

Chapter Eight - Individual Frameworks

The Power of the 2 x 2 Matrix: Using 2 x 2 Thinking to Solve Business Problems and Make Better Decisions

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PROFESSIONAL EFFECTIVENESS FRAMEWORKS

What are my unique professional strengths, interests, orientation, and values? How can I be more effective at work?

Each year, industry spends billions of dollars on professional development in the hope that employees will update their skills, knowledge, and outlook. Businesses don't tend to fail all at once. Deterioration is gradual, and the way to fight it is through ongoing investment, focus, and reinforcement.

2 x 2 frameworks are at the core of many of the most important professional development systems. Three key areas are addressed: career planning, leadership, and interpersonal effectiveness.

Social Styles

David Merrill and Roger Reid

We should point out again here that we are talking mostly about the tensions created between people because they act differently. Behavioral differences are causing the problem, not differences in belief or values.

—David Merrill and Roger Reid^[12]

As unique as we each are, our social style, that is, the way we behave with others, is likely to fit one of four patterns. We may be a decisive Driver seeking action and results, a warm Amiable interested in relationships and others' welfare, a systematic Analyst concerned with order and facts, or an energetic Expressive looking for enthusiastic buy-in (Figure 8.10). These Social Styles are behavioral tendencies that form naturally in the give-and-take of life experiences. While we are capable of assuming alternate approaches, our style is the stance in the world that feels most comfortable and that others are likely to expect from us. There are no "bad" styles, although different styles have been found to predispose people to one or another kind of career.

Social Style is a function of two sets of behavioral preferences: Assertiveness, ranging from active, forceful initiating to quiet inquiring and waiting, and Responsiveness, ranging from openly displaying feelings to hiding our feelings from others. The four styles represent combinations of the polar extremes of these dimensions. Developing the model in the 1960s, Merrill and Reid found significant numbers of each of the types in the general population. Subsequent studies have confirmed the validity of the model and four styles in different countries and cultures around the world.

Interpersonal effectiveness is improved when we become aware of the interplay between different Social Styles and adjust our responses and behaviors accordingly. For example, you would present carefully chosen facts when trying to influence an Analyst, whereas to convince a Driver, you would be wise to point out urgency and describe concrete actions they should take. By understanding behavior as a function of Social Style, we are able to separate out issues of form from those of substance. This makes it easier to defuse unhelpful and unnecessary conflicts arising from misunderstanding rather than genuine disagreements.

Merrill and Reid describe a basic four-phase approach, beginning with knowing yourself (awareness), controlling yourself (self-utilization), knowing others (observing), and doing something for others (communicating with sensitivity).

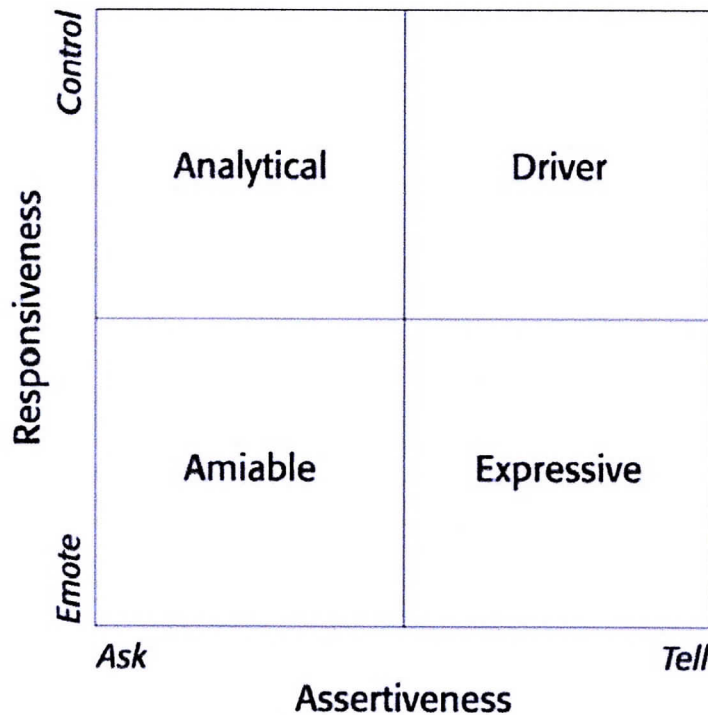


Figure 8.10: Social Styles Matrix

The Two Dimensions and Their Extremes. The Social Styles matrix explores two key dimensions: Responsiveness and Assertiveness:

Responsiveness. This dimension of behavior describes how much feeling a person tends to display, whether one tends to openly Emote or to Control feelings in social situations.

Assertiveness. This aspect of behavior describes whether a person tends to Tell versus Ask, and the extent to which others see one as trying to influence their decisions. People viewed as assertive are described as likely to take a stand and to make their position clear on matters.

The Four Quadrants. Each of us has a dominant Social Style. By understanding the behavioral preferences of ourselves and others, we can tailor communications in ways that increase comfort levels and improve interpersonal effectiveness. According to Robert and Dorothy Bolton, "Any style can conflict with another style, but our point is that if you can recognize and accept style differences, you can do much to minimize tensions which are unnecessary and clearly unproductive."^[13] Understanding is the first step. Although our Social Styles are relatively set, we can improve our Versatility by being thoughtful and sensitive in communicating with others. Merrill and Reid found that although Social Styles do not in themselves differentiate those who are more or less successful in their undertakings, Versatility is consistently an ingredient of success, and it can be learned:

- Upper left: Analytical. Analyticals are organized, cautious individuals, interested in facts and reason. They tend to be thorough in whatever they do, gathering information and processing it thoughtfully and objectively. They are sometimes seen as overly structured, stubborn, or indecisive.

When communicating with an Analytical, be specific and concrete, following up with action, not promises. It matters to Analyticals that you agree with their carefully derived ideas and principles. Let them know your opinion. Although they cannot be hurried, it helps to be persistent and clear with this kind of person.

- Lower left: Amiable. Amiables place high value on personal relationships, cooperation, and affiliation with others. They are often warm individuals who bring positive energy and freshness to social situations. They prefer to achieve objectives with others, acting with respect and understanding rather than power or coercion. They can also be seen as emotional, sentimental, or easily influenced by others.

When communicating with an Amiable, it is important to recognize the human aspects of the issue. Who is involved, how do they feel about it, and how will this affect them? They care about relationship and trust. Remember to establish rapport and to work at defining mutually agreeable goals and methods.

- Lower right: Expressive. Expressives are assertive; however, they share their inner feelings and are experienced by others as enthusiastic and friendly. They tend to be influential people, engaging others with their energy and optimism. Expressives can overwhelm and be perceived as too talkative or domineering. They tend to be weak on details.

When communicating with an Expressive, it is important to recognize their dreams and intuitions. Remember that they are interested in the new and innovative aspects of the message and are less concerned with details. When reaching agreements, make sure to be specific about terms and next steps.

- Upper right: Driver. Drivers tend to be serious, assertive people, interested in action and results. Often viewed as decisive and pragmatic, they live in the here-and-now. They go to great lengths to tell others what they think and require, while revealing little about their feelings. They can appear severe, tend to be task focused, and are most comfortable when they are in charge. They can appear pushy or impulsive, ready to act without enough preparation.

When communicating with a Driver, focus on the what and how, not the why or who questions. Drivers don't necessarily require a personal relationship or deep philosophical alignment. Pay more attention to desired outcomes and the actions needed to realize them.

Example: Company Acquisition: The Negotiation. Social Styles training and skills have been used in thousands of corporate settings over the years. Application of the framework raises interpersonal awareness and provides a common language participants can draw on to communicate effectively and resolve conflicts. The hypothetical situation described here illustrates the impact of communication effectiveness on feelings and outcomes.

BigCo is interested in acquiring SmallCo. The fit appears ideal for both sides of the transaction, and four players, two from each firm, have gathered to iron out final issues and conclude the deal. The participants are the BigCo vice president of acquisitions (a Driver), the BigCo human resources director (an Amiable), the SmallCo founder (an Expressive), and the SmallCo chief scientist (an Analytical).

Each participant in the meeting has good intentions and will need to play a critical role in arriving at a successful outcome (Figure 8.11). The different Social Styles can become a barrier, however, if people feel pressured or wary. In intense negotiations, this happens too easily and often.

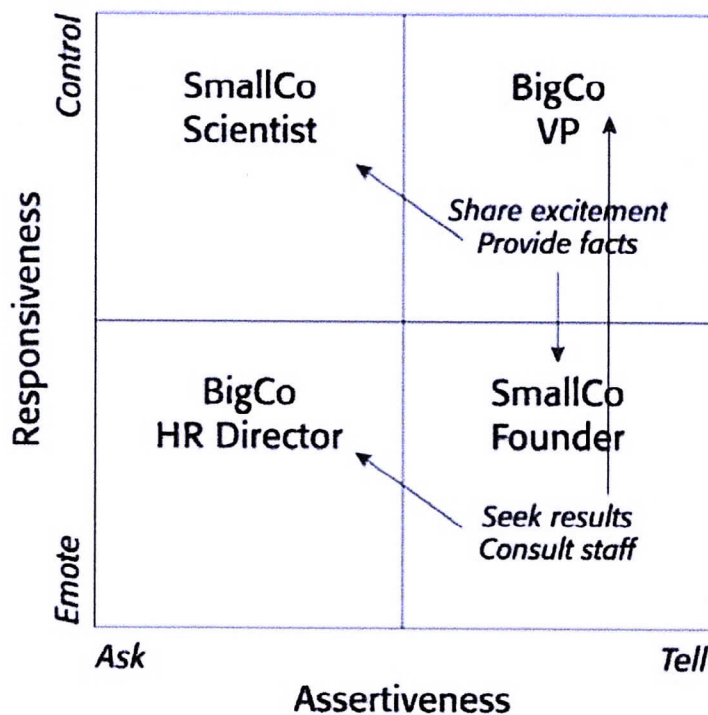


Figure 8.11: Improving Negotiations Matrix

For example, the BigCo vice president might lead off by selling the financial virtues of the deal, looking for a speedy conclusion, while the Expressive and Analyst SmallCo representatives are looking for enthusiastic engagement and reliable facts. The BigCo vice president needs to begin by addressing the felt needs of the SmallCo representatives before forcefully pursuing her own agenda to close the deal. She might consider allowing her human resource director to engage the founder and provide concrete benefits information to the Analytical scientist. In her offer, it will be important to recognize the pride and sense of accomplishment of the SmallCo reps. She needs to listen to the founder and demonstrate excitement.

The SmallCo founder might naturally be inclined to share his business vision in an animated manner, only to feel deflated at the lack of uptake by the BigCo representatives. The founder needs to consider the vice president's needs and offer her reassurances about his shared desire for speedy progress and a concrete outcome. In communicating with the

human resources director, it would be useful to describe his company's staffing philosophy and commitment to full and fair consultation with employees.

By attending to each others' style needs, all parties feel more at ease and respected, and are less likely to be negatively distracted from the primary purpose of the transaction.

Context. The Social Styles approach is deployed to improve performance across a wide range of individual and team situations, and has been used by over 10 million people in more than twenty countries since it was introduced in the 1960s. The framework is particularly well suited to improving skills in leadership and sales.

Method. Follow the steps here to benefit from Social Styles insights:

- Step 1: Determine the context: individual, team, organizational, educational?
- Step 2: Complete the Social Styles Diagnostic Survey, available from the Tracom Group.
- Step 3: Score and debrief results in the context set for the process.
- Step 4: Improve communication with others based on personal insights and understanding of the model.

References

Bolton, R., and Bolton, D. P. *Social Style/Management Style*. New York: Amacom, 1984.

Merrill, D., and Reid, R. *Personal Styles and Effective Performance*. Philadelphia: Chilton, 1981.

TRACOM Group. [<http://www.tracom.com>].

Getting It Right

Peter Drucker

There is surely nothing quite so useless as doing with great efficiency that which should not be done at all.

—Peter Drucker^[14]

This commonsense framework comes out of the study of highly effective leaders and their organizations. One view is that managers do the job right, while leaders ensure that the right job is being done (Figure 8.12). This leadership responsibility is especially pertinent in bureaucratic settings where work is too easily abstracted from its larger purpose and context and the assigned task becomes an end in itself. The framework raises useful questions about the relevance and importance of the work being done by an individual, a team, or a larger unit within an organization. As organizations distribute more authority to knowledgeable workers, it becomes everyone's job to ensure the validity and design of their own work.

Right Job	Yes	Could Succeed	Excellent Chance of Success
	No	No Chance	Waste of Time
		No	Yes
		Job Done Right	

Figure 8.12: Doing Things Right Matrix

The Two Dimensions and Their Extremes. The Doing Things Right matrix explores two key dimensions: Right Job and Job Done Right:

Right Job. This dimension describes the content of work activity. Not all task definitions are equally useful or aligned on purpose. Success begins with getting the Right Job defined.

Job Done Right. This dimension describes the process of work activity. Work can be completed well or poorly.

The Four Quadrants. Of the four possible scenarios, only one, Yes-Yes, has any real chance of success. Improvement begins with diagnosis. Knowing the need helps you decide where to place your efforts:

- Upper left: Could Succeed. In this case, there is a chance of success because the work is properly defined, but there are problems getting in the way and undermining efforts. Diagnosis of the situation and course correction are required.
- Lower left: No Chance. Both the job definition and the methods being applied are wrong. Although this situation appears almost comically obvious, groups often find themselves here. This is because the two problems attract each other. In such an unhealthy atmosphere, it can become very difficult to challenge the status quo and launch corrective steps.
- Lower right: Waste of Time. This is perhaps the most tragic of the four states. Good work is being accomplished, but to no particularly useful end. Things could be turned around, but leadership is required.
- Upper right: Excellent Chance of Success. High performance requires both of the qualities measured by this framework. Great leaders provide focus to their teams and help members to work at their best.

Method. Follow these steps to improve organizational priority setting and to diagnose possible causes of performance ineffectiveness:

- Step 1: Focus. Pick an individual or business unit engaged in a defined work activity.
- Step 2: Assess. Assess current effectiveness by using the matrix and responding to the questions, "Are they doing the Right Job [validity]?" and "Are they doing the Job Right [quality]?"
- Step 3: Correct. Depending on the assessment, take appropriate action. For example, if the job is poorly defined, get clear about what is really needed. If the work is being done poorly, launch an effort to find out why, and then tackle the problem. If neither job nor work effectiveness is acceptable, rethink the legitimacy of the function or unit, and consider fundamental redesign or elimination.

Reference

Drucker, P. F. "Managing for Business Effectiveness." *Harvard Business Review*, May 1963, p. 56.

Leadership Coaching

Bryan Smith and Rick Ross

Nobody is more powerful than a passionate leader; particularly in terms of his or her impact on others. That is why the coaching that leaders receive is arguably one of the highest-impact leverage points available to a team.

—Bryan Smith and Rick Ross^[15]

People in leadership positions face unique learning challenges when they want to improve their leadership effectiveness. Formal courses are often irrelevant and artificial, free time is scarce, and subordinates are often fearful of delivering honest feedback that may be received negatively. Bryan Smith and Rick Ross suggest coaching as a more practical and useful option.

Leadership Coaching opens the door to learning directly from what is or is not working well in the daily execution of leadership responsibilities (Figure 8.13). Acting as part mentor, part mirror, the coach encourages and supports honest reflection and improvement efforts.

The Two Dimensions and Their Extremes. The Leadership Coaching matrix explores two key dimensions: Message Content and Evaluation:

Message Content. The content of the coach's message ranges from Ambiguous to Specific. Specific performance feedback is most helpful.

Evaluation. Feedback ranges from Judgmental to Descriptive. Judgmental feedback risks provoking defensive, emotional responses, and damaging the connection between coach and leader. Descriptive feedback makes valuable information available to the leader.

Message Content	Specific	Your body language is alienating	When you look at the floor when we are talking, I make the assumption that you are not interested
	Ambiguous	You've got a bad attitude	Your body language is hard to read
		Judgmental	Descriptive
		Evaluation	

Figure 8.13: Leadership Coaching Matrix

The Four Quadrants. Effective feedback is Descriptive rather than Judgmental and Specific versus Ambiguous:

- Upper left: Judgmental and Specific. This is a dangerous and counterproductive approach. Even when the feedback is accurate, the leader is likely to feel judged and try to rationalize her behavior.

- Lower left: Judgmental and Ambiguous. It is difficult for the recipient to respond to nonspecific criticism or feel good when judgments are emotionally loaded. The goal is to move toward the Descriptive and Specific.
- Lower right: Descriptive and Ambiguous. Descriptive feedback is empty if it is not accompanied by relevant observations and examples. The leader needs this information to understand what exactly has occurred and what is worth changing.
- Upper right: Descriptive and Specific. As we move from the Judgmental to Descriptive, and Ambiguous to Specific, areas of improvement can be identified in a constructive and open manner.

Method. Coaching is a continuous process, as leadership skills are constantly tested and refined.

- Step 1: Set the scene. Coaches begin with establishing rapport and trust with the leader, and they take responsibility for successful coaching outcomes.
- Step 2: Observe behavior. It is ideal for the coach to attend meetings and other events to collect firsthand information. When this is not feasible, the coach is restricted to working with the leader's own account of events, helping the leader make sense of experiences.
- Step 3: Recreate the scene. It is helpful to review difficult and challenging situations, asking questions like, "How did you do in that encounter?"
- Step 4: Share observations. Using descriptive, specific language, provide feedback and help the leader to expand self-understanding and set meaningful leadership improvement objectives.

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Senge, P., and others. *The Dance of Change: The Challenges of Sustaining Momentum in Learning Organizations*. New York: Doubleday/Currency, 1999.

Career Transitioning

Based on the work of Richard Nelson Bolles

There is a vast world of work out there in this country, where at least 111 million people are employed in this country alone—many of whom are bored out of their minds. All day long.

—Richard Nelson Bolles^[16]

With over seven million copies sold in the past two decades, few books have been as influential as Richard Nelson Bolles's *What Color Is Your Parachute?* The book's premise is that most people choose a career path without properly evaluating their own skills, interests, and aspirations. As a result, millions of people are in jobs that are a poor fit for them. They miss their true calling and waste their working lives.

Bolles boils the issues involved in determining a career down to two main questions: What do you want to do? and Where do you want to do it? The book arms those who are seeking new careers with simple tools for finding out all of the information they need in order to make a meaningful career decision.

The Career Transitioning matrix (Figure 8.14) looks at two key variables involved in considering a new career.^[17] Taken together, these determine the degree to which changing jobs will be simple or complex.

The Two Dimensions and Their Extremes. The Career Transitioning matrix explores two key dimensions: Job Title and Field:

Job Title. Job title refers to the nature of the work itself. One can remain in the same profession or switch.

Field. Field refers to industry context. One can stay in the same industry or move to a new one.

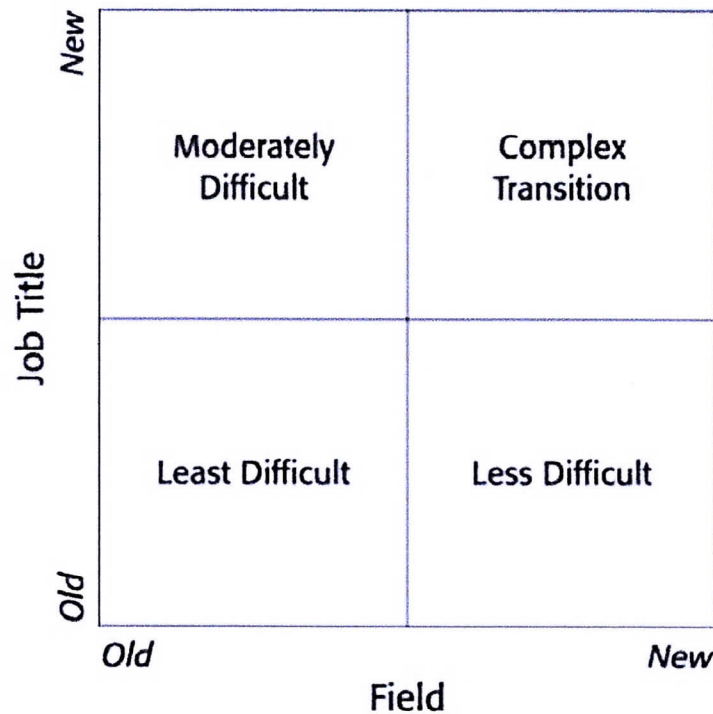


Figure 8.14: Career Transitioning Matrix

The Four Quadrants. The complexity and challenge of a career change increase with the addition of new elements. The Career Transitioning matrix illustrates how the two variables of Job Title and Field define a meaningful range of options with varying levels of difficulty:

- Upper left: Moderately Difficult. Changing Job Titles while remaining in a familiar industry context, as when an accountant moves into sales or a copyeditor moves into reporting, is moderately difficult. The challenge for the job seeker is to demonstrate aptitudes and abilities for the new position, which is often a move up.
- Lower left: Least Difficult. Staying in the current job and changing employers (while remaining in the same industry) is a common transition when one is happy in one's career but seeking a better opportunity or new geography.
- Lower right: Less Difficult. In professions such as sales, accounting, human resources, and graphic design, skills are standardized across industries. Moving from one industry to another constitutes a relatively easy transition.
- Upper right: Complex Transition. Finding lifelong fulfillment—the color of one's parachute—often means changing Job and Field. This is the toughest transition of the four. Many employers seek specific experience or technical skills. In addition, there is the risk that the job seeker will choose a career for which she is not prepared or temperamentally suited. The key to this transition is being realistic about what is possible and the amount of effort it will take to become fully competent.

Method. Follow these steps to create a high-level plan to effect the transition from one career to another:

- Step 1: Select a career direction. Identify the career or job you would like to attain, and locate it on the matrix. Consider the difficulty of attaining the desired job.
- Step 2: Interview. Prepare a list of informational interview questions for workers in that job. Include questions about skills, the daily nature of the work, education, coworkers, salary, lifestyle, personal fulfillment, success factors, work, and personal challenges. Conduct informational interviews with up to five people working in that field.
- Step 3: Acquire skills. Identify the skills that you will need in order to be happy and successful in the new career or position. Put a plan together to fill those skills gaps.
- Step 4: Switch jobs. Create the plan that will take you from your current position to the one you have identified.

Reference

Bolles, R. N. *What Color Is My Parachute?* Berkeley: Ten Speed Press, 1974.

[12]D. Merrill and R. Reid, *Personal Styles and Effective Performance* (Philadelphia: Chilton, 1981), p. 79.

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[14]P. F. Drucker, "Managing for Business Effectiveness," *Harvard Business Review*, May 1963, p. 56.

[15]P. Senge and others, *The Dance of Change: The Challenges of Sustaining Momentum in Learning Organizations* (New York: Doubleday, 1999), p. 108.

[16]R. N. Bolles, *What Color Is Your Parachute?* (Berkeley, Calif.: Ten Speed Press, 1970).

[17]We adapted the Career Transitioning matrix based on a reading of Richard Bolles's work, although he did not specifically present it as a 2 x 2 matrix.

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