

The Career Development Workshop

a decision-making guide for younger managers

P.J. Marsh

“Effective development of managers does not include coercing them (no matter how benevolently) into acceptance of the goals of the enterprise, nor does it mean manipulating their behavior to suit organizational needs. Rather it calls for creating a relationship within which a man can take responsibility for developing his own potentialities, plan for himself, and learn from putting his own plan into action.”¹

This article describes a Career Planning Workshop for managers which was profoundly influenced by this statement of Douglas McGregor's. Its purpose is to support and accelerate the process of individual development without organizational coercion or manipulation. It was designed for young managers (under 33) who have demonstrated above average achievements and who appear to have the potential of advancing to the top levels of a corporate hierarchy, but who have not yet attained high level visibility throughout the organization.

Philosophy To Process

We believe it represents one corporation's successful beginning in translating the McGregor developmental philosophy into a process which benefits both the managers and the corporation.

The workshop has three objectives. Participants should leave with:

1. Improved self-understanding and directing. They will draft a Career Development Plan in which they have integrated self-perceptions with feedback about their managerial and interpersonal strengths, have identified career goals to capitalize on strengths and have written action plans to achieve their goals.

2. Improved understanding of group and organization dynamics. They will be able to: differentiate between task and process, assume

either task or maintenance leadership roles and utilize interpersonal contract building.

3. A working understanding of the development process. They will be able to: describe the process of self-renewal and assist others in formulating a career development plan.

The objectives are interrelated; some elements of the workshop contribute to the three objectives concurrently even though the focus progresses from the individual to the group and then to individual development plans. The workshop utilizes heuristic learning: group interactions, managerial simulations and questionnaires generate the data for learning; little time is spent in lecture.

In this article we describe the need which prompted the program, the workshop elements and rationale and we comment on its success and applicability.

Need For Development

In 1969 we analyzed the ages and capabilities of our management and discovered that in the coming 10 years substantial numbers of openings would occur near the top of the organization. Many upper level managers were approaching retirement age. Others had not kept pace with advancing technology.

Because we had had no systematic recruiting program over the years, lower management ranks did not seem capable of providing managers needed. Even more important, because we had lacked a planned approach to development, lower management levels lacked the knowledge, skills and breadth of experience necessary for advancement.

The primary need appeared to be not for the stringent assessment of existing talent but for development, particularly of our younger talent. It seemed essential that we immediately begin helping our

The author wishes to express his thanks to Mr. Bob Saunders of Robert Saunders Associates for his contribution in both designing and conducting this workshop.

most promising young managers to anticipate the future and to prepare themselves for positions of increased responsibility.

Rationale

As staff consultants, we strongly believe that the development of managerial talent is primarily a line, not a staff, responsibility. We further believe that the individual manager himself must assume the major responsibility for his *own* development.

We did not want to create a mechanistic, step-by-step approach that assured upward mobility through following a patterned sequence of activities: we wanted to help managers help themselves.

We rejected a program of career pathing and job rotation initiated and controlled by a third party. Such an approach contradicts our belief in the importance of an individual's assuming responsibility for his own development. Further it tends to encourage dependency and reactive behavior rather than the inquisitive, proactive behavior we believe to be most desirable in future upper level managers.

Because of time constraints and the number of managers needed, we concluded that an individual consulting approach to creating self-development plans was impractical for us. We wanted to establish widespread understanding about the process of personal and managerial development and start upwardly mobile managers using the process themselves and with their subordinates.

Peer Development

We determined to use a workshop in which participants helped and depended on peers as the first step in the process of development. During the planning stages, we adhered to the following guidelines:

1. The workshop should not be an end in itself; it should foster proactive behavior, encourage participants to embark on their own on-going development program, and provide them with the skills needed to continue the process.

2. Systems and conditions within the corporation must facilitate, support and reinforce participants' development activities in order to ensure a continuing process.

3. Workshop facilitators were to be consultive resources only; they would not direct participants into the "correct" career path or prescribe needed development actions.

4. Participants should learn to give and receive feedback constructively and to regard it as a tool for continued growth.

5. They should receive feedback about their behavior and the

way in which others view their technical and managerial strengths and limitations. Feedback should come from a variety of sources and situations and should be incorporated into development plans.

6. Participants should learn the "helping" skills (listening, reflecting, effective questioning) needed to help subordinates in creating development plans.

7. Participants should understand the potential impact of role assumptions on the individual in the organization.

8. After the workshop, participants should feel a sense of empowerment, seek additional responsibility and make their career desires known.

This approach to the process of development and the workshop itself reflect our belief that learning and development are internal processes which are most effective

**Honor
America
July 4**



HONOR AMERICA DAY

197th Anniversary of the United States

when the individual recognizes gaps between “where he is and where he wants to be,” and then institutes a process of self-inquiry to close the gaps.

Workshop Overview

Figure 1 illustrates the overall design of the Career Development Workshop. A description of the elements follows. The major headings refer to the elements of the workshop which are italicized in Figure 1. Published simulations and exercises are referenced so that the reader who wishes to become more familiar with them may do so.

Prework

Literature sent to participants prior to the workshop contains a

description of the workshop and the process it involves. It states that participation is purely voluntary. No stigma is attached to anyone who elects not to participate.

Participants complete prework assignments consisting of readings and data gathering about themselves. (Data is gathered via two instruments: an “Individual Development Questionnaire” and a psychological test, the “Myers Briggs Type Indicator.” They are asked to complete a copy of the questionnaire stating the way in which they see themselves and to send copies of the questionnaire to people with whom they have worked closely and whose opinions they value. This enables them to compare their self-perceptions

with the way in which others view their capabilities and performance. The questionnaires are summarized by an external consultant to ensure the respondent’s anonymity.

The psychological test provides them with insights about the way in which they gather information, the way in which they deal with it, whether they seem to be “thinkers or doers,” and their propensity to either make decisions quickly with limited data or to postpone judgments while gathering more information.

Confidential Treatment

Both instruments are treated with absolute confidentiality. No one other than the workshop facilitators sees the data, and no

Figure 1.
DESIGN: CAREER DEVELOPMENT WORKSHOP

Monday 8:30 a.m.	Tuesday 8:30 a.m.	Wednesday 8:30 a.m.	Thursday 8:30 a.m.	Friday 8:30 a.m.
<i>The Development Process</i> - The Career Development Plan <i>Self Understanding</i> - Johari Window - First Impressions Exercise - Guidelines for Feedback <i>Helping Relationships</i> - Trio Building	Career Analysis continued - Accomplishment Analysis Demonstration - Accomplishment Analysis - Trio Discussion	<i>Self Understanding and Working Relationships</i> - Transactional Analysis - Theory Discussion - Self Perceptions - Feedback - Discussion - Journal Entries	<i>Small Group Dynamics:</i> <i>Effective Leadership</i> - Introduction - Decision Making Exercise - Discussion - Decision Making Exercise - Discussion - Journal Entries	<i>Drafting the Career Development Plan continued</i> - Criteria for Action Plans - Individual Work - Trio Discussion - Role Plays - Analysis
Lunch 12 Noon	Lunch 12 Noon	Lunch 12 Noon	Lunch 12 Noon	Lunch 12 Noon
<i>Self Understanding and Helping Relationships</i> Career Analysis - Life Perspective - Value Systems - Future Accomplishments	- Accomplishment Analysis General Discussion - Personality Theory - Distribution of Tests - Implications for Development - Development Questionnaire Distribution - General Discussion - Trio Discussion	<i>Organization Effectiveness Opportunities for Improvement</i> - Introduction - Hollow Square Co. Simulation - Analysis of Effectiveness - Organization theory - Journal Entries	<i>Drafting the Career Development Plan</i> - Guidelines for Future Jobs - Trio Discussion - Job Requirements - Planned Learning Experiences - Small Group Discussions Selected Jobs	- Discussion - Participant - Facilitator commitments
7:30 p.m.		7:30 p.m.		
Career Analysis Continued - Peak Accomplishments	Free Evening	Open discussion with Corporate Officer	- Discussion - strengths and limitations	

record of it is kept. The information is given only to participants for their use in planning for their own development.

As a first step in establishing a system which supports and reinforces development efforts, participants' supervisors are contacted prior to the workshop. The in-house facilitator discusses with them the objectives and design of the workshop and the career development plan which will result. The importance of the supervisors' role in an initial discussion of the plan and in continuing periodic discussions is stressed.

Contract Building

During the first night of the workshop, we begin to establish a norm of open and trusting relationships on which the success of the week depends. During the evening, participants begin to know one another. Through a mutual sharing of concerns and expectations about the workshop and the facilitators' role, a "contract" is evolved between participants and facilitators regarding:

- the confidentiality of information disclosed during the week and
- the assumption of responsibility for learning.

To accelerate the process of involvement and trust building, we use a "Getting Acquainted" exercise which facilitates self-introductions in small groups.²

The Development Process

In order to establish a framework for the week's activities and to demonstrate how they relate to the objectives, the workshop begins with an overview of the career development process and a presentation of the Career Development Plan format. Steps in the development process are:

1. Personal data gathering and

self-analysis to determine one's managerial, technical and interpersonal strengths and limitations.

2. Formulation of a "profile" of these characteristics.

3. Identification of factors in a work situation which have contributed to success and resulted in a sense of satisfaction.

4. Surveying various types of jobs that appear to offer the possibility for satisfaction and determining what knowledge and skill is required for these positions.

5. Deciding on a likely succession of future jobs including the ultimate job to which one aspires and the intermediate jobs between the ultimate and present job.

6. Comparing one's present strengths and limitations to the requirements of the positions chosen in Step 5.

7. Identification of development needs (gaps between present abilities and the requirements of future jobs) and prioritizing these needs.

8. Surveying possible approaches for closing gaps (reading, course work, job rotation, etc.)

9. Choosing what appears to be the most appropriate approach for closing the gaps.

10. Writing action plans for the highest priority development needs.

11. Carrying through on the action plans.

12. Comparing progress to the plan.

13. Periodically re-examining the total process and revising as needed.

Plan Format

The format of the Career Development Plan takes these steps into account. It attempts to anticipate the future and create an interface between the present and the future. It requires participants

to list in sequence:

1. The ultimate job to which they aspire and its requirements.

2. Intermediate jobs and their requirements.

3. A current profile of strengths and limitations.

4. Development needs resulting from a comparison of the most desirable next intermediate job with the profile.

5. Options considered for meeting the needs.

6. Action plans which outline specifically what will be done and when it will be done to meet the needs.

The workshop provides information on each of these elements but places particular emphasis on providing personal feedback and the opportunity for self-insight. Participants are encouraged to keep a journal in which to summarize what they learn about themselves and the functioning of groups and organizations.

Relationships

The first major time block focuses on the process of self-disclosure and on giving and receiving feedback. Guidelines for feedback are discussed and feedback is generated through a First Impressions Exercise.³ Participants summarize the feedback they have received in their journals.

Next, using the knowledge gained about one another from the previous night's introductions and the First Impressions Exercise, participants self-select into the sub-groups, usually trios, in which they will work most closely during the week. In these groups participants typically agree to share openly their perceptions about both their own and each others' interests, strengths and limitations. They also agree to help one another in formulating career development plans.

Working in the trios, participants complete a Career Analysis Exercise.⁴ This exercise helps each participant understand his value system, identify the factors that have contributed most to his past achievements and sense of satisfaction and determine what he would most like to accomplish in the future.

Factors which have contributed to past achievements and resulted in a sense of satisfaction are identified through the following process. Each participant lists approximately 20 "peak accomplishments" (things that he did alone or that he contributed to which he enjoyed and which continue to seem significant to him). He then selects what he considers to be the most significant five and describes them in detail. He and his two trio partners next analyze them to determine the specific factors contributing to the achievement. They consider the type of satisfaction derived, the activity in which the participant was engaged, his relationship to others, the environment and any other contributing factors.

Provide Insights

The results of this exercise provide participants with insights about their strengths and interests. The information is used later in the week to establish guidelines for each participant's optimum future working conditions and his most desirable career path.

When the analysis is completed, participants receive inputs about their strengths and limitations from the two prework sources: the psychological test and the questionnaire. After they have received their own psychological test profiles, a group discussion is held on the theory on which the test is based. The theory holds suggestions for better utilizing

one's own strengths and for minimizing one's limitations by utilizing the identifiable strengths of others through interdependent relationships.

Participants next receive their summary of the Individual Development Questionnaires completed by their peers, subordinates and superiors. They compare the views of themselves as seen by others with their self-perceptions. Although it is optional, most participants hold comprehensive discussions about the data they have received from both the test and the questionnaire in their trios.

Transactional Analysis Used

As a means of bridging self-understanding and working relationships, Transactional Analysis is introduced.⁵ It is presented as a model for gaining additional self-insights and for analyzing the transactions which take place between individuals and in groups. After a lecture and discussion on the theory underlying Transactional Analysis, trios combine into groups of six for further discussion and a feedback session. Each participant presents his self-perception of the way in which he interacts with others. He also receives feedback from the other five on how they see him interacting. This feedback is non-judgmental and is based on specific behaviors observed during the workshop.

The theoretical and experiential base provided by these exercises is then used in a general group discussion of supervisory/subordinate and peer relationships. The issues of role assumptions, dependency, counter dependency and interdependence are explored. Journal entry time is provided after the discussion for summarizing learnings about self and groups.

Organization Effectiveness

An organization simulation, the Hollow Square Co.,⁶ is used to contribute additional insights into the dynamics of interrelationships in organizations and the impact that role assumptions, leadership and communications have on motivation and group productivity.

After the simulation the group analyzes its interactions, determining the factors which contributed to effectiveness and those which rendered it ineffective. This analysis is followed by a lecturette on organization theory. Each participant next summarizes what he has learned about organization effectiveness and his own effective and ineffective behavior in his journal.

Open Discussion

Wednesday evening is spent in an open discussion with an officer of the company. The purpose of the discussion is twofold. It lends credibility to the importance placed on management development in the company, and it enables a top ranking executive to learn first hand about the frustrations experienced by bright young managers as they attempt to grow.

Small Group Dynamics

Thursday morning offers an opportunity for participants to sharpen their process observation skills, to learn about group dynamics in decision making and to study their own effectiveness in influencing groups. Utilizing the "fishbowl technique"⁷ one small group (as an inside circle) is given a decision-making task to perform. Another group (as an outside circle) observes the process of decision making. Each member of the outside group acts as a personal consultant to a participant (client) in the decision making group. The consultant provides feedback on the partici-

pant's effectiveness in a role he has chosen. (Roles might be to contribute to group maintenance or to task accomplishment, or only to assure that individual needs for personal recognition are met.)

The decision-making process is interrupted once to allow for a consultant-client discussion on the participant's effectiveness and then resumed. When the total time period is up, the observers report on the dynamics they observed, and a general discussion of task, process, leadership, and membership issues ensues. The positions of the inside and outside groups are then reversed with the new inside group given a different decision making task. Following this exercise each participant again summarizes his learning about group dynamics and about his own effectiveness and impact in groups.

Drafting the Plan

On Thursday afternoon we begin tying together the various learnings into a career development plan and action steps for increased personal effectiveness.

The first step is establishing guidelines for future jobs. Guidelines are a list of 10 to 15 factors which appear to be critical for the participant's feeling of satisfaction and sense of accomplishment. This step draws upon the analysis of past experience completed during the first and second day of the workshop. The rationale is that if the factors that contributed to achievement and satisfaction in the past are present in future jobs, the probability of success in those jobs is increased. Once again, participants work first individually and then in trios: each member of the trio both gives and receives help.

Our focus next shifts from the individual's interests to the re-

quirements of various upper level jobs within the corporation. Emphasis is placed on the *procedure* for determining job requirements. The procedure combines open ended thinking about activities performed in jobs, types of decisions made and knowledge and skills required, with reading and discussions with job incumbents. It minimizes dependence on personnel "experts."

Resources for this step include corporate organization charts, a booklet of 50 job descriptions covering all functional areas, the workshop staff and participants. (Because participants represent a mix of line and staff personnel drawn from several disciplines, they can contribute knowledge about job requirements in several functions.)

Begin As Total Group

We begin by working as a total group and focusing on a high level job. Two lists are created: the activities the job involves, and the knowledge and skills the activities imply.

Our objective is to assist participants in becoming adept enough with the method to use it themselves in learning about the requirements of jobs that are attractive to them. This will enable them to determine if the job closely matches their interests and to compare their own strengths and limitations with the job requirements. After having repeated the procedure for two or three jobs, participants have usually demonstrated facility in using it.

It is this method of comparing individual strengths, limitations, and interests with job requirements that determines the gaps between "where the participant is" and "where he wants to be." Closing the gaps becomes the basis

for writing specific action plans for development.

We next review methods for closing the gaps, emphasizing how to benefit from "planned learning experiences." We acknowledge the importance of on-the-job training but stress more formal educational experiences because the company has traditionally neglected them.

The final stage (in which each participant begins to identify his own gaps) is an open discussion around the requirements of specific jobs. Participants self-select into groups comprised of those who, based on their guidelines for future jobs, are interested in discussing the same or similar jobs. Using the method discussed above and drawing upon each other as resources, they list the activities of the job and then the knowledge and skills required.

Discussions and Reactions

After the requirements are compiled, participants discuss self-perceptions, past experience, the gaps believed necessary to overcome and the options seen for closing the gaps. Group members share their reactions to each other's strengths and limitations and make suggestions on other options which might help prepare them for the job.

Most participants are now ready to begin writing their Career Development Plans. They have formulated guidelines for future jobs, chosen tentative ultimate and intermediate jobs, learned how to determine position requirements, acquired information about their strengths and limitations and have explored methods of closing gaps.

Friday morning begins with a presentation of criteria for writing action plans. The emphasis is on making plans specific, measurable and complete with dates so that both the author and any reader

know what will be accomplished, whose help is needed in accomplishing the plan and when various elements will be completed. Participants then work individually for approximately two hours on their own plans. After this they meet in trios; each trio member critiques the plan of the other two and suggests improvements based on action plan criteria.

Because some participants believe their supervisors may resent the audacity of the plans, we next "role play" a career-development discussion. The role play case consists of 1) an actual career-development plan drafted in another workshop 2) a description of the way in which the participant who drafted the plan saw his supervisor; and 3) the problems he anticipated in discussing the plan both from his and his supervisor's points of view. In preparation for the case, participants self-select into two teams: each team prepares one member to "play" the subordinate who will discuss his plan with his supervisor. One of the facilitators "plays" the supervisor.

The discussion is held twice and is videotaped. This permits teams to compare approaches. After both discussions, the tape is played back and the total group analyzes the process of interaction during the discussion making notes on what seemed to help and seemed to hinder the effectiveness of the discussion.

Because the plan is to be considered tentative until it has been reviewed with a manager's supervisor, a brief discussion is next held about other actions which would facilitate their dialogue. As a result of the discussion, the in-house facilitator typically commits himself to:

1. Sending a letter to each man's supervisor, the next higher level of supervision, and the

employee relations director of the division from which the man comes. (This letter advises the man's supervisor that the man created a career development plan, and that he will soon be requesting a career discussion.)

2. Reviewing the final plan, critiquing it, and sending the critique to the man.

Participants commit themselves to completing a plan, discussing it with their supervisor and next higher level of supervision and sending a copy to the in-house facilitator.

System Reinforcement

Support and reinforcement of the development process began with the facilitator-supervisor discussion prior to the workshop. It is continued and strengthened through a series of activities that takes place after the workshop.

1. The Career Development Plan is discussed with the immediate supervisor, the next higher level of supervision and the employee relations director of the participant's operating unit.

2. After these discussions, participants forward a copy of the plan to the in-house facilitator. This copy is critiqued and returned with comments to the participant.

3. Approximately six months after the discussion, participants assess their progress toward goals and write a commentary on it. The commentary is forwarded to all participants and to the in-house facilitator.

4. One year after the workshop, participants reconvene for a one and a half day meeting in which they compare progress towards plans, analyze the factors which have helped or hindered their development and revise their plans as needed.

5. Their plans are updated and discussed yearly with supervisors after this meeting.

6. General managers are asked to review the progress of participants and report on it to the executive vice president during an annual manpower review.

Initial Shortcoming

The outline and elements described here reflect the modifications introduced after each of four workshop experiences. Although even the first workshop was highly successful as an individual learning experience, it didn't provide adequately for supervisory support in carrying out action plans nor did it achieve the career focus we sought.

The action plans created tended to be short-term and reflected only a highly personal behavioral orientation. In some cases they provided no information about future jobs. Because of the personal nature of the plans, some participants didn't discuss them with their supervisors. The result was that although supervisors received highly favorable comments about the workshop, some justifiably questioned its *career* impact, resented their lack of involvement and were in fact, precluded from playing an active role in the development of their subordinates.

As a result of this deficiency, we made several major changes: we adopted the career development plan format presented in this article, allocated additional time to the process of determining job requirements and provided additional resources on these requirements.

In addition, we adopted the practice of having individual pre-workshop discussions with supervisors and writing post workshop letters which informed them of the dates for submitting plans as well as providing them with guidelines for career development discussions.

Results

The workshop has been presented four times during a 15-month period. Despite its limited use, the approach has had a major impact. Our most promising young managers have formulated career plans and made them known to the organization. The Career Development Plans have proved to be valuable guides for individual decision making and for company-wide internal placement and succession planning.

We have received numerous comments from both supervisors and subordinates stating that the career development discussion was the single most important work-related discussion ever held. Many supervisors have requested a similar learning experience for themselves.

As a result of career development discussions division employee relations directors and general managers reflect an increased understanding of the development process and have expressed a desire to expand the use of the workshop.

In the 15 months since the first workshop, 20 of the 48 participants have received promotions and two have transferred to positions which will give them the experience necessary to achieve continued mobility. Each move was consistent with the participant's plan.

Applicability

Because the success of the workshop is highly dependent on open and trusting relationships and because it stresses mobility and early preparation, its use appears limited to younger managers who have most of their careers before them and who are not currently competing closely with one another. It also appears to be inappropriate for use in a small operating unit - too many

participants from one unit currently tend to decrease trust and openness.

However, the enthusiastic reception of the process and the results it has produced appear to ensure its continued and expanded corporate use with younger employees.

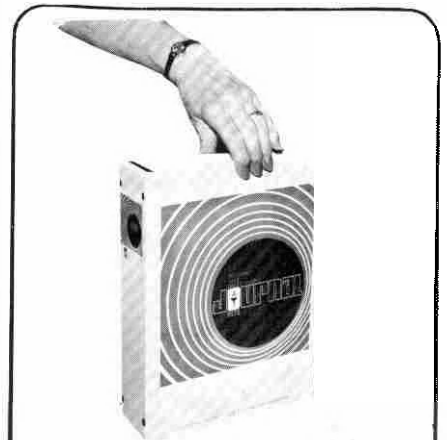
USE ASTD

References

1. McGregor, Douglas "An Uneasy Look at Performance Appraisal," *Harvard Business Review* (September - October, 1972).
2. Pfeiffer, J.W. and J.E. Jones *Structured Experience for Human Relations Training*, Vol. I, University Associates Press, Iowa City, Iowa, 1969; page 2.
3. Pfeiffer, J.W. and J.E. Jones *Structured Experience for Human Relations Training*, Vol. II, University Associates Press, Iowa City, Iowa, 1970; page 95.
4. Saunders, Robert, unpublished exercise adopted from Herb Shepard's Life Planning Exercise and an exercise presented in Bernard Haldane's *Making a Habit of Success*.
5. Harris, T.A., *I'm O.K., You're O.K.* Harper & Row, New York, N.Y., 1969.
6. Pfeiffer, J.W. and J.E. Jones *Structured Experience for Human Relations Training*, Vol. II, University Associates Press, Iowa City, Iowa, 1970; page 35.
7. Kolb, D.A., I.M. Rubin, J.M. McIntyre *Organizational Psychology an Experimental Approach* Prentice-Hall, Englewood Cliffs, N.J., 1971; page 195.

P.J. Marsh is an organization consultant with N L Industries, Inc., New York, N.Y. He was

formerly supervisor of human resources, Celanese Plastics Co. He is a graduate of the George Washington University, Washington, D.C., where he received a M.A. in personnel management. He is a member of the American Society for Training and Development and the National O.D. Network.



New! '73 Journal Binder

Attractive new white binder, imprinted with the *Training and Development Journal* cover design in ASTD blue and gold, holds a year's issues of the *Journal* in its new 1973 size.

As handsome as it is handy for easy reference in your home or office, the binder is available at **\$4.50**.

Add \$.50 for postage and handling. All orders must be pre-paid.

ORDER DEPARTMENT

**American Society for
Training and Development**

P.O. Box 5307 Madison, Wis. 53705

Wisconsin residents add 4% sales tax.