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Kathleen Kane
University of San Francisco

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Teaching & Learning

Revisiting the behavioral matrix for leadership and team development

Kathleen Kane

*School of Management, University of
San Francisco, San Francisco, USA*

**Correspondence: Kathleen Kane,
School of Management, University of
San Francisco, 2130 Fulton St.,
San Francisco, CA 94117, USA
Tel: 415 422 6965;
E-mail: kkane@aol.com**

Abstract

The Behavioral Matrix functions on a variety of levels, as: an introduction to self-awareness; a team building exercise; an ice breaker; an introduction to individual differences; or an opening exercise to a course or leadership development program. This exercise can be adapted for a variety of participants in college courses: undergraduate and graduate, as well as for executive and corporate training. Behavioral styles are categorized on a matrix with two axis. The four quadrants created by the intersection of the axis yield four different categories: Controller (formal/dominant), Supporter (informal/flow-with), Analyzer (formal/flow-with), and Promoter (informal/dominant). Specific guidelines for using the exercise are given.

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Keywords: style diversity; teams; experiential learning; self-awareness; leadership



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Introduction

The Behavioral Matrix is an exercise that helps individuals understand themselves and others by producing a “felt experience” in the present, rather than just a conversation or lecture about individual differences. This exercise creates a variety of insights for the participants while it also has the potential to help build strong teams and organizations. Participants learn about their own styles as well as come to appreciate the style differences inherent in any group. They often have insights into how they might alter their own style to be more effective leaders and team members with a diversity of people. This exercise has the potential to help students begin to create: self-awareness, strong teams, awareness of diversity, and strategies for creating and enhancing the diversity of an organization.

Effective leaders are developed through self-awareness, feedback, and willingness to grow and change based on self-discovery, reflection and opportunities to experiment with new ways of relating to others. In the process of leadership development, most individuals discover or are directed to assess their own skill sets and behaviors and then alter those based on the needs of the followers and the situation (Bennis, 1989, 2009; Lowney, 2003).

It is also well known that diverse teams produce the most innovative and effective products, services, and outcomes. Yet, it is difficult to get to that synergistic moment when the team transforms from a group of individuals who judge each other for

being different to the cohesive team that truly appreciates each others' differing viewpoints and work styles (Ericksen and Beauvais, 2000; Dugal and Erickson, 2004).

The exercise is based on a model called The Behavioral Matrix. The origins of the matrix are a mystery. A literature review reveals an article from 1978 by Susan Sayers in the Northwest Regional Educational Lab, Portland, Oregon. Her references are limited to Carl Jung, Isabel Myers-Briggs, Blake and Mouton, and, the Lifespring Corporation; Communication Management Association: Atkins-Katcher Assoc., Inc.; and, the Northwest Regional Educational Lab (and educational research organization that published her paper.) She does not explain how she or someone else developed the Matrix and the research into her citations does not yield any reference to the matrix, although somewhat related concepts emerge from Jung, Myers-Briggs, Blake and Mouton, and Atkins-Katcher. In her article, she quickly covers the Matrix, but the focus of the article is to present workshop materials to use with the Matrix. Her workshop is very different from this exercise, but might be of interest to anyone wanting a longer, more in depth exercise to use with the model (Sayers, 1978).

The Matrix is presented on a website by Alan J. Rowe: www.shalev-institute.com/files/lecture/presentation/32.pps with a power-point lecture with the matrix explained in some detail. He describes the Matrix as "decision making" styles, whereas, Sayers above refers to it as "leadership styles." Rowe and Mason (1987) created the Decision Style Inventory (DSI) that falls into four different quadrants: analytical, conceptual, behavioral, and directive. They assert that decision style "is the way we perceive and comprehend stimuli and how we choose to respond." According to Rowe and Mason, the DSI styles can also be classified according to Jung's typology sensing/thinking (ST), intuiting/thinking (NT), sensing/feeling (SF), and intuiting/feeling (NF). ST = Directive, NT = Analytical, SF = Behavioral, and NF = Conceptual. Rowe and Mason state that the Myers-Briggs Type Indicator (MBTI) (Briggs and Myers, 1957) became the first reliable instrument to sort people into Jungian categories. Research in the 1980s, Dickel (1983) and Mann (1982), showed a highly significant relationship between the MBTI and the DSI. The authors assert that the DSI is a valid test instrument and is consistent with current psychological research. See Chapter 9 of their book for a full historical,

philosophical, and literature review of the relevant research. The DSI quadrants overlap with the Behavioral Matrix in this way: Behavioral (Promoter), Conceptual (Supporter), Analytical (Analyzer), and Directive (Controller). Rowe, on the Shalev Institute website, is the first to use the Formal/Dominant, Formal/Easy-going, Informal/Dominant, and Informal/Easy-going categories for the four quadrants. These sub-titles for his four styles (which are the same as the axis titles for the Matrix) do not appear in his book; therefore, he must have developed or discovered them since the book was written. The supposition then is that The Behavioral Matrix presented here was developed using Jungian typology and was built on by various people over the years, most notably Sayers and Rowe even though they never reference each other in their work.

In addition, Hart and Quinn (1993) describe in the Competing Values Framework, a model with two axis: vertical, which ranges from flexibility/spontaneity to predictability/structure, and horizontal from internal to external focus. Their model yields four quadrants that have perceptual opposites: human relations (flexibility/internal), in contrast with the rational goal model (control/external) and open systems model (flexibility/external) in contrast with the internal process model (predictability/internal). Their model yields four competing demands, which leaders face: Innovation, Commitment, Efficiency, and Performance. These overlap with the Behavioral Matrix quadrants in this way: Innovation (Promoter), Commitment (Supporter), Efficiency (Analyzer), and Performance (Controller). Extensive research has been completed on the Competing Values Framework.

One last reference to the Matrix was found on the internet used by Office Automation Consultants, Inc and it is called the D.I.S.C. Behavioral Styles Matrix. It has four styles Dominance, Influence, Steadiness, and Compliance – that directly relate to the descriptors for the Matrix's – Controller, Promoter, Supporter, and Analyzer. It appears to be used by their Precision Hiring Division at www.precisionhiring.com for employee assessments.

The Behavioral Matrix used in this exercise has two axis. The perpendicular axis has the titles Formal at the top and Informal at the bottom. The horizontal axis has the titles Dominant on the left and Flow With (or Easy-going) on the right (Figure 1). Once the exercise is complete the entire model is revealed (Figure 2).

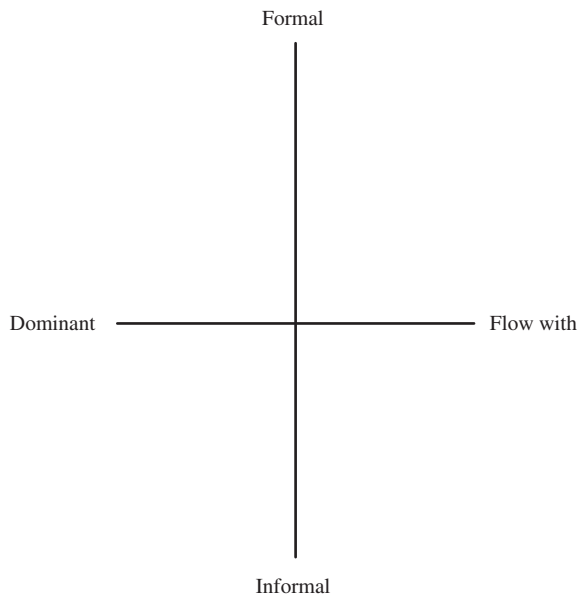


Figure 1

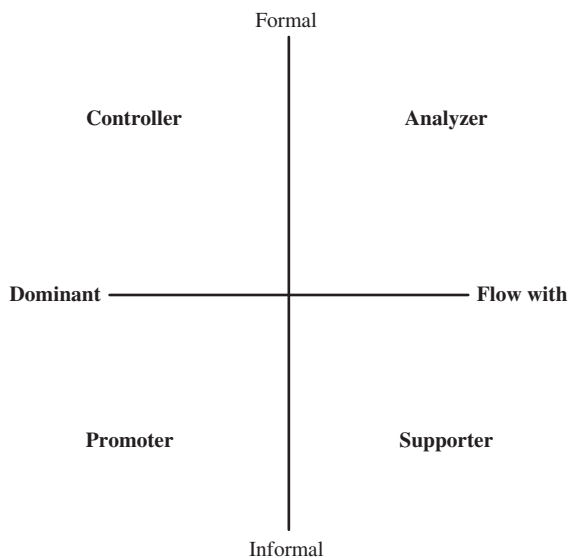


Figure 2

Target audience

This exercise is designed for faculty members or organizational consultants and trainers who want to demonstrate individual differences and their potential affects upon teams and organizations. It also has implications for leader/follower relationships and can be used in leadership courses or leadership development workshops. Depending upon the participants, it also can be applied to cross-cultural understanding. It can be used with undergraduates or graduates.

Learning goals for the participants

By engaging participants in a felt-experience, they come to understand the differing styles and values brought by themselves and other organizational members to the work team or workplace. Through each group's self-assessment, immediately followed by listening to the very different self-assessments of other group's, participants begin to understand differing styles and values and how they may have previously judged the others, particularly those with opposite styles, harshly or unfairly. They also learn the strengths of the other styles and begin to value those who are different (Driver, 2001).

The exercise

Exercise activity: (30–45 min)

- Give participants a three by five card and instruct them to draw the diagram on the card shown in Figure 1.

Self-assessment

- Ask each participant to rate themselves as either more formal or informal. Ask them to place a small x on the vertical line, but not in the center; they must commit to above or below the line. Then have them rate themselves Dominant or Flow With, with another x on the horizontal line. Again, they must commit to one side of the line or the other. Ask them to circle the two x 's they have produced and to keep their cards "close to their vest." They should not show anyone else their own assessments. Participants usually ask for some definition of the names at each end of the axis. The facilitator can use dress style, work environment, how they spend their free time, how they act with others when they first meet, etc. It is best to let them figure out what the axis descriptors mean to them, particularly because they are in a forced choice exercise.

Peer feedback

- Ask participants to mingle with as many other participants as possible and ask each person they encounter to give feedback about their style: "Am I formal or informal, am I dominant or flow with?" Have participants mark the answers from each other as tick marks on the lines indicated. Repeat to the participants that they must keep their own rating secret from the others while they are receiving feedback. Keep them moving, they are just to ask those two

questions, quickly get and give the answers, and move on to the next person.

Note: It does not matter if people know each other or not. This can either be a “getting to know you exercise,” or “getting to know you better” exercise. The point can be made that we usually make snap decisions about people even though we do not know them. This is an opportunity for participants to hear from others how they initially come across.

Making a choice

- Say to participants, “Now you have a decision to make. You will be joining a group of people who are in the same quadrant as you. Some of you have received feedback which is mostly in alignment with how you have rated yourself, but others of you may have received feedback that is quite different from your own assessment. You have a choice to go with your own assessment or that given to you by other participants. Should you find yourself in the wrong group, you are welcome to abandon your group and join another anytime during the exercise.” It is very important to not reveal the names of the quadrants until the groups have finished their reports.
- Ask the participants to self-select into one of four groups:
 - Formal/Dominant
 - Informal/Dominant
 - Formal/Flow-with
 - Informal/Flow-with
- If you are standing in the front of the room – have Formal/Dominants sit to your right, Formal/Flow-withs to your left in the front of the room. Have Informal/Dominants sit in back to the right and Informal/Flow-withs in back to the left. Formal/Dominants should be kitty-corner to Informal/Flow-withs
Formal/Flow-withs should be kitty-corner to Informal/Dominants.

Group awareness

- Ask each group to pick a scribe/spokesperson. Have each group answer the following questions: (The questions should be on the board or on a Power Point).
 - What are your likes?
 - What are your dislikes?
 - What do you tend to save or hang on to?

- Are you task or relationship oriented people?
- Are you buyers or sellers?
- What motivates you?
- What do you feel you need to learn?

Note: These questions often produce the most diverse set of answers, but the facilitator could use other questions depending upon their learning goals and outcomes.

- It is essential that they answer the questions as a group, not as a list of individual answers. Everyone in the group must agree with the answers. If a person does not agree with the majority of the group, participants may be in the wrong group and might want to try another group. Help s/he find the right group.
 - Move around the room and encourage each group to answer the questions with substantive answers (not just “we like ice cream”). Especially, have them answer what kind of people, situations, organizations, work, etc. they like or don’t like.
 - For task and relationship – ask if they met with a group would they have a beer first then work or would they work first then (maybe) socialize.
 - For buyers or sellers – ask them if they are buyers of others’ ideas or opinions or do they like to sell their own ideas, etc.
 - Work with each group as they answer questions and sometimes do a little prompting, especially if the group is non-English speaking group.
 - Give the groups around 15–20 min to answer the questions. Sometimes it is easy to see differences in how they are seated (body language), how they work and how fast they complete the questions.

Awareness of others

- Ask the entire group, “Who should go first?” (The Formal-Dominants will generally raise their hands first). Even if they do not raise their hands first, go with them anyway. Say something like: “If we don’t go with them, we might have a problem.” (Everyone usually laughs.)
- After the spokesperson for the Formal-Dominants answers the first two questions: What are your likes? What are your dislikes? ask their permission to go across the room to the Informal-Flow with group. Approach the new group and:
 - Ask them the same two questions: What are your likes? What are your dislikes?



- Point out the contrast in the answers. Use humor, and make the exercise fun.
- Move back and forth between the Formal/Dominants and Informal/Flow-with groups, asking the next questions that the groups have answered from the board or overhead, alternating answers and comparing them.
- After you have finished with the first two groups ask the entire group what they noticed.
- Move to the Informal /Dominant group and alternate in the same way with the Formal/Flow-with group. Process them the same way as the first two groups.
- After each group has completed answering the questions, ask them if they would like to know the names for each of the groups:

Formal/Dominant = Controller
 Informal/Dominant = Promoter
 Formal/Flow-with = Analyzer
 Informal/Flow-with = Supporter

The instructor can hand out a summary of each style or just give a brief description using Table 1 information. It is important to tell the students that these are a summary of possible attributes for this behavioral style. They make the final decision as to how useful the information is and if it helps them understand themselves better.

Debriefing discussion

The instructor can use self-reflection and participant discussion to debrief the exercise. Participants are very eager to discuss their observations and experiences.

If the group is large, then have them break into smaller groups with members of each style in each group. If the group is 20–25, then process them in the larger group.

Ask the group(s):

Diversity

In what ways did you notice the groups differed, particularly the groups that were sitting kitty-corner to each other?

Team building

What would be the advantages of having one of each group on a team? How would each style enhance the team effectiveness and creativity?

Leadership awareness

What are the differing leadership styles that you saw emerge from each of the groups? Is one style

Table 1 Descriptors of behavioral matrix styles

Controlling style

Emphasis: Dominance; Shape the surrounding environment by overcoming opposition to desired results.

Behavior:	Direct and self-contained
Pace:	Fast
Priority:	The task at hand
Focus:	Produce a measured and tangible result
Irritation:	Wasted time. People getting too close emotionally. Touchy/feely
To get a decision:	Give them your opinion (make sure they know it's just an opinion) and probable outcomes. Allow them to make the decision
What they question:	What "it" does, and most especially by when?
Specializes in:	Being in control and in charge
For security:	Attempts to control everything
For acceptance:	Attempts to win through skill

Theme: Look at my accomplishments

Decides quickly based on bottom line
 Says they want results
 Competes for time and money
 Saves time and money
 Powers up, handles, manipulates
 Perceived as aloof
 Could use humility
 NEED – to be in charge
 TONE – Direct-abrupt
 BODY LANGUAGE – Assertive/Aloof

Promoting style

Emphasis: Influence others; Shape the surrounding environment by bringing others into alliance to accomplish.

Behavior:	Direct and open
Pace:	Fast
Priority:	Relationship
Focus:	Interaction, dynamics of relationship
Irritation:	Boring tasks. Being alone
To get a decision:	Give them incentives and testimonials
What they question:	Who else uses "it"?
Specializes in:	Being social
For security:	Relies on flexibility
For acceptance:	Depends on playfulness

To increase flexibility, needs to:

- Be more objective
- Spend more time checking, verifying, specifying, and organizing
- Follow-through and follow-up
- Concentrate on task
- Be more logical

Theme: Look at me

Decides quickly based on feelings
 Says they want a good time



Table 1 Continued

Competes for recognition, time and money
 Saves very little
 Cuts corners, relies on feelings
 Perceived as flashy
 Could use self-discipline
 NEED – to have recognition and flash
 TONE – Upbeat/Fun/Playful
 BODY LANGUAGE – Outgoing

Analyzing style

Emphasis: Compliance; Work with existing circumstances to promote quality in products or service
 Behavior: Self-contained and direct
 Pace: Methodical, steady and slow
 Priority: The task
 Focus: The details and the process
 Irritation: Surprises (both positive and negative) and unpredictability
 To get a decision: Give them facts, details and documentation
 What they question: How “it” works and how you reached your conclusions?
 Specializes in: Processes and systems
 For Security: Relies on preparation
 For Acceptance: Depends on being correct

To increase flexibility, needs to:

- Openly show concern and appreciation of others
- Occasionally try shortcuts and time savers
- Adjust more readily to change and disorganization
- Work on timely decision-making and initiating new projects
- Compromise with opposition
- Verbalize unpopular decisions
- Use policies and guidelines rather than “hard and fast rules”

Theme: Look at my efficiency

Decides slowly based on data
 Says they want information
 Measures progress by amount of activity
 Saves face
 Studies for perfection
 Perceived as careful
 Could use spontaneity
 NEED – to be informed
 TONE – Calculating/methodical
 BODY LANGUAGE – Curious/Thinking

Supporting style

Emphasis: Cooperating with others to accomplish the task
 Behavior: Open and indirect
 Pace: Slow, easy, and relaxed
 Priority: Relationships
 Focus: Building trust and getting acquainted

Table 1 Continued

Irritation: Pushy, aggressive behavior
 To get a decision: Give them reassurance and guarantees (then follow through)
 What they question: How “it” will affect their personal circumstances?
 Specializes in: Support
 For security: Relies on close relationships
 For acceptance: Depends on conformity, loyalty, and helpful nature (having friends and being a friend)

To increase flexibility, needs to:

- Attend to task completion without being over sensitive to other’s feelings
- Be willing to reach beyond personal comfort zone
- Take uncalculated risks
- Delegate

Measures personal worth by: Attention from others

Theme: Look at how well I’m liked

Decides slowly based on relationships
 Says they want comfort
 Measures progress by feelings
 Saves memories
 Keeps on working
 Perceived as assuring
 Could use assertiveness
 NEED – to be with others
 TONE – Soft/Appreciative
 BODY LANGUAGE – Inviting

more effective than another, or could they all be effective given the followers and the situation?

Organizational awareness

What insights do you have about your own organization and the people with which you currently work? Can you imagine having better rapport now that you understand their behavioral style in a work setting?

Career and job fit

What careers or jobs might be a good fit for you, now that you know your style? Which ones would be a bad fit?

Altering behavior to be more effective

Now that you know “what you need to learn,” how might you alter your approach towards others or towards work that could make you more effective?

Organizational learning

Now that we have done this exercise, what do we know about ourselves as a group? How can



we use that knowledge to work together more effectively and take advantage of the diverse ways we see the world?

There is a small possibility, in this exercise, of a Barnum Effect (Snyder *et al.*, 1997) but since students rate themselves, then answer the questions themselves, and reveal the answers themselves, the opportunity to be influenced by what a rating schema tells them is very small. The descriptors for each style are not given to the participants until they have completed answering the questions and compared their very different answers spontaneously without prompting.

One final caveat on using this or any other “personality, preference, or style” assessment tool, is that the point must be made many times to students that these measurement instruments only measure a tiny portion of any individual’s entire personality. They are tools to understand oneself and others more easily and to allow team members to be more accepting of others’ different tendencies, needs, and approaches. They are also a guide to self-understanding, particularly in leadership development, where a goal is to expand one’s repertoire of behaviors and approaches to people, decisions, problems, and opportunities. As mentioned before, students are always told that they are the ones to decide if these measurement tools have any relevance to their own behavior.

Note: Sometimes, the instructor can use a personal example of exhibiting each of the styles, for instance, I often explain that when I was a flight attendant, earlier in my life, I was a Supporter. When I became an accountant, I would have classified myself as an Analyzer, when I was a manufacturers’ rep, I used Promoter skills, and now that I teach, students always rank me as a Controller.

Conclusion

Individuals become very interested in knowing about themselves and enjoy their time within their groups. They develop rapport with their own similar group very easily and fast. There is always a great deal of laughter and humor during the session when they are answering the questions within their individual groups. They start to suspect that the other groups may have different answers, but are shocked at how different the answers are. For instance: the Formal/Dominant group often likes: structure, being in charge, high performance, getting things done. They dislike: lazy people, being told what to do, lack of goals or structure, time wasting. Their opposites, the Informal/Flow-withs,

often like: fun, being relaxed, time off to enjoy family, being helpful to others. They dislike: bossy people, micro-management, overworking, and too much structure.

When the exercise is run with very large groups, the large group can be broken into smaller groups. During the debrief, the spokespeople come to the center of the room and to be interviewed in turn, giving each one a chance to speak for their small group. Again, they are surprised how similar their answers are to the other groups within their larger group.

The results that often occur from this exercise are as follows:

- A college class will be eager to do more self-assessments and begin to appreciate the power of the diversity in the classroom.
- Participants start to see overlaps and connections to other self-assessments, particularly the MBTI, and the Managerial Practices Survey (Quinn, 1988).
- An executive group will relax and start to enjoy the training experience as it breaks the ice and gets people talking to each other.
- Individuals learn something about their own styles and how they might modify them to relate to others more effectively.
- Teams will form based on diverse styles naturally, rather than forcing that outcome.
- Cultural differences and similarities become easy to talk about.

Over and above the myriad of learning outcomes produced by this exercise, it is always fun to facilitate. The learning flows from the exercise, not from the facilitator. Humor is a great part of this exercise and almost always creates unexpected learning.

The Matrix can be used as an opening or can be placed into a selection of self-assessments that might include the MBTI (Myers and Myers, 1980, 1995), the Leadership Practices Inventory (Kouzes and Posner, 2002–2008), the Six Thinking Hats (De Bono, 1985), Managerial Practices Survey (Quinn, 1988) or Emotional Intelligence, (Goleman, 1998; Bradberry and Greaves, 2009). The introduction to the topic of self-assessments and self-awareness can be enhanced with the a short lecture using the Johari Window (Luft and Ingham, 1955), demonstrating how self-awareness can help us reduce our blind spots and make us more effective leaders, followers, and organizational members. Or the participants can be introduced to the idea of style diversity and differences by running the exercise and letting them learn what it might mean and



then tie it to other assessments later in the course or training. The self-assessments above are ultimately source material for a self-development plan, which is the final paper for the leadership course.

This exercise has been used with Executive Training Groups from all over the world. It has also been run with translators in Spanish, Chinese, and French. It is useful to encourage the participants to

speak their common language while they are in their small groups. This facilitates nuanced answers that might not occur if they were forced to speak English or have a translator with each group. The facilitator can have the translator translate the native language to the facilitator rather than the opposite. The Behavioral Matrix is quite robust and can be used across cultures and with mixed cultures.

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About the author

Kathy Kane received her Ph.D. from The Claremont Graduate University in Organizational Behavior where she studied with Peter Drucker. Prior to that, she was President and owner of Business Management Services, a consulting, accounting, and tax practice. Kane’s teaching assignments include graduate courses in Leadership, Organizations, and Negotiation. She also consults in the areas of leadership development, organizational culture, vision and values, team building, and strategic planning with both for-profit and not-for-profit organizations. Currently, she is the Program Chair for the 2011 Organizational Behavior Teaching Conference. Her scholarly interests are in the areas of teaching excellence, appreciative inquiry, and trust in leadership. She can be reached at kkane@aol.com.