative inquiry technique for probing and inquiry?            Yes    No

## Appendix C

## Narrative – Individual Questions

1. Think back on your experience in the workshop and tell me about a moment when you felt that an activity or discussion was working well – so well that it helped you learn and understand the content in a way that was exciting or inspiring. What was it that made it so effective?
2. Reflecting on your experience in the workshop, remember a topic that you thought was particularly relevant to your work with ETC. Why was it relevant to what you do?
3. Now that it has been several weeks since you participated in the workshop, you may have found that you since you've returned to your daily responsibilities, you are referring to things you learned. You may also be recalling new things learned about the people from the workshop. What parts or aspects of the workshop are you finding to be most useful in your work or relations with others? What have you used that has been particularly effective, successful or exciting?
4. What value do you feel you added to the workshop? Why do you feel this value was important?
5. Think back on a time in the workshop when you felt that you had a voice and were well heard by other participants? Did you get validation that your point(s) were heard? What were they?
6. Having your starting point of understanding of strategic planning, organizational development and appreciative inquiry prior to the workshop; what did you learn about the collective model that was used? Can you recall a time since the workshop where you have used these skills learned from the workshop in other situations? Please tell me about it.
7. If the entire workshop were to be redesigned for use in another organization, what three wishes would you offer the workshop designers to make it better?
8. If this workshop were designed to be totally relevant and useful to your job, what additional topics would it include?

Appendix D

Consent Form for Research Participants

Dear Workshop Participant:

I consent to participate in a research project conducted by Joey Fowkes, at Alaska Pacific University in Anchorage, Alaska.

I understand that this study entitled Business Discovery and Redesign Model© will be conducted to explore, examine, and understand the values, mission and objectives for ETC and to provide useful information for the refocus, growth and diversification of its business.

I understand my participation will consist of participating in individual interviews that will be conducted approximately 2-3 weeks following the workshop. I understand that my participation is voluntary and can be discontinued at any time without penalty, and that I will be exposed to minimal risks, no greater than that encountered in daily life.

I understand that my identity will be kept confidential by the researcher coding the data and that my identity will neither be attached to the data I contribute, nor stored with other project data. Audio tape recordings, transcriptions and disk will be kept in a secure location during the study; the audio tape recordings and any identifying documents will be destroyed at the completion of the study.

I understand that the results of this study may be published or otherwise reported to scientific bodies, but my identity will in no way be revealed.

I understand that in the event I have questions or require additional information I may contact the course professor. If I have any concerns or questions before or during participation that you feel have not been addressed by Joey Fowkes, I may contact:

Dr. Carole L. Lund  
Department of Business Administration  
Alaska Pacific University  
564-8212 clund@alaskapacific.edu

I consent to participate in a research project conducted by Joey A. Fowkes, a Senior Class project at Alaska Pacific University located in Anchorage, Alaska.

Participant's Signature\_\_\_\_\_ Date\_\_\_\_\_

Researcher's Signature\_\_\_\_\_ Date\_\_\_\_\_



### Author Note

A special thanks to Expert Technologies Corporation (ETC) for their support and for participating in this research project. I am blessed to work with my friends and colleagues at ETC. I am also very pleased to know that our team will remain steadfast on the road to a successful redesign and launch of ETC's new product offerings to achieve the goals we set - together!

Another note of appreciation to Alaska Pacific University (APU)--especially Beverly Dennis, Carole Lund, Carl Hild, Tracy Stewart, and Yaso Thiru-- for the support and guidance I received for this senior project. I learned from this experience and I am grateful for your willingness and enthusiasm to share your knowledge and wisdom with me. I value the encouragement I received during my journey with APU's Degree Completion Program.

And, a note of thanks to Suzanne Waring--a dear friend--who inspired me long ago to finish my degree and to broaden my knowledge through the adventure of education. Thank you for your gentle nudge and your gift of crafting the English language. You are a treasured friend and mentor.

Lastly, to my family who deserves the greatest heartfelt "thank you" for their unwavering support. I felt graced by your love while I was completing this project and achieving the dream of earning my degree. I hope I inspire you to reach for the stars, knowing that I will be your biggest fan, as you have been mine.