

ADVANCED SKILLS

Chapter 11

MAKING GOOD DECISIONS

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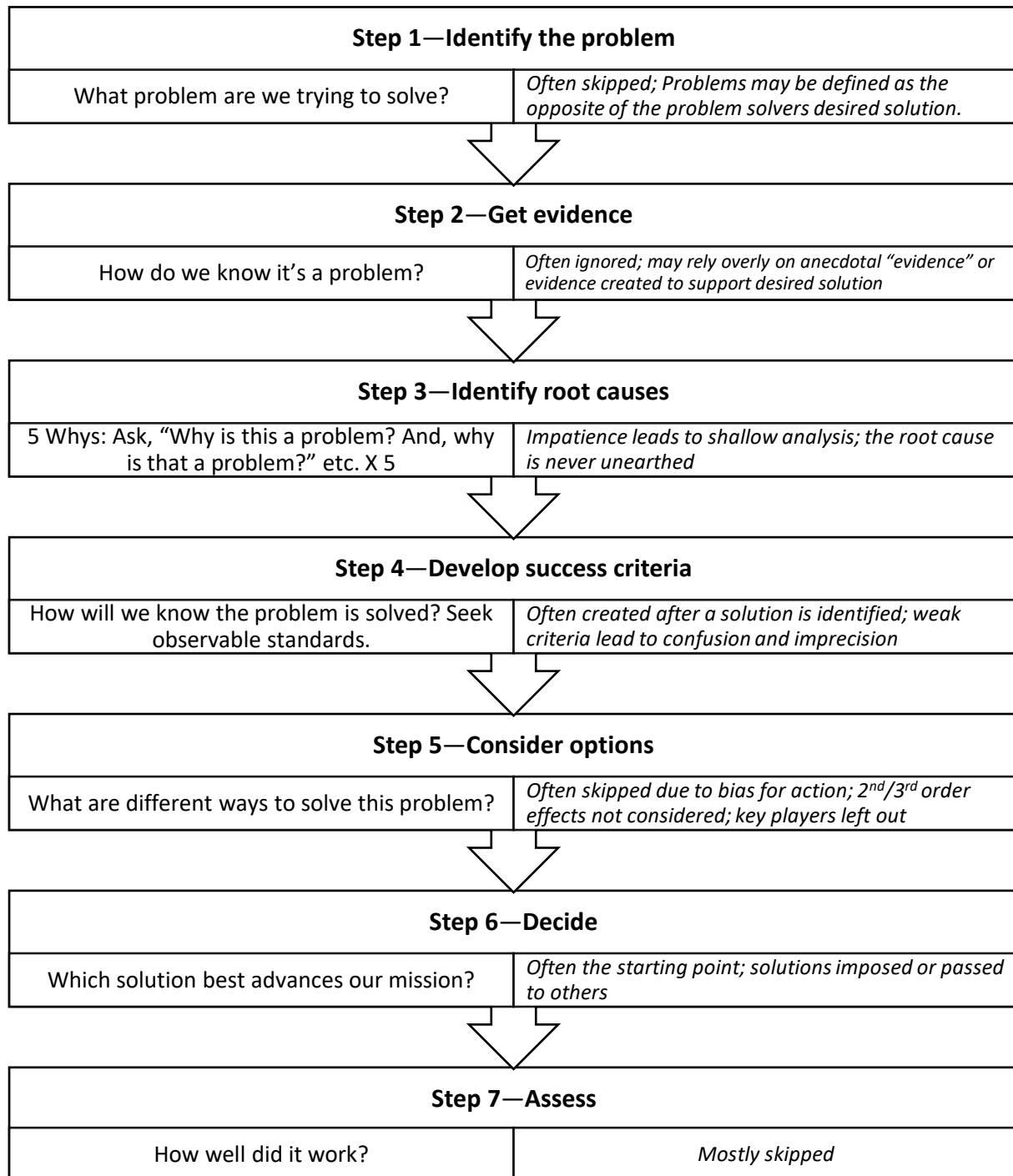
**The most difficult thing is the decision to act.
The rest is merely tenacity.**

*Amelia Earhart
Pioneering Aviator*

11.1 A Practical Problem-Solving Sequence

ABOUT THIS TOOL—The author of this tool, Harlan Patterson, former President of Bastyr University in Kenmore, Washington, is known for his rigorous and systematic approach to problem solving. He emphasizes the first step, problem identification, is the most critical because it determines the focus and scope of the subsequent discussions, research, and solutions.

APPLICATION—Follow this sequence to solve problems so they stay solved. Beware the pitfalls!



Source: Harlan Patterson email to author, July 26, 2019

11.2 A Practical Problem-Solving Worksheet

Identify the problem

What problem are we trying to solve?

Get evidence

How do we know it's a problem?

Identify root causes

5 Whys: Ask, "Why is this a problem? And, why is that a problem?" etc. X 5

Develop success criteria

How will we know the problem is solved? Seek observable standards.

Consider options

What are different ways to solve this problem?

Decide

Which solution best advances our mission?

Assess

How well did it work?

Source: Developed by the author

11.3 Using Force Field Analysis to Assess Challenging Situations

ABOUT THIS TOOL—Force Field Analysis (FFA)¹ enables a group to take a comprehensive look at forces supporting a decision and the opposing forces reinforcing the status quo. Mitigating the strongest restraining force is the most effective way to enable decision implementation.

APPLICATION—Use this tool to analyze the opposing forces influencing a decision and develop compelling strategies to mitigate the strongest restraining force.

Step ①—Identify your change goal

Step ②—List the driving and restraining forces related to the goal and rate their strength

Step ③—Select the strongest restraining force

Step ④—Brainstorm how to minimize it

Step ⑤—Pick two or three solutions

① GOAL: Hold a one-day teambuilding retreat

② Driving Forces →	← Restraining Forces ②
Will help us work better together →	We're too busy; we don't have the time ←
A chance to work on the <i>how</i> to get to a better what →	Could seem too touchy-feely for some ←
It will be fun →	It's expensive ←
Stepping away from our day-to-day pressures will help us think more clearly →	Tensions could erupt and damage relationships ←
Good relationships take work →	③ Our customers will suffer and we may lose business by being away for a day ←
A chance to clear the air on developing tensions within the group →	

④ Ideas for minimizing or mitigating the strongest restraining force: Hold a one-day teambuilding retreat

- ⑤ Split the retreat into two half days
- ⑤ Let customers know in advance
- Give the customers a hotline number to call
- Read a book together about teams and discuss during our regular staff meetings
- ⑤ Get support from leadership
- Follow up with our stakeholders, including our customers, once the retreat is over

Source: Developed by the author

¹ Force Field Analysis was developed by the social psychologist Kurt Lewin in the 1940s.

11.4 Test Your Decision with a Premortem

ABOUT THIS TOOL—“A premortem is the hypothetical opposite of a postmortem....A premortem in a business setting comes at the beginning of a project rather than the end, so that the project can be improved rather than autopsied. Unlike a typical critiquing session, in which project team members are asked what might go wrong, the premortem operates on the assumption that the ‘patient’ has died, and so asks what did go wrong. The team members’ task is to generate plausible reasons for the project’s failure.”²

APPLICATION—Adapt these questions to the needs of your specific project, and then use them to test your decision before finalizing it. You can find more pre-mortem questions online.

SAMPLE PRE-MORTEM QUESTIONS

What can we learn from the stumbles and mistakes of past projects?

What will our critics say we missed?

What about this decision has you worried?

What might cause a delay or obstruct full implementation?

How confident are we that we have the systems in place to support this decision?

What metrics or feedback will tell us we may have missed the mark?

What interests and which stakeholders have we overlooked or minimized?

What are the possible unintended consequences?

What external factors could upend our efforts?

Source: Developed by the author

² Gary Klein, “Performing a Project Premortem”, Harvard Business Review, Sept. 2007

11.5 An Effective Group Planning Process

ABOUT THIS TOOL—This straightforward process makes visible the perspectives of all participants involved in decision-making. Everyone sees the whole picture: What you’re hoping to achieve, how you see the situation now, and the practical steps to reaching the target.

APPLICATION—Follow the steps described in this tool.

Step 1—Post 3 pieces of chart paper

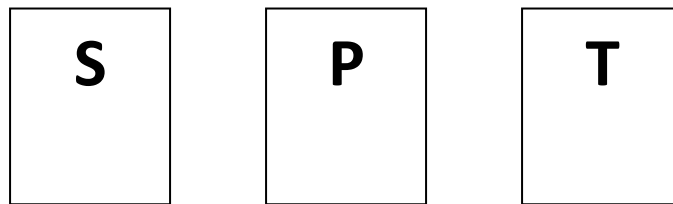
Title them as follows:

“**S**” — What is the current **situation** giving rise to the problem or opportunity?

“**T**” — How would you describe the desired **target** state? What does success look like?

“**P**” — What are some proposals or **plan** for getting from where you are now to where you want to be?

Place the “S” chart on the left, “T” on the right, and “P” in the middle.



Step 2—Identify the **T**arget

Write on the “T” chart what success would look like. What would you like to see around here that isn’t here now? What are our goals? What outcomes or results do you want in this situation? What are you aiming for?

Step 3—Describe the **S**ituation now

Make a list on the “S” chart describing the situation as it stands today in relation to the target. What is wrong with the way things are going? What is going right? Where exactly is the problem occurring? How serious is this?

Step 4—Develop a **P**lan

Use the “P” chart to brainstorm a list participant ideas on what can be done to bring the current situation in line with our target. What might we do to solve the problem? What actions should we take? How can we get from where we are now to where we want to be?

Step 5—Decide

Give each participant a marking pen and have them place a check next to the top three ideas from the list on the “P” chart. The proposals with the most check marks are the actions the group sees as most likely to achieve the target.

Step 6—Assign Accountability; Agree on Timing and Deliverables

The final step is fleshing out the plan by assigning accountability for next steps and agreeing on deadlines and deliverables.

Source: Developed by the author based on a conversation with consultant Carolyn Gellerman

11.6 ORBIT Your Opportunities [repeated as Tool 7.7]

ABOUT THIS TOOL—The ORBIT coaching sequence begins by envisioning the future you want, rather than the obstacles you’re facing. Doing so enables you to coach others both deliberately and optimistically. This is my go-to tool for professional development conversations and decision-making.

APPLICATION—Follow this sequence when coaching others.

<u>O</u>utcome	What outcome do you hope to see in this situation? What does the problem look like solved or the aspiration realized? What do you hope to achieve?
<u>R</u>eflection	What are the current circumstances in relation to your desired outcome? Consider both facts and feelings. This would be the ideal time to use Force Field Analysis [Tool 11.3]
<u>B</u>rainstorming	Generate at least seven unique ideas to achieve your objective in light of your reflections. Why seven? Your initial ideas will be the obvious solutions; by the time you get to seven you get creative and think beyond the obvious.
<u>I</u>ntention	Which of the ideas you brainstormed hold the most promise for achieving your objective? Which ones energize you? Just pick two or three. One is all you need to get started.
<u>T</u>asks	What are the initial tasks and timing to implement your intention? You don’t have to create an entire plan; you just need to identify the first steps you’ll take and when you will take them.

For an even more complete problem-solving session, consider adding an E and R to your ORBIT...ORBITER

<u>E</u>ncouragement	What encouragement or support do you need to assure you’ll follow-through on the tasks you’ve identified? It may be as simple as putting a couple of notes on your calendar or committing to a colleague to check in periodically.
<u>R</u>efinement	Did your steps achieve their intended objective? If so, what can you learn from your success? If not, how can you refine your actions to better achieve your objectives?

Source: Developed by the author

11.7 Sample ORBIT Coaching Conversation [repeated as Tool 7.8]

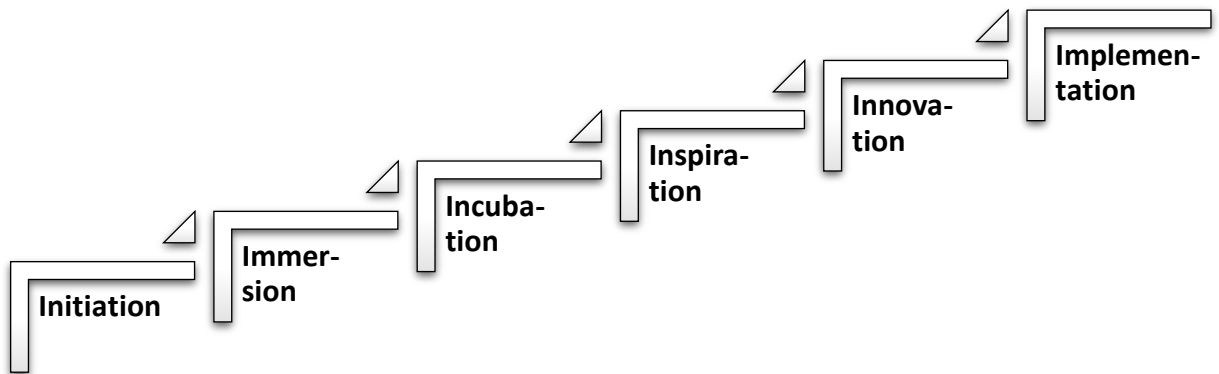
Step	Manager	Employee
O		I'd like to be the lead on the next project...a real project manager
R	Say more. Why does this appeal to you?	
		I feel like I'm ready—I've been a member of three project teams. I really enjoy the work. The details and discussion of what to do and when have been a real education on how to tackle complicated projects. I've learned a lot. Plus, I completed an online workshop.
B	Let's put together a list of ideas on how you could step up to a project manager role.	
	<p><i>Both Manager and Employee participate in the brainstorming</i></p> <ol style="list-style-type: none"> 1. Take a more formal project management course 2. Become a Certified Project Manager 3. Learn about how to design and facilitate project meetings 4. Interview a few project managers to learn more about their work and training 5. Find a project manager who could be a mentor for me 6. Shadow a project manager 7. Review a project manager's job description to understand the work and requirements better 8. Study a few projects more deliberately to identify common practices 9. Join a professional association of project managers 	
I	Those are a lot of good ideas. Where do you want to start?	
		I'd like to begin by interviewing a few project managers. [Idea #4 from above.]
T	How and when will you start?	
		I'll reach out next week to the project managers I've worked with and ask them for an appointment.

Source: Developed by the author

11.8 Get Creative!

ABOUT THIS TOOL—"Successful businesspeople approach their problems creatively."³ None other than Albert Einstein said, "Imagination is more important than knowledge."⁴ Creativity—the ability to transcend traditional ideas, rules, patterns, relationships, or the like, and to create meaningful new ideas, forms, methods, interpretations⁵—is essential when facing complex business dilemmas for which historical solutions are insufficient.

APPLICATION—Incorporate this sequence into your decision-making when tackling complex challenges.



Frame your initiating question carefully! It guides your inquiry. What is the problem you're wanting to solve? [See also Tool 11.1 A Practical Problem-solving Sequence]	Learn as much as you can about the issue you're tackling. Seek data from multiple sources and the perspectives of various stakeholders.	Let it rest. Step away from the issue.	The "Ah Ha!" moment. This generally occurs when engaged in activities outside of work and unrelated to the issue.	Play with the idea. Try different ways to frame the insight. Expand it, shrink it, test it up close and from a distance.	Follow the change and transition steps in Chapter 12.
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Source: Developed by the author

³ Michael Ray & Rochelle Myers, *Creativity in Business*, (NY: Doubleday, 1986), p. 4

⁴ *Ibid*, p. 3

⁵ Dictionary.com <https://www.dictionary.com/browse/creativity> Accessed February 14, 2022