Do Your Quality Circle Leaders Need More Training?

By EDMUND J. METZ

One of the most popular buzzwords of the new industrial productivity movement is "quality circles." The movement and the faddish desire to have quality circles is spreading rapidly as company after company races to start its own program. In spite of the growing recession within the industrial heart of the United States, the momentum of the quality circle movement has not slowed. If anything, increased organizational pressure to cut costs and ensure some minimum profit level, if not survival, has fueled the desire and willingness of management to move even more rapidly into implementing quality circles.

I have spoken with a number of managers and facilitators who have privately admitted that their quality circle programs are in trouble. Behind the "published success" which upper management wants to hear, facilitators are struggling in many cases to keep the programs operating and to help circle leaders and members cope with a host of problems that reduce the potential for success. Too many companies appear to have been over-sold on the idea that quality circles are a panacea for most types of organizational and managerial ills.[1]

In the haste to implement quality circles, too many short-cuts cause key elements to be ignored. A foundation element

often ignored, short-cut or poorly delivered is the training of managers and quality circle leaders.

How are quality circles started?

As vice president of the Greater Chicago Chapter of the International Association of Quality Circles (IAQC), I was curious about how some of our chapter members actually got started with quality circles. An informal telephone survey of 60 member companies showed that 3 of the 60 did not yet have circles, and of the remaining 57, 42 began their own circle programs without any professional consulting assistance. They did this by either sending someone to one of the popular five-day facilitator training programs or, in some instances, by simply starting the program themselves. Although I make no claims that these numbers reflect any national statistics, they point out at least two significant quality circle implementation shortcomings:

•Despite the fact that organizational readiness is a necessary aspect of the implementation process, the sad reality is that in most cases, it is not done at all or is done superficially[2];

•Training of managers and circle leaders, a key and integral part of the process, is shortened, poorly delivered, or worse, non-existent in a number of implementations.

Is the honeymoon over?

Middle managers are usually enthusiastic about and supportive

of a quality circle program during the actual planning and implementation phase. This is to be expected because of the "press" quality circles have received. Unfortunately, enthusiasm and support frequently begin to wane in a few months following the start of the program. Conversations I have had with facilitators who managed circle programs three to six months old indicated there were problems within and around circles. The facilitators believed:

•The amount and the quality of the initial training received during and after implementation was important and should be increased;

•A number of the problems appeared to be "generic," occurring commonly in many quality circles regardless of the type of organization;

•Management support and reinforcement of key circle leader skills was generally weak.

In order to find out what training improvements were necessary, I decided to do some basic diagnostic work on quality circle programs six months old. My objective was to determine not only how initial quality circle training could be improved, but also to identify any additional specific skill needs of circle leaders after the quality circle program had started.

Training is an integral part of quality circles. It is the key to how the leaders and the members become problem-solvers. Although the bulk of the training is given to facilitators, leaders and circle members, unless management is also trained in quality circle concepts, program

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design, problem-solving techniques and how to positively reinforce the leaders, the quality circle effort will soon experience problems with lack of adequate management support.

Although there is a fair degree of variation in the various training approaches being used, a fairly common on-site training model which I have used and which is used by a number of consultants consists of essentially three training phases:

PHASE 1:
Key Executives   1-Day
Union Officer(s)   Orientation
Steering
  Committee

PHASE 2:
Middle   2-Day Middle
  Managers   Management
Facilitator(s)   Workshop

PHASE 3:
Quality Circle   3-Day Leader
  Leaders   Training
Facilitator(s)

Following the completion of these training activities, the usual practice is to have the circle leaders and the facilitator train the circle members in the use of the various problem-solving techniques.

An alternative and different approach which a large number of companies use is to select a facilitator, send that individual to one of the five-day facilitator training programs, and after the training, this individual will have the responsibility of starting quality circles within the organization. These five-day facilitator training workshops are well-designed and in most cases are professionally delivered. The problem is not with the training but with what happens back in the organization. For example, facilitators are selected by managers who may not really know or understand the role of the facilitator or the relevant skills needed to be effective. Frequently, these facilitators lack even a minimum background in education and training. Because training is such an integral part

of implementing a quality circle program, it is not possible for a five-day workshop to give a facilitator the depth of skill sometimes needed. Even for facilitators who have adequate skill levels, they do not always have either the organizational position or comfort in running an executive orientation or a middle management workshop. Because these management workshops are frequently not conducted, it should not be surprising to understand why management support appears to be weak in such programs.

Assessing additional training needs

From the broad range of organizations (manufacturing, service, utility, software and structural engineering, distribution, agricultural products) which I have worked with to implement quality circles, I selected three for an in-depth follow-up six-month training needs assessment. The companies I selected were chosen by the following criteria:
• Different functional specialization;
• Range of size (from 60 people to 1,100);
• Geographically distant;
• Experience in different degrees of circle effectiveness;
• Experience with significantly different training implementation methods.

The final three selected are identified as:
Firm A: a medium-size electronic parts manufacturing company.
Firm B: a small utility service organization.
Firm C: a large research and development corporation.

In both firms A and B, the training was delivered by experienced training professionals who had quality circle consulting experience and followed the three-phase training model previously described. In firm C, the training was handled by two engineers who, although trained for five days in quality circle techniques, lacked other professional training experience and

also decided to drastically shorten the training as follows:

Three-Phase Model	Planned Training	Actual Training
PHASE 1:		
Key Executives		
Steering		
Committee	1 Day	None
PHASE 2:		
Middle		
Managers	2 Days	4 Hours
PHASE 3:		
Circle		
Leaders	3 Days	1 Day
Circle		
Members	16 Hours	8 Hours

Because of this difference in training implementation, I expected to see some significant differences at the end of the six months in the number of content and process problems existing between firms A and B versus firm C.

I collected the information by visiting each of the firms and individually interviewing each of the facilitators, leaders and circle members. In addition, I also met with entire quality circles. As a control against these visits, I spent time as an observer with six quality circles in different companies, recording actual leader/member behavior and group process data to compare to what was being reported to me by my pilot locations. My final conclusions are made on information I collected from four facilitators, 16 quality circle leaders and 74 quality circle members.

A structured interview format and related questionnaire was used to collect the information. The structure to the interview questions is listed in Figure 1. My primary interests were two-fold:
• To identify possible changes or additions to initial quality circle implementation training;
• To identify the six-month generic task/process problems experienced by quality circle leaders and which could be cor-

rected by additional leader skill training.

Implementation training

Within firms A and B, the training material used was a complete package purchased from one of the major quality circle consulting firms. A complete training model was delivered by professional consultants. It was not surprising to learn that the facilitators, leaders and circle members gave the training materials and workshop, as well as their actual technique training, relatively high marks for both quantity and quality. The facilitators were pleased with the practical utility of the manuals and audio-visuals as a valuable teaching aid for the members. Within firm C, the training was shortened and the program content was developed essentially from other materials and was delivered by two individuals who had engineering backgrounds but no professional quality circle consulting or training experience. My role was strictly that of an observer within this organization and I noted a number of significant instructional errors which caused varying levels of confusion and frustration among the participants.

The top management of firm C made the decision to short-cut training because:
- They believed the supervisors' and managers' time was too valuable to spend in two solid days of manager training and three solid days of leader training;
- The circles would be composed of professional level employees who, it was believed, did not need as much training as employees within a manufacturing environment;
- The goal was to train everyone quickly in just the absolute basics and keep training costs as low as possible.

Overall, within firm C, I found almost twice the number of problems relating to the application of the circle problem-solving process and the use of the problem-solving techniques within the

Figure 1.

INTERVIEW QUESTIONS* ASKED OF	Facilitator	Leader	Member
1. What is the level of member participation?	X	X	
2. What has hindered participation?	X	X	X
3. How has the leader encouraged participation?	X		X
4. What should the leader do differently to get more participation?	X		X
5. How satisfied were you in the decisions of the group regarding: a. selecting a problem b. deciding what to do c. selecting a solution		X	X
6. What has helped/hindered the group consensus process?	X	X	X
7. How has the facilitator helped or hindered you?		X	X
8. If you were to go through the leader training again, knowing what you know now, what subjects should be emphasized, added or deleted to be more helpful?		X	
9. In what ways has management shown its help or support for the program?	X	X	X
10. How would you like to see management show support?	X	X	X
11. How has being in a quality circle helped you?		X	X
12. What expectations about your involvement have not been met?			X
13. What do you like most/least about quality circles?		X	X
14. How/what are your feelings about the quantity of training your circle received?		X	X
15. How/what are your feelings about the quality of training your circle received?		X	X
16. How effectively is the circle operating as a team?	X	X	X
17. What are the three biggest factors hindering teamwork?	X	X	X
18. If you could change anything in the entire program or organization, what would it be?	X	X	X

*A structured and related questionnaire was also used.

circles than I found at either firms A or B. In addition, at firms A and B, the circles had progressed faster regarding the actual solving and implementation of solutions to problems. At the six-month point of circle life, firm A had already expanded its circle program (and also added two management circles), Firm B was on the verge of expanding, but within firm C the program remained in a status quo situation with thoughts of expansion a future possibility only. Although all three firms had reported some level of lack of management support, the feeling that management did not really support the program was almost universal among the leaders and members of firm C. It is also important to mention that more than 60 percent of the individuals at firm C

thought that initial training was inadequate and wanted to have more training scheduled for both leaders and members.

Regarding quality circle implementation training, I came to the following major conclusions:

•Quality circle implementation training should not be short-cut or reduced.

•Training content quality and program design is important, and commercially available programs appear to be superior to "home-grown" products.

•Quality circle instructor skills and experience are important to effective learning of facilitators and leaders. Instructors should be highly skilled in "modeling" relevant facilitator intervention behaviors and circle leader behaviors.

•Middle managers need to learn not only the basics of quality circle process and techniques, but also how to positively reinforce participative behaviors in their supervisors and circle leaders.

•Quality circle leaders need more practice in modeling non-directive leadership behaviors as part of initial implementation training.

•It should not be assumed that individuals who have professional backgrounds will be any more effective at solving problems or becoming a cohesive team than will individuals who are blue-collar or factory employees. All individuals appear to need complete training in the application of the quality circle problem-solving process and techniques.

•Facilitators do need to develop increased skills in two areas: the making of interventions into the quality circle task and process[3] and the ability to identify and reinforce desirable participative behaviors of quality circle leaders.

Although a few companies have also recognized the need for additional skills training for quality circle leaders, in most cases this needed training is not happening as part of a planned and systematic process. While the initial three-day leader training process is adequate for getting a quality

circle program started, it is not completely adequate to provide the support for needed leader skills important for helping the circle succeed and grow. Based on the information obtained from the three study locations, there are some important quality circle leader skills which exist and need to be strengthened. These are skills which appear to be common and generic to all the leaders

with whom I spoke or observed. Additionally, these skills should be strengthened by the six-month point of quality circle life.

Although I also identified a number of other necessary skills, these were either specific to the individual or the organization. Based on the number and type of problems reported, the generic skills fall under three clusters, in order of importance as:

•Circle meeting leadership skills;

•Communication/listening skills;

•Time management/planning and scheduling skills.

Circle meeting leadership skills

One of the most common problems reported by both facilitators and circle members was that of the tendency of circle leaders to show too much dominance within the circle meeting. Leaders generally did not see that one of the consequences of this dominant behavior was a reluctance to participate on the part of the circle members. It became a self-defeating cycle where the leaders showed increasing levels of dominant behavior as circle members participated less and less. One way in which quality circle

leaders could obtain more member participation would be to give more recognition to members who contributed ideas.

Although the initial implementation training included the process and some practice in how to set up and conduct a quality circle meeting, the circle leaders frequently failed to set meeting agendas and, as a consequence, meetings lacked structure and

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adequate process control. Circle members reported frustration at not knowing what was to be accomplished and there were obvious negative effects on circle member motivation. What also tended to compound the problem was the circle leader's lack of using or having a defined cognitive model of a problem-solving process. This would have helped the leader get circle members more involved and would have avoided "awkward silences" and wasted time because no direction or process was clear. The development of problem-solving discussion and questioning skills in the circle leaders is needed and the lack of these skills is evident.

Group dynamics issues such as counter-productive member behaviors and differences of opinion or interpersonal competition/rivalry were sometimes not identified by either the leaders or facilitators. Most of the circle leaders showed some degree of inability to manage multiple circle member group behaviors using a non-directive style of leadership or, in some cases, to even recognize when a circle was encountering a process issue. Both facilitators and leaders would benefit by having more training in group dynamics in in-

itial start-up training and also by receiving some additional training in simple team building techniques after the circles start. Every circle reported some issues or events which were hindering teamwork, but most said they were "satisfied" with their general level of team effectiveness.

Communication/listening skills

One important behavior which I noted as a general tendency among the quality circle leaders was the too frequent use of "telling" as a leadership behavior and not enough use of "questioning" to get circle members more involved in the circle process. The increased use of questioning skills would help to increase the level of member participation because more members could share their ideas with the circle. Training in the use of questioning techniques would not only be helpful in gaining increased member participation but would also help leaders behave in less directive or domineering ways. The use of effective questioning techniques is also a critical skill for facilitators who showed more of a tendency to intervene into the quality circles by "telling" the circle members what the problem was rather than by "asking" members questions which could help them learn how to diagnose and solve their own process and task problem.

Listening is also a skill which more circle leaders need to demonstrate in circle meetings. A variety of pressures appear to be at work on circle leaders, causing them to not only listen less but dominate or "push" the circle members toward task completion. For example, there is the pressure of meeting only one hour per week and the resulting feeling that not enough progress is being made in solving the problem; there is often a "feeling" (usually unstated) of concern about solving problems faster because it would please management; there is the pressure that comes with the dual role of being both a group's formal supervisor

as well as a circle leader and member and the feeling that the leader, by virtue of position, is the individual who should know most of the answers to problems. These types of pressures cause circle leaders to listen less and talk more. Although listening skills are taught and practiced briefly in quality circle implementation training, circle leaders could benefit by additional skill training in how to analyze both the content and intent of quality circle member communications.

Time management/planning and scheduling skills

A quality circle must meet regularly as a problem-solving group if the process is to work. A problem reported by all the circle leaders was the scheduling of circle meetings. Although meeting cancellations were infrequent, operational pressures caused regular scheduling conflicts and increased the time pressures and the perceived work load on the circle leaders.

Some circle leaders did not know how to develop a personalized work shift plan based on established planning/scheduling principles. A few did not even know how their departmental production plans were developed by, for example, a planning department. Some circle leaders reported virtually no input in the making of their production plans and others felt powerless to influence the process. Forty percent of the circle leaders reported frustration at the frequent schedule changes and unexpected demands made by their managers.

Although the majority of the circle leaders had a regularly scheduled circle meeting time, the pressure of scheduling around this time and keeping a production or office operation functioning in their absence created some scheduling demands. Additional skills training in both time management and planning for both managers and circle leaders would at least assure that the skills could be

used. In addition, some attention to the planning process and the work systems would show where modifications or changes could reduce the scheduling pressures felt by circle leaders. In some instances, it was evident that more effective communications between managers and their supervisors/circle leaders could result in better work plans and improved time management for both.

Conclusion

We are still in the honeymoon phase with quality circles in the United States. The movement, still relatively new, is maturing quickly. For those organizations which have been involved with quality circles for the past few years, it has become evident that it takes more work, skill and management support than was initially perceived to have an effective program. The same reality appears to exist regarding the training of managers, leaders, members and facilitators. Training is vital and should be planned as an integral and ongoing process to help improve the skill levels of managers, leaders and facilitators and the long-term health and effectiveness of quality circles. —*TDJ*

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