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## Self-Directed Work Teams: The New Wave for American Corporations

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**SELF-DIRECTED WORK TEAMS:  
THE NEW WAVE FOR AMERICAN CORPORATIONS**

Janetta K. Cole, B.S.

A Culminating Project Presented to the Faculty of the  
Graduate School of Lindenwood College in Partial  
Fulfillment of the Requirements for the  
Degree of Master of Business Administration

1995

## **ABSTRACT**

This thesis will focus on the study of self-directed or empowered work teams and on preparing a plan to implement the empowered work team in the Customer Contact Center in Wentzville, Missouri.

Self-directed work teams are a relatively new concept in the workforce and could be the 90s version of the total quality concept. The philosophy is that first line management takes a step backward and the workgroup virtually leads themselves. Employees are empowered to make the decisions and then act on those decisions to produce a better quality product than before. The concept is designed around teamwork both from within the corporation and occasionally from outside the corporation.

Much has been written about the empowered work team, albeit in bit and pieces, and what makes them so successful in some corporations and unsuccessful in others. The purpose of this study is to investigate the methods utilized to implement the leaderless work

team and determine the best of the best methods to implement the plan.

The study revealed that there is no formal plan for implementation documented and most corporations have relied on their own processes and resources to implement the plan. Both successes and failures are documented and the reasons for those successes and failures reviewed to select the best of the best methods for the implementation plan developed for the Customer Contact Center in Wentzville, Missouri.

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## Chapter I

### INTRODUCTION

Self-directed work teams, empowered work teams, leaderless work groups, and a variety of other terms describe the buzzwords for corporations in America today. It is the new wave for the future of American corporations.

In the business world today, change is a constant companion whereas before there was a pause between periods of change. Not so today, and to survive, corporations must take advantage of new opportunities and not only master these changes but react to them with creativity, adaptability and effective use of available resources.

Organizations everywhere are seeing the need to create an environment which not only accepts and deals with change, but also thrives on change and never ending improvement. Hence, the evolution of self-directed work teams, empowered work teams, leaderless teams, etc.

Self-directed work teams have produced improvements

in quality, productivity, and customer service in many industries. The concept for self-directed teams has been around for quite some time and is actually a spinoff of the total quality process or quality circles which have proven successful both in the United States and Japan. Businesses who realized that they must keep working for constant improvement or, as the Japanese call it, Kaizen, realize that everyone in the organization has to be thinking about better ways to do business every day in order to reduce costs, produce quality, enhance sales, and produce revenue (Byham vii.).

In his book, ZAPP!: The Lightning of Empowerment, Byham conveys that the organizations that will be a success will be the ones who utilize the skills and abilities of the entire workforce toward this constant improvement. However, the philosophy cannot be forced upon employees. They must be empowered to assist in the decisionmaking process and the implementation of self-directed work teams allows them to do just that (viii.). Along with constant change and continuous improvement, several other factors are involved in the implementation of self-

directed work teams. Long before the NAFTA agreement, American workers were competing with workers all over the world to prove that they can produce the highest quality products and services at the lowest price. Those employees who once knew about "cradle to grave" jobs are gone from the workforce. Continuous training of employees is now required.

Process re-engineering is also a common buzzword in American corporations today. Corporations must continually be reviewing their processes to ensure that they are working smarter to reduce costs. And nine times out of ten when costs are reduced so are employees and the same amount of work is being performed with fewer employees (Hitchcock 58).

Harper's thoughts in his book, Succeeding As A Self-Directed Work Team, are that technology has also contributed to a change in the workforce today. With new technology, corporations can now receive information more quickly than in the past and, as a result, can react more quickly. Having the ability to receive and send information within minutes now allows them to react more quickly to changes in the marketplace since they know they need to keep ahead of

the competition. All of these are factors in the drive for self-directed work teams (2-3).

This concept that is making history and shaping the future of American business is commonly defined as a group of employees ranging from five to eighteen who are fully responsible for a whole segment, product, or process of work. They are accountable for producing a finished product or service and they share equal responsibility as opposed to a narrow piece of the business for which a typical factory worker would assume responsibility (Orsburn et al. 8).

Allender believes that the team members must have "maturity and skill" to meet the demands of the customer and the workforce as a whole. He also is emphatic that team members possess a variety of skills since they will be accountable for production, quality, cost, hiring, firing, etc. Communication skills both oral and written are a prerequisite for team members along with problem-solving skills, decisionmaking skills, interpersonal skills, etc. In essence, the individual participating on the team must be a well-rounded individual who is not only technically capable of performing the task at hand, but also possesses the

skills of a manager or supervisor per se (13).

This process defies all the rules of a typical or conventional work group as most of us know it today. In their book, Self-Directed Work Teams: The New American Challenge, Orsburn, Moran, Musselwhite, and Zenger are convinced that the job category itself changes from a narrow category to a team responsible for one or two broad categories. The position of authority changes in that the supervisor controls the activities in the conventional workgroup and a self-directed work group controls the activities through group decisions. The typical reward system is tied to individual performance and job seniority whereas in a team concept, the rewards are tied to team performance (9-11).

At his seminar in Texas, John Cook advised that not all organizations are ready to implement self-directed work teams due to their design and operational procedures. Organizations described as "learning organizations" are thought to be more conducive to self-directed teams than organizations whose management theories are based on scientific management. Learning organizations are geared toward learning, self-

correction and continuous improvement. This type of organization fosters group learning where the knowledge of the group becomes greater than the combined knowledge of its individuals. Learning organizations can adapt quickly to the changing environment and not only adapt but develop learning which leads to the creation of new ideas and generates change.

All resources agree that an organization cannot just arbitrarily decide to become a "learning organization" and implement self-directed work teams. Much preplanning and communication along with training must take place in the developmental process. Historically, it takes two to four years for a self-directed work team to be fully implemented at full efficiency. Various authors cite three to five stages in the implementation process. Cook has identified four stages and has labeled them "forming, storming, norming, and performing."

Stage One, or the "forming" stage is easiest for those employees who have faith in self-directed work teams and are personally committed to making the philosophy a success in their organization. These particular employees look for the successes and

overlook the failures. The emotions that one would see in Stage One are confusion, uncertainty, frustration, and excitement. During Stage One, research and visitation to sites who have successfully implemented self-directed work teams is recommended (Cook).

Stage Two, or the "storming" stage involves designating the team leader to guide the team and keep it together. The team is now becoming united and the employees experience a sense of belonging. Team members are learning to trust themselves and each other. Training begins to take place. Emotions experienced in Stage Two are conflict, resistance, and trust (Cook).

Stage Three, or the "norming" stage completes the training process. Team members are learning to evaluate their performance through feedback and measurement systems. Understanding the concept is developing well and loyalties begin to shift from individual team members to the group. Emotions experienced in Stage Three are reconciliation, job satisfaction, and responsibility (Cook).

Stage Four, or the "performing" stage is when the team is operating at peak performance. The team

handles all planning, scheduling, coordination, training, etc., needed to keep the work team performing at peak levels. The team members participate in open and authentic communication and conflict has been reduced to a minimum. Emotions experienced in Stage Four are pride, agreement, and confidence (Cook).

The role of the supervisor or manager changes drastically with the implementation of self-directed work teams. Top managers fear the loss of control and middle managers feel threatened. To become successful, managers must be willing to share authority and let team members take actions that will help business (Margolies 17).

Dana Computer Services literally turned the organizational chart upside down placing customers at the top of the organizational chart. Their team agreed that their current organization which consisted of 85 employees of whom 41 were management prohibited teamwork and communication. Therefore, customers were placed at the top of the organizational chart and each layer thereafter contained a team of DCS personnel rather than individuals. Staff was placed at the bottom of the organizational chart and their role



became more that of a coach or a facilitator (Weis 26-27).

The role of the manager needs to change from that of an autocratic manager to that of a participative manager to successfully implement self-directed work teams. The autocratic or directive manager will experience difficulty relinquishing control; however, unless the company begins to practice some form of participative management at the beginning of the transition, the process will be much slower to implement and could take as long as five years to achieve the objectives set forth by the team, according to Hitchcock (58).

The supervisor or manager must realize that although their influence will be much more subtle and indirect than before, it is still important to the process and the organization. There is still a direct connection between the supervisor or manager's actions and the performance of the team. The role becomes more that of a facilitator or observer rather than the leader. Thus, empowerment is born which is a vital principle of the self-directed or empowered work team (Orsburn et al 28-37).

The intent is to delegate more decision-making authority to the employees who are running the business on a day-to-day basis and to encourage employees to accept responsibility for their own quality, productivity, and customer service. Management must keep in mind that empowerment is teamwide and that team empowerment rather than individual empowerment makes the self-directed work team a success (Harper 16).

The "high performance workplace" may, in fact, be hampered by an outmoded labor law that provides the right to collective bargaining in order to balance workers' power against that of management. The law prohibits employers from creating or supporting a "labor organization" - an entity through which workers deal with management over their wages, hours, working conditions, and related matters. Because of this wording, the National Labor Relations Board ruled against two firms early in 1993 who had set up committees which consisted of hourly, union employees to review issues like pay or plant safety. Dentzer reports that, "The NLRB ruled that, in both instances, management dominated the formation and operation of these groups which met the broad definition of labor

organizations." (51)

As American corporations downsize and the span of control widens for management employees, there is a definite need for the empowered work team, leaderless work team, or the self-directed work team. Corporations are doing more work with less employees and the layers of management are being reduced in an effort to cut costs and put the front line employees in the driver's seat. The only way out seems to be to involve the employee in the decisionmaking process and empower them to perform the job that they best know how to do. Verstieg urges corporations to "move with caution" and ensure that they gain commitment even when they cannot gain consensus. She also warns them to "expect chaos at first." (12) And, now the NLRB has also become involved in the implementation process and what types of decisions employees will be allowed to make.

When employees are given the floor and encouraged to communicate openly, there is sure to be some conflict at first. Dumaine reports that in 1990, Jerry Junkins, CEO of Texas Instruments said, "No matter what your business, these teams are the wave of the future"

(52). Jamie Houghton, CEO of Corning whose company had 3,000 teams at the time said, "If you really believe in quality, when you cut through everything, it's empowering your people and it's empowering your people that leads to teams" (Dumaine 52).

Whatever it is called, empowerment, leaderless work groups, self-managed work teams or self-directed work teams, management needs to find a process to ensure the work is completed when the commitment is made to the customer that it will be completed. In addition, not only quantity but also quality must be provided to the customer along with the products and services. Both management and hourly employees must be committed to providing high quality customer service at the least possible cost. Corporations have come to the realization that management alone can no longer make that happen in an autocratic or directive environment. Frontline employees must be involved in the decisionmaking process and management must empower them with the responsibility and the tools to make things happen. How this process evolves in an organized manner without affecting customer service is the challenge. This study will investigate the various

methods utilized to implement empowered work teams and select the "best of the best" methods to develop a plan for implementing empowered work teams in the GTE Customer Contact Center in Wentzville, Missouri.

## Chapter II

### LITERATURE REVIEW

Although empowered work teams are the new wave for American corporations, the implementation process to some extent has not been clearly defined. Nor has a cut and dried plan for the implementation process been established. For the most part, organizations are utilizing the "trial and error" method to implement empowered work teams.

According to Michael A. Verespej,

It's one of the most talked about concepts in worker empowerment today. And to hear some experts discuss it, you'd think that self-directed work teams - that is a group of workers who have the day-to-day responsibility for managing themselves and the work they do - can work miracles, that they have the power in themselves to transform overnight once stodgy organizations into world-class competitors with improved quality, productivity, and employee morale.  
(30)

Unfortunately, the process is not quite that simple. American corporations, although realizing that self-directed work teams are an emerging trend, are

merely experimenting with the process simply because they are just learning how to use the work teams and what must be done to make them successful. In fact, the majority of self-directed work teams (78%) have been in existence for three years or less and 59% have been around for less than two years (Verespej 30).

Organizations today are using the "team" word in every context such as team work, team spirit, quality teams, empowered work teams, self-directed work teams, leaderless work teams. Buhler reports, "The common denominator is the presence of a group" (8).

Work teams are being created today in many organizations. They are sometimes created involuntarily when an organization is downsizing or redesigning the organizational structure. The end result seems to be that a group receives an ultimatum to become self-managed with no instruction. Combs believes that an involuntary conversion can become successful if four key actions take place.

1. There needs to be an evaluation of the group members' ability to function as an empowered team.
2. Open communication with all employees must be

established.

3. Members must be trained and educated.
4. Patience is required while the teams are being developed (Combs 128).

Mikalachki feels that we are all members of some type of team because "our society is inundated with teams" (15). However, he feels that most people want to be on a winning team. Winning sports teams and management teams have one common link and that is cohesion. Three conditions contribute to cohesion on a team. The first is the opportunity to interact, the second is the interdependence of the team members, and the third is the acceptance of each other from the team members (Mikalachki 16).

The team must also have clear goals and a game plan or strategy. And finally, they must have committment. It is imperative that these three components be present when developing the self-directed or empowered work team. Azco, a defense contractor, failed in their efforts because they ignored these three components and merely selected people to be on teams before they were identified as being compatible with the team (Mikalachki 19).



Dumaine reports that, "Corporate America is having a hot love affair with teams." (86) Dumaine also reports that, "The most common trouble with teams: Many companies rush out and form the wrong kind for the job" (86). Several companies such as NYNEX, Federal Express, and IDS are cited as being very successful utilizing self-directed work teams. However work teams are also high maintenance and very expensive. The reason for this is that, in many cases, there is no prior analyzation as to whether or not a team is really needed (86).

Too often, the CEO of a corporation gets excited about the idea of teams and puts the procedure in place to establish them as if there is only one type of team to establish. Meanwhile, there are several teams in place who do not know how to work with other teams (88).

Although called a "management process fad," the empowered team has become the sole basis for many American firms. Portner reports that, "The results have almost always included very substantial increases in quality of production and worker productivity.

However, perhaps as importantly, there is a marked increase in product innovation, substantially less employee turnover, and overall improved employee morale" (24).

The self-directed work team organization differs from conventional organizations in that they are leaner with fewer layers of management. Their leaders are more facilitators or coaches. The reward system is tied to the team rather than to seniority. Results are shared with all employees rather than a select few. Employees are expected to learn multi-tasks rather than a single task (Wellins 27).

Holpp gives ten recommendations for implementing the self-directed work team which he believes will create harmony between teams and quality.

1. Start with a business case that is clear and concise as to the reasons self-directed work teams are being implemented.
2. Develop a mission statement that gives meaning to the commitment the organization has made.
3. Educate all employees with what the organization is doing and why.

4. Provide opportunity for feedback and input. Let employees express their fears and expectations.
5. Develop an implementation plan and communicate the plan. Make sure employee input is included in the plan.
6. Prepare for success early. Start with small teams that include the "best of the best."
7. Involve the Union employees early on and train employees to "sell" the process to other employees.
8. Don't over look the successes and celebrate them.
9. After successful models have been built, expand the teams.
10. Resist the urge to tamper with the process at the first sign of trouble. Let the team work things out on their own (Holpp, "Making Choices" 76).

The San Diego Zoo implemented self-directed work teams and experienced problems with its managers accepting the process. They felt that their best

workers had been removed from their respective departments and placed on teams. Had management been more involved in the process from the onset, the less panic there may have been. Utilizing the managers as coaches in the process can not only ease their fears but can contribute to the overall success of the teams as well (Austin 28).

In 1989, Northern Telecom Ltd's Nashville plant was a divided organization. Burgess Oliver, Director of Operations, began to implement self-directed work teams with a method which can only be described in his own words. Burgess said, "We're going to reach, teach, empower and equip you to be missionaries" (Southerst 50).

The method of "reaching" was to schedule seminars for all employees both hourly and management which were dedicated to teamwork, customer service, risktaking, and quality. Oliver wanted every worker to "take on the job of championing teamwork" (50).

Burgess did not begin "teaching" until a year later when everyone learned skills such as problem solving, conflict resolution, customer service, and how

to lead a meeting. The "empowering" came when the teams were put in place giving the workers the responsibility for sharing in the management of the plant (50).

"Equip" came about when workers learned more sophisticated skills such as marketing, how to read financial statements, and how to prepare flow charts. Nashville employees are now referred to as being "born again." Northern Telecom Ltd., Nashville, Tennessee, now holds the highest customer satisfaction rating in North America with 91 percent of their customers providing a "satisfied" rating as opposed to 58 percent in 1988 (50).

Carr reports that, "Most effective team implementations progress in stages. The workgroup becomes a limited self-managing team, then (perhaps) a fully self-managing team, then (less likely) an entrepreneurial team" (46). Carr also lists six basic points that can guide a corporation through the planning and implementation process. They are as follows:

1. Work organization and management has no

universally applicable technology.

Any new technique being incorporated is not a "cure all" for the organization (44).

2. A goal merely to implement teams is not adequate.

Teams must be implemented to provide a clear business requirement not as panacea for all ills. The team itself is not the "savior" for the organization (44).

3. Teams can only succeed when they have clearcut goals and team members are committed to those goals.

Goals need to be measurable, clear, and worthwhile. They must also be compelling and the team members must be committed to the team's goals (45).

4. Teams are more successful with team-oriented rewards rather than individual rewards.

Teams should be rewarded for team success (46).

5. Displacing first and second level supervision for self-managed teams is a mistake.

An organization that assumes there is no place for the supervisor workforce robs itself of experience and competence (46).

6. Teams that are self-managed will experience conflict and that conflict must be anticipated and resolved.

Teams are often in conflict with the organizational culture. Organizations need to realize early on that the culture is changing and there may be resistance and conflict which can and must be resolved (46-47).

Carr believes that these six basic points represent some of the core issues that corporations must confront and resolve to successfully implement self-directed work teams (46).

Hughes gives 25 stepping stones discovered so far by companies that have made the attempt to implement self-directed work teams. The first thing a corporation should do is forget the word "self-directed" because newly formed teams are not "self-directed" nor will they be for a very long time (44).

The first process that needs to take place is awareness training which leads to a common vision among the stakeholder, supervisors, and hourly employees. Implementation of work teams is also individual and unique to each corporation. Hughes believes that an

organization cannot duplicate the plan of another organization (45).

Everyone will not be excited about the new concept. Usually 25 to 30 percent of the employees do not wish to be "empowered." All stakeholders need to understand that the process takes time possibly three to five years. They must also be assured that they will not suffer as a result of the improvement in performance (45).

Team development will have its ups and downs and will not follow a straight line. Just because a group of employees is named a "team" does not necessarily mean that those employees will function as a team. The team will need assistance in establishing a mission and vision. For each step the team takes forward, management must take a step backward which sends the message that management is serious about the concept of self-directed work teams (45).

Hughes advises against putting a "stake in the ground" and expecting change to begin that very day. It is a process which will evolve over time. Managers need to be the role model for their employees during



the process. Management's credibility is at stake and subordinates are quick to notice that no change has taken place if they only pay "lip service" to the process (45).

Management must be careful not to become the stumbling block to implementing self-directed work teams and, at the same time, not become too participative and fail to be directive when direction is needed. First line management must be involved in the process in order for it to be a success (45-46).

In a new operation where there are no experienced employees, Hughes feels it is best to overstaff and move employees to other locations as the organization stabilizes. However, team members need to have varied experience and backgrounds, especially those who are on the steering committee. Good interpersonal skills are a must. In addition, team members should have the latitude to remove ineffective team leaders (46).

Teams should not be given tough decisions at the onset but should be allowed to make easy decisions at first and progress to making tough decisions. Hughes believes that visits to other organizations who have

already implemented self-directed work teams is crucial for members of the steering committee and design teams (46).

As the team develops, systems, policies, and procedures will need to be changed to avoid a "glass ceiling." Compensation, wages, and training need to be reviewed and evaluated in the implementation process. Most importantly, open communication is a must in the implementation process which will build trust (46).

Managers must realize that this will be one of the most difficult changes encountered and managing after the process is fully implemented will become a challenge. However, organizations which are structured around work teams are considered the more desirable places to work and may provide an edge for competition in the labor pool (46).

Holpp gives a few guidelines to follow in the early stages of implementing self-directed work teams to boost the chances of success which, in some cases, are redundant of his recommendations for creating harmony between teams and quality. These guidelines also support the previously cited research by

Mikalachki ("5 Ways," 42).

1. Develop crystal clear business reasons for self-directed work teams.

Holpp suggests putting together a business plan to let the team know what is expected and which goals and milestones will be used in the evaluation process (42).

2. Organizations should ensure that resources are available before the vision is developed.

Implementing a self-directed work team is very costly especially in terms of training. The steering committee needs to ensure funds are available for implementation before developing the vision (42).

3. An organization should not assume that all management is in favor of implementing self-directed work teams.

Redefine the job responsibilities of management and involve them in the implementation process. Not everyone will believe in the process from the onset (42).

4. Organizations must communicate to the team the expectations.

Goals and milestones along with a timeline must be

established and communicated to the team (42).

Lynch and Werner advise when considering the implementation of self-directed work teams in a small company to think about whether it fits the company's style. Most small companies do not have the financial resources to develop work teams nor do they have the time to spend making them work. They suggest that the first step is to set the stage and ensure that all employees believe in the new structure which is critical to the success of the organization. They also suggest a process flow map of the company's work flow to further strengthen the need for empowered teams (37).

Lynch also suggests forming teams around the work using the process flow map as a guide. On a small scale, process improvement teams which consist of cross-functional members may be the best method for solving problems and reducing costs in the small company (38-39).

The final step is to provide training to ensure managers are fluent in the team-management process and ensure they possess skills such as problem solving

skills and interpersonal skill. Managers must be trained before the remainder of the employees are trained (39).

3M Company shares their experiences after learning that it takes a non-traditional approach to make teamwork successful. According to Braun, 3M Group Vice President, successful teams have the following characteristics:

They are highly focused.

They have a specific charter

They are short term/high energy (Allio 19).

Allio reports that 3M learned some valuable lessons as to how to manage empowered teams. Clear goals and objectives are absolutely essential. An organization should commit to planning in advance to implement self-directed work teams. An important step is to secure the support and buy-in from senior management due to the transfer of power from the management ranks to the team. Organizations must invest in team training due to the fact that self-directed work teams require a whole new skill set. 3M's last recommendation is to carefully manage group

size and composition. They advise organizations to be selective in identifying team members and leaders. Inflexibility has no place on the self-directed work team (19-20).

After the teams are in place, Braun advises that the process needs careful management. The team must be given the authority to make decisions and to act on them. The team also should be able to choose the degree of risk that will bring about the most success. After being given the ability for risktaking, the team must be allowed to control the budget to support the risk. While the empowered team is progressing, management must be aware that there are different phases that the team will progress through. There will be a transition phase, an operating phase, and a critical phase. And finally, Braun advises organizations to "let the team be involved in the reward process" (20).

Braun also shared some caveats that go along with the implementation of empowered work teams. Middle management concerns must be anticipated ahead of time; therefore, as others have suggested, middle management

needs to be involved in the process early on. The organization also needs to recognize that the team will struggle. Middle management must be prepared to carefully review the time allocated to the team and reallocate team members' time as required. Senior management must set explicit performance guidelines and review team performance carefully (20-21).

Braun advises that the benefits derived from the empowered work team have "improved communications and cooperation and enhanced personal credibility and trust" (20). However, Braun readily admits that they had several obstacles to overcome due to the significant culture change the process required (20).

XEL Communications, Inc., decided not to train their employees before placing them on teams and it became apparent rather quickly that training was a priority for the team to survive. Now a portion of their training focuses on individual accountability and employee empowerment, skills which most of their employees did not possess. They readily admit, "You can't train enough in a self-directed team environment. It's a never ending process" (Caudron 49).

Caudron also reports that Displaymasters, a display manufacturer in Minneapolis, decided to put their workers into teams without defining their roles and expectations and without providing training. The result was chaos. Employees became silent and frustrated. The company now has taken a step backward and provided training on how to become a part of an effective self-directed work team (49).

NASA also admits that creating effective work teams takes an investment in time and training. Godwin advises,

You've got to spend a lot of time at it and it isn't all formal training. It's getting to know people and working together with them for many months. You have to develop confidence in others, and a lot of what creates confidence and effective teams is being in close proximity with your team mates on a regular basis. (Caudron 49)

Palef reports that ASEA Brow Boveri Canada, Inc., received employee feedback after employees had participated on an empowered work team and gave the company the most important factors to consider with respect to the team. The first was time considerations due to the time required for the strategic planning.



Secondly, once again, they stressed the need for training to ensure all team members have the skill set required to participate in a team environment. Process mapping and benchmarking were two very important aspects required in preparation for empowered work teams (Palef 48).

In their book, Self-Directed Work Teams, The New American Challenge, Orsburn, Moran, Musselwhite, and Zenger provide a whole section on the tools and techniques required to implement self-directed work teams. Nineteen tools and techniques are outlined which do not differ in scope from the information provided by other authors but contain more in depth information as to "what, when, who, how and what's next" (Orsburn et al 219-220).

The first technique outlined is employee involvement and it outlines six levels of employee involvement which range from managers making all the decisions to workgroups assuming responsibility for the decisionmaking. They suggest the steering committee be formed as the next step and then a feasibility study be performed to determine if the organizational climate

and business conditions are suitable for self-directed work teams (221-222).

After an organization has made the decision to implement self-directed work teams, the mission statement is developed which summarizes the objectives the company plans to achieve or the "vision" for the organization. Developing the mission statement is followed by the design team training which consists of executive management, middle management, and first line supervisors. All employees are then scheduled for awareness training which assists them in understanding the process and reasons for the organizational change (246-247).

A workplace analysis is conducted to examine the current levels of productivity and employee satisfaction in a specific department or work group. Team member training then takes place for those skills required to implement self-directed work teams such as interpersonal skills, problem solving skills, and work team awareness skills. Manager and supervisor training is conducted to ensure management is aware of their new roles and the evolution process they will be going

through (264).

The hand-off plan is then developed for management to systematically transfer tasks to the team and the team member expansion role plan is developed which lists the responsibilities for the individual team members (281).

A peer disciplinary review committee is established to review complaints relative to disciplinary action and/or termination. On the other hand, reward and recognition techniques are developed to provide recognition to the work team for their accomplishments (297).

At this time, mature team-new team coaching sessions begin which consist of coaching sessions between a mature team and a new team to assist the new team in the development process. Procedures for group problem solving are developed for team members and cluster meetings are conducted which are short, stand-up meetings designed to be information sharing meetings rather than problem solving meetings (305-306).

The peer performance appraisal is developed and appraisals are performed on an annual basis. Repotting

workshops are developed which actually renew the sense of purpose and identity for the team. Finally, diffusion strategies are outlined to establish new work teams within the organization by increasing the number of teams at the existing facility or establishing work teams at a new facility (318).

In their book, Teamwork, New Management Ideas for the 90s, Petersen and Hilkirk talk about Ford Motor Company and the steps they took to implement empowered work teams. Petersen was the CEO of Ford Motor Company in the 1980s when the company was rated the lowest among the Big Three automakers in quality. Their first step was to launch an employee involvement program which was the beginning of the team concept for Ford (21-22).

They opened up the books for the employees and shared with them the financials of the company that previously had only been shared with senior management and a select few. The financial review included the profits of the individual plants and the quality ratings for the company. Following the financial review, they organized the steering committee which was

chaired by the union leader and the plant manager (39-40).

Ford went a step further in their implementation process and solicited outside assistance by using Dr. Edward Deming and other outside consultants to help the steering committee pinpoint the problem areas. They selected four assembly plants to pilot their team concept and publicized their intentions to the local managers and workers via the union newsletters and bulletin board messages (40-41).

They began the process at the selected pilot locations and formed two or three problem solving teams per plant. Each team selected a facilitator to help the teams get started. Once the teams were up and running the steering committee evaluated what worked and what did not work. After determining what their successes were, they began to spread the word to other plants that work teams were bringing about quality results (42-43).

Apple Computer, Inc., realized that increasing competition was forcing them to change their business proposition in 1989. Hamlin reports that, "The real

world had come to Apple with a vengeance" (56). They began to redesign the organization. All members of the team were on an equal basis regardless of rank and they began to develop a team network. They advised key stakeholders of their new philosophy and began to develop team-based rewards to bring about desired results (Hamlin 55-57).

They began to establish cross-functional teams with team members accountable for various aspects of the business globally rather than in one specific geographic area. Each team leader was held accountable for the management of their team. The process began in 1989 and was implemented in January, 1992. They have increased volume, grown revenues, and reduced costs. Hamlin advised that Apple had to "challenge sacred institutions, suffer political assaults from many quarters, redistribute personal power, and subordinate some local autonomy" (62). However, Apple has gained a competitive advantage as a result of its organizational redesign (Hamlin 62).

Taggart Frost says,

One of the most challenging work cultures for

an organization to create, sustain, and improve is an authentic team-work based environment. For an organization to change from a traditional classical structure to an organic team-based structure requires changes not only in structure, but in processes, systems, attitudes, leadership philosophy and style, and paradigms. (17)

In a manufacturing environment, the first step is to conduct a study to identify the organizational areas of change that would bring about a team-based environment and the differences among people in terms of their perception of teamwork and how it relates to their job classification, years of service, salary, and responsibilities (17).

According to Frost, the study can be as simple as conducting a survey to identify areas of change that would bring about the teamwork culture while recognizing the differences with respect to demographics and individual perceptions of teamwork. The manufacturing corporations would then identify the areas for change as a result of the study and establish their "vision" (18-20).

Isgar, Ranney, and Grinnell define the team leader as "the critical link between the concept of quality

and its implementation through employee participation" (45). The team leader tends to come from two groups within the organization and that is the supervisors or the subject matter experts. Either group has the potential for excellent team leaders given the appropriate training (45-46).

Training programs need to focus on team building which gives team members the skills to work together, and resolve interpersonal differences, not particularly how to lead. Without the appropriate training, team leaders can be either too directive or too passive (46).

Senior management must support the team leader and the committee in order for the team to become effective. The team leader assists the team members in building the charter for the organization and proceeds to manage the team's work. According to Isgar, Ranney, and Grinnell, "leaders give their teams a beacon to light the way to success" (47).

According to David Antonioni, Professor at the University of Wisconsin School of Business, a manager has five different roles to engage in as they lead



teams:

1. Internal consultant
2. Visionary
3. Experimenter
4. Coach
5. Educator

Antonioni makes it sound so simple. The final task of the team leader is to "record the team's new ideas and communicate them to senior management which in turn integrates the ideas into the internal operations' strategic plan" (3).

Katzenbach and Smith report that, "A real team is more than just the sum of its parts" (7). They advise that a corporation needs to keep its options open and not just "assume" that a team is "all or nothing." They suggest paying attention to five guiding principles.

1. The team should be defined in terms of performance opportunities.

Don't make becoming a team the primary objective (71-73).

2. Team members should be assigned on the basis

of skill not status.

Identify who has the skills to meet the performance challenges (75).

3. Leaders should be chosen on the basis of attitudes and beliefs rather than seniority or position.

The CEO should not necessarily be the team leader because some are not good team leaders (77).

4. Regular team discipline should be enforced on all teams.

Team members must hold themselves accountable for desired results (78).

5. Values as well as limits of the group should be recognized.

Some groups of employees operate more effectively as a working group rather than as a team; therefore, a combination of approaches may be used (79).

Lewis and Bloom say, "Teams don't just happen they're built" (32). They believe that teams are often unsuccessful due to the team leader not possessing the ability to turn the group into a team. Team leaders must develop teamwork by meeting with team members and

asking the group for their ideas and suggestions (32).

Team goals must be emphasized to help team members understand their importance. Team leaders should also lead by example and present themselves as a resource or a coach rather than a manager. They should also share the lead by conveying equality to the group. And, finally, the team should celebrate accomplishments. Lewis and Bloom advise, "Make building your team a fun project" (33-34).

Vashilash reports that Freudenberg-Nok, an automotive supplier in Plymouth, Michigan, has established a "Growth" program which is executed through empowered work teams. The work teams are given specific assignments to complete in a specified period of a time. Their teams work on projects which take from one to two days to three months to complete ("The Team Approach," 66).

Melissa McCoy, Lean Strategy Associate for Freudenberg-Nok, gives the following tips concerning teams:

1. Limit team size to six to eight members.
2. Limit time for meetings to no more than 90

minutes per session.

3. Be inclusive in team membership and involve people from all levels in the organization.

4. Don't expect teams to last forever; they should disappear over time (68).

Caterpillar Inc. has been using teams long before teams were a part of the "popular production culture" (58). Kenneth Bennett, General Manager, Medium Engine Products, Mossville, Illinois, advised that the power of teams is in the benefits derived from the team. "We introduced the new engine in record time, met some reliability targets we'd never met before, and did a lot of concurrent product and process design work in development which, again, we hadn't done before" (Bergstrom 58).

Bennett suggests that teams must include experienced employees who have the skill sets to perform the required work. Bergstrom advised, "A specialist in emissions, for example, has to know his or her emissions, or their contribution will fall short, and the work of the team will be compromised" (59). Therefore, team members must be recruited and

chosen carefully. It is a selection process, not a democratic vote of the people (59).

Bergstrom further reports that team members must be able to "contribute to the synergism of the team, for the benefit of the team" (59). They must be 100 percent focused. Bergstrom finally advises management to get out of the way and allow the team to be empowered to perform the task that they are charged to perform (59).

Shaw advises that team members must not only be aware of the changes that are taking place in the workplace, but also the diversity within the team. Shaw says,

We need to understand that we are all individuals with our own levels of confidence and that we approach change in different ways. We must recognize that we cannot mold each other into what we perceive the perfect team player to be (42).

Shaw says that "equality is essential in building team spirit" (42). The organization must build the confidence of the team members and offer support and guidance that result in "an organization of the best people available" (42).

Louis W. Joy III, president of Manufacturing Excellence, Inc., says,

Teamwork is not the goal. Organizing people into teams is a way to get things done in manufacturing organizations. It's a way to get the best ideas out on the table. A way to get people motivated to do their best and to participate in the improvement process (65).

Joy believes that teams are the right way to go but making that choice is merely a good business decision. However, teams can only be effective as long as management and labor understand that the organizational change is beneficial to everyone (Vasilash, "Teams" 65).

Joy believes that team meetings should be held daily with weekly retrospective meetings that look backward as well as forward at team tasks. Self-directed work teams should have "as much authority and responsibility as they can handle" (65). Joy further believes that the team should have authority with the hiring and firing in the organization. The team training should include teaching employees how to perform those tasks. Joy also wants employees involved

in decisions which affect employee salaries. Joy says, "Who knows better what someone deserves than people who work day-to-day with that person" (65).

Joy believes that if financial information is shared with the team the employees will have a better understanding of why downsizing and restructuring is necessary. Vasilish reports that although Joy is the president of a consulting firm, consultants are not always required to assist long term in the implementation of self-directed work teams. The assistance of consultants should only be required for a minimum of six months and after that the initial team should be in place to implement the process (65).

Margaret Kaeter reports that some organizations believe that by the time work teams have matured and are fully implemented that they should be self-sustaining and the process is over. Some of the problems with maturity are that team members become surprised to find that they are faced with new difficulties just when they thought things were running smoothly. The team may even revert to pre-team habits that are undesirable. Communication problems come into

play when team members get to the point that they can "read each other's minds" and feel there is no longer a need for discussion of the issues (Kaeter 4-5).

Kaeter suggests some tools to cure the team and prevent stagnation:

1. Ensure that the corporate culture supports the team. It's not an option to quit the team when the going gets rough.
2. Tell them they're not unique. Discuss the stages of team growth and share experiences of other organizations.
3. Revisit the basics. It may be necessary for the team to actually "begin again."
4. Build on their knowledge. Training on more sophisticated skills may be required.
5. Don't neglect the individuals. Ensure that everyone on the team sees their benefit to the organization.
6. Expand teams to other parts of the organization. Begin to add cross functional team members.
7. Broaden their picture. Provide more detailed



business information to allow team members to see the "big picture."

8. Set continuous growth as a goal. The team should be learning as they work through the developmental stage.
9. Think of teamwork as a process. Teams must "define the processes of running the team and continually improve them."
10. Celebrate the successes (5-6).

In his article, "Teaming to Win," Beal says that "the CEO must summon the patience to ride out initial bumps that are sure to accompany the transition-- including the possibility of a temporary dip in productivity as employees adapt to a new environment" (26). He further advises that he tells Rockwell executives and managers to "...throw away your cookbooks. Break down the walls of bureaucracy, and empower your people. Ask yourself--and your employees--to think as if each were the chairman of the company and were accountable for its success, then use teamwork to implement the ideas necessary to make that success happen" (26).

Empowered work teams have both successes and failures to report. The Gaines Dog Food plant in Topeka, Kansas, implemented self-directed work teams two decades ago and has been 20 percent more productive than similar, traditional plants of its type (Carr 43).

Allina, a company which runs 17 nonprofit hospitals in Minnesota, first tried to form teams in the 1980s but due to a hostile relationship between the Company and the Union, their efforts failed. However, they came back in the early 1990s to negotiate with Union officials and successfully reached an agreement to proceed with implementing empowered work teams which has produced "stunning results" (92). One of the problem solving teams saved the company over \$200,000 a year by revamping the maintenance procedures from being performed by outside sources rather than their own staff (Dumaine 92).

Xerox Corporation reports that their plants which are utilizing empowered work teams are now 30 percent more productive than their conventional plants. Procter & Gamble reports 30 to 40 percent higher productivity in their team-based plants. Tekronix Inc.

reports that their self-directed work team produces more in three days than it formerly produced with an entire assembly line in 14 days. GM reports 20 to 40 percent productivity gains in their plants utilizing empowered work teams. General Mills reports that with the introduction of empowered work teams that productivity has risen 40 percent and their night shift now works unsupervised. Federal Express reports that they have reduced service errors by 13 percent due to the implementation of empowered work teams (Orsburn et al 5-6).

Those success stories along with the successes cited in this paper such as Northern Telecom Ltd., Ford Motor Company, Apple Computer, Inc., and Caterpillar, Inc. are encouraging to the company that is preparing to embark on the journey to implement self-directed work teams. However, there are some failures to report as well. Gossen Corporation in Milwaukee struggled with the implementation process and was unsuccessful in their efforts to convert to self-directed work teams due to the "Lone Ranger" concept. They had preached individuality for so long their employees did not have

the knowledge nor "want to" to become part of a team (Caudron 42).

For the very same reasons, Shelby Die Casting in Shelby, Mississippi, came very close to failure in the implementation process. In addition, employees could not accept their new role as a decisionmaker. Management finally overcame this hurdle simply by advising the employees if they did not make the decisions they would have to close the plant and their jobs would be gone (Caudron 42-43).

Other failures or those companies who came close to failure cited in this paper are Azco who failed due to its selection of team members, the San Diego Zoo who experienced problems with its management team letting go, XEL Corporation who experienced problems due to the lack of training, and Displaymasters who experienced chaos as a result of failing to define the roles and responsibilities of the team members. Each of the reasons for failure or near failure for these companies has been addressed in the research provided. The research provides an organized method for implementing self-directed work teams provided by actual

corporations who have "been there, done that" or those who specialize in the study of empowered work teams.

Many corporations have implemented empowered work teams with their own formula for success. Most of them have established that "hindsight is 20/20" and would do some things differently or use different methods if they were to begin the process over. Even those companies who have failed in their efforts have been able to identify the reasons for the failure and some, such as Allina have had the courage to back up and begin the process again. The charter for GTE is to select the "best of the best" methods used from this research to implement self-directed work teams in the Customer Contact Center in Wentzville, Missouri.

**Chapter III**  
**METHODS AND EVALUATION**

**Materials**

The Implementation Plan (Appendix A ) for Self-Directed Work Teams in the Wentzville Customer Contact Center is comprised of seven areas intended to provide direction for the initial implementation of the empowered work force. The plan is in no way intended to encompass all the requirements for eventually becoming a "leaderless" work team.

Utilizing the research material, the plan was constructed around the most frequently discussed elements in the implementation process which are:

1. Communicating the "vision" and the mission statement for the organization to all employees.
2. Discovering and analyzing the employees' viewpoint of the corporation.
3. Assessing the organizational needs and determining whether or not empowered work

teams should be implemented.

4. Providing training to all employees not only during the initial implementation but also as the plan matures.

The plan begins with an Empowerment Overview which outlines the reasons for the implementation plan with the establishment of the mega Customer Contact Centers where the span of control has widened. Clearly stressed in the overview is the fact that the plan is intended for initial implementation only and will continually be evaluated going forward while the implementors are both reactive and proactive in their assessment of the implementation process.

Following the empowerment overview, the first element addressed in the implementation process is communicating the "vision" or mission statement for the organization to all employees. From the research gathered, all sources identify the need for employees to understand the "big picture" and the vision for the company in the most competitive environment the telecommunications business has ever faced. Therefore, the presentation "Where Is This Company Headed?" will

be conducted for all employees at all levels within the Customer Contact Center so that they clearly understand the opportunities within GTE both nationally and internationally. The presentation material will provide employees with the vision for GTE and the strategy the company is taking to offset competition.

As the second element of the implementation process is addressed, discovering and analyzing the employees' viewpoint of the corporation, the aid of outside consultants will be enlisted who will assist the management team in identifying the current level of support for the empowered work team. Two vehicles are available through the company include an Organizational Climate Survey and an Organizational Readiness Assessment Survey. The Organizational Readiness Assessment Survey will address the third element of the implementation process which is assessing the organizational needs and determining whether or not empowered work teams should be implemented. From the results of these two surveys, an overall empowerment strategy will be designed if the survey results prove that empowered work teams can effectively be implemented.



Within the Customer Contact Center, only one job function is performed which is inbound telemarketing; therefore, work teams are already established by supervisory group with a span of control of 1:25. With the first line supervisor title defined as "Coach," the supervisor must move out of the group from the role of leader to the role of facilitator and the front-line, hourly employees must become empowered to make the decisions formerly made only by their supervisor. Therefore, the position of Lead Rep has been established to take on the role of Team Leader and assist their peers with those decisions.

The implementation plan provides the guidelines for selection of the Lead Rep and the utilization of the Lead Rep in the workforce. Detailed guidelines are provided which encompass all activities associated with the Lead Reps from the initial nomination of the employee to the work performance that would lead to suspension from the program.

The final element of the implementation process is providing training to all employees not only during the initial implementation process but also as the plan matures. All research emphasized the need for training

during the implementation process for both hourly and management employees which would provide the skill set required for successful empowered work teams. The Training Specifics are outlined in detail beginning with an overview which outlines the need for the training. Each workshop and/or training session is outlined with the time line required for the training, the skill sets that will be developed from the sessions, and the tools required to enhance those skills.

The plan provides an initial empowerment development plan which lists the workshop, the time allocated for the workshop or session, and the number of employees requiring the training.

The initial implementation plan provides a tentative time line for implementation which includes all of the items discussed above. The completion dates were developed based on the volume of employees who will be involved in each particular part of the implementation plan and the particular needs of the business. The months of May and August are the months with the highest call volume; therefore, no activity is scheduled which would require the front-line employees

to be away from their workstations during this time. None of the time frames are final and can easily be adjusted as the plan is evaluated going forward and changes are required.

### Subjects

The implementation plan was evaluated by two management employees within the Customer Contact Center. Earnest Fifer is a second level manager responsible for half (eight) of the first line supervisors in the Customer Contact Center and half (200) of the front-line employees.

Fifer graduated from Schriener Junior College in Kerrville, Texas, with an Associate of Arts degree in Business Administration and completed his education at St. Joseph's College in Collegeville, Indiana, where he graduated with a Bachelor of Science degree in Finance. He began his career with GTE in 1973 as a Staff Assistant Trainee and performed as a management trainee in Finance, Personnel, Operator Services and Accounting. He later became an Operator Services Supervisor and went on to be named the Manager of Operator Services. His past five years have been spent

managing first line supervisors responsible for customer contact employees. He was named to his present position as Section Manager - Customer Contact Center in October, 1993. He has been an advocate of empowered work teams and is anxious to begin the implementation process especially since the span of control has widened for our supervisory staff.

Pat Hatcher is the General Sales Manager for the Customer Contact Center in Wentzville, Missouri, and was named to that position in May, 1993. Hatcher attended St. Petersburg Junior College and Eckerd College in Florida where she majored in Business Administration. She has a long and varied career with GTE which spans 28 years. She has held positions from the hourly front-line employee in Operator Services to her current position as General Sales Manager responsible for a workforce of approximately 450 hourly employees, 16 first line supervisors, four second level managers, and eight staff support management employees.

Like Fifer, Hatcher realizes the challenges facing the supervisors and is anxious to begin the implementation process for empowered work teams. She was very interested in reviewing the implementation

plan and wants the implementation to begin as soon as the plan is agreed upon.

### Instrument

The implementation plan and a cover letter (Appendix A) were provided to the evaluators. Areas of evaluation in the questionnaire included plan comprehension, information flow, timeliness of implementation and budget constraints.

### Procedure

The plan was provided to the evaluators on January 3, 1995 for review. Each evaluator was asked to critique the plan based on the questions in the cover letter. A written evaluation of the plan was provided and a follow up conference call was used to further discuss the evaluation.

## Chapter IV

### RESULTS

The Implementation Plan for Self-Directed Work Teams in the Wentzville Customer Contact Center has been reviewed by the evaluators. A follow-up conference call was held to discuss any questions the evaluators may have had relative to the four categories outlined in the questionnaire which was provided in the cover letter. The four areas of evaluation were plan comprehension, information flow, timeliness of implementation, and budget constraints.

Evaluators provided their responses to the questionnaire provided in the cover letter in writing. The summarization of their individual responses is provided in Appendix B. The results of the evaluation as a whole are provided by area of evaluation.

#### Plan Comprehension

"Are the contents thorough and able to be understood by all employees involved? If not, what are your recommendations to clarify the plan? If so, please provide comments on any adds, changes, or

deletions that would streamline the plan and provide for ease of implementation."

Both evaluators responded that the plan was both thorough and complete in content. The Empowerment Overview was very well received especially the portion which outlined why the plan is necessary. The fact that plan is not intended for full implementation but merely as a starting point also received favorable comments.

Communicating the "vision" and the mission statement for the organization to all employees also received favorable comments. The evaluators have already begun the process and have individually embellished the presentation to include further information on the new technology which drives the corporation to become "the easiest company to do business with in the industry." It also reinforces the necessity for self-directed work teams.

Although both evaluators felt the Organizational Climate Survey was necessary, some question was raised as to whether or not an Organizational Readiness Assessment Survey was necessary. There was some

thought that the organization's readiness for and the necessity of the empowered work team is outlined in the "vision" presentation.

Both evaluators praised the Lead Rep program which has been in place for some time; however, the original guidelines have not been strictly enforced. The suggestion was made that the guidelines for the selection and use may need to be reviewed by first line supervision and front line employees for validation. Some changes may be forthcoming in those areas after the review. The guidelines for compensation were deemed acceptable as is. Suggestions were also made to update the Qualifications Matrix for the particular qualifications required to become a Lead Rep and provide more subjective data in the area of performance and skill level.

Both evaluators agreed that the Training Specifics may be too detailed and one evaluator suggested a change to provide only high-level information. However, the other evaluator suggested a trial utilizing the detail as it is currently provided. During the conference call, both evaluators agreed to a trial utilizing the detail as it is currently provided



and narrowing the detail only if warranted upon completion of the "test run."

The timelines provided and the number of training days required to complete the training sessions were an issue for both evaluators and will be discussed further in the timeliness of implementation and budget constraints areas.

#### Information Flow

"Is the flow of information in the correct sequence or should we change and/or rearrange? If not, what changes or rearrangements would you make to correct the flow of information? If so, please give your comments on why the flow of information should be in the sequence outlined?"

Both evaluators felt the flow of information was in the correct sequence. As stated above, however, there is still some question as to whether or not the Organizational Readiness Assessment Survey is required. The evaluators felt strongly that an overview outlining what is taking place should definitely be the first step. There was some discussion that the overview should be included in the "vision" presentation. In

essence, Section I and Section II could be combined and presented into one session to a workgroup rather than having two separate sessions. This would eliminate some scheduling conflicts.

Both evaluators felt that the Organizational Climate Survey should not be conducted until after the "vision" presentations were completed. They felt that the survey would provide more meaningful data if each employee clearly understood the "vision" for the company. One evaluator feared that a survey conducted before the presentations were completed might include a mix of employees, some of whom had seen the presentation and some who had not seen the presentation, and the data would be distorted based on employee understanding of the vision for the organization.

General consensus was that the Lead Rep program should be reviewed and revamped as required before the actual training process begins due to the fact that new Lead Reps may be selected based upon new or revised criteria. Therefore, training dollars would not be expended on employees who may be removed from the Lead Rep program.

Although there were concerns on the detail provided in the Training Specifics, both evaluators agreed that some type of overview should be provided prior to the actual training sessions. Each employee who participates in the Employment Strategy and Awareness training should be provided with an overview of the training session and why it is required in the implementation process.

#### Timeliness of Implementation

"Can we implement in the timelines provided? If not, what timelines should we use? If so, please provide comments on how, by whom, and to whom should the communications plan be provided?"

Both evaluators expressed concerns that the timelines are too aggressive. Based on forecasted call volumes for the Customer Contact Center, there will be periods of time that no training sessions, presentations, or surveys can be conducted. Removal of the timelines allocated for the Organizational Readiness Assessment Survey and the analyzation of those results will provide a ninety day period of time that can be utilized as required. The suggestion was

made to utilize that timeframe to review the Lead Rep selection and use criteria and update the Qualifications matrix for the Lead Reps. Therefore, the selection process can be completed by the original date assigned.

The timelines provided for training sessions will need to be adjusted based on the needs of the business; however, that task cannot be completed at this time. Both evaluators agreed to leave the original schedule for the training sessions intact and adjust as required. They will also be responsible for the communications plan which they will develop for all employees within the Customer Contact Center since all will be affected by the implementation plan. Their plans are to provide a document to each employee following the "visions" presentation.

#### Budget Constraints

"Will we be able to support the plan with budget dollars? If not, what steps need to be taken to put pieces of the plan in place with the dollars allocated?"

Each section of the plan does not require budget

dollars over and above those dollars allocated for "business as usual" with the exception of Section VI, the Training Plan. Both evaluators expressed concern that there are not budget dollars allocated for additional training sessions which this plan provides. One evaluator pointed out that there are twenty Lead Reps, twenty first line supervisors, six Quality Training Coordinators, and three second and third line managers. The plan provides for 67.5 training days for Lead Reps, 120 training days for first line supervisors, thirty-six training days for Quality Training Coordinators, and six training days for second and third level managers. This is a total of 229.5 training days which are not budgeted. It was suggested that the plan be provided to executive management and a budget overlay requested to provide the training as outlined in the plan. If budget dollars cannot be allocated to implement the entire training plan, the budget will be reviewed monthly for any favorable variances which would allow the training to begin in the third quarter as outlined. The final alternative would be a decision to overrun the budget to accommodate the training and suffer the consequences.

The final consensus was that the training plan would remain as outlined and the process would begin as budget dollars become available. Both evaluators suggested that the plan should not be altered or changed at this time but would be reviewed ongoing.

Appendix C provides a synopsis of each section of the plan and the status after reviewing the plan. Much of the plan remains as it was originally outlined. The section requiring the most review and updating is Section IV which will be accomplished by a task force of both front line employees and management employees. Fifer and Hatcher agreed to oversee the assignment of the task force and the completion of the new and/or revised section.

Both evaluators were very pleased with the plan and are anxious to begin the implementation process. Portions of the plan are already in progress.

## Chapter V

### DISCUSSION

#### Summary

The Implementation Plan for Self-Directed Work Teams in the Wentzville Customer Contact Center was well received by the evaluators primarily due to the fact that the plan focuses only on the initial implementation process. Three areas of concern were identified which will require either revision of the plan or removal from the plan.

The plan provides two tools to assist in determining whether or not the corporation is ready for the empowered work team. It was decided to only use one of those tools, the Climate Survey, and remove the other tool from the plan. The general consensus after much discussion was that the Organizational Readiness Assessment survey was redundant and was already covered in a prior presentation.

Timelines for implementation and budget constraints will provide some opportunity for revision of the plan during the initial implementation process

primarily because the amount of time allocated for training is above and beyond the budget dollars allocated for business as usual in the Contact Center. However, there was no question that training of all employees is the most critical part of the implementation process. The agreement was reached to proceed with the training, and budget dollars would be secured through a budget overlay or through budget variances.

One other area which will require some work is the Lead Rep program which is in place today; however, management and hourly employees have deviated from the original guidelines set forth and both evaluators agreed that some changes need to be made to the program. An agreement was reached that a task force would be established which would consist of both hourly and management employees to review and update the plan as required. Selection of the best team leaders for the work teams is a priority.

Implementating the empowered work team in the Wentzville Customer Contact Center is critical to its success. The Center opened in December, 1993, and has grown to 400 plus employees with only 16 supervisors.



The span of control is 25:1 and approximately 90 percent of the hourly employees have less than one year of service. The initial training period to perform the job of the front line Contact Center Associate is approximately 16 weeks in duration; therefore, four months of their short tenure has been spent in a training environment.

The first line management employees are anxiously awaiting the implementation of the empowered work team. They have attempted to assume the role of coach rather than leader but are sometimes unsuccessful due to the shear volume of questions to be answered by their employees, escalation of customer complaints, and performance reviews for probationary employees.

The Implementation Plan for Self-Directed Work Teams in the Wentzville Customer Contact Center was developed using those methods considered the "best of the best" by other corporations who have implemented empowered work teams. Many corporations have implemented the empowered work team and some have been very successful, while others have not. However, many companies which have not been successful have identified their weak areas, and some have attempted

the process again and have been successful the second time around.

The plan was developed around the four core objectives that were common to all corporations that were successful:

1. Communicating the "vision" and the mission statement for the organization to all employees.
2. Discovering and analyzing the employees' viewpoint of the corporation.
3. Assessing the organizational needs and determining whether or not empowered work teams should be implemented.
4. Providing training to all employees not only during the initial implementation but also as the plan matures.

In addition, the plan was developed utilizing the recommendations from 3M Corporation who also attempted to implement empowered work teams and had to rethink the process after some months. The plan covers the following recommendations from 3M:

1. Plan in advance.
2. Get the support and buy-in from senior

management before the process begins.

3. Invest in training.
4. Be selective in identifying team leaders.

The majority of the companies that failed in their efforts attempted to implement empowered work teams without the investment in training. This plan provides for a total of 229.5 training hours for all employees just for the initial implementation.

Clearly, some type of planning is required; however, the plan cannot be so well defined that there is no room for flexibility. The Implementation Plan for Self-Directed Work Teams in the Wentzville Customer Contact Center addresses the initial implementation only and allows room to add, change, or rearrange as the plan is implemented and work teams evolve.

The plan embraces the four concepts listed on the previous page which provided successful implementations to 3M Corporation, Northern Telecom Ltd., Ford Motor Company, Apple Computer, Inc., and Caterpillar. The plan also addresses those areas which resulted in unsuccessful implementation for Shelby Die Casting, Azco, XEL Corporation and Displaymasters. Those areas which resulted in unsuccessful implementations are

primarily a direct result of failing to provide the training required for all levels of employees.

### Limitations

The research material available on the empowered work team is somewhat limited at this time. Although the empowered work team has been a topic of conversation for several years, the majority of self-directed work teams have been in existence for three years or less, and 59 percent have been around for less than two years. Most of the research revealed that it takes three to five years to fully implement the empowered work team; therefore, material was limited for corporations that are fully up and running with the self-directed work team.

The research provided many articles in various periodicals which provided information on the empowered work team; however, few books were available on the subject. Those books that could be obtained contained instructions on how to implement the empowered work team but did not contain actual documentation from corporations who had either implemented and been successful or had implemented and had been

unsuccessful.

In depth material on the subject matter was difficult to obtain. Actual documentaries on corporations who had implemented the process would have been helpful. Most of the material on the successes and failures could be found in a short article in a periodical rather than detailed information in a text. In depth material on the successes and failures would perhaps have resulted in a more detailed implementation plan.

Most corporations are in the initial implementation stage and many never got beyond this stage, deciding that the empowered work team is not going to be a panacea for all ills, so they discontinued implementation. This type of information also does not provide good research material.

Many libraries had limited material on the subject matter while others contained a respectable amount of material if it could be found. The terms "empowered, self-directed, and leaderless" often led to a dead end when researching the topic. "Work teams" also did not provide much material on the subject matter. It became a game to determine which combination of words would

provide the appropriate material for the subject matter. As the research progressed, often times the combination of words changed and it was a new challenge to, again, put the correct combination of words together.

#### Suggestions for Future Research

This subject matter will continue to be of interest not only to GTE but to other corporations who are in the process of restructuring and downsizing. As the research stated, many times those situations are the driving forces which lead to the empowered work team whether or not the corporation is ready for it.

The widened span of control is a direct result of downsizing, and corporations must adapt some type of empowerment philosophy or plan for the frontline employees. Time and experience has taught us that the front line employee is the most important person in the corporation. Many times they are the first and most impressionable contact with the customer. Everything and everyone must ensure that the frontline employee has the tools to perform the job and is empowered to make the decisions required to satisfy and retain the

customer.

Given the opportunity to replicate this research, I would undoubtedly visit Ford Motor Company, Xerox, 3M Corporation, or any other company who boasts success in productivity and profitability as a result of the empowered work team. My interest in this subject matter will not end with the completion of this project primarily because most corporations are in the "forming" stage of the process. It will be interesting to follow their progress and record both their successes and failures with the empowered work team.

Different evaluators might be chosen should this project be replicated. Both evaluators had no prior experience with empowered work teams and were anxious to begin the implementation process. Evaluators who had "been there, done that" might have proven helpful in reviewing the implementation plan and could have provided a little more insight into the actual implementation process.

The subject matter was continuously updated while the research was conducted; this could have become distracting at times but instead provided further interest in the subject matter. Each periodical,

newspaper article or textbook which provided material on the workforce of the 90s contained material on the empowered work team in some fashion. Reading material passed down from executive management often contained information on the subject matter. Empowerment is truly one of the buzzwords of the 90s.

The research was interesting and could have been conducted from several different perspectives. It could easily have been utilized for a "thesis driven" study and become even more interesting. Research could be conducted on those companies who were unsuccessful in implementing the empowered work team and focus on the reasons why they were unsuccessful. In contrast, research could be conducted on those companies who have been successful and focus on the reasons why they were successful.

Personally, it will be interesting to follow those companies who claim success today and review whether they continue to be successful. The empowered work team is the new wave but only time will tell its longevity in the work force.



## APPENDIX A

### COVER LETTER

Dear

Attached is the implementation plan for empowered work teams in the Wentzville Customer Contact Center. As we discussed, I would like for you to review the plan and provide feedback to me. I am specifically looking for input in the following four areas:

1. Are the contents thorough and able to be understood by all employees involved? If not, what are your recommendations to clarify the plan? If so, please provide comments on any adds, changes, or deletions that would streamline the plan and provide ease of implementation.
2. Is the flow of information in the correct sequence or should we change and/or rearrange? If not, what changes or rearrangements would you make to correct the flow of information? If so, please give your comments on why the flow of information should be in the sequence outlined.
3. Can we implement in the timelines provided? If not, what timelines should we use? If so, please provide comments on how, by whom, and to whom should the communications plan be provided?
4. Will we be able to support the plan with budget dollars. If not, what steps need to be taken to put pieces of the plan in place with the dollars allocated?

Please provide your comments back to me in writing by January 17, 1995. I will then schedule a follow up conference call on January 24, 1995 at 2:00 P.M. for discussion on your comments.

I look forward to hearing from you.

Sincerely,

Janetta Cole

**IMPLEMENTATION PLAN FOR  
SELF-DIRECTED WORK TEAMS IN THE  
CUSTOMER CONTACT CENTER  
WENTZVILLE, MISSOURI**

Janetta K. Cole

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**SECTION I**  
**EMPOWERMENT OVERVIEW**

Competition, deregulation, accelerating technological advances, and a changing workforce are just a few of the forces that are continually reshaping GTE's organizational environment.

To address these forces head on, we need a more participative work ethic, higher standards of quality and customer service, a quick response to change and growth and a more skilled and flexible work force that can compete in a changing environment.

Additionally, and equally important, leaders at all levels must realize what a powerful impact their support has on the work force and must be committed to providing this support. We need to be aware and part of the empowerment strategy taking place so we can demonstrate strong commitment and ongoing support to the concepts and skills being integrated into our operation.

Our span of control has widened and we are no longer able to be "all things to all employees." We

have come to the realization that we must depend heavily on our frontline employees to assist us with the day to day activities and decisionmaking processes. The Power of One must become a reality in our Center and we must empower our employees to first make the decisions and, secondly, to have faith and confidence in their decisions once made and communicated to the customer.

This proposal provides a plan to implement the empowered work force in the Wentzville Customer Contact Center with the initial establishment of Lead Representatives to assume the role of Team Leaders. This plan is only intended to address the initial implementation process and is in no way intended to encompass all the requirements for eventually becoming a "leaderless" work team.

We will learn together as we continue to grow and the empowered work force evolves. We will re-evaluate the plan as it is implemented and take corrective action as required. We will not only look forward, we will also look backward and rethink our procedures as we deem necessary during the implementation process.

We will first review the vision for the Company

with each employee in the Customer Contact Center and ensure they have a clear understanding of where we are headed as a company and why we have a need for the empowered work force. We will then assess our readiness for empowered work teams as an organization with the Organizational Climate survey and the Organizational Readiness assessment. These two vehicles will assist us in designing an overall empowerment strategy which will be more all encompassing than the initial implementation plan.

We will review the selection criteria for the Lead Representative and begin our selection process for 1995. When the selection process is completed, we will begin the training required for both management and the Lead Reps to assist us in the transition to the empowered work force. We must clearly understand the skill set required by both management and hourly employees to successfully implement the plan for an empowered work force.

Our work teams are already defined for us and we will grow and bring diversity to those teams in 1995. The vision must become a reality for GTE to remain in business and the empowered work force is one way to

bring that vision to reality. We must work closely with our frontline employees realizing that the success of this company lies with them. Let us begin our journey.



## SECTION II

### "WHERE IS THIS COMPANY HEADED"

Our goal in presenting this information to every employee in the Customer Contact Center is to understand where we are headed as a company. The presentation will give an overview of the great strides we have made in strengthening our position in a very competitive marketplace. It also will help us to understand how we can hit our targets in a fully competitive marketplace. It has not always been clear to all employees where our business direction is taking us and this presentation will give us a closer look.

We will cover our role on the Information Superhighway, advanced technology to be offered by GTE in the very near future, and the importance of regulatory policy to the telecommunications industry which can provide for both winners and losers in the marketplace.

We will cover our opportunities in the international marketplace and where our focus will be within the next two years. We will identify who our

customers really are and the role the Customer Contact Center employees play in obtaining new customers and retaining existing customers.

The future for GTE is ViViD which will be fully explained as Voice, Video, and Data by using the infrastructure we already have in place and the intelligent network we are introducing to target markets.

Our vision is clear. We must become the easiest company to do business with in this industry. To accomplish that, our employees must change our attitudes and our mindsets from the old GTE to the new company which has been established into lines of business.

At the end of this presentation, we are asking four questions:

1. What are the barriers to achieving the vision?
2. Which barriers can we remove by ourselves or with our teammates?
3. What will the benefits be of GTE offering the full ViViD product line and becoming the easiest company to do business with?
4. Do our personal and team objectives support

the vision?

Employees in the Consumer Line of Business will be given the tools and training to work with customers from all over the country, in a prompt and professional manner. Requests will be handles ranging from new service to billing eliminating handoffs to other departments. The transition from supervisor to coach will provide the support to make decisions "on the spot" that are in the customer's best interests. All work activities will be focused on responding to customer needs while administrative functions will be handled elsewhere. We will become the easiest company to do business with in this industry.

### **SECTION III**

#### **EMPOWERMENT STRATEGY**

##### **ASSESSING ORGANIZATIONAL READINESS**

Several assessment instruments are available to assist the management team in identifying the current level of support for a high involvement/empowering climate.

They include:

##### **ORGANIZATIONAL CLIMATE SURVEY**

- 31 questions focused on four employee dimensions.
- Administered by internal Consultants

Survey Administration Fee	\$ 865
Consultant Travel Expense	1000

##### **ORGANIZATIONAL READINESS ASSESSMENTS**

- Administered to random sample of employee base by external Consultant

Survey Administration fee	\$10 per person
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Survey results are analyzed, reviewed with management team, and an overall empowerment strategy is designed.

## SECTION IV

### CUSTOMER CONTACT CENTER LEAD REPRESENTATIVES

#### Guidelines for Their Selection, Use, and Compensation

##### PURPOSE

This document is intended to:

- A. Guide local management in establishing the Lead Representative (Lead Rep) program in the Customer Contact Center.
- B. Detail the process of selection/use of Lead Reps who will assist Supervisors with daily activities in support of Customer Contact Associates.

As individual work team sizes approach 25 Customer Contact Associates (or more), a qualified pool of Lead Representatives will be essential to the effective operation of the Contact Center.

##### LEAD REPRESENTATIVE RESPONSIBILITIES

Lead Reps will report to first-line supervisors and will work closely with Quality Training Coordinators (QTC's).

- \* 80%, or 32 hours of the Lead Rep's weekly schedule should be devoted to assisting the other Customer Contact Associates in his/her assigned work team.
- \* The remaining 20%, or eight hours of the Lead Rep's schedule should be spend on-line assisting customers.

The Lead Rep's off-line responsibilities should include, but are not limited to:

<u>Responsibility</u>	<u>Hours</u>	<u>Percent</u>
Performing informal peer coaching and	18	45%

advising CCA's on call handling techniques.

Answering questions for other CCA's and showing them how to use reference materials.	8	20%
Handling upward referrals from insistent customers.		
Holding small group meeting with CCA's to review policy and procedural changes.	4	10%
Facilitating informational and skill development workshops.		
Reading instructional bulletins and policy change announcements which impact CCA's.	2	5%

This is not intended to be a fixed weekly time budget for each Lead Rep. Some Lead Reps will be involved with some responsibilities more than others depending upon the needs of the work teams.

Lead Reps should not be assigned any of the following responsibilities:

- Remote service observing
- Documenting employee performance
- Preparing attendance reports on time sheets
- Disciplinary memorandum preparation or issuance
- Tracking down employees determined to be "missing in action"

Large team sizes will require approximately one Lead Representative for every eight Customer Contact Associates. A section with 12 supervisors with 25 CCA's will require from 35 to 37 Lead Reps.

#### **IDENTIFICATION OF PROSPECTIVE LEAD REPRESENTATIVES**

The best process to employ in the identification of Lead Reps is the one that is simple for all to understand, well-structures, and, above all, fair. If the identification process is not generally held to be fair, more harm than good will be done.

Clearly, not all CCA's are cut out to be Lead Reps. For the purposes of identifying those who are, however, the CCA population in the Center can be divided into four classifications as depicted below.

	GROUP 1	GROUP 2	GROUP 3	GROUP 4
MEET QUALIFICATIONS	NO	NO	YES	YES
HAVE THE DESIRE	NO	YES	NO	YES
ENDORSED BY PEERS				YES

The principle task is to determine which associates fit into Groups 3 and 4, i.e., those that possess all the skills and may or may not have the desire to be Lead Reps. From those "Group 4 Associates" who have both the skill and desire to be Lead Reps, it will be a matter of choosing the best of the best.

All Customer Contact Associates in the office should be given the opportunity to review the qualifications for entering the Lead Rep Program. Associates interested in being considered should be instructed to complete a Lead Rep Self-Nomination form and submit it to their immediate supervisor.

Supervisors may also wish to invite certain Associates to enter the program and sponsor them although all candidates are subject to review and approval by the Lead Rep Selection Committee.

#### **LEAD REPRESENTATIVE SELECTION COMMITTEE**

This committee, chaired by the Section Manager, will be comprised of the Quality Training Coordinator assigned to the section and at least three supervisors. The committee will call for nominations and meet to review candidates according to the selection criteria listed below. The committee will identify the pool of qualified candidates from which assignments to work teams will be made.

#### **LEAD REPRESENTATIVE SELECTION CRITERIA**

Nine dimensions should be considered when selecting Lead Reps:

1. **PERFORMANCE HISTORY:** Consideration of the candidate's past performance in terms of customer satisfaction, sales, and productivity.
  2. **TECHNICAL KNOWLEDGE:** Candidate's knowledge of proper call handling , i.e. opening and closing phrases, fact-finding, suggestive selling, summarization, order writing and use of the system, i.e. screen to screen navigation, system restoration, overlapping, and knowledge of products, services, tariffs, and billing procedures.
  3. **INITIATIVE:** Assessment of how well the candidate utilizes on and off line reference materials to answer questions and solve problems.
  4. **ELEMENTS OF COACHING:** The successful candidate will have strong interpersonal skills which include the ability to listen, translate knowledge into words, show patience, and give constructive feedback.
  5. **CUSTOMER RELATIONS SKILLS:** Assessment of how well the candidate handles customer complaints and upward referrals.
  6. **SELF-DISCIPLINE/ORGANIZATION:** An expression of how well the candidate handles distractions and maintains focus on assigned duties without becoming inflexible.
- The supervisor should collect input from CCA's in the work team in assessing a candidate on the following three dimensions as part of their nominations and in endorsing an Associate who has issued a self-nomination.
7. **CREDIBILITY:** Resourcefulness and how well the candidate supports what is said and done with facts.
  8. **INDEPENDENCE:** How well the candidate works with minimum supervision and carries out instructions.
  9. **TRUSTWORTHINESS:** The candidate's reputation as one who can be trusted to meet obligations, follow through with commitments, respect lines of organization and adhere to confidentiality.

**CRITERIA WEIGHING** (Optional)



Some dimensions in the criteria may be deemed more important than others depending on the needs of the Contact Center. The relative importance of each dimension can be shown by assigning it a weight on a 1 to 5 scale before assessing any of the candidates. With the criteria weighing completed, candidates are then scored on each dimension. The weight is multiplied by the rating to come up with a weighted rating for each dimension. Finally, the weighted ratings are tallied with the overall score entered at the bottom of the score sheet.

If all the dimensions are viewed as having equal importance, then the weighing step can be eliminated. Instead, each candidate can be rated on each dimension and given raw scores which are tallied at the bottom of the score sheet.

#### **INTERVIEWING CANDIDATES AND THEIR SUPERVISORS (Optional)**

Once the candidate pool is identified, Contact Center management may, at their option, schedule interviews with candidates and their supervisors. Interviews with supervisors should be conducted to help the Selection Committee assess the performance history, technical knowledge and observed skill levels of each candidate they have sponsored.

By contrast, candidate interviews should concentrate on learning why the candidates want to enter the Lead Rep program, what they feel they can contribute to the program, and what they expect to gain from it.

#### **NOTIFYING CANDIDATES OF RESULTS**

It is the Section Manager's responsibility to ensure that all candidates have been advised if they have or have not been selected to enter the program before the announcements are made.

Candidates not selected should be given a clear understanding of why they were not selected and what they need to do to strengthen their candidacy should they wish to be considered for the program in the future.

#### **ASSIGNMENT OF LEAD REPS TO WORK TEAMS**

Generally, Lead Reps' first assignments should be with the teams with whom they were working when they were selected. In certain circumstances, the Section Manager may wish to confer with the Quality Training Coordinator and supervisors to assign Lead Reps to other teams based on an identified need of a team that is well-matched to a particular Lead Rep's capabilities.

#### **Rotation Frequency**

Customer Contact Associates who qualify as Lead Reps should be enrolled for six to twelve months. At the end of that period, Lead reps who have proven themselves should be encouraged to renew their candidacy to be selected for the next year.

#### **Rotation Between Work Teams (Optional)**

Lead Reps will benefit from rotation between work teams after 90 to 180 days. Rotations of this sort will help them broaden their understanding of the Contact Center and allow them to work with a wider variety of people and situations thereby keeping the assignment interesting and challenging. Rotations between work teams should only be made between quarters with notice of the changes issued to the local MSTS coordinator.

#### **WEEKLY ACTIVITY PLAN FOR LEAD REPS**

It is highly recommended that supervisors work closely with the Quality Training Coordinators when guiding their Lead Reps in the establishment of Weekly Activity Plans. The Weekly Activity Plans should include scheduled on-line time, peer coaching time, and meeting times.

#### **LEAD REP PARTICIPATION IN WORKSHOPS AND TRAIN-THE-TRAINER SESSIONS**

Lead Reps will prove invaluable as communicators of changes associated with policies, procedures, and new products to the CCA's they support. Given the volume of training anticipated, having Lead Reps attend train-the-trainer sessions and passing that training along to the CCA's in their work teams will enable the Contact Center to be trained at a much faster pace than in the past.

## **LEAD REPS AND THE RESOURCE MANAGEMENT TEAM**

Close coordination with the Resource Management group is essential if the Lead Reps are to be able to perform their duties with minimum interference. This requirement cannot be overemphasized. The Resource Management group should have an up to date list of Lead Reps and copies of their Weekly Activity Plans at all times.

In addition, it is recommended that all Lead Reps attend formal training for resource management and be given a three month assignment in the Resource Management group to give them a clear understanding of force scheduling and intraday line staffing.

## **INCENTIVES AND RECOGNITION FOR LEAD REPS**

### **Circle of Achievement**

Lead Reps will retain their eligibility to earn AwardbanQ credits through the year long Circle of Achievement program. Since Lead Reps will be spending only part of their time in the Contact Center handling calls on line, their credit earning potential will be seriously diminished unless an adjustment is made. The number of AwardbanQ credits awarded to Lead Reps will be based on either the credit averaging method (for their individual work team) or the actual credits earned during the month whichever is higher.

Credits earned by Lead Reps will continue to be tracked and reported each month through the Mechanized Sales Tracking System (MSTS).

### **Participation in SPURTS and Spotlights**

During the month prior to a sales event such as a SPURT or a spotlight, Lead Reps may be heavily involved in peer coaching or helping with administrative duties to free the supervisor's time to coach other CCA's in the work team. However, during the SPURT month, it may be strategically advantageous to have Lead Reps spend most of their time in the Contact Center on line taking calls. Having Lead Reps on line throughout the SPURT gives them the opportunity to earn bonus credits while contributing toward the Center's revenue objective for the month.

### **Eligibility for Travel Awards**

Though Lead Reps are tracked through MSTs with other CCA's, their limited time on line will impede their ability to compete for Circle of Achievement travel awards. Prospective Lead Reps must be advised by their supervisor that entering the program will more than likely make them ineligible for travel awards.

#### **Eligibility for Circle of Achievement Quality Program Payout**

Lead Reps will be eligible for Quality Program bonus payout in the same fashion as other CCA's as explained in the Circle of Achievement program guidelines.

#### **ONGOING EVALUATION/FEEDBACK FOR LEAD REPRESENTATIVES FROM PEERS**

Lead Reps will benefit enormously by receiving regular feedback from the supervisor and the CCA's they support in their work team. This is especially crucial during the first three months of the assignment. Lead Reps should be encouraged to seek direct feedback from other CCA's. All Lead Reps should be scheduled for an informal review with the supervisor before changing responsibilities.

#### **ELIGIBILITY/WITHDRAWAL FROM THE PROGRAM**

This is a voluntary program and participants may withdraw without penalty by giving their immediate supervisor sufficient notification. However, to remain in good standing in the program, Lead Reps will be required to sustain better than average revenue, productivity, and quality levels as described below:

<b>PERFORMANCE MEASURE</b>	<b>REQUIREMENTS</b>
<b>SALES PER CALL</b>	<b>Exceeds HUB objectives</b>
<b>AVERAGE HANDLING TIME</b>	<b>Exceeds HUB objectives</b>
<b>NCQC PERCENT SATISFIED</b>	<b>Above 96% YTD</b>

As part of the performance standards program, monthly MSTs reports will indicate each Lead Rep's performance in meeting the objectives. Supervisors will also receive a monthly report issued by the National Consumer Quality Assurance Center (NCQC)

which indicates each Lead Rep's performance relative to the Percent Satisfied (PSat) objective.

#### **SUSPENSION FROM THE PROGRAM**

Should a Lead Rep's performance fall below 100% of the HUB objectives for SPC or AHT, the Lead Rep will be subject to suspension from the program. Should the Lead Rep's year to date PSat rating fall below 96%, the Lead Rep will be subject to suspension from the program.

A Lead Rep will also be subject to full dismissal from the program if the Rep is given disciplinary action for any infraction, i.e. attendance problems, customer complaints, tardiness, etc. CCA's may be reinstated in the program at the discretion of local management.

#### **QUALIFICATIONS**

A minimum of one year experience as a CCA plus a high level of demonstrated capability in each of the qualifications listed in the table below are required for each Lead Rep.

<b>QUALIFICATIONS</b>	<b>PERFORMANCE/SKILL LEVEL</b>
<b>PERFORMANCE HISTORY</b>	
Customer Satisfactions	96% or above, YTD
Sales Per Call	Exceeds HUB objective
Average Handling Time	Exceeds HUB objective
<b>TECHNICAL KNOWLEDGE</b>	
Selling Skills	Very Knowledgeable
Call Handling	Very Knowledgeable
Order Writing/System Usage	Very Knowledgeable
Products, Services, & Tariffs	Very Knowledgeable
Billing Procedures	Very Knowledgeable

<b>INITIATIVE</b>	Very Important
<b>ELEMENTS OF COACHING</b>	
Listens	Extremely Important
Translates Knowledge into Words	Extremely Important
Shows Patience	Extremely Important
Gives Constructive Feedback	Extremely Important
<b>CUSTOMER RELATIONS</b>	Extremely Important
<b>SELF-DISCIPLINE/ORGANIZATION</b>	Extremely Important
<b>CREDIBILITY</b>	Extremely Important
<b>INDEPENDENCE</b>	Very Important
<b>TRUSTWORTHINESS</b>	Extremely Important

**SECTION V**  
**TRAINING SPECIFICS**

The way organizations typically respond to meeting the needs of a changing work environment is to commit time and funds to training and development. However, no matter how good the training is, studies show that individuals will use new skills only if the skills are supported and reinforced by the work environment. Also, training and development done at only one organizational level are often less effective than desired due to lack of organizational support. One key to successful training implementation is to adopt an organization wide perspective, as opposed to a "one-level" focus. In a major training effort, it's important to address related needs at every level - hourly employee, first-level leader, middle manager, and senior manager to ensure organization wide support for training goals and objectives.

The above principle should be kept in mind

when planning to implement empowerment training. For example, if training efforts are focused only on training at an hourly employee level, those who are trained might not use the newly learned skills if the skills are not supported and reinforced by first-level leaders in the work place. Similarly, first-level leaders trained might not use newly learned skills if the skills are not supported by second level managers. In order to ensure effective organizational support, every level should be considered when preparing for empowerment training.

The goal of management support training, i.e. Empowering Leader and Coaching workshops is to build leaders' awareness and skills so they can actively support the training by:

Modeling - Leaders need to use the new skills themselves. They need to "walk the talk" rather than giving the message, "Do as I say, not as I do." Leaders are role models. Hourly employees watch them to see what to do and how to do it.

Coaching - Hourly employees need guidance go



use new skills. Leaders need to encourage others to try new skills and take on new challenges, not just by telling them what to do but by seeking their ideas and discussing what should be done. To provide guidance and be effective coaches, leaders need to understand and use the skills themselves. Reinforcing - One of a leader's most important responsibilities is to recognize and praise effective use of new skills. This reinforcement will increase employees' commitment and encourage them to use appropriate behaviors again and again in similar situations.

#### **PATH TO EMPOWERMENT**

The Path to Empowerment is a two day class composed of a cross functional group of employees from all levels of the organization. It is experiential in nature because the class members work in groups to identify problems and develop solutions. Suggestions that are made are taken seriously by upper management who attend the classes on a regular basis. Many teams are put

together on the spot and are given the ownership to take action to solve specific challenges.

The class is divided into seven sections. On Day One, participants spend time identifying challenges and defining empowerment. They learn about communication styles and how these styles affect teamwork. Case studies of successful companies are studied and direct correlation to GTE is made. The impact of team synergy is tested on the first day and participants become aware of how important each member of the team really is.

Day Two is a solution day. After having uncovered trouble spots in the organization, actual plans for change are presented. This is an interactive day that generates ideas and allows for candid feedback. Participants experience teamwork and the power of taking ownership to solve problems. Sharing what they know with each other and exploring opportunities together is the real heart of this class.

#### **ZAPP!! WORKSHOP**

This workshop provides knowledge and understanding of the skills required for

empowerment. It utilizes the book Zapp! The Lightning of Empowerment and materials developed by Development Dimensions, Incorporated (DDI) to:

- (1) Understand what Zapp! is and how Zapping an organization results in higher quality products, heightened teamwork, greater productivity, increased morale and job satisfaction, and continued success;
- (2) Examine reasons for empowerment and discover how it can benefit individuals and organizations;
- (3) Learn factors that must be present in a Zapped organization;
- (4) Determine an organization's Zapp level;
- (5) Learn how the traditional manager can become an empowering leader;
- (6) Plan actions to create an empowered organization using "Zapp! Best Practices."

#### **INVESTMENT IN EXCELLENCE**

The objectives of this program are: (1) Establish and sustain a more positive attitude at work and home; (2) Effectively cope with change on a personal level; (3) Enhance self esteem resulting in improved interpersonal effectiveness; (4) More effectively use goal setting; (5) Enhance

the perceived quality of work and quality of life;  
(6) Establish personal responsibility and personal empowerment as the foundation for success.

#### **EMPOWERMENT WORKSHOP**

This workshop introduces managers and supervisors to the concept of empowerment. The first component addresses the trouble with paradigms, personal/organizational change, what are the attributes of an empowered manager and how to create an empowered organization. The second component educates the management team on basic/advanced facilitation skills. Key components include group dynamics/behaviors, effective interactions, giving and receiving feedback, making interventions, and coaching for improvement.

The focus of this workshop is to encourage participants to accept responsibility for their own empowerment and relates the steps that must be taken to develop an empowered organization.

#### **EMPOWERING LEADER WORKSHOP**

This workshop is a six to eight hour session that introduces the concept of empowerment to

first-level leaders, middle managers, and senior management particular when the organization is in the early stages of empowerment awareness. In this workshop, participants will learn what empowerment is and how they can empower others and share their concerns about empowering others and identify ways to overcome problems. They will learn the basic principle of empowerment in three empowerment areas: Job Design, Systems and Environment, and Leadership and identify focus areas for building empowerment skills.

#### **COACHING - DEVELOPING HIGH PERFORMANCE WORKSHOP**

This workshop is a six to eight hour session that introduces the concept of coaching to first-level leaders, middle managers and senior management. In this workshop, participants address the following challenges facing them today:

1. What's the difference between coaching today and coaching five or ten years ago?
2. What topics should be the focus of any coaching discussion?

3. What situational factors influence the way a leader coaches?

With greater spans of responsibility, leaders don't have time to look over every person's shoulder. This workshop identifies techniques for developing leadership among individuals and teams. By helping others learn to think through problems, ideas, and opportunities, leaders can focus on broader strategic issues while creating an environment in which high performers do their best work.

Each learning unit includes three elements: A preclassroom enrichment segment which enhances classroom time and builds commitment to the experience.

A classroom segment and a post classroom follow up segment, which is participant managed and contains tolls that make application on the job as practical and simple as possible.

**TECHNIQUES FOR AN EMPOWERED WORK FORCE**

This workshop consists of fourteen three to four hour skill building modules for work teams.

The modules can follow each other or can stand on their own. "Making the Difference" is the core or prerequisite module. The modules are clustered programs. The first program, Team Action, is designed to develop skills in how teams work together. The second program, Taking Action, is designed to develop skills in problem solving and uses a five step problem solving model that replicates GTE's Employee Involvement 5 stage problem solving process. The third program, Interaction, develops individual team member skills. The program/module names and objectives are:

**Making the Difference (Core/Prerequisite module) -**

By the end of this workshop, participants will:

Understand their role in personal and organizational success.

Recognize the importance of interpersonal skills, team skills, and continuous improvement skills as keys to optimum performance.

Be able to demonstrate that the search for continuous quality improvement benefits the

employee and the organization.

Learn a set of key principles and interaction guidelines ensuring that there is effective skill transfer back to the workplace.

**Program 1: Team Action**

**Module 1, Valuing Differences** - By the end of this workshop, participants will understand:

The types of differences that make each person unique.

How differences in styles, abilities and motivations are valuable to the team.

The importance of accepting, encouraging, and supporting differences.

Ways to value others.

The module uses video and experiential exercises to help participants learn to value differences among members of a work group. Participants learn their style, their abilities and their motivations, and also learn about other team members. This module illustrates how differences in S.A.M. (styles, abilities and motivations) make a team more effective.

**Module 2, Participating in Meetings** - By the end



of this workshop, participants will be able to:

Identify the roles and responsibilities of meeting participants, recognizing that leaders and members share responsibility for effective meetings.

Use Key Principles and Process Guidelines to make meetings more productive.

This module is based on the premise that everyone in a meeting shares responsibility for its effectiveness. As such, it focuses on the participating skills that each person attending a meeting must use: Interaction Guidelines, Process Guidelines and Key Principles of Communication.

**Module 3, Leading Effective Meetings** - By the end of this workshop, participants will be able to:

Recognize when a meeting is the best way to generate ideas and solutions to meet customer requirements and solve problems.

Plan and prepare for a productive meeting.

Conduct an effective meeting using Interaction Guidelines, Key Principles and Process Guidelines.

Building on the participation skills learned in

Participating in Meetings, this module focuses on the meeting leader's use of the Interaction Guidelines in meetings. This module is designed to give each learner an opportunity to practice the Interaction Guidelines as a meeting leader. Meeting preparation is covered and a meeting planning form is provided.

**Module 4 - Rescuing Difficult Meetings** - By the end of this workshop participants will be able to:

Identify the different types of difficult meeting situations.

Use techniques to prevent difficult meeting situations.

Use appropriate techniques to handle difficult situations when they occur in meetings.

Building on meeting skills learned in

Participating in Meetings, this module focuses on the use of intervention and prevention techniques to handle more difficult meeting situations.

Participants learn the common types of difficult situations that can upset the meeting process - or cause a meeting to fail- and are given

opportunities to apply the appropriate techniques to rescue these situations.

**Module 5, Reaching Agreement in Teams** - By the end of this workshop, participants will be able to:

Why reaching agreement in teams is important to the success of their work group.

The role and benefits of consensus in reaching agreement.

What is needed to help reach consensus.

This module focuses on techniques that work groups can use to reach agreement. It is designed to give participants an opportunity to practice consensus-building techniques in an exercise and a case study.

**Program 2: Taking Action**

**Module 1, Assessing Improvement Opportunities** - By the end of this workshop participants will be able to:

Take the first step in a continuous improvement effort.

Identify customer requirement.

Use a process map to analyze how they do their work.

Identify chronic problems in their work processes.

In this Assessing the Situation. The four steps are:

1. Deciding where to start.
2. Defining customer requirements.
3. Describing the current situation.
4. Identifying areas for improvement.

Through the use of these four steps, participants begin a job application by assessing the situation for an on the job problem. Participants are also introduced to the process mapping tool in this module.

**Module 2, Determining Causes** - By the end of this workshop, participants will be able to:

Identify the difference between the symptoms and the causes of a problems.

Identify possible causes of a problem.

Determine which causes have the greatest impact on customer requirements.

Through small group discussions and videos, participants learn the importance of eliminating the causes of a problem rather than its symptoms.

Participants also learn the importance of verifying causes, and how to select the cause with the most significant impact using a Pareto Chart. Participants begin applying these techniques to the on the job problem identified in the Assessing Improvement Opportunities module.

**Module 3, Targeting Improvement Ideas** - By the end of this workshop, participants will be able to:

    Redefine a problem to help target a solution for it.

    Look at a problem from different points of view to generate ideas for solving it.

    Analyze the implications of potential solutions systematically.

    Evaluate potential solutions and select one.

Through video and experiential exercises, participants are introduced to a four step process for Targeting Solutions. The four steps are:

1. Redefining the problem.
2. Generating ideas for solutions.
3. Analyzing solutions.
4. Selecting a solution.

Participants learn strategies for generating ideas

for solutions and also use solution/impact diagrams to pick the best solution. Participants begin to apply these techniques to the on the job problem identified in earlier modules.

**Module 4, Implementing Ongoing Improvement** - By the end of this workshop, participants will be able to:

Create a detailed action plan for implementing an improvement idea.

Test the idea to make sure it works.

Evaluate the results of the improvement.

Make the idea a regular part of the work processes.

Improve the idea or take on a new area for improvement.

In this module, participants will learn how to implement solutions and how to make them ongoing. They will be introduced to a four step model for implementing solutions and a three step process for making them ongoing. The four steps for implementation are:

1. Plan it.
2. Test it.

3. Do it.
4. Evaluate its effectiveness.

The three steps for making it ongoing are:

1. Document
2. Standardize
3. Assess the situation.

**Program 3: Interaction**

**Module 1, Communicating with Others -** By the end of this workshop, participants will:

Know why effective communication is important in the workplace.

Be aware of communication barriers and how to overcome them.

Begin to use Key Principles, Interaction Guidelines and Key Actions to handle interactions.

This module uses video and skill practices to help participants understand the importance of effective communication. Participants will get a chance to practice communication skills in a variety of situations, and get feedback on their use and those skills.

**Module 2, Influencing Others -** By the end of this

module, participants will be able to:

Create and follow a plan for influencing others.

Select appropriate preparation strategies.

Influence others effectively by using

Interaction Guidelines, Key Actions and Key Principles.

Through the use of video, discussions, and skill practices with feedback, this module helps participants learn effective strategies for influencing others, whether individuals or groups.

The module devotes a lot of attention to the importance of preparation and knowing audience.

**Module 3, Training Others** - By the end of this workshop, participants will:

Know more about the importance of training others in the workplace.

Be prepared to plan and conduct on the job training with one or more people.

Be able to use Key Principles, Interaction Guidelines and Key Actions when training others.

This module uses video and skill practices with



feedback to help participants learn to train others. The module focuses on the importance of planning training, whether for one on one or for several people. It also stresses the importance of effective listening when training others.

**Module 4, Handling Conflict** - By the end of this workshop, participants will:

Understand common sources of conflict.

Understand how differences in perception can lead to conflict.

Begin to use Key Principles, Interaction Guidelines, and Key Actions to resolve conflict situations.

This module uses videos and skill practices with feedback to help participants learn to handle conflict. The module first focuses on how differences in perception can lead to conflict. It stresses that a key to handling conflict is the ability to see the situation from the other person's point of view.

## SECTION VI

### EMPOWERMENT STRATEGY AND AWARENESS TRAINING

#### Initial Empowerment Development:

WORKSHOP	TIMEFRAME	NO. OF EMP.
Path to Empowerment	2 Days	40
Investment in Excellence	5 Days	20
ZAPP!! Workshop	1 1/2 Days	20
Empowerment Workshop	1 - 2 Days	20

#### Leadership Development (Lead Reps):

Leadership Style Inventory	1 Day	All Lead Reps
Empowering Leader Workshop	1 Day	All Lead Reps
Coaching Workshop	1 Day	All Lead Reps

#### Management/Supervisor Development:

Empowering Leader Workshop	1 Day	All Management
Coaching Workshop	1 Day	All Management

#### Team/Supervisor Development:

Team Development Inventory	1 Day	All Supervisors
Techniques for an Empowered Workforce	1 Day	All Supervisors

#### Certification Process:

Quality Training Coordinators

4 Days

All QTC's

**Support Resources Available:**

Organizational and Development Consultants

Supervisors

Quality Training Coordinators

Management Education and Training

**SECTION VII**  
**TIMELINES FOR IMPLEMENTATION**

<b>ACTION ITEM</b>	<b>COMPLETION DATE</b>
Present Vision to all employees - "Where Is This Company Headed?"	January 31, 1995
Administer Climate Survey	February 28, 1995
Provide analyzation results of Climate Survey to management	March 15, 1995
Administer Organizational Readiness Assessment Survey	March 30, 1995
Provide analyzation results of Organizational Readiness Assessment Survey to management	April 13, 1995
Design empowerment strategy based on survey results	May 26, 1995
Review selection criteria for Lead Reps and begin the nomination process	June 16, 1995
Complete selection of Lead Reps and make announcements to Teams	June 30, 1995
Conduct "Path to Empowerment" training to selected hourly and management employees	July 28, 1995
Begin Empowerment Strategy and Awareness Training for all management and Quality Trainers	September 29, 1995
Begin Empowerment Strategy and Awareness Training for Lead Reps	October 28, 1995
Actual implementation	Ongoing from August 1, 1995

## APPENDIX B

### QUESTION 1. Plan Implementation

#### HATCHER

##### Section I

Good overview. Covered necessity for plan very thoroughly.

##### Section II

Yes! I like it. All employees need to understand our vision.

##### Section III

Good Tool; however, why do we need the Organizational Assessment Survey? Seems redundant.

##### Section IV

Good data. Qualifications Matrix may be outdated. How about Reps participating in updating? Needs more subjective data for skill level.

##### Section V

Too much detail. Can we give a high level description rather than all this detail?

#### FIFER

Like the overview. Happy it is not a complete plan but provides a good starting point.

Reinforces the necessity for the empowered work team. I have already begun to deliver this message.

Climate Survey looks good. Organizational Readiness is not necessary. Already covered in the "vision" presentation.

Concept is good; however, we have gotten away from original guidelines. Needs to be reviewed for validity. Compensation guidelines look good.

Very detailed overview; however, would not recommend changing without a "trial run."

**QUESTION 2: Information Flow****HATCHER**

Good flow of information. Overview is definitely the starting point. Could be included in the "vision" presentation in the interest of time. Lead Rep program should be updated before training to save budget dollars that we do not have. Training overview prior to training is good.

**FIFER**

Flow of information is in the correct sequence. Should be careful to give Climate survey only to those employees who have been through the "vision" presentation so as not to distort the results with a mix of employees some who have had the training and some who have not.

**QUESTION 3: Timeliness of Implementation****HATCHER**

Timelines are too aggressive. Based on call volumes, some training and surveys will need to be rescheduled.

**FIFER**

Cannot possibly meet the timelines provided; however, if Readiness Assessment Survey is not conducted, will buy us 90 days which can be utilized to update the Lead Rep program.

**QUESTION 4: Budget Constraints****HATCHER**

Our current budget does not provide any dollars for the training. Recommend presenting the plan to executive management for a budget overlay. Otherwise, cannot complete this year unless we can reallocate some dollars or overrun the budget.

**FIFER**

Training is not budgeted. Plan calls for a total of 229.5 days for training. Perhaps we can monitor budget for first and second quarter for favorabilities which can be utilized for training which will not begin until the third quarter.

## APPENDIX C

### IMPLEMENTATION PLAN STATUS

SECTION	AS IS	CHG	RMV	COMMENTS
I	X			
II	X			Perhaps combine I & II
IIIA	X			
IIIB			X	Redundant
IV		X		Update
V	X			Trial basis
VI	X			Will revise if required
VII	X			Will revise if required

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