

# MILLENNIUM

## Leadership Capsules for the 21<sup>st</sup> Century

### Coaching & Performance Feedback Training Scenes

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#### *Introduction:*

This capsule of the **MILLENNIUM** series consists of 8 training dramatizations. Each of these scenarios is followed by a brief discussion by management and human resource experts who review key learning points. This capsule can be used as a stand alone learning resource or to complement Capsule #2 - *The Leader as Coach* and Capsule #4 - *Providing Performance Feedback* of the **MILLENNIUM** series. This program is also available as the 5<sup>th</sup> volume in QMR's **Training Scenes Library**.

#### *Training Methodology:*

**Coaching & Performance Feedback Training Scenes** is a flexible resource with a variety of uses:

- it can help focus a group's discussion of specific coaching or performance feedback challenges
- it can be plugged into comprehensive training programs (like **MILLENNIUM**) which you have designed or are presenting
- it can be part of a refresher course for employees who are already familiar with the coaching or performance feedback issues being addressed
- it can be used by individuals to explore issues in a self-study environment

Each scenario begins by setting up a coaching or performance feedback situation culminating in a **Decision Point**. Here you are presented with 3 options as to how the scene should continue. Each of the options are played out and the consequences of the choices made are explored. A panel of experts discusses each option after the dramatization is presented.

#### **Facilitated or Group Learning:**

This guide offers the facilitator a series of handouts which can be used to stimulate and focus discussion at the Decision Point of a particular training scene and following each option. We recommend that you use the following methodology in most settings:

*Facilitated Methodology:*

1. Welcome participants, *introduce the topic* to be addressed and explain why this training session is taking place.
2. *Play the video scene*. Stop the tape at the **Decision Point** indicated on-screen.
3. *Distribute the appropriate Options Handout* in this guide and ask participants to respond to the questions, noting down their initial thoughts.
4. *Lead a discussion* by addressing the options and related questions one at a time, asking for feedback from participants. Your Facilitator's Guide has *suggested answers* for these questions to assist you.
5. *Screen the dramatized options* and the expert discussion that follows.
6. Lead a follow up discussion to *reinforce the key learning points*.
7. *Repeat this process with each additional scenario you have selected*.

**Supporting a MILLENNIUM Coaching & Performance Feedback Session:**

If you have licensed **MILLENNIUM** Capsules 2 and/or 4, we suggest you present these first along with the activities described in their guides and then use the Training Scenes to reinforce and support the skills and information learned.

Review the issues addressed by each scenario on this tape. These are listed in the Index on Page 4 of this guide. If a particular issue or issues are especially relevant to your group's current needs, you might want to use that scenario as an introduction to the training before proceeding to explore the broader coaching and performance feedback skills presented in **MILLENNIUM** Capsules 2 and 4. This can clarify the relevance of the training and reduce any resistance individuals in the group are feeling.

**Self-Study Approach:**

If you are planning to use this video and guide as a self-study tool, we recommend you use the following approach:

1. *Play the video scene*. Stop the tape at the **Decision Point** indicated on-screen.
2. *Read the appropriate Options Handout* in this guide and respond to the questions, noting down your initial thoughts.
3. *Review the suggested answers for these questions* as outlined in the Facilitator's Guide.
4. Screen the remainder of the scenario and the expert discussion that follows to *reinforce the key learning points*.
5. *Repeat with each additional scenario you have selected*.

**For Non-Trainer Managers or Team Leaders:**

In the changing workplaces where QMR products are often used, many supervisors and team leaders who do not consider themselves *professional trainers* are being asked to facilitate or present training. *Coaching and Performance Feedback Training Scenes* has been developed to meet the needs of these non-trainer trainers.

This guide should make your work considerably easier. While a professional facilitator or trainer can bring a wealth of ideas to the learning process, there is nothing in the methodologies outlined above that requires extensive preparation or experience. Your task is to share your insights and knowledge with your team, but more importantly, to listen to their contributions, respect their ideas and model the kind of learning from which you would like them to benefit.

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## Coaching & Performance Feedback Training Scenes

### INDEX

<u>Scenario #</u>	<u>Title</u>	<u>Issues Addressed</u>
1	Always Late	Chronic performance issues, accommodating personal issues, appropriate peer feedback
2	I Like Things Just as they Are	Resistance to change, fear in the workplace
3	Great Stuff	Positive performance feedback, coaching exceptional employees, creating learning environments
4	Attitude	Overcoming peer cynicism, peer coaching for managers
5	Maximizing Potential	Coaching the under-performer, coaching more experienced team members
6	Do You Smell Something?	Counseling around personal issues, uncomfortable situations
7	Lest I Offend You	Feedback and EEO concerns, feedback is better late than never
8	360° Feedback	Modeling how to receive feedback, getting feedback as a team leader

## SCENARIO ONE – *ALWAYS LATE*

There are 2 Decision Points in this scenario.

### Decision Point 1: HANDOUT

**What challenges does Margo face at this decision point?**

**Here are 3 options Margo might choose. Consider how each decision would impact Jeff and the consequences that might result.**

#### *Option A*

*Margo gives Jeff a formal reprimand and warns him of additional disciplinary action unless the situation improves.*

Impact on Jeff:

Consequences:

#### *Option B*

*Margo asks Jeff to let her know if she can help in any way.*

Impact on Jeff:

Consequences:

#### *Option C*

*Margo insists Jeff arrive on time and focus on his work and asks what he will do to make this happen.*

Impact on Jeff:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO ONE – *ALWAYS LATE*

There are 2 Decision Points in this scenario.

### Decision Point 1: Suggested Answers

#### What challenges does Margo face with Jeff at this decision point?

(Margo has to find out what is going on with Jeff. She needs to clearly outline the performance expectations of the team and help Jeff come up with a solution to his lateness issue that will meet those expectations.)

**Here are 3 options Margo might choose. Consider how each decision would impact Jeff and the consequences that might result.**

#### *Option A*

*Margo gives Jeff a formal reprimand and warns him of additional disciplinary action unless the situation improves.*

Impact on Jeff: (Feels threatened, sees no options, hardens his position)

Consequences: (Jeff either chooses to leave or grudgingly complies)

#### *Option B*

*Margo asks Jeff to let her know if she can help in any way.*

Impact on Jeff: (gets no direction, no clear expectations, no help with actions to take)

Consequences: (he will likely continue as he has been - no performance change)

#### *Option C*

*Margo insists Jeff arrive on time and focus on his work and asks what he will do to make this happen.*

Impact on Jeff: (makes him responsible for his actions, sets out clear expectations)

Consequences: (allows him an opportunity to design a solution to the issue)

What lessons can we draw from this scenario? (importance of listening, coach doesn't have all the answers)

## SCENARIO ONE – *ALWAYS LATE*

### Decision Point 2: HANDOUT

What challenges does Margo face with Frank at this decision point?

Here are 3 options Margo might choose. Consider how each decision would impact Jeff and the consequences that might result.

#### *Option A*

*Margo explains she is the team leader and if Frank has a problem with someone, he should take it up with her.*

Impact on Frank:

Consequences:

#### *Option B*

*Margo explains to Frank that Jeff has some financial issues and asks him to ease off.*

Impact on Frank:

Consequences:

#### *Option C*

*Margo asks Frank how he can provide more supportive feedback and sets out the components of effective feedback.*

Impact on Frank:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO ONE – *ALWAYS LATE*

### Decision Point 2: Suggested Answers

#### What challenges does Margo face with Frank at this decision point?

(Margo has to set some guidelines for how team members give each other feedback while valuing Frank's contribution to the team. Ideally, she needs to get Frank and Jeff to iron out their conflict.)

**Here are 3 options Margo might choose. Consider how each decision would impact Jeff and the consequences that might result.**

#### *Option A*

*Margo explains she is the team leader and if Frank has a problem with someone, he should take it up with her.*

Impact on Frank: (cuts him out of the resolution of the problem, discourages team members from working out their own issues)  
Consequences: (Margo becomes the team judge and jury, not their coach)

#### *Option B*

*Margo explains to Frank that Jeff has some financial issues and asks him to ease off.*

Impact on Frank: (Margo has violated a trust, Frank has information he shouldn't have, but his situation is not improved)  
Consequences: (the trust level within the team will likely decline, no behavior improvement)

#### *Option C*

*Margo asks Frank how he can provide more supportive feedback and sets out the components of effective feedback.*

Impact on Frank: (has clear idea of Margo's expectations, includes him in a team process)  
Consequences: (makes this a team issue, establishes norms of behavior for the team)

What lessons can we draw from this scenario? (performance issues impact the whole team and may need to be dealt with as a team issue)

SCENARIO TWO – *I LIKE THINGS JUST AS THEY ARE*

**Decision Point: HANDOUT**

**What challenges does Vanessa face at this decision point?**

**Here are 3 options Vanessa might choose. Consider how each decision would impact Sharon and the consequences that might result.**

***Option A***

*Vanessa explains that they have no choice and asks Sharon what's wrong with working in her home.*

Impact on Sharon:

Consequences:

***Option B***

*Vanessa explains the advantages of working at home.*

Impact on Sharon:

Consequences:

***Option C***

*Vanessa empathizes with Sharon, explains why the change is necessary, and asks for suggestions and help working out a solution.*

Impact on Sharon:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO TWO – *I LIKE THINGS JUST AS THEY ARE*

### Decision Point: Suggested Answers

#### What challenges does Vanessa face at this decision point?

(Vanessa must discover why Sharon is so resistant to working in her home, and must get Sharon involved in working out a solution.)

**Here are 3 options Vanessa might choose. Consider how each decision would impact Sharon and the consequences that might result.**

#### ***Option A***

*Vanessa explains that they have no choice and asks Sharon what's wrong with working in her home.*

Impact on Sharon: (she feels frustration with the fact she has no options, hardens position)

Consequences: (Sharon will likely dig in her heels, and may leave the organization)

#### ***Option B***

*Vanessa explains the advantages of working at home.*

Impact on Sharon: (might work, might not, depending on if Sharon sees the same advantages that Vanessa sees in working at home)

Consequences: (Sharon may feel Vanessa doesn't really care about Sharon's concerns)

#### ***Option C***

*Vanessa empathizes with Sharon, explains why the change is necessary, and asks for suggestions and help working out a solution.*

Impact on Sharon: (she may feel included and inclined to work this out with Vanessa)

Consequences: (Sharon opens up with Vanessa and they have an opportunity to work towards a solution)

What lessons can we draw from this scenario? (importance of empathy, of listening to the person you are coaching and of allowing the person being coached to develop solutions)

### SCENARIO THREE – *GREAT STUFF*

**Decision Point: HANDOUT**

**What challenges does Bob face at this decision point? What about Debra?**

**Here are 3 options Bob might choose. Consider how each decision would impact Debra and the consequences that might result.**

***Option A***

*Bob strongly encourages Debra to do the presentation, asking that she trust his judgment on this.*

Impact on Debra:

Consequences:

***Option B***

*Bob acquiesces to Debra's wishes and drops the whole thing.*

Impact on Debra:

Consequences:

***Option C***

*Bob clarifies with Debra what her concerns are and asks for her input on how to best proceed.*

Impact on Debra:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO THREE – *GREAT STUFF*

### Decision Point: Suggested Answers

#### What challenges does Bob face at this decision point? What about Debra?

(Bob must determine why Debra is resistant to his suggestions, what her concerns are and if she has any solutions. Debra must communicate her concerns and work with Bob on a mutually agreeable solution.)

#### Here are 3 options Bob might choose. Consider how each decision would impact Debra and the consequences that might result.

##### *Option A*

*Bob strongly encourages Debra to do the presentation, asking that she trust his judgment on this.*

Impact on Debra: (Debra feels forced to comply and goes along against her better judgment)

Consequences: (Debra's reward becomes a kind of punishment)

##### *Option B*

*Bob acquiesces to Debra's wishes and drops the whole thing.*

Impact on Debra: (Debra avoids conflict with her co-workers but misses a career opportunity)

Consequences: (what could have been a learning process for Debra and the team is lost)

##### *Option C*

*Bob clarifies with Debra what her concerns are and asks for her input on how to best proceed.*

Impact on Debra: (she feels heard, has a chance to work on a solution with Bob)

Consequences: (it is likely they will come out with a solution that both recognizes Debra's good work and provides a learning opportunity for the team)

What lessons can we draw from this scenario? (when providing feedback, listen, listen, listen)

## SCENARIO FOUR – *ATTITUDE*

**Decision Point: HANDOUT**

**What challenges do Gwen and Ron face at this decision point?**

**Here are 3 options Gwen and Ron might choose. Consider how each decision would impact Fred and the consequences that might result.**

### *Option A*

*Gwen and Ron try to reason with Fred and win him over to a more positive approach.*

Impact on Fred:

Consequences:

### *Option B*

*Ron and Gwen realize there's no point in arguing with Fred and decide to just leave him alone.*

Impact on Fred:

Consequences:

### *Option C*

*Ron and Gwen point to the positive role Fred can play as a cynic and encourage him to continue.*

Impact on Fred:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO FOUR – *ATTITUDE*

### Decision Point: Suggested Answers

#### What challenges do Gwen and Ron face at this decision point?

(Ron and Gwen need to get past Fred's cynicism and involve him productively in the work of leading the organization)

**Here are 3 options Gwen and Ron might choose. Consider how each decision would impact Fred and the consequences that might result.**

#### *Option A*

*Gwen and Ron try to reason with Fred and win him over to a more positive approach.*

Impact on Fred: (he doesn't feel understood or heard, but gets to debate or spar a little)

Consequences: (no progress is made, all three of them feel frustrated)

#### *Option B*

*Ron and Gwen realize there's no point in arguing with Fred and decide to just leave him alone.*

Impact on Fred: (he wins a round but makes no progress)

Consequences: (status quo - no coaching is going on)

#### *Option C*

*Ron and Gwen point to the positive role Fred can play as a cynic and encourage him to continue.*

Impact on Fred: (Fred feels valued, opens up to a more positive role)

Consequences: (Fred continues to question decisions made by the organization but his questioning becomes a more positive part of the organization's process)

What lessons can we draw from this scenario? (accept people for who they are and work with their strengths)

## SCENARIO FIVE – *MAXIMIZING POTENTIAL*

### Decision Point: HANDOUT

What challenges does Alex face at this decision point?

Here are 3 options Alex might choose. Consider how each decision would impact Esther and the consequences that might result.

#### *Option A*

*Alex tells Esther she isn't maximizing her potential and asks her what she could do to improve*

Impact on Esther:

Consequences:

#### *Option B*

*Alex tells Esther he values her contribution but she needs to cut out all the gossiping and make better use of her time.*

Impact on Esther:

Consequences:

#### *Option C*

*Alex asks Esther for ideas to improve productivity in the department and invites her to help him set up a productivity committee.*

Impact on Esther:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO FIVE – *MAXIMIZING POTENTIAL*

### Decision Point: Suggested Answers

#### What challenges does Alex face at this decision point?

(Alex needs to get Esther involved in designing a productivity solution which will help her maximize her potential)

**Here are 3 options Alex might choose. Consider how each decision would impact Esther and the consequences that might result.**

#### *Option A*

*Alex tells Esther she isn't maximizing her potential and asks her what she could do to improve*

Impact on Esther: (she doesn't understand, feels Alex is wrong - no one else has complained)

Consequences: (no behavior change since she isn't clear on what the problem is)

#### *Option B*

*Alex tells Esther he values her contribution but she needs to cut out all the gossiping and make better use of her time.*

Impact on Esther: (Esther feels threatened, insulted, defensive)

Consequences: (she goes underground, stays away from Alex, spreads the "word" about him)

#### *Option C*

*Alex asks Esther for ideas to improve productivity in the department and invites her to help him set up a productivity committee.*

Impact on Esther: (she feels included, important, motivated to look for productivity solutions)

Consequences: (she may use her networking and communication skills to improve productivity)

What lessons can we draw from this scenario? (a direct confrontation is not always the best solution to performance issues)

## SCENARIO SIX – *DO YOU SMELL SOMETHING?*

**Decision Point: HANDOUT**

**What challenges does Keith face at this decision point?**

**Here are 3 options Keith might choose. Consider how each decision would impact Andrew and the consequences that might result.**

***Option A***

*Keith tries to gently lead Andrew into a discussion about unpleasant odors at work.*

Impact on Andrew:

Consequences:

***Option B***

*Keith tells Andrew he has an offensive body odor and suggests he pay attention to his personal hygiene.*

Impact on Andrew:

Consequences:

***Option C***

*Keith explains to Andrew he has an unpleasant body odor, asks if he has any health issues and assures him he is liked and respected.*

Impact on Andrew:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO SIX – *DO YOU SMELL SOMETHING?*

### Decision Point: Suggested Answers

#### What challenges does Keith face at this decision point?

(Keith needs to be direct and honest with Andrew while preserving his dignity and showing compassion and respect.)

**Here are 3 options Keith might choose. Consider how each decision would impact Andrew and the consequences that might result.**

#### *Option A*

*Keith tries to gently lead Andrew into a discussion about unpleasant odors at work.*

Impact on Andrew: (doesn't get the message)

Consequences: (no change in the situation except Keith gets more frustrated)

#### *Option B*

*Keith tells Andrew he has an offensive body odor and suggests he pay attention to his personal hygiene.*

Impact on Andrew: (he is confused and hurt by what feels like an assault)

Consequences: (the odor may go away, but the working relationship is destroyed)

#### *Option C*

*Keith explains to Andrew he has an unpleasant body odor, asks if he has any health issues and assures him he is liked and respected.*

Impact on Andrew: (he gets the message and while this is painful, he still feels valued and respected)

Consequences: (behavior is changed and the relationships are preserved)

What lessons can we draw from this scenario? (when dealing with personal or sensitive issues, be compassionate and direct)

## SCENARIO SEVEN – *LEST I OFFEND YOU*

**Decision Point: HANDOUT**

**What challenges does Mark face at this decision point?**

**Here are 3 options Mark might choose. Consider how each decision would impact Joanne and the consequences that might result.**

***Option A***

*Mark tells Joanne he has had several documented complaints and asks her what can be done to improve the situation.*

Impact on Joanne:

Consequences:

***Option B***

*Mark asks Joanne how she feels things are going and offers her help if she feels she needs any.*

Impact on Joanne:

Consequences:

***Option C***

*Mark explains he has received complaints, asks for Joanne's feedback on what might have happened and suggests he support her on her next customer meetings.*

Impact on Joanne:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO SEVEN – *LEST I OFFEND YOU*

### Decision Point: Suggested Answers

#### What challenges does Mark face at this decision point?

(Mark must provide Joanne with honest information and feedback in a way that doesn't feed her fears or threaten her, and then he must coach her to help her improve.)

**Here are 3 options Mark might choose. Consider how each decision would impact Joanne and the consequences that might result.**

#### *Option A*

*Mark tells Joanne he has had several documented complaints and asks her what can be done to improve the situation.*

Impact on Joanne: (Joanne feels threatened and fears her job is at risk)

Consequences: (she becomes defensive, plans how she will protect herself)

#### *Option B*

*Mark asks Joanne how she feels things are going and offers her help if she feels she needs any.*

Impact on Joanne: (she senses something is going on but doesn't know what the problem is)

Consequences: (no performance improvement but she is wary and on her guard)

#### *Option C*

*Mark explains he has received complaints, asks for Joanne's feedback on what might have happened and suggests he support her on her next customer meetings.*

Impact on Joanne: (she feels included in a performance improvement process)

Consequences: (she is open to his feedback and works on improving her work)

What lessons can we draw from this scenario? (putting off performance feedback only makes matters worse - coach for success, not as a way to get rid of someone)

## SCENARIO EIGHT – 360° FEEDBACK

**Decision Point: HANDOUT**

**What challenges does Ann face at this decision point? What about Beth?**

**Here are 3 options Ann might choose. Consider how each decision would impact Beth and the consequences that might result.**

### *Option A*

*Ann explains the project has been difficult and asks Beth to submit her suggestions in writing so she can present them to the team.*

Impact on Beth:

Consequences:

### *Option B*

*Ann explains there are proper channels for registering a complaint and encourages Beth to use those channels.*

Impact on Beth:

Consequences:

### *Option C*

*Ann asks Beth for more information, welcomes the feedback and offers a course of action to implement Beth's suggestions.*

Impact on Beth:

Consequences:

What lessons can we draw from this scenario?

**HANDOUT**

## SCENARIO EIGHT – 360° FEEDBACK

### Decision Point: Suggested Answers

#### What challenges does Ann face at this decision point? What about Beth?

(Ann must try not to react defensively, to hear the feedback from Beth and to respond in a way that allows Beth to feel heard and valued. Beth must present her feedback in a way that is not threatening to Ann and gives Ann an opportunity to work out an effective solution.)

**Here are 3 options Ann might choose. Consider how each decision would impact Beth and the consequences that might result.**

#### *Option A*

*Ann explains the project has been difficult and asks Beth to submit her suggestions in writing so she can present them to the team.*

Impact on Beth: (Beth feels put off, punished for her feedback)

Consequences: (the process will stop here and the team will not benefit from Beth's feedback)

#### *Option B*

*Ann explains there are proper channels for registering a complaint and encourages Beth to use those channels.*

Impact on Beth: (she is shut down and feels unheard and threatened by Ann's reaction)

Consequences: (Beth and the team will learn that Ann doesn't care about the success of the team as much as they do - performance will suffer)

#### *Option C*

*Ann asks Beth for more information, welcomes the feedback and offers a course of action to implement Beth's suggestions.*

Impact on Beth: (she feels heard and valued)

Consequences: (Beth's feedback may lead to process improvements for the team)

What lessons can we draw from this scenario? (anyone can coach anyone on the team - a leader models how to receive feedback as well as how to give it)

## **Who's Who in *Coaching & Performance Feedback Training Scenes***

### ***Linda Dowling***

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Linda Dowling founded Communication Concepts in 1979 to customize communication training for executives, managers and supervisors. Her clients are in healthcare, banking, credit unions, security systems, manufacturing, government and education throughout the United States. She consults about both organizational and managerial communication issues. Her training topics include interviewing, performance management, coaching, leading teams and team development.

A native of Oklahoma, she received a BA in mass communication from Wayne State University in Detroit, Michigan. She has 16 years of experience in broadcasting and banking, plus 17 years of training experience. She coordinated the construction and was the first manager of KGOU, the University of Oklahoma's FM radio station. While there, she trained over 250 students a year for seven years and taught management and communication courses. In recognition of her accomplishments at KGOU, she was named National FM Broadcaster of the Year in 1973.

Recently, she has taught at the University of Oklahoma in both the Communication Department and the College of Business Administration. She is listed in *Who's Who in Finance and Industry, Oklahoma*, and *American Women*. She is a member of the American Management Association and the American Society for Training and Development (ASTD) where she is a regular presenter in the ASTD Certificate Program.

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Benita Horn is the president and principal consultant of Achievement Architects -North, founded in 1990. Her practice is based in Seattle, Washington and specializes in organization development with an emphasis on organizational planning and issues of diversity. Her firm has conducted organizational assessments, developed training curriculum, provided training, facilitation and conference presentations for a variety of clients both locally and nationally.

Prior to private consulting, Benita spent twenty years in telecommunications management, ten of which involved internal consulting, personnel development and training.

Ms. Horn's formal education began at Reed College in Portland, Oregon where she majored in languages (Spanish and Russian) and has continued in consultant training through University Associates in San Diego, California and business administration through City University of Seattle, Washington. Intercultural training certificates have been earned through the Summer Institute of Intercultural Communications at Pacific University in Forest Grove, Oregon and the East-West Center at the University of Hawaii.

Community action is an important part of Ms. Horn's professional commitment. She serves on a variety of non-profit and community service boards, committees and speaker's bureaus.

***Nancy Newell***

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For the past twenty years, Nancy Newell has played a key role managing people and change within organizations. She founded Perspective, Inc., a consulting firm specializing in individual, team and organizational development in 1992. Nancy has perceptive understanding of the dynamics of any work group within an organization including strong insight into individuals' behavior and needs in the work place. Perspective, Inc. provides executive coaching, facilitation in strategic planning, off-site retreats, conflict resolution, problem solving, team development and other services.