The Development of Cognitive Complexity:
Understanding its contribution to Organisational Strategy

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This report is not confidential. It may be used freely by the Graduate School of Business.

We wish to thank Thys Pretorius, the Retail Academy delegates and Woolworths executives for their time and insights on the complex world of retail.

I certify that except as noted above the report is my own work and all references used are accurately reported in footnotes.

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ABSTRACT

Executive development programmes are challenged with the task of preparing executives to deal effectively with a business world of high complexity. Many programmes fail to adequately equip participants for this challenge. The UCT Graduate School of Business has developed an educational methodology which has its foundations in systems thinking and which aims at shifting the cognitive abilities of individuals to higher levels of complex thinking. This study tracks the development of delegates who are attending an executive development programme of this kind, and use grounded theory as a research methodology, as well as systems thinking frameworks to capture, analyse and interpret the data and findings. This study also attempts to link this developmental shift to its relevance within a specific organisational context.

KEYWORDS: executive development, cognitive complexity, cognitive maps, systems thinking, mental models, future mapping, action learning, reflective learning, critical incidence logs, soft systems methodology, theories-in-use, espoused theories, grounded theory, open-ended interviews.
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1. INTRODUCTION

Many executive development programmes offered by business schools around the world continue to follow a traditional model of education, which emphasises the delivery of content-based material. Other programmes have taken on a more competency-based approach, which emphasises the development of specific managerial skills. Much scepticism however exists around whether these programmes achieve the outcomes required to prepare executives for today’s business world.

Ryan (2000) argues that cognitive complexity underlies all core management meta-skills. If learning and assessment is focused on cognitive complexity, the other meta-skills will fall into place more easily. Little data is available that helps us to understand what the individual differences are in managerial complexity and how we can train existing managers to function in a more complex fashion. The work done by Tom Ryan in the Executive MBA at the UCT Graduate School of Business in this area is therefore groundbreaking.

The researchers are building on the work done by Ryan and are investigating both the relevance and impact of this particular approach to executive development within the context of the Woolworths Retail Academy programme, which has been developed specifically for Woolworths (Pty) Ltd, a South African retailer. The researchers are particularly interested in whether this approach succeeds in achieving a shift in mental models amongst participants and if so what the nature of this shift is. They are also interested in whether this shift makes a contribution to the strategic objectives of Woolworths.

The researchers have employed a post-positivist approach to this particular research undertaking, in which they have embarked on a path of discovery and the creation of theory. The proposal’s research questions and procedures are broadly defined to allow for discovery and the emergence of answers.
2. BACKGROUND TO THE PROBLEM TO BE INVESTIGATED

Organisations find themselves in an environment of enormous turbulence and increasing complexity. According to Senge (1990), “… we are becoming overwhelmed by complexity…humankind has the capacity to create far more information than anyone can absorb, to foster far greater interdependency than anyone can manage, and to accelerate change far faster than anyone’s ability to keep pace…organisations break down, despite individual brilliance and innovative products, because they are unable to pull their diverse functions and talents into a productive whole…” In order to thrive in this environment, managers must be able to cope effectively with this complexity.

The UCT Graduate School of Business, led by Tom Ryan and his work in the development of the Executive MBA, is developing executive development programmes, which are constructed within a Systems Thinking framework. One of the underlying assumptions of this approach is that developing the individual’s ability to think in a more complex way will equip them to be more effective in a complex environment. This draws on the work of Senge who says, “Systems thinking is an antidote to the sense of helplessness that many feel as we enter the “age of interdependence”. Systems thinking is a discipline for seeing the “structures” that underlie complex situations, and for discerning high from low leverage change…systems thinking offers a language that begins by restructuring how we think.” Morden (1997) supports the need for leaders to find ways to deal with complexity when he quotes Hickman, who suggests that when a leader wishes to view the full picture they do so by simplifying it. The leader searches for patterns, connections, frameworks or concepts that encompass all the confusing details that surround a particular issue. As a result of this inclination leaders tend to create simple visions of perceptions of reality. Leaders use the detail to find patterns and frameworks in order to simplify the complexity.

One of the executive development programmes, which has been developed and is being run by the UCT Graduate School of Business is the Woolworth’s Retail Academy programme, which has been designed using much of the methodology developed in the Executive MBA programme. Woolworths Pty Ltd is a South African retailer and this programme has been tailored to suit their...
particular requirements. This research focuses on delegates’ development within this programme over a period of four months, and specifically aims at tracking the shift in mental models achieved by this programme. It also attempts to gauge the appropriateness of this shift within the Woolworths context. The full programme extends over one year but this research undertaking tracks only the first four months of the programme, due to the time constraints imposed by requirements for completion of this research project. The research focuses on the shift in mental models of delegates, and tries to understand the nature of this shift.

Woolworths (Pty) Ltd., started a business reengineering process in April 1999. This resulted in a shift and an acceptance of new business practices that have been embraced as part of the manner in which the company now operates. The company is currently focusing on a one-year strategic plan as part of the “Way we do Business”, which should ultimately lead to the development of a long-term business strategy.

The plan acknowledges the importance of leadership in the organisation and a list of leadership competencies has been developed to assist in the identification and development of leadership potential. A new Retail Academy programme was designed, in association with the Graduate School of Business. The purpose of this programme is to further the development of dynamic delivery orientated leaders in order to achieve the company’s future strategic intent.
3. REVIEW OF ACADEMIC LITERATURE

The review of academic literature has fallen into three main areas namely, systems thinking and systems methodologies, systems thinking and its contribution to executive development, cognitive complexity and associated readings on theories-in-use, espoused theories, mental models, cognitive mapping, future mapping and lastly trends in executive education, including a review on reflection and critical incidence logs as a component of action learning.

3.1 Systems Thinking

Systems thinking forms the backbone of both the executive development process which is described in this report as well as the methodology and framework employed by the researchers to capture, analyse, interpret and understand the subject under investigation.

3.1.1 What is a system?

In systems thinking a “system” is a complex and highly inter-linked network of parts exhibiting synergistic properties, the whole being greater than the sum of its parts.

According to Waring (1996), at a simple level, a system may be described as a recognisable whole which consists of a number of parts (called components)...that are connected up in an organised way. These components interact, i.e. there are processes going on. A system has the following characteristics:

- A system does (there are processes and outputs).
- Addition or removal of a component changes the system.
- A component is affected by its inclusion in the system.
- Components are perceived to be related in hierarchical structures.
- There are means for control and communication which promote system survival.
- The system has emergent properties, some of which are difficult to predict.
- The system has a boundary.
- Outside the boundary is a system environment which affects the system.
• A system is owned by someone.

3.1.2 What is Systems Thinking?
Scientists over the years have been typically concerned with breaking whole bodies into their component parts for detailed examination and analysis, but systems thinkers believe there is also value in considering how these parts interact to produce the properties of the whole.

According to Waring (1996), Systems Thinking is a way of looking at the real world for purposes of understanding and/or improvement.

Senge (1990) describes systems thinking as a discipline for seeing wholes, for seeing interrelationships rather than things, and for seeing patterns of change, rather than static snapshots of the world. The interrelationship of parts within a system, are best understood within the events/patterns/structure pyramid. Mostly we react at an events level to situations eg. a machine breaks down and we repair it, rather than to think about the causes for the breakdown or how they fit into a larger pattern. But reacting at an events level does not allow us to anticipate or shape these events. In addition solutions at an events level tend to be short-lived. They do not alter the fundamental structure that caused the event. According to Senge (1994), by uncovering the systemic structure that drives events, we can begin identifying higher-leverage actions. This is discussed in further detail in the next section.

The systems approach seeks to build meaning by sweeping in the multiple perspectives of stakeholders to determine the shared issues and purpose around which the community can form. (Day, 1998). Senge (1994) suggests that the greater the number of perspectives considered and the more differences of nuance captured, the greater the number of possibilities for effective action there will be.

3.1.3 Systems Thinking and its contribution to Executive Development
The systems thinking concepts and tools are beginning to occupy a time-slot and place the in executive development process. A key concept advanced by systems thinking is that the leverage for organizational transformation comes from the ability to view interdependency among various
elements of the system and locating leverage points to influence future actions. In today’s fast paced environment, an executive’s experiential and operational domain is made up of events and reactive actions. To act on the system, one needs to distance oneself from the operational domain to see the interdependencies and to move out in time to understand the underlying time-varying behaviour. According to Jambekar (1995) this clearly requires that we need to work at three levels of understanding: events, sequence or pattern of events, and underlying systemic structure. Our experience in the operational domain is made up of events. An important component does not show up, we acquire a new supplier; profits drop, we cut costs by limiting travel or laying off people; a machine breaks down, we call maintenance. Each event causes another event to create an ongoing flow of cause-and-effect relationships. At the event level, a problem may be staring at us demanding resolution and hence, we feel helpless. The only option is to react the way we are familiar with and move on to the next problem at hand.

Our focus on time-varying behaviour or pattern of events allows us to uncover orderly and recurring behaviour. If we can anticipate problems, we find the way to accommodate them. We institute predictive and preventive maintenance in anticipation of machine breakdowns. We have backup suppliers in case of erratic behaviour by our primary supplier, even though we are still reacting, but in a proactive method. Managing at this level we anticipate trends in events and accommodate them.

Jambekar (1995) continues by saying that at the level of systemic structure, we begin to see and understand what creates the pattern of events we observe and then take actions to change the process structures. It allows us to address the root cause of the problem rather than deal with symptoms or events. Systems thinkers know that focusing on the level of structure provides the greatest leverage for solving chronic problems. The purpose is to recondition our thinking so as to be able to see structure at play, and to see the leverage in those structures. Systemic thinking offers a framework that leads to a better understanding of change in the operational domain of events in which we live. As we move from the level of events towards the level of systemic structure, the focus also shifts from short-term orientation to longer-term orientation. However, the systemic viewpoint advocated takes time to absorb. In today’s fast-paced world of executives,
this poses a serious challenge to develop improved mental models to guide personal and public actions.

3.1.4 Soft Systems Methodology
The researchers found Soft Systems Methodology (SSM) particularly useful in revealing and highlighting the issues within the Woolworths context which executive development should be addressing.

Human beings are anything but predictable in the way they behave. Each individual is unique, and each of us reveals only a glimpse of our own world-view in our relationships with others – and this may lead to misunderstandings and conflicts. Each of us is constantly guessing at what other people really mean, what they really intend, and really believe. Soft systems are perceived as those concerned with human activity and Checkland’s original SSM (1981), specifically intended for use where a situation is perceived to exhibit crisis, conflict, uncertainty or unease in relationships among the human ‘actors’.

SSM provides a means of action for change in situations that are perceived to be ‘messy’. The methodology is capable of being used to tackle situations where a hard systems approach is not appropriate in that it does not focus on finding a solution to pre-defined, structured ‘problem’; the purpose is not to devise ways of reaching objectives. According to Waring (1996) with SSM, problem solving is a practical sense only comes (possibly) at the end of a process of enquiry.

3.1.4.1 Issues and tasks
Soft systems problem situations are often referred to as ‘messes’. Waring paraphrases Ackoff’s definition of a mess as ‘a system of problems which defies resolution simply by solving the constituent problems’. Solving individual ‘problems’ would, of course, merely change the system of problems. Problems could be made up of two kinds of ‘wrongness’ – problems which are based in the primary task and problems which are issue-based. Primary task refers to the overall objective purpose(s) of the human activity system. Focussing on primary tasks is tempting because primary tasks deal with aspects of organisational life which are relatively concrete and unambiguous. However, primary tasks tend to avoid underlying causes of the
‘mess’ and so may not always produce an effective outcome. An issue is something which evokes emotional responses such as frustration, anger, despair and resentment and which may lead to conflict, disaffection or poor performance.

3.1.4.2 The Analyst’s role
The question arises as to how far an analyst dare assume that he or she is a neutral observer. SSM explicitly requires the analyst to recognise his or her contribution to the setting under examination and the impossibility of strict neutrality or true objectivity in the analyst’s interpretations. To be competent in SSM the analyst must try to be frank about his/her own values, assumptions, prejudices and motives. The analyst will both affect and be affected by the situation under examination.

3.1.4.3 A World-view
Waring (1996) sees a world-view as a perceptual window which biases the individual’s perception of systems in general, of any particular system and of approaches to understanding or improving them. World-view represents the complex set of perceptions, attitudes, beliefs, values, assumptions and motivations which characterise an individual or a group of people. World-view is a kind of perceptual window through which each person interprets the world and his or her relationship with it. Because world-views affect system behaviour and outcomes, the world-views both of the social actors in the setting being examined and the analyst need to be identified. In systems work it would usually be impractical to consider the world-views of hundreds of individuals but it is important to identify the world-views of key individuals who appear to exert particular influence.

Shared world-views are important for the integration and stability of the organisation. In all systems work the analyst has to try to identify explicit and implicit world-views in the situation. World-views are especially important in soft systems methodology because they are usually at the heart of the ‘messy’ problems being examined.
3.2 Cognitive Complexity

The concept of cognitive complexity is central to this research and therefore understanding what it is, its role in management practise and how it is assessed is central to this research.

3.2.1 What is Cognitive Complexity?

According to Steufert and Swezey (1986), cognitive complexity is a measure of the degree to which a potentially multidimensional cognitive space is differentiated and integrated. Differentiation refers to the number of dimensions that are relevant to an information-processing effort, and integration that they will be able to discriminate, abstract and configure highly complex models of the world. The level of cognitive complexity is likely to vary between domains of activity for the same person.

Expressed slightly differently, from the standpoint of Kelly’s personal construct theory (1995), all psychological development involves not only progressive differentiation among subsystems, but also increasing integration of constructs both within and between subsystems. Differentiation serves the specialisation of subsystems, whereas integration serves the unity of each subsystem and that of the entire system as an operational whole.

Crocket (1965) proposes the concept of “level of hierarchic integration of constructs” to define the complexity of a construct system. He defines hierarchic integration in terms of the pattern of logical relationships between constructs and the extent to which subsystems are interrelated by superordinate constructs. He argues that the “structural complexity” of a person’s cognitive system can be viewed as a function of both its degree of differentiation, the number of constructs, and its level of hierarchic integration, patterns of logical relationships between constructs and the extent which subsystems are interrelated by superordinate constructs.

Our cognitive processes therefore enable us to organise information and make it available for doing work. The cognitive complexity of our cognitive processes reflects the level of task complexity we are able to cope with. Jaques (1978) sees complexity as the number, ambiguity, rate of change and the inter-connectiveness of the variables involved in the task. The higher our cognitive complexity, the higher the level of task complexity we are able to deal with.
On the other hand, simple description of phenomena implies a low level of thinking. Complex cause and effect explanations imply a higher level of thinking. The way an issue is perceived is also a measure of the level of thinking present as is the abstract level of the concepts used and the number of alternatives generated is also considered a measure of level of thinking.

A cognitively complex person should be capable of construing broader aspects of reality and reconstructing it in more innovative ways. Bieri and his colleagues (1966) point out that complexity involves construing social behaviour in a multidimensional way, and a more cognitively complex person should have more cognitively complex constructs available for perceiving the behaviours of others. Ryan (2000) quotes Adams-Webber as saying that a cognitively complex person will exhibit more skills than a cognitively simple person in inferring the personal constructs of other social situations. In addition, according to Adams-Webber, “persons with relatively monolithic (or cognitively simple) conceptual structures will tend to resist change in the face of ambiguity in order to avoid further confusion and anxiety.

### 3.2.2 The role of Cognitive Complexity in effective Management Practice

Steufert and Swezey (1986) report on how cognitive complexity is likely to influence management and organisational performance, by showing that high levels of interpersonal cognitive complexity enhances managerial competence.

Ryan (2000) makes substantial claims to the positive effects of cognitive complexity on managerial practice. He has described the role of cognitive complexity in three main areas of management practice, namely in information management, management relationships and the practise of management. The following is his list of positive effects of cognitive complexity in each of these roles –

#### 3.2.2.1 Cognitive Complexity and Information Management

According to Ryan, cognitively more complex individuals display the following characteristics in relation to these areas:

**Information**

- Tend to be more open to new information
• Rely on their own integrative efforts rather than new information
• Seek more novel information
• Search across more categories of information
• Are less externally information bound
• Take in more information
• Form better rounded impressions

**Flexibility**
• Are more flexible in thinking
• Demonstrate more fluency of ideas in creativity

**Communication**
• More effective at a communication-dependent task
• More resistant to persuasive attacks if inoculated (e.g. have been trained in counter arguments)

### 3.2.2.2 Cognitive Complexity and the Management of Relationships
Likewise, according to Ryan (2000), cognitively more complex individuals tend to react in the following manner in the management of relationships -

**Attraction**
• Are attracted to each other and work more effectively with each other

**Social Influence**
• Are less stable in attitudes
• Less prone to polarize on an issue
• More affected by environmental changes
• More likely to change attitudes when incongruent information is made highly salient because they consider greater variety of information resulting more moderate attitudes.

**Creativity**
• Are able to generate more novel, unusual, and potentially remote views and actions.
3.2.2.3 Cognitive Complexity and Management Practice

In the area of management practice, according to Ryan (2000), cognitively complex people tend to behave in the following manner in these areas -

**Problem solving**
- Search for more different kinds of information when faced with a decision problem
- Are often less certain after a decision, especially if verification is unavailable.

**Strategic planning**
- Are better strategic planners due to consideration of more information, from more perspectives, and greater flexibility in considering alternatives
- Develop more inclusive long-range goals
- Consider wider range of implications, and develop more complex strategies

**Leadership**
- Leaders are generally more complex
- More flexible across situations as environment changes
- Are high integrators because they are able to relate complex patterns of many elements

3.3 Espoused Theories, Theories in Use and Mental Models

3.3.1 Espoused Theories and Theories in Use

Eden and Ackermann (Eden 1998: 37) define “espoused theory” as “the way people account for how they think and act”. This is therefore the theory which people use when asked to explain or justify a given pattern of activity. “Theory-in-use” on the other hand is defined (Eden 1998: 37) as, the way (“how”) “people think and act”. This is the theory that is implicit in the performance of a particular pattern of activity. We are therefore interested in capturing the Retail Academy delegates “theories in use”. We want to establish their thoughts and belief systems about the organisation that are the basis for action. The theory of mental models may help us to ascertain the theories-in-use rather than the espoused theory that delegates use.
3.3.2 Mental Models

The basis for understanding the way individuals thoughts are structured and how their cognitive process work is the concept of mental models.

Balle (1994) states that mental models can be seen as the “architecture“ of our thinking: the way we order our thoughts and assemble our mental representations of reality around us. The models are deeply held and are often subconscious sets of assumptions about the world. It therefore provides a theory for understanding people’s perceptions and evaluations of the situations they encounter.

Kearney and Kaplan (1997) define mental models as knowledge structures incorporating peoples understanding, assumptions and misconceptions about the world. They, as well as Balle (1994), propose that mental models determine how we act when facing new situations, interpreting new information and evaluating our responses. Senge describes mental models as “deeply ingrained assumptions, generalisations or even pictures or images that influence how we understand the world (Senge 1990:2). Senge, Ross, Smith, Roberts and Kleiner (1994) further describe mental models as maps stored in the individual’s long and short-term memory. Individuals then use these maps in their daily interaction with the world and continuously modify these maps for future use.

According to Balle (1994) mental models tend to follow three general rules: consistency, stability and simplification. He states that most people’s models are internally consistent and that people find it problematic to maintain contrary beliefs. When faced by situations that require such action they may experience stress and anxiety. Individuals’ mental models are also stable and people tend to resist change by holding onto their beliefs attitudes and opinions. An occurrence, which may challenge a mental model, is often dismissed so that no change in the mental model is required. The final rule is that the models are simplifications of the real world. The maps operate as “maps” of reality and are therefore often over-simplified. This is necessary for the individual to deal with the complexity of the world. If a map is over-simplified confusion may occur when the model is compared with a real situation.
Balle (1994) also discuss that mental models are organised around four main elements of representation, namely background, experience, context and purpose. The element of “background” represents attitudes toward the world that can be traced towards our upbringing. This is particularly relevant for abstract matters where direct experience becomes almost impossible. Experience relates back to the individuals conditioning, meaning the values with which we are brought up with as well as personal experiences. Context refers to the environment at the time of the event. Purpose is influenced by the individual’s current concerns - what is the purpose for a particular request. It is important that we consider these elements when assessing cognitive maps.

Mental models can therefore be seen as the individual’s interpretation of the world. It is therefore mostly tainted with personal attitudes and beliefs and thus not the most objective view. Day (1999) agrees that mental models are individual interpretations and not objective representations of the real world. It is important for the interpreter to keep this in mind when analysing the models and he/she needs to try and “read between the lines” in order to achieve clarity. The question of how to assess mental models and the complexity thereof is key to this research. Kearney and Kaplan (1997) describes three methods. The first method measures it according to semantic proximity while the second method is based on a free card-sorting method. For the purpose of this research we used the third method, that of open-ended interviews. These interviews allow the interviewee to reveal more of his/her individual’s models as no constraints or parameters are set by the interviewer. Limitations to this type of research include that it is time consuming, the researcher can misinterpret the information gathered, and the interviewee and researcher’s background will influence the final interpretation.

3.3.3 Cognitive Mapping

Cognitive mapping is used extensively in this research to help the researchers to make sense of the information gathered during interviews. Cognitive mapping is a term that is closely associated with mental models. Cognitive maps can be seen as a tool to visualise these mental models. The maps are graphic representations of mental models which in turn represent the individual’s concepts and the relationships amongst these concepts. Kearney and Kaplan (1997)
describe a cognitive map as a conceptualisation of a network of objects, concepts and the relationship between them.

Langfield-Smith (1992:350) state, “Cognitive maps provide graphical descriptions of the unique ways in which individuals view a particular domain (field of thought or action)”. Cossette and Audet (1992:327) posit a similar definition: “a cognitive map is a graphic representation of a set of discursive representations made by a subject with regards to an object in the context of a particular interaction”. They continue to emphasise the importance of the researcher in the process, observing the final representation as being as much the work of the researcher as the individual’s whose map is being drawn.

Eden and Ackermann (1998:285) are also in agreement: “Cognitive mapping is a technique designed to capture the thinking of an individual about a particular issue or problem in a diagrammatic, rather than linear, format.” They also state that the map is designed to focus on the values, beliefs and assumptions an individual has about a particular issue. Finally, Kitchin (1994:2) takes a broader view, seeing a cognitive map as “a mental construct that we use to understand and know the environment”. In effect, the map is seen as a diagrammatic representation of spatial and environmental knowledge.

The theoretical basis of cognitive maps originates from Kelly’s Theory of Constructs (Kelly 1995). Kelly theorised that man as a researcher continually evaluates the sense he/she makes of the world. This is established by employing his/her current understanding (construct system) to predict and reach out for the future. The individual is therefore constructing a personal system and a relationship between these constructs. Brown (1992) states that cognitive maps were build on this concept and has been developed to provide a process through which additional richness can be established, the map is immediately useful to both the researcher and interviewee, and the process can take place during an unthreatening interview.

The cognitive maps therefore makes it possible for the researcher to make sense of large amounts of information regarded as relevant by the interviewee. The maps not only allow for the
exploration of detailed and holistic properties, but also reveals the issues relate to each other and how changes in a particular issue may create repercussions for another.

Brown (1992) acknowledges the importance of the researcher in the mapping process. He makes the point that effective cognitive mapping depends on the skill of the researcher, a view echoed by Eden and Ackermann (1998). In order to ensure that the cognitive maps produced are effective and bias is reduced to a minimum, researchers need to be trained, competent and confident with the techniques they use. If not, it is easy for the maps produced to become superficial and uncommunicative. For the purpose of this research the researchers spend a significant amount of time practicing, reviewing and analysing each other’s maps in order to familiarise themselves with the process before facing the interview sample individuals.

If we define mental models as a simplification or representation of understanding, it places them at the conceptual level in our awareness. The models can thus be utilised as a framework for a more complete understanding of the development of our comprehension of knowledge and understanding. However, this definition does not create an effective framework for the representation or elicitation of understanding, and based on the discussion above cognitive maps can be utilized to create such a framework. Cognitive maps can therefore be observed as a form of representation, which allows us to obtain, picture, analyse and compare mental models.

3.4 Future Mapping

Future mapping was another technique used by the researchers to gather information for purposes of analysis. Phillips (1996:11) describes future mapping as “a powerful process for creating a compelling vision, deciding how to achieve it and generating a motivation to act”. He also states that it engages the mechanisms of the mind by which we all get to know what we want. It therefore draws from the individual’s mental models of reality and the future. The future map allows individuals to notice immediate opportunities and to take action in order to achieve them.

According to Phillips (1996) future mapping operates by placing the individual in the future at the specific time of the individual’s ideal outcome. This successful outcome, described in detail, comprises the vision of the future. By looking backwards from the future-base it allows the
individual to establish milestones, events and turning points in order to achieve the vision. In both situations (the visionary future and the steps to success) the starting point and the successful outcome are all taking place in the mind. Both processes are imaginary in nature with no real-world, tangible elements at all and draw from the individual’s mental models.

The final future map can range from being extremely creative and generative, to being detailed, structured and specific. It can be applied for short-, medium- and long-term thinking and planning. Ostrander and Schroeder (1981) state that short term planning can be as short as a couple of hours, and long term planning can span over many years. It helps creative thinking and of particular importance to this paper, to share visionary ideas based on the individual’s mental model.

There are three distinct phases in future mapping:

1. creating a compelling ideal future as if it were happening already;
2. mapping out milestone events and achievements that took you there;
3. managing accomplishment of the outcomes, beginning back in the present.

There appears to be two ways in which we think or plan ahead, namely forecasting and visioning. Both these approaches are legitimate and successful in many contexts and environments. However, future mapping is more closely related to visionary thinking. It deals more specifically with formulating a vision or description of how the individual would want things to be if he/she could control his/her destiny.

There are very few original and brand new creations and ideas in the world. The processes and underlying assumptions of future mapping are no exception. One of the strengths of future mapping is that it relies on cognitive mechanisms that are part of any individual’s repertoire. The uniqueness of future mapping is the way in which the individual utilises these mechanisms to create a map to decide what he/she wants to achieve in the future, and develop a process of how to get there
3.5 Trends in Executive Education

Trends in executive education indicate a focus on developing organisational and individual capabilities aligned to the business objectives in order to create competitive advantage. One of the major challenges at hand for executive education professionals is that of linking learning and developmental objectives more closely with strategic and organisational objectives. (Ready, Vicere and White 1994). Ready et al outline a critical role for executive development in the strategic management process and link executive development to the organisation’s strategic planning system. They highlight the fact that executive education is a vital component of the strategic development of a firm. Our research aims to explore the role that the Retail Academy programme plays in contributing towards Woolworths’ strategic objectives.

Linked to this is a growing awareness that executive education has an important role to play in the creation of competitive capabilities such as “…breakthrough thinking as well as continuous improvement renewal – the key conditions for competitiveness in today’s business environment…” (Ready, Vicere and White 1994).

Driver (1962) established that the decision-making and interaction characteristics of cognitively complex organisational decision makers differed from decision making by less complex decision makers. For example, cognitively more complex decision makers employed considerably more strategic thinking and engaged in more extensive planning. According to Streufert and Swezey (1986), the organisation that can create an adequate match between organisational and individual’s ability to process complex information should be more successful in today’s competitive marketplace. Thus this implies that if the complexity of the business matches the individual’s cognitive complexity the organisation should gain a competitive advantage. We therefore assume that as the complexity of organisations continuously increase, a need exists to develop the cognitive complexity of the individuals employed by these organisations.

The research of Willcocks and Conway (1995) emphasise the importance of executive training to develop the individual’s critical and reflective powers: the individual’s cognitive ability or the ability to handle cognitive complexity. The implication of this view is that executive training programmes should focus on experiential learning such as action learning where delegates are
required to solve realistic problems. The delegates should be active rather than passive learners. This will enable them to become critical and reflective in their own managerial practice.

3.6 Reflection and critical incidence logs as a component of Action Learning

According to Keys (1994) action learning is a unique organisational learning process that involves a non-traditional instructional approach and mindset. Revans (1982) confirms that action learning differs from normal training in that its primary objective is to learn how to ask appropriate questions rather than to find the answers to questions that have already been precisely defined by others. Action learning can therefore be seen as workplace learning in which the individual has no preconceived notions of the truth but seeks to investigate and ask the right questions in order to discover the solutions.

Reynolds defines reflection as “a management learning concept of problem solving” and a focus “on the immediate, presenting details of a task or problem” (Reynolds 1998: 183, 189). He also introduces the concept of “critical reflection” which “involves an analysis of power and control and an examination of the taken-for-granted within which the task or problem is situated” (Reynolds 1998: 189). Critical reflection therefore takes the learning experience to a higher level as it includes the examination of assumptions, power relations, as well as social and individual implications. We are therefore assuming that the critical reflective learning process will lead to the development of a more complex level of understanding and therefore thinking.

Daudelin’s approach relates reflection to the “day-to-day experiences of managers as they confront challenges and problems on the job” as a “rich source of learning” (Daudelin 1996: 36). She also states that the there are two important conditions for learning from experience, namely to develop insights from past events and to apply these insights to future actions. Barclay (1996) focuses on reflection in order to avoid making the same mistakes. Reflection will also assist in developing a greater self-understanding and to manage your personal development.

Densten and Gray state that leadership development requires the integration of knowledge and experience, and that the capacity to reflect relates directly to how effectively individuals can learn
from their personal experiences (Densten 2001: 119). They stress that keeping a logbook assists in the process of gaining deeper personal understanding.

Reflection and the recording of this reflection using logbooks can therefore be seen as an excellent tool to encouraging learning from past experiences and achieving a better understanding of how to act in future. It is also an outstanding method for self-exploration and development.
4. RESEARCH QUESTIONS

Having explored the literature in more detail and having taken ourselves down the road of discovery during this research process, we are thankful that our research questions have been sufficiently broad thus not constraining the exploration. The essence of the research however remains to uncover information that will inform us about the nature of the shift achieved by the executive development process of the Woolworths Retail Academy programme, and to discover to what extent this shift contributes to the strategic direction of Woolworths. Our research questions are:

**Question One :**
Can the theory of mental models help us to ascertain the theories-in-use rather than the espoused theories that delegates have?

**Question Two ;**
Can the documentation of these models – before and after attendance of the Retail Academy programme – provide information about the nature of the shift in mental models achieved by the programme.

**Question Three :**
To what extent does this shift contribute to the strategic direction of Woolworths?

**Question Four :**
Can the contribution be measured through action learning projects?
5. RESEARCH METHODOLOGY

5.1 Grounded Theory

Research methodology designs can be divided into two main approaches. Denzin and Lincoln (1994) define these approaches as follows:

- The positivist approach focusing on the earliest identification and development of a research question and accompanied hypothesis. The proposal formulates the research procedures and attempts to forestall any possible problems.
- The Post-positivist approach where the researcher embarks on a path of discovery and creation of theory. The proposal’s research questions and procedures are broadly defined to allow for discovery during the process.

Goulding (1998) mentions that Grounded theory was first presented by Glaser and Strauss in 1967 when they published their book *The Discovery of Grounded Theory*. The text provided a strong intellectual rationale for using qualitative research to develop theoretical analysis. The emphasis behind grounded theory therefore became one of new theory generation. Grounded theory can therefore be defined as a general methodology for generating theory grounded in qualitative data that have been assembled and analysed for this purpose.

The theories that are developed using the grounded theory method can be described as interpretations made from given perspectives as adopted by the researcher. The researchers need to remain open to the essential character of every theory as the qualitative nature focuses on the search for meaning and understanding in order to build new innovative theories. The process of development can direct the researcher to new informants or interviewees.

Strauss and Corbin (Denzin and Lincoln, 1994) state that the objective of Grounded theory is to generate plausible relationships between concepts and sets of concepts. Goulding (1994) confirms that the concepts uncovered need to be evaluated for their interrelationships and that through a process of analytical evaluation the new theory will emerge.
The data for analysis can be obtained from observations, interviews and documentation. The interactive interview process will draw from both the interviewee’s and researchers’ experience and socially influenced perspectives. It is therefore important to note that the theory is an interpretive approach and will be influenced by personal perspectives of both parties.

5.2 Systems Thinking Methodologies

The researchers have made extensive use of two systems thinking methodologies to capture, analyse, understand and interpret information gathered during this project. These methodologies have already been described in detail and include Soft Systems Methodology and Cognitive Mapping.

The researchers have also referred extensively to Ryan’s (2000) on cognitive complexity and have developed a measuring instrument based on his work for purposes of this research. We have made use of his index of positive effects of cognitive complexity on managerial practice to measure the shift in complexity of delegates.

Future mapping has been used as a third methodology to capture and interpret information.

5.3 Research Process

5.3.1 Selection of the Research Sample

The Woolworths Retail Academy programme 2001/2002 was chosen as the research case. The nature of the research required that it be conducted in parallel with an executive programme, which could be tracked during the months in which the research was being conducted. This particular programme met this requirement. In addition both researchers were directly involved with this particular programme in different ways. Bonita Lee-Shew is the course director at the Graduate School of Business for this particular programme and Philip van der Merwe is a senior employee of Woolworths. As a result both had easy access to the delegates and all programme-related information, as well as to the Woolworths suppliers and executives.
The Retail Academy group for 2001/2002 consists of fourteen delegates. All fourteen delegates were interviewed twice. The chief executive and six group heads (executive level managers who are responsible for each of the groups within the company) from Woolworths were interviewed. This covered the most senior level of the organization comprehensively. Two suppliers from textiles and one from foods were interviewed. These suppliers were chosen on the basis of their substantial and longstanding relationship with Woolworths and were therefore seen to be key suppliers. The participants for the research were therefore chosen in line with guidelines of the Soft Systems Methodology, which requires that key players are interviewed.

5.3.2 Interviews
Open-ended interviews were used for all interviews conducted as this technique according to Kearney and Kaplan (1997) allows the interviewee to reveal his/her mental models as no constraints and parameters were set by the interviewer. The purpose of the interviews was to gather information on the candidate’s theory-in-use by revealing his/her mental models through open-ended interviews.

5.3.2.1 Interviewing Retail Academy Delegates
Each Retail Academy delegate was interviewed individually for one and a half hours on two occasions – immediately before the commencement of module one and on completion of an action learning phase of approximately twelve weeks and module two of the programme.

The interview process was composed of two phases:

1. An interview based on an open-ended question, which was taped, and
2. A future mapping session in which delegates were asked to map on paper, the path they will take to become successful.

The interview proceeded with the same open-ended question, which was put to all interviewees on both occasions:

“What must you be able to do to be a successful leader in Woolworths?”
The following probe questions were used to clarify vague statements, to gain clarity on unclear comparisons, to justify absolute phrases and to challenge broad statements where necessary.

i. “What do you mean by...?”

ii. “Why do you say this...?”

iii. “What could influence your success?”

iv. “Do you think there are other ways of seeing this”

v. “Does this take into account your own strengths and weaknesses?”

These questions were asked to probe for information that shows ability to back arguments or demonstrate interrelationships; to assess the ability to see alternative/multiple perspectives; and to assess the ability to see personal patterns of behaviour and self-assessment. This first phase ran for approximately one hour. Cognitive maps were developed during the first phase of the interviewing process with Retail Academy delegates, which captured what had been said visually. This allowed the opportunity to provide feedback to the interviewee and to gain confirmation from the interviewee about the accuracy of the maps.

During the second phase of the interview process the interviewee was asked to construct a future map. This phase was composed of two sections:

Firstly the interviewees were asked to -

“Think about an event in the past when you were successful. What did it feel like? Describe what you saw, how it felt, what you heard?”

The purpose was to construct a picture and to generate an emotional response about a successful period in the past. This was designed to assist the individual to recall the feelings associated with success and with this still fresh, to imagine that success in the future brings the same feelings. This is referred to as the reflection session in the report and these are attached in Appendix M. Interviewees were then asked to-

“Vision yourself as a successful leader in the future and plot in as much detail as possible what steps you will need to take to get there. Include all the milestones and events required to get there.” This phase ran for approximately 45 minutes.
5.3.2.2 Interviewing Woolworths Executives
All executives were asked one open-ended question which was –
“Describe the process you use in developing a strategy for your group…”
Probe questions such as –
“How is it currently been used? “How will it be used in the future?”
were used to elicit information about implementation of the plan. Each interview ran for
approximately one to one and a half hours. All interviews were taped for later development of a
SSM (Soft Systems Methodology) rich picture.

5.3.2.3 Interviewing Woolworths Suppliers
All supplier were asked one open-ended question –
“Describe your experience as a Woolworths supplier”.
Each interview ran for between one and a half and two hours. The information gathered was
used to develop a SSM rich picture.

5.4 Data Capturing

5.4.1 Cognitive maps:
Banxia’s Decision Explorer software was used to capture information gathered via the interviews
onto cognitive maps. The maps were then assessed for accuracy, prior to analysis, according to
the guidelines as defined by Ackermann, Eden and Cropper (1996). These guidelines are:
• Separate the sentences into distinct phrases. These phrases are likely to be no more than about
10-12 words long. Keep the phrases used by the interviewee, still will increase the sense of
ownership.
• Build up the hierarchy.
• Look for opposite poles. These clarify the meaning of concepts.
• Add meaning to concepts by placing the concepts in the imperative form and where possible
including actors and actions.
• Identify the option and outcome within each pair of concepts. Discuss with interviewee.
• Ensure that a generic concept is super-ordinate to specific items that contribute to it. Generic concepts are those for which there may be more than one specific means of achieving it. The cognitive maps are presented in Appendix A and B.

The researcher had access only to the demonstration package, which allowed a limit of 30 concepts to be captured. The researcher therefore could load only the thirty most prevalent (most substantially presented by the delegates) concepts onto each cognitive map. Two cognitive maps were developed for each delegate – one which captured the information from the first interview and the other from the second interview.

5.4.2 Future Maps:
The data gathered was recorded as follows:
• Each delegate wrote his/her own reflection section. This is attached in Appendix M.
• The future maps were recorded in a chronological manner, from the present to the visionary date and achievement as indicated by the interviewee.

The future maps are presented in Appendix I.

5.4.3 The Seven-Stage Soft Systems Methodology
Pioneered by Checkland (1981) this methodology was specifically intended for use where a situation is perceived to exhibit crisis, conflict, uncertainty or unease in relationships among the human ‘actors’. SSM also provides a means of action for change in situations that are perceived to be ‘messy’. The seven steps developed by Checkland was used to collect information about the Woolworths context, and to capture, analyse and understand it for purposes of this research.

5.4.3.1 Step One – Collecting Data
Interviewing key figures was a necessary part of the process but particular attention was paid to expressions of dissatisfaction and concern. The analyst looked particularly for signs that a key figure was apparently satisfied or unconcerned whereas other key figures were not. Apparent lack of concern about a problem situation often contributed to a ‘mess’ or system of problems, which defies solution simply by tackling each one separately.
5.4.3.2 Step Two - Analysis
Analysis began by drawing a rich picture of the messy situation. A rich picture is the analyst’s own interpretive ‘snapshot’ of the ‘mess’. From the rich picture, the analyst was able to identify a number of issues, which seem important to the situation. Clues about these are to be seen in symbols and expressions of clashes, pressure and uncertainty.

5.4.3.3 Step Three – Relevant Systems and Root Definitions
This step required a complete shift of thinking to the abstract world of systemic thinking in which relevant systems identified in step two are fleshed out and tightly defined as ‘root definitions’. A root definition needs to be adequate, otherwise difficulty may be encountered with later steps in the methodology. There are two complementary ways of testing whether a root definition is adequate. This first is to assess it critically by examining it for ambiguities, woolliness and implicit assumptions which may be questionable. The second test is more structured – the CATWOE test, a mnemonic which stands for –

C – customers (beneficiaries or victims of the system)
A – actors (those involved in operating the system)
T – transformation (the essential process)
W – weltanshauung(en) : (world-views of the actors)
O – owners (power figures who control the existence of the system)
E – environment (constraints on the system)

The essence of the test is to see whether the CATWOE elements are explicit or implicit in the root definition and whether any omissions are critical.

5.4.3.4 Step Four – Conceptual Models
Having satisfied oneself with the adequacy of a root definition, the next stage was to construct a conceptual model of what the system logically would have to comprise in order for it to work.

5.4.3.5 Step Five – Comparing ‘What might be’ with ‘What is’
At this stage a comparison was made between the conceptual model and the rich picture, with the purpose of identifying discrepancies. The aim of the comparison was to draw up a list of
activities or topics which are either missing or unsatisfactory in the real-world situation. This forms an agenda for discussion with the actors in the situation. This methodology requires that the analyst identify functional deficiencies but it is up to the actors to decide how, if at all, practical changes should be made. The researchers did not take the research to this extent as this was not necessary for purposes of this undertaking. The researchers ended this particular exercise with a synthesis of the findings of the comparison of the conceptual models with the rich picture. The analysis of all the issues using the SSM are attached in Appendix J.

In common with other systems approaches, iteration is a permanent feature of SSM. The comparison stage could well suggest that there are aspects of the problem situation, which remain opaque, and so more information may have to be gathered in order to sharpen the rich picture. This in turn may cause reflection on, and modification of, the relevant system(s), root definition(s) and conceptual model(s).

For purposes of completeness the last two stages of SSM are described below but the researchers did not take the analysis this far as has already been mentioned.

5.4.3.6 Step Six – Discussing the Agenda
The analyst’s role in the discussion is that of a skilled facilitator who is able to draw on his or her knowledge of systems and of the situation. The aim is to encourage the actors to reach agreement about which activities are functionally deficient and require attention. Those that are accepted as requiring action will have to be valid in systemic terms and feasible within the culture of the organisation.

5.4.3.7 Step Seven – Action for Change
Specific actions, in terms of how to implement agreed changes, are matters for the actors in the setting.
5.5 Data Analysis and Synthesis

5.5.1 Analysis and Synthesis of Cognitive Maps
The data captured on cognitive maps was analysed in two ways – firstly by using a clustering process, and secondly using an analysis tool based on a special effects of cognitive complexity index developed by Ryan (2000). Both these analytical tool were developed by the researchers and are described in detail under the section headed analysis.

5.5.2 Analysis and Synthesis of Future Maps
The future maps were analysed using Ryan’s complexity dimensions. The researchers attempted to find general trends or shift in the future maps using these dimensions. The researchers also attempted to find trends towards increasing alignment with Woolworths strategic objectives by analysing the content of the future maps and comparing these with the content of the Woolworths objectives.

5.5.3 Analysis of Woolworths Context
The information gathered and captured about the Woolworths context was analysed using the Soft Systems Methodology described above.

5.5.4 Analysis of Critical Incidence Logs
The critical incidence logs were analysed using Ryan’s (2000) positive effects of cognitive complexity index.
6. ANALYSIS, FINDINGS AND DISCUSSION OF RESULTS

6.1 Cognitive Maps

6.1.1 Analysis of Cognitive Maps using Clustering

For purposes of making sense of the cognitive maps the researchers developed a method of analysis. The concepts capture on the cognitive maps were grouped into fourteen clusters based on the main themes, which emerged from a process of grouping and re-grouping of these concepts by the researchers until they were satisfied that the concepts fitted comfortably into relevant clusters. (see Appendix C.)

The clusters created by the researcher, as well as the main themes which these clusters represented are attached in Appendix C.

Each cognitive map was analysed by identifying the concepts, which related to particular clusters and recording these against the relevant clusters. (see Appendix D and E). The number of concepts allocated to each cluster was counted up and this provided a number, which was used as a way of rating the clusters for each of the delegates, revealing more dominant and less dominant clusters. The analysis for the first and second interviews were collated onto one spreadsheet each, which allowed the researcher to average the number of occurring concepts for each of the clusters for both sets of interviews (see Appendix D and E). These averaged numbers provided a ‘rating’ for each clusters across the group of delegates, thus allowing comparison of clusters between each other and across both interviews.

6.1.1.1 Findings

6.1.1.1.1 First interview: cognitive maps

Averaged ratings across the full group for the first interviews showed that the cluster leadership style scored the highest with 7.2, personal development scored second with 5.5, and broader
business experience scored third with 2.6, closely followed by strategic thinking with 2.5. (see Appendix D).

6.1.1.1.2 Second interview: cognitive maps
Averaged ratings for the second interviews showed personal development with the highest score at 9.6, followed by leadership styles at 5.4, development of people at 3.5 and strategic thinking at 3.2. (see Appendix E).

6.1.1.2 Discussion
These results show a significant shift in emphasis to personal development from the first interview to the second. This shift is clearly the most significant shift experienced by the delegates from the first module to the second and revealed a great increase self-awareness, self-reflection and analysis, increased awareness of own strengths and weaknesses, increased insight into self, eagerness to learn, learning from others, striving towards a more balanced lifestyle, and emphasis on career planning with a view to self-fulfilment. Although leadership style came up in the second interview as an important cluster, this occurred to a lesser extent in comparison to the first interview and therefore showed some shift away from the textbook jargon which was so predominant the first time round. Another significant shift was increased importance place on people development, which moved from a 1.6 to a 3.5 in the second interview. This reveals an increase appreciation of the importance of people as human assets in the business and the need to develop and ‘take them the along’. Strategic thinking remained high on the priority list and achieved a increase in emphasis during the second interview during which time the evidence of an ability to take into account multiple perspectives by considering different views, multiple information gathering, awareness of greater complexity was more evident.

The clusters developed by the researchers have been generalised across all delegates, thus assuming that there is a common view about the meaning of each one of these clusters. In reality this is not necessarily the case, because as the theory tells us, mental models are individual interpretations and not objective representations of the world. The same term or concept may therefore take on a different meaning for different individuals. But for purposes of this research it is assumed that the use of similar language and terms by the delegates have implied similar
meaning. The researchers have also assumed that the concepts and clusters of concepts used represent the mental models of each of the delegates. One can therefore conclude from these findings indicate that a shift in mental models was achieved by the Retail Academy programme as described above.

A note of caution here would be to state that the interpretation of both the information from the interviews and the allocation of this information to clusters could very well be influenced by the worldview held by the researcher. It is therefore important as this stage to make the worldview of the researcher with regard to the topic explicit. In this particular case the researcher holds the view that a successful leader must understand the aspirations of his people and encourage and support them in developing themselves towards achieving these aspirations. This particular worldview may therefore have influenced the way in which the information from the interviews was interpreted and analysed.

6.1.2 Analysis of Cognitive Maps using Positive Effects

The researchers attempted to establish not only whether a shift in mental models was achieved by the Retail Academy programme, but also to establish whether this shift was a shift in cognitive complexity. For purposes of this analysis the cognitive maps developed above were analysed using Ryan’s (2000), positive effects of cognitive complexity index.

The researchers did not use the full index to analyse the cognitive maps but instead identified five areas for analysis. The cognitive maps were scanned for evidence of a shift in some of the effects described in Ryan’s index, and based on this scanning processing identified five areas where shifts seemed to have occurred. These five areas were used to analyse the cognitive maps. These five positive effect areas used together with the themes and concepts associated with these positive effects are attached in Appendix F.

The cognitive maps were analysed by identifying concepts present on each one of the maps, which can be associated with the relevant positive effect, as described above. Each of these associated concepts was then recorded against each of the positive effects (see Appendix G and H). The number of concepts recorded for each map against each positive effect was totalled, and
this was used as the rating for each of the positive effects. The results of cognitive maps of all delegates for both the first interview and the second interview were collated and average scores were calculated for each of the positive effects for both first and second interviews (see Appendix G and H). These results were as follows –

<table>
<thead>
<tr>
<th>Positive Effects</th>
<th>Average rating across all cognitive maps for interview one</th>
<th>Average rating across all cognitive maps for interview two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tend to be more open to new information</td>
<td>2.7</td>
<td>4.1</td>
</tr>
<tr>
<td>Are less externally information bound.</td>
<td>0.6</td>
<td>1.6</td>
</tr>
<tr>
<td>Are more flexible in thinking.</td>
<td>0.3</td>
<td>0.9</td>
</tr>
<tr>
<td>More affected by environmental changes.</td>
<td>1.4</td>
<td>0.6</td>
</tr>
<tr>
<td>Are better strategic planners due to the consideration of more information from more perspectives, and greater flexibility in considering alternatives.</td>
<td>1.7</td>
<td>2.1</td>
</tr>
</tbody>
</table>

### 6.1.2.1 Findings and Discussion

These results show the most significant positive shift in the first two positive effects, namely *Tend to be more open to new information* and *Are less externally information bound*. Of the remaining three, only one showed a negative shift, namely *More affected by environmental changes*. The last two showed positive shifts. In general this limited analysis does reveal delegates’ tendency to seek new information from multiple sources and to create their own conclusions based on this information. This indicates a positive shift in cognitive complexity of delegates after having attended the Retail Academy programme. The researchers were unable however to establish the extent of this shift due to lack of in-depth information and this could be investigated in further research. The negative shift in the effects of environmental changes can be explained by the fact that the second interviews were biased towards information about more
personal issues and less about external and environmental issues. Further research could include using the full index for a more thorough analysis.

6.2 Analysis, Findings and Discussion of Future Maps

The reflections do not form part of the analysis but were used to ‘set the scene’ for the creation of the future maps. This exercise serves to encourage the individuals to place themselves in a situation where they were successful and to recall the emotions associated with this experience. This enables them to identify with the emotion and to attempt to recreate this by imagining their success in the future.

Two future maps were developed by each of the delegates and are attached in Appendix I. In comparing the future maps developed before the first module and after the second it was hoped that they might reveal a shift in both complexity and an increased alignment with the strategic objectives of Woolworths, as a result of the delegates having attended part of the Retail Academy programme.

These future maps were analysed using Ryan’s positive effects index and it quickly became obvious that the information contained in the maps were insufficient to draw any significant conclusions about shifts in complexity. In fact the maps remained either very much the same or became less detailed and the path to success less certain in some cases. In describing their paths to success many of the first maps were quite certain in terms of dates and milestones to be achieved. Many of these achievements were of a concrete nature such as achieving promotions, completing courses etc. The shift to less certainty in the second map may be attributed to their exposure to the programme as the delegates were encouraged via the systems thinking methodologies to see things in many different ways and to consider the multiple perspective available to them. This perspective typically results in individuals being ‘less stable in attitudes’, ‘less certain after a decision, especially if verification is unavailable’ (Ryan, 2000). One can conclude therefore that although the maps themselves did not reveal an increase in complexity, the delegates showed a shift towards more complex thinking.
Delegates stated that their career aspirations changed very little between the first and second modules of the programme and no association could therefore be found between exposure to the programme and an increase in alignment of participant objective to the Woolworths strategy (see Appendix I). This result was not a surprise as the time lapse was only twelve weeks. It was both unrealistic of the researcher to have expected a shift on this level, and in retrospect also seems to be too obvious and a not very informative or interesting question to have posed.

In retrospect the researchers have realised that the disappointment with this tool is partly due to the manner in which this was handled. The researchers asked the delegates for milestones and events which might lead to their success. This prompted them to develop their maps in a linear fashion. If the question was posed as a more open-ended one the researchers believe that they may have gathered more useful information. Secondly the researchers found that the delegates did not spend enough time on developing these maps, particularly the second time round as they has just completed the second module and were eager to get home. In general the researchers feel that the tool has potential, if implemented differently. The reflection session also have the potential to be a good source of data.

6.3 Analysis of the Woolworths context using Soft Systems Methodology

6.3.1 Rich picture

Having conducted interviews with the Retail Academy delegates who essentially represent the middle management structure of Woolworths, the Chief Executive Officer and six senior executives, as well as 3 suppliers, the researcher developed in line with the Soft System Methodology a rich picture as seen on page 37.
6.3.2 Issues

Using this rich picture ‘issues’ were identified by the researchers. The following were the main issues which emerged -

Issues:
1. Skills retention.
2. Appreciation of diversity.
3. Developing a large pool of untapped talent.
4. Suppliers to become true strategic partners.
5. Implementation of vision and strategy.
7. What do customers want?

6.3.3 Researcher’s World-view

It is important at this point to make the researcher’s world-view explicit. This will place much of the analysis in perspective and may highlight possible bias in this process. This is only a precautionary note.

*Researcher’s World-view*

*People should be trained, supported, appreciated and empowered if the organisation is to benefit optimally from its human assets.*

6.3.4 Issue Analysis

The following is the analysis, including iterations, of one of the issues identified from the rich picture. The researchers believe that it would have been more effective to represent this in the form of process maps, rather than in this linear fashion but the researchers did not have sufficient time to develop these maps. The maps would have been more effective in representing the iterative process which is not linear in nature. The analysis of the remaining issues are attached in Appendix J.
RELEVANT SYSTEM 1

First iteration:
A system that retains skill within the organisation.

Retain (what does this mean?)
Skills (which skills should be retained?)

Second iteration:
A system that seeks to keep strategically important skills within the organisation.

What are strategically important skills?

ROOT DEFINITION 1

Customers – employees, organisation, shareholders (first iteration)
- employees who possess skills that contribute to the competitive advantage of the organisation, the organisation, shareholders (second iteration)

Actors – HR, employees, MD

Transformation – A system of rewards, recognition and incentives that is sufficiently attractive to keep strategically important employees (first iteration).

A system that encourages strategically important employees to remain highly motivated and productively employed by the organisation (second iteration).

A system that encourages employees who possess skills that contribute to the competitive advantage of the organisation to remain highly motivated and productively employed by the organisation. (third iteration).
Weltanschauung(en) – certain employees are assets which are essential to business success and should be valued and retained.

Owner – HR, MD

Environment – labour market (skills shortage), competitors, social conditions (crime, poor health and educational systems)

Root definition – *A system that is owned by the MD and operationalised by HR, which encourages employees who possess skills that contribute to the competitive advantage of the organisation, to remain highly motivated and productively employed by the organisation, to the extent that the organisation remains competitive over the long-term in a labour market of declining skills.*

**CONCEPTUAL MODEL 1**

**First Iteration:**

1. **Define the organisation’s competitive advantage.**
   - Define the activities, which are unique to the organisation and which set it apart from its competitors

2. **Identify the skills within the organisation, which are essential to maintaining this competitive advantage.**
   - Identify the specific skills required in order to maintain these activities.

3. **Identify the particular people in the organisation who possess these unique skills.**
   - Conduct a skills audit through interviews, performance appraisals, recommendations by line managers, colleagues, subordinates, assessments by independent consultants, objective assessment systems, ask people to nominate themselves.
4. **Determine what system would motivate these employees and ensure that they remain productively employed within the organisation.**
   - Conduct interviews with these employees to determine what motivates them and what their values and aspirations are.
   - Discuss ways in which these values and aspirations can be met.
   - Structure unique systems for each employee.
   - Track international trends in this area and what other leading organisations are doing.

5. **Implement this system.**
   - Allocate resources
   - Ensure it remains relevant.

6. **Monitor performance.**
   - Monitor through retention statistics of valued employees.
   - Monitor through comparisons in cost of lost skills, recruitment and training versus cost of retention packages.
   - Monitor through financial performance.

7. **Continually review 1 and 2.**
   - Ensure that identified competitive advantage remains relevant.
   - If the definition of competitive advantage shifts, the definition of key skills will do likewise.

**Second Iteration:**

1. **Define the organisation’s competitive advantage both in the short-term and long-term.**
   - Define the activities, which are unique to the organisation and which set it apart from its competitors currently.
• Define the activities that are essential to the long-term sustainability of the organisation.

2. **Identify the skill within the organisation, which are essential to maintaining this competitive advantage over the long-term.**
   • Identify the skills required currently to maintain competitive advantage.
   • Identify skills that are required to maintain competitive advantage over the long-term.

3. **Identify those people in the organisation who possess these unique skills as well as those who have the potential to develop these skills.**
   • Conduct a skills audit through interviews, performance appraisals, recommendations by line managers, colleagues, subordinates, assessments by independent consultants, objective assessment systems, ask people to nominate themselves.

4. **Determine what system would motivate these employees and ensure that they remain productively employed within the organisation.**
   • Conduct interviews with these employees to determine what motivates them and what their values and aspirations are.
   • Discuss ways in which these values and aspirations can be met.
   • Structure unique systems for each employee.
   • Track international trends in this area and what other leading organisations are doing.

5. **Implement this system.**
   • Allocate resources
   • Ensure it remains relevant.

6. **Monitor performance.**
   • Monitor through retention statistics of valued employees.
• Monitor through comparisons in cost of lost skills, recruitment and training versus cost of retention packages.
• Monitor through financial performance.

7. **Continually review 1 & 2.**

• Ensure that identified competitive advantage remains relevant.
• If the definition of competitive advantage shifts, the definition of key skills will do likewise.

**COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’**

The rich picture reveals the lack of an adequate system in place at Woolworths that encourages employees who possess skills that contribute to the competitive advantage of the organisation to remain highly motivated and productively employed by the organisation. This has resulted in Woolworths losing many of its key people to competitors and opportunities elsewhere. The members of staff in the senior levels of the organisation appear not to be conscious of this. No record is kept of this loss and no cognisance seems to have been taken of its impact on the company.

The next step in this process would be to discuss these findings with key members of the organisation in order to sharpen the rich picture. Once the picture more accurately reflects the real situation the analyst can move towards gaining agreement from actors about activities which are functionally deficient and require attention. This finally culminates in action, but before this happens the analyst must ensure that there is both agreement within the organisation that these are valid and accepted and secondly that the organisation is culturally ready for these changes. These three final steps of the SSM are not implemented by the researchers as this is obviously not appropriate. The first five steps were used by the researchers simply as a tool to analyse the situation and to assist in making sense of the information gathered.
6.3.5 Findings and Discussion
This SSM analysis has revealed a number of issues, which are largely associated with the style of leadership which currently exists within the organisation. These issues centre around problems that various stakeholders (employees and suppliers) have with top-down, ‘command and control’, and almost arrogant style of leadership. This results in stakeholders feeling that they are not valued, that they are left out of the process, they feel dis-empowered. This has resulted in lack of motivation and commitment from them. This analysis and therefore revealed the need to transform the leadership style and culture within Woolworths to one that is inclusive, that truly recognises and values people for the contribution they can make to the organisation. This includes involving employees, suppliers and customers in substantial conversations that make a real difference to the business. This approach feeds through to issue of appreciating diversity and its contribution to the business and valuing suppliers for the input they can make as true partners to the business.

6.4 Analysis, Findings and Discussion of Critical Incidence logs
The Retail Academy delegates were required between modules to complete a number of action learning projects. One of these requirements was the completion of a critical incident logbook containing ten critical incidences. (see Appendix K for framework).

Delegates were required to record particular incidences in the workplace where they felt that they learnt something. They were encouraged to critically reflect on the incident, describe their response to the situation, what the outcomes were, the reason for these specific outcomes, how they felt, what their intentions were, what they learnt, what they could have done better, what abilities and ideas were involved, what abilities and ideas would be required in the future for a better outcome. This is a structured process that required delegates to practise the skill of reflective learning. As the literature has pointed out this type of reflection is a rich source of learning, for developing greater self-understanding and to manage personal development.
Reflection and the development of a logbook can therefore be seen as an excellent tool to learn from past experiences and to achieve a better understanding of how to act in future. It is also an outstanding method for self-exploration and development.

An analysis of these logs revealed that all the delegates engaged adequately with this process and this showed evidence of substantial reflection and personal learning. (see Appendix L for an example of a completed critical incidence log). Most displayed the ability to learn from the incidences and many were able to deal with situations effectively in the workplace. The following is a synthesis of the skills employed by delegates in incidences recorded in the critical incidence logs about their management practice -

Listening and use effective communication skills;
Facilitation skills;
Gathering information from multiple sources before making a decision;
Prepare counter-arguments thoroughly;
Trust people to do the work;
Confronting with care;
Systemic thinking;
Ask the right questions;
Give constructive feedback;
Teamwork.

This shows evidence of implementation of many of the skills acquired during the first module of Retail Academy. These skills link appropriately into the leadership skills required by Woolworths as revealed by the SSM analysis, which included many of the skill mentioned above.
7. CONCLUSIONS AND RECOMMENDATIONS

The researchers set out to explore a number of questions during this research process using the Grounded Theory methodology, and its exploratory nature allowed many of the conclusions to emerge from the data, rather than present themselves as forgone conclusions before the outset. The process has also posed many more opportunities for further research than it has answered questions conclusively. These conclusions are therefore drawn both tentatively and cautiously. The hesitancy by the researchers is the result of their awareness that much of the process of capturing, analysing and interpretation of the data was subject to personal biases, which the researchers have lent to the process. The researchers are also aware of the need to carry out further research in order to substantiate some of these findings more thoroughly. These conclusions can therefore be seen to be much more the personal perspectives of the researchers rather than generalisable, objective truths.

The first research question posed by the researchers was *Can the theory of mental models help us to ascertain the theories-in-use rather than the espoused theories that delegates have?* The reason for posing this question was that the researchers wanted to be certain that the data captured was the theories-in-use rather than the espoused theories of interviewees. The researchers were able through their literature search to establish that using the technique of open-ended interviewing provided an opportunity for interviewees to reveal their theories-in-use, and therefore their mental models. The researchers are therefore satisfied that the information gathered represented interviewees theories-in-use and therefore established a valid basis for analysis. Further analysis would however need to confirm this.

The next question posed by the researchers was *Can the documentation of these models – before and after attendance of the Retail Academy programme - provide information about the nature of the shift in mental models achieved by the programme?* The researchers analysed this shift using two measuring instruments which they developed for purposes of this research. The first instrument used clustering of concepts on the cognitive maps to indicate the nature of the mental model shift achieved by the Retail Academy. This shift indicated an increased emphasis towards personal development as a key issue to becoming a successful leader. This shift was in keeping
with the objectives of the first module of Retail Academy and therefore confirms to some extent that this module achieved its objectives. It would be worth further investigation into whether analysis carried out after the completion of the next module once again resulted in a shift which is in keeping with that module's objectives.

The second instrument used the positive effects of cognitive complexity index developed by Ryan (2000) to ascertain whether this shift indicated an increase in cognitive complexity. The researchers found that there was indeed a shift towards more cognitively complex thinking. However, this second instrument was limited to just five areas of analysis rather than the full index and further research could investigate further development of this instrument for more substantial analysis.

The researchers were therefore able to use the documentation of mental models to provide information in both instances on the nature of the mental model shift which was achieved by the Retail Academy programme.

Both tools developed by the researchers to measure the mental model shifts are relatively rudimentary but we believe form a credible basis for further development.

It is assumed that ongoing analysis of these mental model shifts in line with increasing exposure to the Retail Academy programme will reveal an ever increasingly shift in level of ability to think in a complex way. Currently this shift is relatively modest and further more substantial research would need to establish further development.

Furthermore, the researchers used the development of future maps to try to establish a shift in mental models of delegates attending the Retail Academy programme. This particular data-gathering tool was of limited use other than to establish a remote link between the shift in these maps and a possible shift in cognitive complexity. The researchers had as a second objective to establish a link between the shift in the future maps and an increased alignment with Woolworths strategies but did not succeed in establishing this. The researchers concluded that this objective could perhaps be establish over the longer term. In general it was felt that this particular tool did
not succeed in revealing the theories-in-use of delegates as the information requested was specific and linear in nature and therefore the usefulness of the information for purposes of this research was limited.

The next question posed was *To what extent does this shift contribute to the strategic direction of Woolworths?* The analysis of the Woolworths context based on interviews conducted with Woolworths directors, suppliers and employees utilised the Soft System Methodology. This analysis attempted to understand what the gaps are between ‘what might be’ and ‘what is’ within Woolworths. This would provide clues as to what the Retail Academy programme should be aiming towards achieving so as to ensure that it is contributing to the strategic objectives of the organisation. This analysis revealed in short the need for both the leadership style and culture of the organisation to be transformed so as to ensure that all the relevant stakeholders (employees, suppliers and customers) are more effectively involved in decision making, and that the leaders develop a true appreciation of the contribution that the people within the organisation can make to its success. This would require leaders to develop personal skills that would assist them to work more effectively with diverse groups of people to obtain commitment from them. The shifts achieved so far have been established as a shift towards more personal development in order to become a successful leaders, as well as shifts in cognitive complexity related specifically to the need to gather information from multiple sources before making decisions. Both shifts clearly contribute to the strategic requirements of Woolworths as defined above, but this contribution is currently modest, given the complex nature of the challenges facing the organisation. More substantial contribution would be expected as delegates progress through to completion of the programme. It became obvious that the SSM methodology is most effective when the analyst is allowed to take the analysis through a few iterations. The researcher however did not have sufficient time to do this justice. Further research could pursue this particular process more substantially and could include further conversations with participants to check for accuracy.

The last question posed by the researchers was *Can the contribution made towards the strategic objectives of Woolworths be measured through action learning projects?* An attempt was made to establish this contribution through the analysis of critical incidence logs, which were
completed by the delegates during their action learning phase. The content of these logs showed a clear link between the skills developed and used during this phase and the requirements of Woolworths as established in the SSM analysis. These skills included many of the personal development and leadership capabilities required to lead Woolworths into the future. These action learning projects therefore show a clear contribution to the strategic objectives of Woolworths as defined in the SSM analysis. Analysis of further action learning project would provide additional evidence of their contribution as the programme progresses.

7.1 Limitations

This research was conducted over approximately three months, which the researchers found to be a significant limitation to the thorough investigation of the various issues. The researchers found therefore that due to the time constraint they were unable to do justice to many aspects of this research. An example of this is the Soft Systems Methodology analysis, which researchers felt would have benefited from more time for reflection, further iterations and follow-up conversations with interviewees to check for accuracy of information, as well as interviews with a larger samples of suppliers and the inclusion of customers.

Another area of concern was the limitation placed on the researchers by the demonstration version of Banxia Decision Explorer, which allowed for the inclusion of only thirty concepts on the cognitive maps. The researchers were therefore compelled to capture only the top thirty concepts for each of the interviews conducted. This limited the amount of information that could be captured and analysed, and the cognitive maps were therefore not a full reflection of each interview.

One of the potential concerns could have been the sample size of the interviewees but due to the nature of the research methodology used which involved in-depth open-ended interviews, this was of less concern, as it was the quality of data rather than the quantity which interested the researchers. Obviously further more substantial research would possibly call for larger sample sizes, more diverse representation, and more in-depth follow-up interviews.
In conclusion this research has generated much food for thought, and many opportunities for further investigation. Questions that still remain include the following –

In considering the clustering process used by the researchers to analyse the cognitive maps, is there a link or association between an increase in the number of concepts within a particular cluster and an increase in cognitive complexity. In other words, researchers found an increase in shift towards personal development in this research and this was indicated by an increase in number of concepts found on the second set of cognitive maps. Can one conclude that this implies an increase in cognitive complexity around personal development simply because of the increase in number of concepts associated with this evident on the cognitive maps?

A number of other suggestions have come up in various discussions in this report about opportunities for further research and development of theories. One of these is the opportunity to further develop the instruments of analysis used in the investigation. Other opportunities exist around furthering some of the issues investigated here.

Executive education must accept the responsibility of demonstrating that it can achieve lasting positive impact on management practice. The education methodology used at the Graduate School of Business attempts to achieve this through lasting change of managers’ behaviour. This change happens at the mental model level – at a significant level of the human psyche - where behaviour is impacted in the long-term. Not only does it achieve a shift in mental models but the nature of this shift is on a cognitive complexity level. If we accept that complex organizations can only be managed on a complex level, then this type of executive education can make a large impact on the way these organizations are run.
APPENDIX A  Cognitive Map – First Interview: Delegate 1

1 Successful Leadership

11 Can you influence as a leader?
12 Interaction with others
4 Help you to think differently
8 Open -up to other ideas and influences
5 Interact with people from other areas
7 Get involved with business issues
2 Make use of Retail Academy
9 Encourage feedback from all parties
6 Mentorship
3

14 Always keep your values and ethics
20 Be responsible for own development
22 Do a continuous SWOT analysis
26 Market awareness
23 Financial awareness
25 Exposure to all areas of the business
24 Business acumen
27 Customer
28 Supplier
21 Be dynamic
29 Trends
30 Listen to your staff and customers
17 Be able to identify people's capabilities
15 Need to learn the Woolworths leadership style - team focus
16 Respect individuals
19 Be clear about deliverables and measurements
18 Assist people to cope with change
13 Be aware of the difference between leadership and management
10 Earn respect
12 Need to experience and embrace diversity
11 Can you influence as a leader?
16 Respect individuals
12 Need to experience and embrace diversity
6 Mentorship
8 Open -up to other ideas and influences
5 Interact with people from other areas
7 Get involved with business issues
2 Make use of Retail Academy
9 Encourage feedback from all parties
6 Mentorship
4 Help you to think differently
3

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13 Be aware of the difference between leadership and management
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12 Interaction with others
8 Open -up to other ideas and influences
5 Interact with people from other areas
7 Get involved with business issues
2 Make use of Retail Academy
9 Encourage feedback from all parties
6 Mentorship
3
Cognitive Map – First Interview: Delegate 2

1. Successful Leadership
   - 2. The leader needs to improve his weaknesses
   - 3. By consulting experts
   - 4. Talk to line managers, sponsors and mentors
   - 5. Need to understand how the business works
   - 6. Seek open and honest feedback from colleagues, subordinates and superiors
   - 7. Seek knowledge about leadership and business issues
   - 8. Seek facts and learn from it

10. Retail Academy
11. Understand the culture and diversity of teams
12. Assess the strengths of the team
13. Understand diversity within the workplace
14. Be adaptable and flexible
15. Should experience no problems with change
16. Should facilitate change

9. Need to be a team player
20. Give employees more ownership
17. Take learnings from other people
18. Be accommodating and able to get on with most people
19. Consult with all parties involved
21. Participatory leadership
22. Get "buy-in"

23. Take "stock" of himself
APPENDIX A  Cognitive Map – First Interview: Delegate 3

21 Accept that you sometimes cannot change certain things
29 Practice Affirmative Action
30 Share information
28 Assist with strategic planning
27 Manage change
23 Customer service
25 Training of staff
24 Ensure quality
26 Networking resources
22 Drive the business through productivity
1 Successful Leadership
17 Challenge people
16 Practise an "open-door" policy
18 Build commitment
12 Focus on the positive
11 Training is key
13 Take risks
10 Ensure that people are successful
7 Do goal setting
14 Role clarity
5 Empowerment
8 Goals should be realistic
6 Give people direction
9 Give people confidence
3 A balance between delegation and doing it yourself
4 Build trust and respect
19 Face challenges
15 People take responsibility and accountability
2 The leader needs to be able to manage people
1 The leader needs to be able to manage people
APPENDIX A  Cognitive Map – First Interview: Delegate 4

1 Successful Leadership

15 A passion for retail
16 Customer leadership programme
25 Humbleness
29 Deadline orientated
22 Self reflection
23 Learn from mistakes
20 Retail Academy

14 Market competitiveness
13 Aware of business and leadership principles within Woolworths
24 Must have leadership qualities
27 Openness
28 Insight
21 Make use of opportunities

12 Community involvement
10 Should be team driven
11 Keep promises
19 Self development
17 Set clear goals
21 Make use of opportunities

9 Must have a shared vision with employees
5 Must understand diversity
3 Approachable
6 Compassionate
4 Good communication skills
7 Other people's successes are your successes
8 Develop and train staff
18 Should be achievable
16 Market competitiveness
11 Keep promises
12 Community involvement
APPENDIX A  Cognitive Map – First Interview: Delegate 5

1 Successful Leadership

2 Be aware of staff morale: are people happy?

3 Keep people informed and be transparent

4 Should have a balance between work and play

5 Choose partners and alliances well

6 Build relationships

7 Connect with people who can open doors

8 Need to be exposed to all parts of the business

9 Know the retail industry

10 The impact of AIDS on the business

11 Understand our competitors

12 Appoint people on merit and not politics

13 Play corporate politics to be successful

14 Have a long-term career goal

15 Need to make things happen

16 Retail Academy

17 Input back into the system

18 Is there an opportunity to move to the next level

19 Influence company culture

20 Success driver

21 Pay for performance

22 Hard work on all levels should be recognised

23 Focus not only on what the managers say

24 Not to focus on status only

25 Change and challenge the culture

26 "Stick to your guns"

27 Allow people to make mistakes

28 Make a decision and live with the consequences

29 Celebrate success

30 Build long-term relationships with staff
APPENDIX A  Cognitive Map – First Interview: Delegate 7

1. Successful Leadership
2. Be and promote entrepreneurship
3. Take ownership
4. If this is your own business would you do the same?
5. Measure people on delivery
6. Change business structure if necessary
7. Need to be perceived as a strong leader to do so
8. People should be comfortable with the leader
9. Put a good strategy in place
10. An opportunity to not only change the familiar but also include the unknown
11. Need to know how the entire business work
12. More credibility if the strategy is good
13. Learn from other successful leaders
14. Be passionate about the business
15. Inspire others to be passionate about the business
16. Lead by example
17. Give people a change, don't "put them down"
18. Have fun
19. People need to want to follow the leader
20. Deliver on promises
21. Be transparent
22. Facilitate people to create a better understanding
23. Get "buy-in"
24. Be prepared
APPENDIX 8  Cognitive Map – First Interview: Delegate 8
APPENDIX A  Cognitive Map – First Interview: Delegate 10
APPENDIX A  Cognitive Map – First Interview: Delegate 11

11 Build strengths
12 Keep focused
13 Spiritual gain and not material
14 Power makes people do bad things
15 "Psyched" myself up
16 I am a survivor
17 Environment
18 Opportunities exist
19 Leadership change
20 Encourage debate
21 Give opportunities to individuals with potential

10 Personal goal prevented myself from resigning
9 Survived the "old" system
8 Mentor
3 How do they make decisions
6 Exposure through courses

2 Expose yourself to leaders
4 Exposure to different parts of the business
5 Areas to improve upon

1 Successful Leadership
7 Who can help me?
APPENDIX A  Cognitive Map – First Interview: Delegate 12

1 Successful Leadership
2 Understand the Woolworths culture
3 Personal feedback and not attacks
4 Build relationships
5 Be aware of the "corridor-talk"
6 Understand operations
7 The dynamics of the different divisions
8 The industry
9 Understand retail
10 The role of the supplier as an integral part of the business
11 Local versus oversea's economy
12 Understand the role of a leader
13 "Walk the talk"
14 Know your personal characteristics
15 Understand people
16 Relationships with colleagues
17 Training and development
18 Professional and not too personal
19 Balance work and home life
20 Understand strategic thinking
21 People's emotional involvement
22 Divisional strategies
23 Understand own personal style
24 Need intellectual stimulation
25 Self awareness of strengths and weaknesses
26 Understand the importance of diversity
27 What influences team dynamics
28 Don't take things at face value
29 Objectivity
30 You are responsible for your own decisions

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Appendix A Cognitive Map – First Interview: Delegate 13

1. Successful Leadership
2. Understanding the external environment
3. Globalisation
4. Competitors
5. Marketing
6. What is your differentiator
7. Grow a sustainable environment
8. A leader requires personal space
9. Balance between work and family life
10. To be able to work in a team
11. Create a flat non-hierachical structure
12. Re-assess yourself
13. No longer the boss and subordinates, now all colleagues
14. Drive decisions
15. Not who you are but what value you can add
16. Different relationships
17. Integrate with all parts of the business
18. Network more
19. Internally as well as externally
20. Get to know the retail business
21. Understand the customer
22. Understand how other parts of the business operates
23. Understand your people and directors
24. An environment that all would like to work in
25. Understand personal learnings
26. Revitalise yourself
27. Grow as a person
28. Create dialogue and feedback
29. Acknowledge staff inputs
30. Address personal problems as soon as possible
APPENDIX A  Cognitive Map – First Interview: Delegate 14

1 Successful Leadership

2 Understand the environment

3 From buying departments to financials

4 Gain credibility

5 Understand the corporate culture

6 Understand yourself

7 Job satisfaction

9 Where do I want to be?

10 Education

11 Career planning

12 Retail Academy

13 Interaction with other members

14 Gain holistic view of the business

15 Be able to lead a team

16 Be a team player/worker

17 Always remember the roles of the individual within the team

18 Develop people

19 Staff career paths

20 Learn by trial

21 Allow people to make mistakes

22 Gain experience

23 Do attachments with key staff

24 In charge of own development

25 Be able to influence others

26 Be a role model and a mentor

27 Leadership qualities

28 Determination

29 Easy people interaction

30 Motivation

3 From buying departments to financials

8 Give your best
APPENDIX B  Cognitive Map – Second Interview: Delegate 1

1 Successful Leadership

2 Need to be clear about what I need to do

3 Must ensure that always add value

4 Take ownership of my career path

5 Drive my career

6 Incorporate Retail Academy learnings into the workplace

7 Learn by continuously reviewing what I am doing

8 Need to know how to deal with other people

9 What is my role in the team

10 Understand diversity within the team

11 Respect emotional differences

12 Listen emphatically

13 Your contribution will be better

14 People confine in me as they trust me

15 Trust others

16 Learn from others and give feedback

17 Network more

18 Make time (time management)

19 Continuously update my knowledge

20 Get information from all areas

21 Make use of the Retail Academy tools

22 The Business also need to use me

23 Create an opportunity to prove what I can do and to earn respect

24 Be passionate about what I do

25 Be at ease with myself

26 Give from myself

27 Have no hidden agendas

28 Understand teamwork

29 Interact effectively

30 Listen to all opinions

2 - 10, 12 - 14, 16, 19, 21, 22, 25 - 29
21 Create a system of leading and managing
22 Do not dismiss yourself as inferior
20 Focus on a balance between my work and personal life
29 Create goals and deliverables
28 Share and discuss it with the business
27 Create a critical path for my own development
26 Be in touch with spiritual leaders
24 Be in touch with our people and customers
25 Admit my wrongs and mistakes
12 Utilise my sponsor and mentor
14 Employ the correct person for the correct position
19 From people on all levels
17 Learn from Retail Academy team and the people I work with
18 Network more
16 Get feedback
15 Ask for help from colleagues
13 Surround myself with positive people
8 Need to get facts on all aspects of the business
9 In order to prepare myself for the future
10 Need to learn from my subordinates and superiors
6 Need the support of my family
5 Try to always improve and to do better
3 Improve on weaknesses and develop strengths
4 Benchmark my achievements against those of others
2 Benchmark my achievements against those of others
7 They need to be aware of everything that I undertake
1 Need to analyse strengths and weaknesses
2 Need to analyse strengths and weaknesses
1 Successful Leadership
21 Successful Leadership
20 Successful Leadership
19 Successful Leadership
18 Successful Leadership
17 Successful Leadership
16 Successful Leadership
15 Successful Leadership
14 Successful Leadership
13 Successful Leadership
12 Successful Leadership
11 Successful Leadership
10 Successful Leadership
9 Successful Leadership
8 Successful Leadership
7 Successful Leadership
6 Successful Leadership
5 Successful Leadership
4 Successful Leadership
3 Successful Leadership
2 Successful Leadership
1 Successful Leadership

20 Focus on a balance between my work and personal life
23 Be modest but confident
21 Create a system of leading and managing
22 Do not dismiss yourself as inferior
1 Successful Leadership

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APPENDIX B Cognitive Map – Second Interview: Delegate 2
APPENDIX B  Cognitive Map – Second Interview: Delegate 3

1 Successful Leadership

2 Need to read more and educate myself

3 This is a continuous process

4 Integrate the Retail Academy information with other new knowledge

5 Offer different perspectives

6 Continue to share my knowledge gained with others

7 Integrate my work and Retail Academy

8 The need to know when to manage and when to lead

9 Allow people to lead in their own areas

10 Give people ownership and responsibility

11 Add value to workers career

12 Try to inspire them

13 People really make the difference

14 Share wrongs and fix it together

15 Follow and develop a process

16 Your attitude needs to be positive

17 Do things and do not always complain

18 Ask for people’s opinions

19 Delegate more

20 Get my staff’s inputs

21 Create an atmosphere of learning

22 Find solutions

23 I need to be a people’s person

24 Capitalise on my strengths and weaknesses

25 Get exposure to the leaders in the business

26 Utilise them and get their support

27 Sponsors and mentors

28 Plan this and follow through

29 Assist with changes and be part of it

30 Discuss it with staff and make it a group effort

31 Try to plan this and follow through

32 Capitalise on my strengths and weaknesses
APPENDIX B  Cognitive Map – Second Interview: Delegate 4

1 Successful Leadership

2 I need to focus on my staff

3 Need to be approachable at all times

4 We need to think on the same level

5 Deliver on my promises to them

6 Listen more

7 Question more and ask for advice

8 How do I see myself and where do I fit in?

9 I fear peoples’ perceptions

10 I will leave the company if it does not deliver on promises

11 I believe that Woolworths is not ready for me

12 Still too much of the "old School" managers

13 I feel that I am more developed than my current boss

14 They do not want to be challenged

15 I need to allow my people to make mistakes

16 Gain their trust

17 Need to be aware of my people’s problems

18 Confront the issues

19 I always believed that I need to be a step ahead

20 I now believe that I need to listen more and understand better

21 I need to understand the other parts of the business

22 I need to understand company processes

23 Put people first and then the business issues and processes

24 Create pride in Woolworths

25 Take my people along with me on the journey of development

26 People need to be able to raise issues openly

27 Your opinions should not be held against you

28 I need to apply my learnings from the Retail Academy

29 I need to improve on my results and work harder

30 Always look for simplicity within complexity

31 I need to apply my learnings from the Retail Academy

32 I need to understand company processes

33 I need to focus on my staff

34 How do I see myself and where do I fit in?

35 I need to allow my people to make mistakes

36 Gain their trust

37 Need to be aware of my people’s problems

38 Confront the issues

39 I always believed that I need to be a step ahead

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43 Put people first and then the business issues and processes

44 Create pride in Woolworths

45 Take my people along with me on the journey of development

46 People need to be able to raise issues openly

47 Your opinions should not be held against you

48 I need to apply my learnings from the Retail Academy

49 I need to improve on my results and work harder

50 Always look for simplicity within complexity
APPENDIX B  Cognitive Map – Second Interview: Delegate 6

1 Successful Leadership
2 Feel that I lack the skill to get to a higher level
3 Need to understand complexity issues
4 My perspectives change all the time
5 Process mapping an excellent tool
6 Created a new picture of a team
7 Can now relate to my team
8 Add value back into the team
9 Need a process of self-reflection
10 Understand myself
11 Understand other people: what makes them "tick"?
12 Help to develop them
13 Evaluate their strengths and weaknesses
14 Focus on the individual's strengths
15 All together we can form a strong team
16 Try to change people's "mindscapes"
17 Help them to fill the "gaps" therein
18 Look, assess and utilise people's skills
19 Focus on the team
20 Discuss and assess different ways of working
21 Listen and review others views
22 The onus is on myself to direct my development
23 Retail Academy not a guarantee for promotion
24 Where is Retail Academy going to take me and where does it fit in Woolworths
25 Understand the complexity of the business and related positions
26 The impact of the different areas on another
27 Understand the financial implications
28 The sustainability of the business
29 Need to upskill myself
30 Do I need to do an MBA?

24 Where is Retail Academy going to take me and where does it fit in Woolworths

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APPENDIX B  Cognitive Map – Second Interview: Delegate 7

1. Successful Leadership

2. Need to share knowledge across the business

3. People are my most important asset

4. Be aware of diversity

5. Understand the dynamics of a large group

6. Be appreciative of all efforts

7. Be tolerant

8. Need to go through a continuous process of learning

9. Reflect on learnings and experiences

10. Need to look at new ways of doing things

11. Understand the different aspects related to a new idea

12. How do I apply theory in the business

13. I need to lead by example

14. Be humble

15. Be aware of the rapid changing world

16. Also be aware that I need to change myself on a continuous basis

17. The process is often very slow, although people may be prepared for the change

18. Perseverance

19. Listen to what people have to say

20. Apply the lessons learnt

21. I do not always need to have the correct answer

22. We need to know who we are as a business

23. What is the identity of the business

24. How do I relate to this identity

25. What is my identity within the business

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APPENDIX B  Cognitive Map – Second Interview: Delegate 8

1. Successful Leadership
2. Be in contact with the people around me
3. On a broad base but also on an individual level
4. Understand the differences between divisions
5. How can Retail Academy help me to do this?
6. We are all leaders in our own areas of influence
7. The programme creates a "tool box"
8. Network within the business
9. Believe in the process
10. Know these areas and get exposure within
11. Allow the people to lead
12. Give clear messages
13. Align these differences to achieve the company’s vision
14. Develop my own leadership skills
15. Deal with matters in an ethical manner and according to my principles
16. Put realistic measurements in place
17. Need to respect people’s skills
18. Build a trusting relationship
19. We all should talk the same message
20. Be in contact with the people by walking around
21. Question the Woolworths leadership on an on-going basis
22. There is no real difference although we believe there is
23. Leaders need to deliver on their promises
24. I should be aware at all times what is happening "on the ground"
25. Woolworths executives are disappointing, I need to be different
26. Need to be in contact with people on all levels
27. Need to be truthful to myself and the CEO
28. Ask challenging questions
29. Get my team’s buy-in
30. "Friends" on a team can make this challenging
APPENDIX B  Cognitive Map – Second Interview: Delegate 9

1 Successful Leadership
2 I need to consider the people I work with
3 Recognise diversity
4 Who am I in all of this?
5 Accept people for what they are
6 Take people along on the development route
7 See if your people are coping
8 Surround myself with competent people
9 See that they have the correct attitude
10 Give feedback on an ongoing basis
11 Build a trusting relationship with all parties
12 Effective communication is a key to this
13 Plan and prioritise my actions
14 Learn to let go
15 Delegate more
16 I need to be a team player and leader
17 Understand the end in mind
18 Understand what motivates all the team members
19 Create a good working environment
20 Create shared methods of operation
21 Give people the scope and the correct tools
22 I need to be a team player and leader
23 Also share my knowledge
24 Create a learning environment
25 The impact of Retail Academy thereon
26 Remember to have fun
27 Network more in the business
28 Identify people with similar goals
29 Share your goals with them
30 Create a vision together

The impact of Retail Academy thereon
The diagram shows a network of ideas and actions related to successful leadership, including understanding diversity, building relationships, giving feedback, planning and prioritising actions, effective communication, and creating shared methods of operation.
APPENDIX B  Cognitive Map – Second Interview: Delegate 11

19 I need more time to absorb everything
15 Listen to all parties involved
16 Shape a new view together
13 What do people really want?
12 The impact of Employment equity
11 Particularly the African culture
18 Learn a few things from Retail Academy
17 Get more knowledge of the business
14 Realise that other people’s views are as important as mine
10 Understand the culture of the business versus that of the employees
9 Ask critical questions
8 Analyse the company
7 Need to think of doing an academic course
6 Need to equip myself as a person
5 Interactive “good” time
4 Form mentorships with staff
3 People who can help me to create a legacy
2 Need to work with the right people
1 Successful Leadership
17 Get more knowledge of the business
10 Understand the culture of the business versus that of the employees
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11 Particularly the African culture
18 Learn a few things from Retail Academy
17 Get more knowledge of the business
14 Realise that other people’s views are as important as mine

APPENDIX B  Cognitive Map – Second Interview: Delegate 12

1 Successful Leadership

13 Try to get into the minds of other people
14 This must take place on ALL levels
15 How do they measure their achievements
16 Try to listen more
12 Understand other parts of the business
11 Show your emotions and be empathetic
5 Be able to work in teams
6 Detailed work as well as team work
2 Understand the culture of the business
3 Manage diversity
4 Understand the people
7 Realise that you as a leader is not perfect
9 Have a clear vision
8 There is always somebody who can do it better than you
10 Where do you want to take your people
20 Be clear about your expectations, specifications and measurements
21 Live a healthy lifestyle
23 Practice good work ethics
28 Gain confidence
25 Build strong relationships within the business
26 Interact more with my colleagues
27 Do not sacrifice who I am and to be true to myself
29 To speak-up and get heard
30 To help others to express their opinions
22 Create a balance between body and mind
18 This will also give more clarity on business issues
17 This will help to "pick-up" different perspectives
19 Trust your "gut" feel
24 Live-up to your principles

APPENDIX B  Cognitive Map – Second Interview: Delegate 13

1 Successful Leadership

2 I need to know myself

3 What action do I need to take in order to achieve this?

4 The role of Retail Academy in this

5 Need to surround myself with the right people

6 Take drastic steps to rectify this if necessary

7 Give people the opportunity to prove themselves

8 They will find the correct level to do this on

9 Empower people

10 Do not fear this

11 Take your people with you

12 Recognise the individual

13 Be disciplined as a leader

14 My attitude should be positive

15 Learn and gain knowledge on a continuous basis

16 Learn from your mistakes

17 Have a holistic view of the world and our business

18 Encourage the ability “to think out of the box”

19Expose myself to the various disciplines of the business

20 Must be able to communicate on all levels of the business

21 Be aware of environmental influences

22 Continuous learning

23 The impact on the work environment

24 Have the courage to challenge people’s opinions

25 Gain confidence

26 Deal with frustrations

27 Make sure that people understand me

28 Make myself heard

29 Deal with issues without emotion

20 Must be able to communicate on all levels of the business
APPENDIX B  Cognitive Map – Second Interview: Delegate 14

1 Successful Leadership

2 Create and seize opportunities

3 Trust your instincts

4 Understand what my people do and need to do

5 Listen to my people

6 Resolve all people issues immediately

7 What is driving my people

8 People usually want me to help them

9 Listen actively

10 I need to pull the team together

11 Get closer to my people, understand their complexities, and strengths and weaknesses

12 Understand my people's readiness level

13 Pull them along with me

14 Use my connections in the business to my advantage

15 Target the correct people

16 Understand the business complexities

17 Raise my level of consciousness

18 Through Retail Academy

19 Be energised

20 Influence those around me

21 Try to get on well with all individuals

22 Be selfish in my own career development

23 Surround myself with the correct people

24 Base this on skills and competencies

25 Be focused on what I need to deliver

26 Try and contribute as much as possible

27 Observe and listen first before I take action

28 Give and get feedback

29 Do not internalise any problems

30 Develop my own management theory

20 Influence those around me

19 Be energised

18 Through Retail Academy

16 Understand the business complexities

14 Use my connections in the business to my advantage

15 Target the correct people

3 Trust your instincts

4 Understand what my people do and need to do

5 Listen to my people

6 Resolve all people issues immediately

7 What is driving my people

8 People usually want me to help them

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11 Get closer to my people, understand their complexities, and strengths and weaknesses

12 Understand my people's readiness level

13 Pull them along with me
### APPENDIX C

#### Clusters and Cluster Themes

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Themes of cluster</th>
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<tbody>
<tr>
<td><strong>Communication</strong></td>
<td>Ability to listen, interact, gain information, give information and provide feedback.</td>
</tr>
<tr>
<td><strong>Managing Change</strong></td>
<td>Awareness of changing environment and processes, and the impact on individuals and workplace, an awareness of how change is dealt with personally.</td>
</tr>
<tr>
<td><strong>Managing Diversity</strong></td>
<td>Awareness of the valuable role played by different cultures, personalities, genders, and diversity in general in contributing to a richer solution in the workplace. An awareness of the difficulties involved in ensuring that diversity is appreciated and harnessed.</td>
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<tr>
<td><strong>Personal Development</strong></td>
<td>Increased self-awareness, self-reflection and analysis, increased awareness of own strengths and weaknesses, increased insight into self, eagerness to learn, learning from others, striving towards a more balanced lifestyle, emphasis on career planning with a view to self-fulfilment.</td>
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<tr>
<td><strong>Strategic Thinking</strong></td>
<td>An ability to take into account multiple perspectives by considering different views, multiple information gathering, awareness of greater complexity.</td>
</tr>
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<td><strong>Environment</strong></td>
<td>Awareness of the broader context of business eg, marketing, competitors, suppliers.</td>
</tr>
<tr>
<td><strong>Ability to influence</strong></td>
<td>Ability to influence in and outside work environment, an awareness of what is required when attempting to influence people in one’s environment.</td>
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<tr>
<td>Networking</td>
<td>Awareness of the importance of networking particularly within the business, an increase in the need to make contact with people with similar ideas and thoughts, use people in the business to develop career, enhance the awareness of business related issues through networking.</td>
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<tr>
<td>Broader business experience</td>
<td>An eagerness to be exposed to and learn from other areas of the business and to work in these areas, gain a wider perspectives of broader business issues.</td>
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<tr>
<td>Teamwork</td>
<td>Awareness of own ability to lead and become an effective team-player, awareness of what is meant by productive interaction in a team or group.</td>
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<tr>
<td>Financial awareness and business acumen</td>
<td>Understand how financials work, its impact on the different areas of business, general business information.</td>
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<td>Principles</td>
<td>Business ethics, personal values.</td>
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<td>Leadership styles</td>
<td>Textbook quotes, jargon, aspirational qualities such as “walk the talk”, “learn to focus”, “take your people with you” etc.</td>
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<tr>
<td>Development of people</td>
<td>Valuing people as assets, developing, taking them along with you.</td>
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APPENDIX D

Cluster Analysis: First Interview

Cluster concepts for all delegates

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APPENDIX D

Cluster Analysis: First Interview

Cluster concepts for each delegate

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# APPENDIX D

## Cluster Analysis: First Interview

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APPENDIX D

Cluster Analysis:  First Interview

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Cluster Analysis: First Interview

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APPENDIX D

Cluster Analysis: First Interview

Cluster concepts for each delegate

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APPENDIX D

Cluster Analysis: First Interview

Cluster concepts for each delegate

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Cluster Analysis: First Interview

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APPENDIX E

Cluster Analysis: Second Interview

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## APPENDIX E

Cluster Analysis: Second Interview

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Cluster Analysis: Second Interview

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APPENDIX E

Cluster Analysis: Second Interview

Cluster concepts for each delegate

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Cluster Analysis: Second Interview

Cluster concepts for each delegate

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### APPENDIX E

Cluster Analysis: Second Interview

#### Cluster concepts for each delegate

**Delegate 9**

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APPENDIX E

Cluster Analysis: Second Interview

Cluster concepts for each delegate

Delegate 11

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# APPENDIX E

Cluster Analysis: Second Interview

## Cluster concepts for each delegate

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**APPENDIX F**

*Positive Effects and the themes and concepts associated with these Positive Effects.*

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<th>Themes/concepts associated with positive effects</th>
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<tr>
<td>Tend to be more open to new information.</td>
<td>Actively establishing new sources of information, business networking, educational sources, seeks feedback, listens to employees.</td>
</tr>
<tr>
<td>Are less externally information bound.</td>
<td>The ability to utilise new information, to create their own theories, to analyse.</td>
</tr>
<tr>
<td>Are more flexible in thinking.</td>
<td>Utilise new information, explore new ways of doing things, accept new ideas on management and business issues.</td>
</tr>
<tr>
<td>More affected by environmental changes.</td>
<td>Awareness of environmental impact on business eg globalisation, local and international economy, suppliers and competitors.</td>
</tr>
<tr>
<td>Are better strategic planners due to the consideration of more information from more perspectives, and greater flexibility in considering alternatives.</td>
<td>Consider different viewpoints, weigh-up different ideas, the analysis thereof and utilise this for the creation of future strategy.</td>
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APPENDIX G

Positive Effects of Cognitive Complexity: First Interview

Positive effects for all delegates

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APPENDIX G

Positive Effects of Cognitive Complexity: First Interview

Positive effects for individual delegates

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**APPENDIX G**

Positive Effects of Cognitive Complexity: First Interview

**Positive effects for individual delegates**

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APPENDIX G

Positive Effects of Cognitive Complexity: First Interview

Positive effects for individual delegates

### Delegate 5

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APPENDIX G

Positive Effects of Cognitive Complexity: First Interview

Positive effects for individual delegates

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APPENDIX G

Positive Effects of Cognitive Complexity: First Interview

Positive effects for individual delegates

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<tr>
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APPENDIX G

Positive Effects of Cognitive Complexity: First Interview

Positive effects for individual delegates

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APPENDIX G

Positive Effects of Cognitive Complexity: First Interview

Positive effects for individual delegates

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

Positive effects for individual delegates

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

Positive effects for individual delegates

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

Positive effects for individual delegates

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

**Positive effects for individual delegates**

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

Positive effects for individual delegates

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

Positive effects for individual delegates

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APPENDIX H

Positive Effects of Cognitive Complexity: Second Interview

Positive effects for individual delegates

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APPENDIX I

FUTURE MAPS

Delegate 1:

A. First Interview

Year One:

• First four months:
  o Sponsor 2 month projects
  o Meet with mentor 6 weekly on 2 broad issues
  o Scanning for new position to aid my diversity aspect
  o Attachments in business units (broad)
  o Store Operations Understanding

• Next four months:
  o Develop role-model relationship
  o Step up on commercial economy reading

• Last four months:
  o Formalise part-time support
  o Close line manager relationship

• End of First year:
  o Retail Academy completion

Year Two:

• First four months:
  o Apply for new position
  o Serious career path discussion – proposing development plan to Category manager

• Next four months:
  o Cross-functional shadowing
  o Do financial/commercial course
• Last four Months:
  o Become a Category Manager

Important:
Family support and buy-in during the two years are extremely important.

B. Second Interview

August 2001  First interview
Start with Retail Academy
August to November 2001  Gain understanding of Planning role
November 2001  Second Interview
November to February 2002  Gain understanding of Buying role
February to August 2002  Category manager understudy
August 2002 to January 2003  Sores Foods Manager understudy
January 2003 to January 2004  Category Manager of a small department
January 2004 to January 2005  Category Manager of a larger department

Delegate 2:

A. First Interview

Currently Textiles manager looking forward to a General management position as store manager in about 6 months should there be an opportunity. Further earmarked position would be that of a regional manager in about 2 years time. Parallel to the above also complete the Retail Academy by next year June.

Retail Academy seen as a vehicle to prepare me to be considered for a strategic position in the business i.e. regional manager and further on to an executive position based at head office within
a period of about 5 years. My role that I expect to play will be to contribute and add value to my organisation. My performance and networking will play a role to enable me to achieve the above.

My future plan will thus be based on a five-year period, as follows:

- Currently Textile manager; approximately 6 months
- Branch Manager; approximately 2 years
- Regional manager; approximately 3 years

B. Second Interview

Currently Textiles Manager
June 2002 To complete Retail Academy and to do as well as I possibly can
June 2002 To manage my own large store
January 2003 To gain Head office exposure to understand the dynamics of the business at large
June 2003 To be ready to become a regional manager

My focus going forward will be to benchmark my performance against my achievements and to do even better.
Also to look at the possibilities of furthering my studies, for example to enrol for a MBA which will give me the opportunity to “beef-up” my Retail Academy knowledge.

Delegate 3:

A. First Interview

Career Path ahead:

2001 June Current position
Medium size store manager Foods Stand alone
2002 July Large size store manager Foods Stand Alone
2004 January Medium size store manager Full line
2005 July Large store manager Full line
2006 July Regional manager Foods alone
2008 January Regional manager

The steps that I will follow to reach my goal:
- Ongoing training
  - Self
  - Subordinates
  - Peers
  - Line
- Self development in all areas
  - Able to identify weakness
  - Mentoring, i.e. Retail Bridging Programme and Classical Training Programme
  - Improve overall understanding of the business

A. Second Interview

July 2001 – July 2002 Retail Academy
  Foods store manager, Foods Stand Alone store
  Attachment to full line stores
  Drive Retail Academy learnings within the store and region
Late 2002 Move to another Foods Stand Alone store or small full line store
2003 – 2005 Move to Head office Foods group or become a regional specialist

Detail:
- Next move, within the next 6-18 months will be to a large foods stand alone store or to become the foods manager to Eastgate or Sandton.
  - In order to achieve this, I will be expected to complete my current goals with regards to Retail Academy. Learnings need to be applied.
I will have to prove my ability and competence in the running of my current store, Paulshof.

My main purpose will be to ensure that I play an effective role in managing and leading the store.

My focus will be to maximise selling opportunities to increase sales growth.
  - Improve customer services and maintain the company standards.
  - Manage costs by controlling expenses.
  - Utilise the resources available to me, to develop my team members and myself, in order to improve business within the company.

Delegate 4:

A. First Interview

Plotting my career aspirations:

August 2001  Foods manager Cresta
June 2002  Complete Retail Academy
August 2002  Store manager of a Medium size store (Full line store)
June 2003  Regional manager

I am currently Foods manager Cresta and at the same time on Retail Academy 2001. I believe that with my current skills as Foods manager and the learning that I will gain this year in terms of the theory and practical projects I will be completing on my own and with the rest of the group, I will reach my goal in completing Retail Academy by June 2002.

I have prior to my arrival at the GSB set a development plan with my line manager in terms of succession, which highlights the mapping above. I have also been identified for fast track development and will use all possible resources in achieving my desired goals in becoming a store manager of a Foods/Textile store. As I am currently in a Foods/Textile store and have been a store manager before I will only have to acquire the necessary textiles experience in order to
make me an effective full line store manager. This I will acquire by completing at least a six-week (part-time) textiles attachment with the textiles manager in my store from January to March next year.

In terms of the regional position I do not have much influence at this stage, but the business is aware of my career development aspirations, and as there is currently no so called “black” regional in the business I am destined to become one.

B. Second Interview

August 2001 Started Retail Academy
November 2001 Completed Second block of Retail Academy
March 2002 Benchmark exercise
May 2002 Final block of Retail Academy

- I am confident that I will complete Retail Academy successfully.
- I believe that I am still on track with regards to the future map completed in August 2001.
- I will be contracting with my immediate line managers to set up a detailed development plan in terms of reaching my goals of becoming a regional manager for foods stand alone stores by August 2002.
- I will be using the knowledge gained at the GSB, plus the networking with fellow Retail Academy candidates, as well as any contacts made during this process, to reach my goal.

Delegate 5:

A. First Interview

Vision and then how to reach my goal.

Goal:
Successful leader in Woolworths.
• The first big step or milestone would be the completion of Retail Academy 2001/2002.
• Within this year I need to get to know the Woolworths Business. I need to build relationships with suppliers, strategic alliance partners and people in all the departments and business units.
• The journey start today and each “study block” would be a milestone. What did I learn? How do I apply the learning in my everyday life and how do I part with the knowledge?
• I need to expand my circle of influence and this needs to happen immediately. I need to make my presence felt. Everyone has a very unique contribution to make to the team. I need to speak my mind and share my views.
• I want to spend this next year to build skills and enhance my knowledgebase. I want to grow in confidence, not only in what I do, but also in how I do it.
• From day 1 I need to take full responsibility for my actions and choices.
• I want to move out of my current job within the next 12 months. I would like to move to the project office in Woolworths Financial Services. However, I need to get exposure to Woolworths within the next 6-8 months. This will influence my decision re the next step in my career.
• I want to be in a senior manager position within the next 36 months.
• As a leader I will start changing the culture in Woolworths immediately. I don’t see myself as a very formal or autocratic leader but rather someone that will empower everybody to make decisions.
• I do believe that my life is going to change significantly from today.

B. Second Interview

Woolworths background:

I have been with Woolworths Financial Services for the past six years.

I have stated my career as a collections clerk and was promoted within six months to a departmental manger. I have spent three years in the Credit Management area and 18 months in the New Business area. I have spent the past two years in a Business Analyst position.
The Next Phase:

Financial Services can be divided into two main areas namely the Operational area and the Support and Development area.

I have spent time in both areas and this gives me a good foundation for a future leadership role. Within the next six months I need to move into the Risk Department.

I understand the business and the products from both the Call Centre agent perspective and the Business Analyst role. This includes the systems used in all areas.

The reason for moving to the Risk Department is to understand the use of management tools – thus the application of software packages that minimises risk and optimises profitability.

This will complete my acquisition of acquiring knowledge regarding the products and process within Financial Services. The learning’s will be action based and will be hands on.

I will spend two years in the Risk Department. From past experience the first year is spend getting to know the “system” and then 6-12 months at adding value back into the system. Within two years I will move back to the operational area. I will be a general manager and not a specialist manager that takes responsibility for all departments of function.

This will allow me to manage managers within the business.

After three years I will move to the level of Head of the Operational Area.

6 Months May 2002 Risk Department
2 Years May 2004 Operational Area
3 Years May 2008 Head of Operational Area.

Delegate 6:

A. First Interview

To progress my career as follows in a linear fashion:

- Grow Claremont’s sales to R3 million
- To complete Retail Academy
- To complete a National Diploma in Marketing
- Increase level of Job Knowledge
• To increase competency level
• To complete the MDP course
• To become a Category Manager

B. Second Interview

I see myself wanting to fill the position of Protein Buyer for a year to understand the dynamics of how the department operates.

My next move should then be into the position of a Produce Buyer because at the end of the 2 to 3 years I would have a good understanding of how the biggest departments in Foods operate. I believe that this will give me a holistic approach to how the Foods Departments, even though they really do work in silos, create the synergy that sustains our Foods Business.

I would then see myself moving into a Category Manager position because at this time my Leadership skills would have developed to the level that is indicative of managing a high level of staff. I am of the strong belief that people can make you or break you. Hence my objective would be to surround myself with a strong dynamic team of people. In the above position I see myself full filling the roll for at least 4 to 5 years.

I believe that if I follow this route it will lay out the building blocks that I would need to propel myself into the Executive arena.

I have tried not to be naïve and place myself at risk with the goals that I have set for myself, but am of the opinion that by following the simple steps and gaining the necessary tools to do the job I will succeed.
Delegate 7:

B. First Interview

Some people have an innate sense of leadership and others use their experience as a frame of reference. For myself I would want to create a balance between the two and grow that with every new experience gained. There isn’t at one specific point that I would consider myself a successful leader – Leadership can be displayed on various levels on an ongoing basis i.e. Visionary leadership, Practical leadership, mustering the troops.

For myself I see being the National Finance Admin Leader for Retail Operations as a goal to achieve within the next five years. At this point my leadership should be reflective of my experiences gained.

Retail Academy and my current portfolio is the First step in achieving this goal. Successful integration of operational and strategic processes and implementation thereof will assist me in furthering my career.

A year spent in Finance Head Office will enhance my current Finance background. Linking Finance and all it’s business decisions to the Field will provide me with a firm foundation for the way forward.

The learning’s gained previously provide one with a platform from which to affect change. In the position of Regional Finance and Admin for the entire South Division, your outputs would be move holistic in a sense that it would have an operational as well as strategic component. A critical objective, as the National Finance and Admin Leader, would be to lead the business in the marketplace along clear and profitable lines. In this position I would together with my team, bring to bear the following:

- My previous Finance background
- Current market trends
- Business strategies, ethics, Operating plans
B. Second Interview

No matter where I see myself in the future, my past achievements and accomplishments are always right beside me.

I realise now that, although the past successes and achievements form a firm foundation, I still have so much more to learn. The ways to future achievements are definitely by networking, systemic thinking and a want to learn.

I am still going to follow the steps that I outlined in the previous future mapping exercise. However, I think it would take longer to achieve than what I initially indicated. I realise during the last Retail Academy block that to change anything on the work front takes time. I have to persevere and stick to my plan with tenacity.

My plan is still to complete Retail Academy, join Head office late 2002 for a one-year “stint” in finance. I will then come back into the field as the divisional finance manager for the South division. Thereafter I want to become the National Finance leader.

I intend to spend time in the other areas of the business to gain a better understanding of the entire business, particularly the franchise division. I think that it is very exciting and that it is the way to do business in the future. During the early part of next year I am going to spend time in foods, textiles and financial services. I will be using my Retail Academy colleagues to gain this knowledge.
Delegate 8:

A. First Interview

Where do I see the future for myself?
The best way I can plot this is to approach it from two angles, firstly the immediate future i.e. 18 months. The second angle, I would prefer to plot my future based on those areas that I have influence over by making use of life skills obtained in the past.

I personally have a problem at plotting a future chronologically with fairly specific dates, as I firmly believe this will inhibit me in the way which I will grow and see things differently.

Yes, I wish to be successful and yes I wish to lead people and organisations, collaborate, inspire and leave a legacy, however specific goals tied to dates don’t allow me enough freedom to explore other options which may or may not be successful. In my mind a large proportion of my growth has been inspired by both knowledge, but more importantly the application thereof in life lessons.

My vision or goal for the future near and far are as follows.

I would like to complete the Retail Academy successfully and by this I mean growing as a person, growing with my colleagues, growing with Woolworths and most importantly growing into an identity that epitomizes wisdom gained from life skills obtained in the next 18 months. For the future I would like the feeling of elation of growing into senior position due to the leadership of the company recognising my leadership qualities, as well as a person who walks the talk and has empathy for all those around him. I wish to leave a legacy, not so much for my name to be remembered or any achievements, but more importantly for the way in which I conducted myself and the way in which I lead and inspired people.

The skills that I will require in achieving my success are interdependent on those areas that I move into as I begin to grow within the company. I would like to have the tools for handling
diversity, as well as the tool (personality) to inspire those around me. I could name several other skills i.e. negotiating skills, crisis management, economics, accounting principles / business principles, but strictly speaking these are tools without application, I need to most importantly learn from the situation around me and others, and translate these experiences into life skills.

B. Second Interview

After reading through my first future-mapping document I’m surprised at the insight I had to this Retail Academy program even before it had started. A lot of things I wished to achieve in the previous process are still the same however I now realize that I was poorly equipped to achieve those desired outcomes. The last three months have created more opportunities and provided me with more tools to accomplish some of my goals.

I also still believe that a time line for my future development is an inhibitor for the same reasons I have previously stated. I am at a point in my life where I want to experience different opportunities and just seeing where the opportunities lead me. Each time I encounter a critical learning I see myself in a different light, and when this happens my outlook on my future changes and I start looking at things from a different perspective. I believe at the moment I’m continually reframing with the more I learn, and each time I reframe the process becomes clearer.

I can only experience what I experience, but it’s the way in which I reflect and draw on that experience each time that changes.

Delegate 9:

A. First Interview

Future achievements:
My greatest ambition for the near future is to become the first black female Merchandise Manager at Woolworths by the end of 2003.
The immediate goal is to do well in the Retail Academy as this form a very important part in my management developmental skills. The knowledge that I will gain from the business school will go a long way in achieving some of the goals.

In order to be a successful manager, the following are key areas that will help towards my success. These are areas that I feel I need to master.

2. People Skills:
   - The greatest challenge that faces most managers is that of diversity and the management of people from different cultures, backgrounds who have different beliefs etc.
   - I need to develop the art of giving negative feedback without offending or de-motivating them.

3. Business acumen:
   - I need to understand the bigger picture at Woolworths and how each department contributes to the success of the organisation. This can be achieved through attachments to other areas of the business and also being in touch with the board members, departmental heads etc.
   - Understand the planning system through working closely with the planners and attending planning courses.

4. Management skills:
   - I feel that this is a continuous learning process and that Retail Academy will address most of these issues.
   - This ranges from delegation of work, empowerment of subordinates, building trustworthy relationships and maintenance.

5. Self management:
   - Ignored to effectively manage people, one needs to self manage them first and I feel that this is an area that I need to work on.
• Includes time management and being critical with oneself. This is one of the ways in which I can grow as a person. Need to constantly review and evaluate what I am doing right or wrong and be able to get feedback from my peers, manager and subordinates.

B. Second Interview

Current:
I am currently a senior buyer for lingerie and feel that I have been very successful in this area. It has been extremely challenging and in the past two years and I have gained so much experience that has built my confidence levels.

We have just completed a very successful campaign in “Breast Wellness” and I gained a lot of insight on how the marketing department works. The campaign was about how to keep in touch with yourself and your body in order to beat breast cancer. It highlighted breast self examination that must be conducted once a month.

An area that I am still working on is to improve my management practice and to help my subordinate to reach her potential.

Six months from now:
I have recently applied for a position in Marketing as a Brand manager for Childrenswear and Cosmetics. My application has been successful and I will therefore start with this new position in about two months time.

The next six months are going to be crucial in my life. I need to devote a lot of my time to learn my new job responsibilities and my Retail Academy projects. The challenge will be to transfer my learnings and also to make a difference in my new job.

The Brand management position is in line with my recently completed Diploma in marketing management. I feel that it would be challenging to put into practice what I have learnt.
One year from now:
I want to complete the Retail Academy programme successfully. I also would like to study further. My main aim is to get a good handle on my new job and to really make a difference.

18 Months from now:
I would like to start my MBA part-time, hopefully through the Graduate school of Business at UCT.

Three years from now:
I would like to be a marketing manager either within Woolworths or any other successful company. I also would like to get married and start with a family.

Five years from now:
I would like to run my own business and not work for anyone else.

Delegate 10:

A. First Interview

My Future Map
Looking ahead at my career – my successful goal will be the promotion to the Woolworths board of Directors. I am aiming to achieve this goal by no later than the month and year of July 2015.

The milestones and events leading towards becoming a Director at Woolworths:

- Successful completion of the Retail Academy – during which time I hope to implement great ideas and solutions through the various projects.
- On completion of RA my next step is to be promoted to a merchandise manager (MM) or Group merchandiser (GM) of a textile area outside Childrenswear, possibly Womanswear or Menswear. This is to get experience outside of Childrenswear. I feel I should remain a MM
or GM for 2-3 yrs maximum. During this time I will do attachments and/or projects with marketing, finance and HR.

- My following move would be to go across to Foods and get the exposure and experience there. I would intend to stay in foods for 3yrs.

- I would then move back across to textiles as either a MM or GM depending on which area I did not do after RA. I would continue in this area for 1-2yrs.

- The next move I would intend on making is becoming a Group head of one of the Textile groups. I would stay a Group head for 3-4 yrs.

- My next level I would move to will be Managing Director of either Textiles or Foods (preferably Textiles) or both over the next 3-7yrs at different times.

- The next move will be a Director of Woolworths.

B. Second Interview

Changes are underlined.

My Future Map
Looking ahead at my career- my successful goal will be the promotion to the Woolworths board of Directors. I am aiming to achieve this goal by no later than the month and year of July 2015.

The milestones & events leading towards becoming a Director at Woolworths:

- Successful completion of the Retail Academy- during which time I hope to implement great ideas and solutions through the various projects - this step is part way there with the successful implementation of Assortment planning (my project) into the business and achieving some good results at GSB.

- On completion of RA my next step is to be promoted to a merchandise manager (MM) or Group merchandiser (GM) of a Textile area outside Childrenswear, possibly Womanswear or Menswear. This is get experience outside of Childrenswear. I feel I should remain a MM or GM for 2-3yrs maximum. During this time I will do attachments and/or projects with marketing, finance and HR.
• My following move would be to go across to Foods and get the exposure and experience there. I would intend to stay in foods for 3yrs.
• I would then move back across to textiles and work in the project area on possibly an Executive level - I would like to get involved on a very strategic level. I would continue in this area for 1-2yrs.
• The next move I would intend on making is becoming a Group head of one of the Textile groups. I would stay a Group head for 3-4yrs.
• The next level I would move to will be Managing Director of either Textiles of Foods (preferably Textiles) or both over the next 3-7yrs at different times.
• The next move will be a Director of Woolworths.

Delegate 11:

A. First Interview

My ultimate goal is to become the store manager of Sandton store.
Why?
When I stared with Woolies Sandton store was the number one store. Currently it is number two, my main goal is to take it back where it belongs. This will happen within the next five years. It will take perseverance, determination, inspiration and equipping one self with self-development courses, seminars and attachments to different spheres of our business.

Step 1 Do the following affirmation on a daily basis: As long as I can conceive it, believe it, I can achieve it.
Step 2 Visualise myself being there already.
Step 3 Start to prepare by getting information, asking the right questions, often checking whether they are relevant, real and achievable. Consolidate and write what I have consolidated down and read frequently.
Step 4 Setting that goal, giving it a time frame, Reading it frequently.
Step 5  Put my name forward for succession planning and do follow-ups and doing some recommendations like how about being deputy manager in that particular store.

B. Second Interview

No Future map was completed during the second interview

Delegate 12:

A. First Interview

Visualise: Successful leader in Woolworths
Action Plan: Now - Retail Academy
          + 2-3yrs - 2005

ACTION: DATE:
1. Complete Retail academy – with application 2002
2. Get broader exposure to the following areas in the business:
   Textile, Woolworths Financial Services, IT 2002 – 2003
4. Get more staff/team management exposure 2002 – 2004
5. Gain a better understanding to how economic markets work
   and how/what influences analysts and potential investors to
   bring insight into the business 2002 – 2004
6. Get more involved in Community and give back some of what I learnt 2003
7. Take time out to have a baby As God will
8. Look more after myself and take time out when needed. Ongoing
9. Be a personal assistant to a leader who I respect and admire. 2004
10. Continue with attending spiritual classes Ongoing
11. Stay the core person I am but GROW  
12. Get more exposure to other leadership thinking – from a 
   perspective, Retail, Economical. Etc.  
   Personal:
13. Decide/Identify opportunities for my own business:  
   What is my potential to address a Niche that I can perform 
   BUT for which there is a need  
14. Identify market, capital requirements and compile a business 
   plan for my own potential business  
15. Gain an insight into people ”motivators”  
16. Identify/gain more knowledge on Human Resources and 
   Industrial Psychology Issues  
17. Gain more knowledge about Corporate Governance and its 
   impacts  
18. Gain a better insight into True Empowerment and what it entails 
   and apply it successfully  
19. Deal effectively in terms of Conflict Management BUT to 
   maintain my personality (Definite major work required)  
20. Believe more in myself  
21. Stress and worry less  
22. Learn to listen more effectively  
23. Learn to say NO more often  
24. Stop being so hard on myself  
25. Be courageous (more so now)  
26. Not forget that there is a higher Power and that I am but one 
   soul in a sea of many – Remain humble with both feet on the 
   ground  
27. Stop procrastinating  
28. Share my thoughts and reasoning more  
29. Be more self-aware and tune into my own and other people’s 
   emotions more
30. LISTEN! From today
31. Look after my body and health more From today
32. Make time to read From today
33. Enjoy LIFE and all it has to offer From today

B. Second Interview

Life plan:

Spiritual: next year continue with current spiritual classes of three times a week
to enhance my spiritual side in preparation for Pilgrimage
5 years performed Holy Pilgrimage
10 years

Physical
next year now a size 36
a healthy lifestyle
5 years to get to a size 34
maintain a healthy lifestyle
10 years to stay at a size 34
continue to maintain a healthy lifestyle
eating properly
exercise regularly

Career
next year to manage a team
to get a new job
5 years to be promoted at least once
getting involved in community services
10 years to become a director or own business
to get very involved in community service

Home
next year to stay happily married
kids?
5 years to stay happily married
to have two kids, hopefully twins
10 years to stay happily married
to have another child
to have my parents living with me

How am I going to get there?

- Successfully complete Woolworths Retail Academy.
- In the process, identify opportunities (and seize them) to getting to manage a team (maybe probably a new job).
- Think systematically about my area and how I can make our team more effectively by using team feedback/tools for teams and working more integrated with people who impact on us and on whom we impact.
- Obtain an even broader understanding of the business and other businesses by networking (locally and internationally), working with other people, researching and feeding back to the team.
- Pass on the tools of hard systems, soft systems, facilitation, process mapping, insight into the supply chain, marketing, etc. to colleagues/team, for example a combination of facilitation, coaching, presenting and feedback.
- Listen more and then comment.
- Epitomise leadership, but still remain humble and part of the team.
- Know when to follow and when to lead and continue my mentoring with Simon Susman.
- Get to know people in my team and balance a culture of delivery, accountability, responsibility and empowerment, whilst still having fun and enjoying life.
- Help people to think long-term, plan better and get a better insight.
- Eat and develop a healthy lifestyle that will ensure that I lose weight, for example eat health, more and breathe properly.
- Continue attending spiritual classes at least three times a week.
- If God graces us with children, to embrace and enjoy the process and experience. If necessary reframe and decide on another course of action.
- To learn to trust my instincts, believe in myself more and give feedback sooner rather than later.
- Explore community service opportunities and get involve with it.
- Potentially study further, but still working to maintain and enhance my married life.
Next 5 years:

- Maintain, embrace and apply my learnings and life experiences and be exposed to leadership and to be a leader.
- Help, motivate and encourage people to achieve their goals.
- Looking at career plan to get to the next level.
- Reviewing options for own business.
- Doing research on options and putting together business cases and plans for options (including capital investment required).
- Compiling capital required so that ideal opportunity, timing and capital can come together.
- Alternatively, move through the ranks of business whilst epitomising leadership, inspiring people and getting the right people around me, for example those who are different but have the same ethos as myself.
- Learn, learn and integrate, integrate and integrate.

Delegate 13:

A. First Interview

No future map was completed during the first interview.

B. Second Interview

A year from now I would like to see myself in a position where I would facilitate the operation of an area in Woolworths Financial services. I have looked at two areas that would allow me to achieve this goal and the personal development and physical action. Below, I have listed the steps that I will follow to pursue my objective.

Personal Development:

- In order to raise my level of consciousness, I will endeavour to continuously reflect about the surrounding environment and myself.
- I will be very clear in my communication and furthermore learn to listen better.
- I will also work on certain of my leadership competencies, for example, having the courage of my conviction to act and engage in the relevant debates.
I have also learnt that there is no single point that one is completely ready to do the next job but rather to have the confidence of accepting the next challenge. My personal truth is that I may lack the courage to take on the new responsibilities but with the growing will assist in getting to the next phase quicker.

Physical Steps:
• Identify the area that I would enjoy as well as have the capacity to lead.
• Learn the technicalities of the area.
• Understand the current issues of the area.
• Have discussions with relevant parties to identify my development in order to close the gap.

Delegate14:

A. First Interview

Time: One Year
1. Communicate my vision, goals, and objectives to my line manager, to get buy-in.
2. Attachments to all areas in the business.
3. Attachments to key persons in the business.
4. Weekly/Fortnightly meetings with mentor.
5. Daily interaction with Sponsors and team-members.
7. Read contemporary books/reading material on:
   a. Retailing
   b. The Value Chain
   c. The Customer
   d. Strategy
   e. Competition; etc.
8. Get Retail Academy Team to set up monthly meetings with various Management Committees in the business, e.g. MMC, TMC.
9. Implement learning from the Retail Academy Learning Interventions e.g. GSB
10. Attend relevant workshops and seminars
11. Engage in Benchmarking exercises – best practices
12. Commit to Healthy Living
13. Become involved in the Finance Community Affairs Project

B. Second Interview

Steps that I need to take to get to my future goal:
- Create and seize the opportunity.
- Simplify things…80/20 principle.
- Have an end in mind. Have a clear vision.
- Focus, focus, focus...
- Trust my instinct.
- Network and forge relationships.
- Take a leap of faith.
- Look after my own body and mind.
- Construct my own Theory of Management practice.

Two-year future plan
- Apply for position of manager, Imports, Sundry debtors and Properties. The job is about managing people and processes. This is a gap in my leadership competencies. I need to develop my general management skills and gain an understanding of finance processes. My current job is about expense management and is business unit focused, which gives me a very narrow exposure and understanding of the business.
- After about one and a half years: look for opportunities in operations or possible a finance operations position (stores finance). I also need to gain exposure to the supply chain.
APPENDIX J

RICH PICTURE ISSUE ANALYSIS

ISSUES
The following issues emerged from the rich picture.

7. Skills retention.
8. Appreciation of diversity.
9. Developing a large pool of untapped talent.
10. Suppliers to become true strategic partners.
11. Implementation of vision and strategy.
12. Empowerment of people.
13. What do customers want?

ISSUE 1:

RELEVANT SYSTEM 1

First iteration
A system that retains skill within the organisation.

Retain (what does this mean?)
Skills (which skills should be retained?)

Second iteration
A system that seeks to keep strategically important skills within the organisation

What are strategically important skills?
ROOT DEFINITION 1

**Customers** – employees, organisation, shareholders *(first iteration)*
- employees who possess skills that contribute to the competitive advantage of the organisation, the organisation, shareholders *(second iteration)*

**Actors** – HR, employees, MD

**Transformation** – A system of rewards, recognition and incentives that are sufficiently attractive to keep strategically important employees. *(first iteration)*

A system that encourages strategically important employees to remain highly motivated and productively employed by the organisation. *(second iteration)*

A system that encourages employees who possess skills that contribute to the competitive advantage of the organisation to remain highly motivated and productively employed by the organisation. *(third iteration)*

**Weltanschauung(en)** – certain employees are assets which are essential to business success and should be valued and retained.

**Owner** – HR, MD

**Environment** – labour market (skills shortage), competitors, social conditions (crime, poor health and educational systems)

**Root definition** – A system that is owned by the MD and operationalised by HR, which encourages employees who possess skills that contribute to the competitive advantage of the organisation, to remain highly motivated and productively employed by the organisation, to the extent that the organisation remains competitive over the long-term in a labour market of declining skills.
CONCEPTUAL MODEL 1

First Iteration

1. **Define the organisation’s competitive advantage.**
   - Define the activities, which are unique to the organisation and which set it apart from its competitors.

2. **Identify the skills within the organisation, which are essential to maintaining this competitive advantage.**
   - Identify the specific skills required in order to maintain these activities.

3. **Identify the particular people in the organisation who possess these unique skills.**
   - Conduct a skills audit through interviews, performance appraisals, recommendations by line managers, colleagues, subordinates, assessments by independent consultants, objective assessment systems, ask people to nominate themselves.

4. **Determine what system would motivate these employees and ensure that they remain productively employed within the organisation.**
   - Conduct interviews with these employees to determine what motivates them and what their values and aspirations are.
   - Discuss ways in which these values and aspirations can be met.
   - Structure unique systems for each employee.
   - Track international trends in this area and what other leading organisations are doing.

5. **Implement this system.**
   - Allocate resources.
   - Ensure it remains relevant.
6. **Monitor performance.**
   - Monitor through retention statistics of valued employees.
   - Monitor through comparisons in cost of lost skills, recruitment and training versus cost of retention packages.
   - Monitor through financial performance.

7. **Continually review 1 and 2.**
   - Ensure that identified competitive advantage remains relevant.
   - If the definition of competitive advantage shifts, the definition of key skills will do likewise.

**Second Iteration**

1. **Define the organisation’s competitive advantage both in the short-term and long-term.**
   - Define the activities, which are unique to the organisation and which set it apart from its competitors currently.
   - Define the activities that are essential to the long-term sustainability of the organisation.

2. **Identify the skill within the organisation, which are essential to maintaining this competitive advantage over the long-term.**
   - Identify the skills required currently to maintain competitive advantage.
   - Identify skills that are required to maintain competitive advantage over the long-term.

3. **Identify those people in the organisation who possess these unique skills as well as those who have the potential to develop these skills.**
   - Conduct a skills audit through interviews, performance appraisals, recommendations by line managers, colleagues, subordinates, assessments by
independent consultants, objective assessment systems, ask people to nominate themselves.

4. **Determine what system would motivate these employees and ensure that they remain productively employed within the organisation.**
   - Conduct interviews with these employees to determine what motivates them and what their values and aspirations are.
   - Discuss ways in which these values and aspirations can be met.
   - Structure unique systems for each employee.
   - Track international trends in this area and what other leading organisations are doing.

5. **Implement this system.**
   - Allocate resources
   - Ensure it remains relevant.

6. **Monitor performance.**
   - Monitor through retention statistics of valued employees.
   - Monitor through comparisons in cost of lost skills, recruitment and training versus cost of retention packages.
   - Monitor through financial performance.

7. **Continually review 1 and 2.**
   - Ensure that identified competitive advantage remains relevant.
   - If the definition of competitive advantage shifts, the definition of key skills will do likewise.

**COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’ ISSUE 1**

The rich picture reveals the lack of an adequate system in place at Woolworths that encourages employees who possess skills that contribute to the competitive advantage of the organisation to remain highly motivated and productively employed by the organisation. This has resulted in
Woolworths loosing many of its key people to competitors and opportunities elsewhere. The members of staff in the senior levels of the organisation appear not to be conscious of this. No record is kept of this loss and no cognisance seems to have been taken of its impact on the company.

The next step in this process would be to discuss these findings with key members of the organisation in order to sharpen the rich picture. Once the picture more accurately reflects the real situation the analyst can move towards gaining agreement from actors about activities which are functionally deficient and require attention. This finally culminates in action, but before this happens the analyst must ensure that there is both agreement within the organisation that these are valid and accepted and secondly that the organisation is culturally ready for these changes. These three final steps of the SSM are not implemented by the researchers as this is obviously not appropriate. The first five steps were used by the researchers simply as a tool to analyse the situation and to assist in making sense of the information gathered.

**ISSUE 2:**

**RELEVANT SYSTEM 2**

**First iteration**
A system that appreciates diversity.

What does appreciate mean? What is diversity?

**Second iteration**
A system that recognises, and employs, strategically and operationally, the strengths of diverse skills that come from previously disadvantaged communities and women.
**ROOT DEFINITION 2**

**Customers** – employees from previously disadvantaged communities and women.

**Actors** - MD, line managers, employees, HR

**Transformation** - A system that recognises the strategic importance of employing diverse skill within the organisation and which ensures that these skills are employed in a strategically meaningful way.

**Weltanschauung(en)** – Organisations in which diversity is valued and meaningfully employed will enjoy competitive advantage.

**Owner** – MD.

**Environment** – Competition for scarce skills in sectors of diversity, white managers who do not appreciate the value of diverse skills, people of diversity who are suspicious of systems which employ them as ‘window-dressing’.

**Root definition** – *A system that is owned by the MD, which recognises the strategic importance of employing diverse skill and which ensures that these skills are deployed in a strategically meaningful way, in an environment of employee sceptism from both white managers and beneficiaries of the system.*
CONCEPTUAL MODEL 2

First Iteration:

1. The MD issues a statement of intent about the organisation’s commitment to employing diverse skills within the organisation in a strategically meaningful way.
   • The MD to define what is meant by ‘strategically meaningful’ by making explicit where these skills might be deployed in order to provide strategic advantage and how.

2. HR develops through consultation with key players, representing all actors, a system for implementation of this policy.
   • HR identifies key players who represent senior management, middle management and beneficiaries of this system.
   • Interview these individuals with the intention of gaining their view about how this system should work.
   • Gather information from companies who have successfully implement this system.
   • Develop a first draft and conduct a number of iterations in consultation with key players in finally reaching a workable system which can be piloted.

3. Implement the system.
   • Allocate resources.
   • Put systems and procedures in place that will ensure implementation.

4. Continually evaluate and improve on the system.
   • HR should be constantly in touch with all players affected by this system to gain feedback about how it is working and how it can be improved.

5. Monitor the success of the programme on a strategic level.
   • Identify criteria to be used to assess the strategic success of this system.
• Develop a process that facilitates the assessment of the system.
• MD to assess this system annually based on criteria identified.

COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’ ISSUE 2
The rich picture reveals a situation where the senior managers state that they are committed to both the harnessing of diversity and employment equity, but employees who should be beneficiaries of this system believe that there is no real commitment to this process. These employees believe that appointments are made as ‘window-dressing’ as they do not feel that they are involved in influencing the business in any substantial way. It appears therefore that there is a gap between what senior management is saying and how they are demonstrating commitment through implementation. It appears therefore that for this system to work real transformation of leaders’ mindsets about diversity needs to happen so that the implementation of the system starts with a real commitment and appreciation of diversity. This commitment will eventually be borne out by the extent to which the business allows diversity to really influence the nature of the business.

ISSUE 3:

RELEVANT SYSTEM 3

First Iteration
A system for developing a large pool of untapped talent.

Developing what and how? What is ‘untapped talent’?

Second Iteration
A system for developing the skills required by the organisation amongst employees in the organisation who possess under-utilised potential.
ROOT DEFINITION 3

Customer – employees with under-utilised potential

Actors – Employees, HR, line managers, MD

Transformation – A system, which identifies and develops the necessary skills required by the organisation amongst employees who possess under-utilised potential.

Weltanschauung(en) – An organisation possesses much untapped talent which should be developed for organisational advantage.

Owner – MD, HR

Environment – Scarce training resources, competitive environment that requires that organisations have immediate access to skills, a lack of high level skills in marketplace, the tendency in organisations to place emphasis on developing high level skills rather than untapped potential.

Root definition - *A system that is owned by the MD and which identifies and develops the necessary skill required by the organisation at various levels, amongst employees who possess under-utilised potential.*

CONCEPTUAL MODEL 3

1. Identify “untapped” potential within the business.
   - Select a key player in each area to establish if there is any under utilised or undeveloped potential in their areas.
   - Set up meetings with the Human Resources department to establish is they are aware of any individual with potential.
2. **Formulate a process of how to “upskill” and use these individual in the business.**
   - Need to discuss with individual to explain the process and the intent of these meetings.
   - Establish their need and create training programmes.

3. **Establish these individuals’ expectations and needs.**
   - Create a non-threatening environment for these discussions.
   - Document these discussions and analyse them for similarities.

4. **Develop a training programme.**
   - Decide on training to satisfy the established needs.

5. **Establish future needs.**
   - Determine future training needs in the business.
   - Establish if the training of the “untapped” resources will satisfy these needs.

6. **Monitor the development process and training provided.**
   - Get regular feedback on the quality of the training.
   - Meet regularly with individuals to discuss their progress.

**Iteration 2:**

1. **Establish if these individuals are suitable for key positions.**
   - Do further assessments.
   - Have discussions regarding their career plans and expectations.

2. **Establish a learning fund not only for business education.**
   - Supply resources so that individuals can equip themselves for other aspects of life to create an exciting work environment.
COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’ ISSUE 3

The rich picture reveals senior managers expressing the fact that people are important to the business and that the business values them. On the other hand employees complain about little evidence of commitment to them and their development. This strategic commitment appears as yet not to have been effectively translated into implementation. A long-term strategy which addresses the development of people is key to future sustainability and an important gap that Woolworths would need to fill.

ISSUE 4:

RELEVANT SYSTEM 4

First Iteration
A system that ensures that suppliers become true strategic partners.

Which suppliers? What does true strategic partners mean?

Second Iteration
A system that ensures that the relationship with key suppliers is a collaborative one, and which ensures that the interests of both organisations are equally protected.

ROOT DEFINITION 4

Customer – Key suppliers

Actors – MD, key suppliers, buying executives, buyers

Transformation – A relationship with key suppliers which ensures that Woolworths protect the strategic and operational interests of their suppliers and vice versa.

Weltanschauung(en) – Key suppliers must be valued and protected.
Owner – MD

Environment – competitive business environment where competitors vie for the attention of good suppliers,

Root definition – A system which is owned by the MD and which ensures that relationships with key suppliers result in a partnership that sees Woolworths protecting the strategic and operational interests of key suppliers and visa versa, in an environment of fierce competition for these suppliers.

CONCEPTUAL MODEL 4

First Iteration:

1. Define what a strategic partner means to both Woolworths and the supplier.
   - Set up an internal meeting for all relevant Woolworths personnel to discuss the role and expectations of a strategic partner.

2. Determine who the key partners will be for Woolworths to achieve their operational strategies.
   - Do an assessment of which the key suppliers should be, based on current situation as well as future predictions.

3. Woolworths needs to formulate a supplier strategy.
   - A documented assessment of various aspects to formulate whom the most desirable key suppliers are.

4. Suppliers need to be aware and share Woolworths short and long term strategies.
   - Formulate the strategy with key suppliers.
   - Share the strategy with new strategic partners.
5. **Monitor the performance of the supplier based on the strategic intent.**
   - Have regular meetings to establish a good relationship.
   - Establish if the partnership is according to the strategic intent.

6. **As a partnership also monitor Woolworths performance based on a supplier perspective.**
   - Set up meetings with the supplier to establish their evaluation of Woolworths performance.

7. **Allocate resource for strategic developments with the supplier such as increased capacity and productivity, as well as developments of new products.**
   - Formulate a process of mutual sharing and understanding to enable this process to be effective and beneficial for both parties.

**COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’ ISSUE 4**

The rich picture reveals a situation where senior managers are expressing their commitment to strategic relationships with their suppliers, as these suppliers form part of their competitive advantage in terms of their delivery on promises of quality at an affordable price. Suppliers however accuse Woolworths of not understanding what this means, and of conducting a one-sided relationship with suppliers. They feel that they are treated badly by Woolworths, they are expected to deliver according to unreasonable and unrealistic expectations about quality and price. Suppliers feel that they cannot survive as businesses based on these expectations and therefore their relationships with Woolworths are not sustainable in the long-term. The gap here is found between what Woolworths regards as a strategic relationship and suppliers’ understanding of what this should involve. Both should therefore be engaging with each other in order to find some consensus about the nature of their future relationship. The situation as it exists is not sustainable in the long-term.
ISSUE 5:

RELEVANT SYSTEM 5

First iteration
A system that ensures the implementation of vision and strategy.

Second iteration
A system that ensures that the vision and strategy of the organisation is communicated to and implement through the lowest levels of the organisation.

Third iteration
A system that ensure that the vision and strategy of the organisation is communicated to and implement through to the lowest levels of the organisation as well as through all strategic partners and stakeholders of the organization.

ROOT DEFINITION 5

Customers – employees, strategic partners, relevant stakeholders

Actors - MD, executives, line managers, employees, suppliers, other strategic partners, relevant stakeholders

Transformation – A system that ensures that the vision and strategy of the organisation is communicated to and implemented via all levels of the organisation as well as through all strategic partners and stakeholders.

Weltanschauung(en) – The vision and strategy remains academic unless it is communicated and put to practice through all levels of the organisation including strategic partners and relevant stakeholders.
Owner – MD

Environment – senior members of the organisation who are under extreme and relentless pressure and do not have the time or the commitment to execute this system, the vision and strategy changes frequently due to market pressure, employees come and go often, there is lack of commitment to the vision and strategy amongst stakeholders as they were not part of its development.

Root definition – A system owned by the MD, that encourages support from all levels of the organisation and stakeholders of the vision and strategy of the organisation, and which ensures that it is carried through at all levels in an environment of constant change and high pressure.

CONCEPTUAL MODEL 5

First Iteration:

1. Determine an action plan in order to achieve the vision and strategy of the business.
   - Divide the vision and strategy into manageable sections.
   - Formulate action plan in order to achieve these sections requirements.
   - Set up a team to be responsible for and to drive these sections.

2. Monitor the progress according to a set delivery date schedule.
   - Meet to discuss progress.
   - The meetings should include not only the team leaders but all levels of the business.
Second Iteration:

1. Set up briefing and feedback sessions with all staff
   - Set up satellite transmission where the MD shares the vision and strategy with all parties.
   - Have people available at all these centres to assist with questions.

2. Create teams with members at all levels to ensure buy-in and that action is taken.
   - These members need to discuss issues with their colleagues and bring new issues back to these meetings.

Third Iteration:

1. Set up briefing sessions with strategic suppliers.
   - Discuss and brief suppliers.
   - Get feedback from them and the impact it will have on their business.

2. Allocate time to get regular feedback from suppliers.
   - Meet regularly to monitor the implementation of the strategy.

3. Monitor the staff and supplier buy in to the strategy.
   - Organise independent monitors, who are not directly involved with particular suppliers or staff to monitor the implementation of the strategy.

COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’ ISSUE 5
The rich picture reveals a top-down approach to the development of the organisational strategy. It also reveals senior managers who express commitment to this strategy but there is little commitment to the strategy by employees and sceptism around a lot of talk but little evidence of implementation of this strategy. The gap appears to be in the lack of consensus as to how strategy should be formulated and how it should be implemented. Firstly senior staff members need to achieve much more substantial ‘buy-in’ into the strategy from its various stakeholders,
and secondly commitment to implementation must extend to all levels of the organisation and interest groups.

ISSUE 6:

RELEVANT SYSTEM 6

First Iteration
A system that empowers people.

What does empower mean? Which people?

Second Iteration
A system that gives employees the appropriate responsibility and accountability in their specific areas, thus creating a sense of ownership, which allows them to do their job efficiently.

Third Iteration
A system that provides employees with the appropriate training and thereafter allocates to them the appropriate responsibility and accountability in their specific areas, thus creating a sense of ownership, which allows them to do their jobs efficiently.

ROOT DEFINITION 6

Customer – employees

Actors – MD, line managers, employees

Transformation – A system that gives employees the appropriate responsibility and accountability in their specific areas, thus creating a sense of ownership, which allows them to do their job efficiently. (iteration one)
A system that provides employees with the appropriate training and thereafter allocates to them the appropriate responsibility and accountability in their specific areas, thus creating a sense of ownership, which allows them to do their jobs efficiently. (iteration two)

**Weltanschauung(en)** – If people are provided with the appropriate training and are then given the appropriate responsibility and accountability and they take ownership and be successful in what they do. People in general are competent given the appropriate training and space.

**Owner** – MD, line managers

**Environment** – current low levels of skill, employees with disadvantaged backgrounds, line managers who do not trust their employees to do the job well on their own, lack of training resources, absence of the required leadership skills.

**Root definition** – *A system that is owned by the MD and line managers, that provides employees with the appropriate training and which then gives these employees the appropriate responsibility and accountability in their specific areas, thus creating a sense of ownership, in an environment in which the necessary leadership skills, and required resources are currently scarce.*

**CONCEPTUAL MODEL 6**

**First Iteration**

1. The MD communicates the value of empowering employees for the organisation and commits to ensuring that this occurs.

2. HR consults with all actors concerned in putting a plan together to implement this intention.
   - HR interviews all key players involved in the system to get their views as to how it should work and what some of the problems might be.
• Processes such as how will appropriate training be identified, at what point will individuals be deemed ready to take on responsibility and accountability, what levels of responsibility and accountability are appropriate, what risk management systems are in place, how will line managers be trained to implement this system, what kind of culture is required to make this successful.
• Given the constraints on resources where should the focus of this system be.

3. Develop the plan.
• Based on the information from the interviews HR develops a first draft of a plan which should be iterated a few times in consultation with key players until a viable system is developed that can be piloted.

4. Implement the plan.
• Implementation should initially be on a pilot basis.
• Once the system is considered viable more substantial resources are allocated.

5. Monitor and evaluate the plan.
• Identify with stakeholders criteria by which the success of the system will be assessed.
• Monitor regularly with a view to constantly improving.

COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’ ISSUE 6
The rich picture shows that at a certain level of the organisation employees believe that they are not sufficiently empowered to do their work. This impacts on their level of motivation and commitment to the business. Senior managers on the other hand express their commitment to development and empowerment of their people but this does not seem to be translated into meaningful action. The clear gap in the system is the managers’ inability to really empower their people. This means to provide the right training, then give them the necessary decision-making powers that will allows them to take ownership. This requires both trust and courage from these managers whose management styles are very much one of ‘command and control’. A need to
transform this style and the organisational culture to one that is less controlling and more trusting of people appears to be necessary.

**ISSUE 7:**

**RELEVANT SYSTEM 7**

**First Iteration**
A system that understands what the customer wants.

What does ‘understand’ mean? Which customers?

**Second Iteration**
A system that provide information on what Woolworths’ most important customers want.

**ROOT DEFINITION 7**

**Customer** – decision makers in the organisation

**Actors** – all employees, customers, market research company

**Transformation** – A system that provides information on what Woolworths’ most important customers want

**Weltanschauung(en)** – An organisation’s strategy should be driven by information on what its most important customers want

**Owner** – marketing department
**Environment** – a lack of coherent organisational strategy will hinder the process of defining who Woolworths’ most important customer is, a lack of information on current customers will hinder this process, organisational arrogance about knowing what the customer wants.

**Root definition** – *A system owned by the marketing department which ensures that the decision makers within the organisation are provided with information on what Woolworths’ most important customers want, within an environment in which this information is both difficult to define and difficult to access, and where these decision makers do not value this information.*

**CONCEPTUAL MODEL 7**

**First Iteration**

1. **The organisation to agree who their most important customers are.**
   - Marketing to consult with all key players in deciding who key customers are.
   - Define how these customers will be accessed and what kind of information will be useful to source.

2. **The marketing department to put a plan in place that defines how the organisation will gather information about these customers.**
   - Define how this information will be gathered.
   - Who will be involved.
   - What information is to be sourced.

3. **Implement this plan.**
   - Identify an area to pilot the system.
   - Once roll out to other areas is appropriate allocate more substantial resources.

4. **Monitor the success of this system.**
   - Agree on criteria for evaluation.
   - Monitor success regularly.
• Revise the plan to ensure it remains relevant to the business.

COMPARING ‘WHAT MIGHT BE’ WITH ‘WHAT IS’ ISSUE 7
The rich picture reveals a situation where the senior managers are expressing their commitment to understanding their customers and to delivering what they want, but in reality the development of products is very much internally-driven and the main focus of most senior managers. The decisions about product strategy is mostly a top-down process and has up to recently not involve the stores, lower levels of the organisation or suppliers to any great extent. Now however this seems to be improving but the perception is that the top structures of the organisation have a way to go before they are truly listening to input from their customers, employees and suppliers.
APPENDIX K

Framework for Critical Incidence log.

CRITICAL INCIDENT LOG

<table>
<thead>
<tr>
<th>Name:</th>
<th>Date:</th>
<th>Week No:</th>
</tr>
</thead>
</table>

A. Where did the incident occur
The physical location in which the incident occurred.

B. Who was involved
Your role in the situation?
Names and roles of others involved in the incident.

C. How typical was this incident in your experience?

D. What Happened – Provide a detail description.
The circumstances or events that led to this event?
The situation itself, including the activities and conversation of those involved.
And especially what you did and said as a participant in the incident.
What was the outcome or result of this incident in terms of the decisions made, conclusion reached, agreements, disagreements, etc?
E. What did you think and feel at the time?
What were you thinking during the time the incident was occurring?
What did you feel about the part you played in the incident?
What did you feel about the part played by the others in the incident?
What did you feel about the outcome of the incident?

F. What was intended?
Why did you act as you did in the incident? What did you intend to accomplish through your actions at the time?
Why do you think others acted as they did in this incident, and what do you think they intended through their action?
As you look back on this incident, why do you think things happened the way they did?
What did you think and feel generally about the incident and others like these that happen in your work?

G. What did you learn?
What do you think you have learnt from your experience in this incident?
As you look back on this incident, do you think you could have improved your performance or effectiveness?
H. What abilities and ideas were involved?
How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions?
What abilities or skills are needed to perform effectively in incidents like this?
Looking back in incidents like this one, what ideas or concepts seem to apply best now?
APPENDIX L

Example of a completed Critical Incidence log.

CRITICAL INCIDENT LOG

| Name: Delegate 13 | Date: 30 August 2001 | Week No: 1 |

A. Where did the incident occur
The physical location in which the incident occurred.

B. Who was involved
Your role in the situation?
Names and roles of others involved in the incident.

C. How typical was this incident in your experience?

D. What Happened – Provide a detail description.
The circumstances or events that led to this event?

In an office building on the 5th floor at a workstation in an open plan area.
WFS – risk area
Recipient of information.
Credit manager and myself.

Typical X Atypical

In preparation for the new set of strategies required detail work regarding set-up. The credit management team had been part of the design process and due to time constraint and workload I need assistance in completing the task. Since this team was quite close to the changes and furthermore it would be their responsibility in operationally implementing the strategy, we considered in asking them to assist as a sign off process. In meeting with the manager she agreed
The situation itself, including the activities and conversation of those involved.

And especially what you did and said as a participant in the incident

What was the outcome or result of this incident in terms of the decisions made, conclusion reached, agreements, disagreements, etc?

**E. What did you think and feel at the time?**

What were you thinking during the time the incident was occurring?

What did you feel about the part you played in the incident?

What did you feel about the part played by the others in the incident?

What did you feel about the outcome of the incident?

**F. What was intended?**

Why did you act as you did in the

that her team would assist acknowledging the learning the team will get from the exercise.

However the every next day, I was then told that her team could not help.

The manager came to the area seeking firstly my peer. Not finding him she then said that she would chat with me. She then proceeded to say that what was agreed the previous day would not be possible due to issues in her area. It was a one directional conversation.

Looking directly at her, I said will have to try and complete, given the current squeezed time frame. I did not sound coherent – words were swallowed.

The incident was one of informing me of a reversal of an agreement reached the previous day.

I was feeling a bit hopeless and tense, as I had thought that the previous meeting was a success.

I did not expect her to revert her decision.

In fact I was speechless. It felt like a unilateral decision and there was no room for further discussion.

There were no other participants.

Felt frustrated, and irritated.

My action was subdued due to the fact that it
incident? What did you intent to accomplish through your actions at the time?

was the manager’s decision and I had not challenged/questioned this manager before. I did not want to prolong an uncomfortable situation.

Why do you think other acted as they did in this incident, and what do you think they intended through their action?

No others.

As you look back on this incident, why did you think things happened the way they did?

In such situations I am always accepting without questioning.

What did you think and feel generally about the incident and others like these that happen in your work?

Incidents like these probably build on my cynical view as to why certain things happen when they do. I almost feel that it is bound to happen again unless I am confident enough to challenge.

G. What did you learn?

What do you think you have learnt from your experience in this incident?

Personal learning is that even though the benefits to the credit team are valid I could have approached it from a different perspective without having time constraint used as a motivator. Sometimes time pressure is a valuable teacher.

As you look back on this incident, do you think you could have improved your performance or effectiveness?

My ability to question and understand the reason instead of blindly accepting the information.

H. What abilities and ideas were involved?

How did ideas or concepts guide your actions in this incident? How were they used or applied in your actions?

The Alternatives were tested with a colleague before deciding on the best solution and putting it into action.

What abilities or skills are needed to perform effectively in incidents like

Skills required are self-control, confidence and ability to question the reason why?
Looking back in incidents like this one, what ideas or concepts seem to apply best now?

Possible incorporation of this work into the process as part and parcel of the overall delivery of the strategy. The commitment/ownership and buy-in is in existence.
APPENDIX M

REFLECTION SESSIONS

Delegate 1

Success Story:
Think about an event in the past when you were successful.

“Feel good” experience:
What:
Training and coaching a FMT (Foods Management Trainee) person successfully.
Why:
• System tools given
• I gave the focus and attention required
• The trainee was very keen to learn
• There was mutual respect
• I was keen to learn – especially the “art” of coaching as oppose to training
• I am driven (as then) by the social responsibility of employment equity (and this happened to be a black individual), i.e. as I had felt that this was a way of re-investing in my community
• I was totally honest in sharing my learning – the good and the bad
• I was relatively comfortable because:
  o I was in my comfort zone (“specialist” field)
  o The unknown in the process were to a large degree diminished by system tools
  o The only unknown was the individual
• The support of an outstanding mentor, not giving answers, but always made me rethink mine.

How did I feel?
• In the beginning:
Apprehended and almost self-doubting

- During the process:
  Empowered and excited (adrenalin rushed!) as I see that certain techniques worked. I was disappointed when other did not work or the individual did not take to it.

- At the end:
  Proud.

Delegate 2:

Success Story:
Think about an event in the past when you were successful.

In 1992 I was successfully appointed as a Foods trainee supervisor based on my performance as a Foods casual. I progressed to a Departmental manager position after undergoing management-training programme in Foods. I was then promised to further undergo Textiles management programme so as to gain general management skills in both Foods and Textiles. These trainings took place in 1993/1994 respectively and I graduated after a successful assessment done on me, which I found it as a great achievement.

In 1995 I was promoted to senior departmental manager and in 1996 to a store manager position based at Secunda, Mpumalanga. During my stay I achieved very good stock take results and well carried our Risk management systems where I was awarded a gold certificate. Due to the above I was promoted to a bigger turnover branch that had Food and Textiles, but later moved out to do projects.

I also succeeded in developing 4 staff members to go on the management trainee programme, which they successfully completed.
The above are seen as my most greatest and fulfilling achievements.

How do I feel about my success?
I feel honoured to have achieved as well as I have and the opportunity given to me by the business to exploit my abilities through acquiring skills and experience. The teams that I have worked with were excellent and dynamic to be able to sacrifice and accommodate changes and challenges before us. We celebrate victories of shrinkage results in style i.e. social function, which was to be motivating and rewarding for good performance.

At the time it was a joy to me to see happy and committed people at work looking forward to their job function through my support and tenacity to try and do better to achieve all possible indicators as set out by the business. I attach value and appreciation to all the people I have worked with to date because I think in one or the other way they helped me to achieve what I am today.

Every moment I think about my achievement I get “jacked-up” in that I want to achieve more and better. I tend to use my success thus far as a benchmark to continuously improve and learn from to make me a better and competent manager in terms of standards set by the organisation.

Delegate 3:

Success Story:
Think about an event in the past when you were successful.

What was the most recent achievement, what was the reaction afterwards?
This has to be my most recent promotion to store manager of Paulshof.

I was the Foods manager at the Glen store. This was the goal of my team and I to reach our target of R800 000 sales per week in the food market. At the time the food market was only averaging R680 000 to R710 000 sales per week. I always set my sights on achieving higher targets cause I believed in my team and myself.

At this stage we had to implement the Foods Supply Chain (FSC). Then we could continue on working towards our target. At first the FSC was a very difficult process to understand and
follow. At the time of the launch my colleagues and I were very negative about the FSC process. When we met as a team, we discussed our plan on where we were going to attack the goal going forward. We discussed how we are going to make a difference. One of the main points was the FSC and that this was going to be new to everyone even if the person had many years of experience. So the focus was on mastering the process at the FSC system. The point was that we are all opening a new store with all new systems and procedures. We started to work towards making the FSC work and I changed my attitude to being positive. This was when I stared achieving results.

Many of my colleagues started asking questions, as to what are we doing differently. All I said was: “guys just follow the process and everything else will fall in place.

Back to my goal of R800 000!!!

Because I was always setting my targets higher I achieved higher results, instead of R800 000 we took R900 000 sales per week, so by this time I have already moved up my target to R1 million. This is when I have found out that I have been promoted to store manager.

The feeling was very mixed cause I did not want to leave at first and also the emotions that we shared as a team. I was surprised of the feeling from the staff and colleagues from the Glen, most of then were sad but happy for me.

Delegate 4:

Success Story:
Think about an event in the past when you were successful.

Foods Manager, Cresta store situated in Randburg, Gauteng since 01 July 2001.
I joined Woolworths in May 1997 from Pick ‘n Pay Superstores in Gauteng as a departmental manager in training. I have since been in eight different stores, which includes East Rand Mall, Menlyn, Springs and East Gate. I was later moved to Centurion store in 1999 as Foods manager. In October 2000 I was promoted to Store manager Town Square, a Foods only store. This store, under my leadership, has turned out to be one of the most successful new initiatives of the business in that it is currently taking the highest returns per square meter, i.e. R800 000 per week on a trading space of 398 square meters. In July of 2001 I was promoted to Foods manager in Cresta store, which is the 3rd largest Foods store in the business.

I believe that my success as a manager in Woolworths is contributed to the support from my subordinates, being the managers that report directly to me as well as the sales assistants within the store. The trust that the head office buying group has in me in terms of my merchant ability also contributes towards my achievements. I believe that you have to transfer your knowledge to your subordinates in this way you enhance their knowledge but at the same time get the job done in a more productive way. I believe in an honest approach (do not promise if you can’t deliver). I also believe that I am as successful as my weakest link. I use the approach of being the team leader in my department and the staff being the team-mates rather than the manager and staff approach.

I know that I sometimes do not listen enough, but always try to make team issues high on my daily agenda. I believe that I have a huge role to play in the success of the store as well as that of my colleagues and vice versa. I therefore try my best to bring my share in getting the job done. I am a good communicator and have a definite passion not only to see myself succeed, but also those that have a stake in my achievements.

Delegate 5:

Success Story:
Think about an event in the past when you were successful.

The Event:
Graduation after completing the B Tech Corporate Administration degree.

- I not only completed my degree put did this while working full-time and lecturing three subjects part-time.
- I was recognised as the best/top student for the course.

Recording and Remembering Feelings:

- I felt very proud to be recognised in public.
- I felt good about my ability to learn and apply knowledge.
- I felt relieved that it was over and that I could spend time with my family and friends.
- I must admit that I also felt “superior” as being the best at something – usually we are very average. People are always better than us or we are better than them. This time around I was the best and although it was for a short period. I felt good.
- I received a bursary from the Ernest Loebenberg Trust and I felt that I did the trust proud as well. I did my best and exceeded my own expectations. I didn’t set out to be the best; I just enjoyed studying and gave it 120%.
- I felt a little less guilty for neglecting my family. Almost as if I could now justify all the sacrifices.
- I don’t have words to describe the feeling when the world makes you a king for a day, but it is as if the sky is bluer and the sun is warmer, as if the birds are happier and people look at you in a different way. Success tastes Good!

It is wonderful to see your name printed on invitations under “Special Awards”. You feel Immortal. It is almost overwhelming to hear your name and there you are alone on stage and an auditorium full of people gives you an overwhelming standing ovation. You hear hundreds of good wishes and they all sound sincere.

For a period you are on top of the world and that is where I would like to stay. I don’t need the public recognition but I owe it to myself to succeed against my own measures.
I saw myself as successful, I experienced the feeling of being ahead. I didn’t measure success in terms of material passions but rather how I felt and that I made everyone that believed in me proud.

Delegate 6:

Success Story:
Think about an event in the past when you were successful.

No information was supplied.

Delegate 7:

Success Story:
Think about an event in the past when you were successful.

The Purchase of my home was a mark of my success. This was a culmination of hard work and perseverance over a period of time. Financial independence also gained me a step closer to my goal.

The first thing I remember exploding in my head was a sense of pride and accomplishment. I remember nervousness on signing the home ownership documents. I ran a gamut of emotions ranging from anxiety to joy. This was me, all on my own. Shouldering a responsibility that was solely mine to make – this was no deadline orientated situation. If I failed, I failed alone. No safety net (Woolworths). Sensations in this period were representative of a live and passion-filled sense of self worth. Everything was larger than life.
Delegate 8:

Success Story:
Think about an event in the past when you were successful.

A significant success that I have obtained and experienced was that of making it into the retail academy and although this sounds maybe a little weak I can assure you that it meant the world to me for the following reasons.

Firstly I had only been with the company for 18 months and was still adapting to the corporate environment in which I was working, it was with great joy that after approaching my line manager in connection with my application for the Retail Academy that it was subsequently approved by my group head of technology.

This meant a couple of things to me one was that in a fairly short time my lime management were very comfortable with the idea that I would be a good candidate for the Academy. Secondly several of my colleagues had not been successful with their line management approval, which re-endorsed the fact that although I have the utmost respect for my colleagues I had been identified as a potential leader within Woolworths.

Secondly going through the interviewing process my confidence grew from the knowledge that my line management were very much behind me, from the point of view that I would be the first Technologist to enter the Academy. And with this new confidence I almost felt that for the first time in my career I was embarking on a journey with more direction, but more importantly the
chance of being given the tools and the learning to fulfil a leadership role in a Dynamic Organisation.

Thirdly the emotion that I felt then and that I still feel now is one of achievement, humility, courage and that dangerous feeling of PRIDE??

Delegate 9:

Success Story:
Think about an event in the past when you were successful.

Achievements:
The greatest achievement this far has been the fact that in the past 3 years I have studied part time and have managed to complete my 3 year Diploma in Marketing Management. It took me longer that 3 years but at least I have managed to achieve a distinction in one of the tougher subjects.

The day that I got my results, I felt so proud of myself that for a moment I thought I was going to cry and when I thought of all the sacrifices that I have made, that it was all worth it. I gave up some friendships and time with my friends because I had to balance my time between work and studies. I put aside one of my most important relationship with my current boyfriend and the day of the result, I had this warm feeling in my heart that I knew that now we could be together and have a normal relationship. He is a wonderful person and the relationship that I currently have is worth everything to me.

The first person that I called was my mother who was even happier than me. All the time, the most vivid vision was that of the Graduation day which unfortunately is so far away (March 2002). I regard this as most successful in that for the past couple of years I have always wanted to have a qualification that is on par with a degree as I was not fortunate enough to go University. I have always wanted to wear the graduation rode and cap, which I am waiting for with great anticipation.
Delegate 10:

**Success Story:**
Think about an event in the past when you were successful.

Thinking back and finding a milestone that is most important to me was not as easy as I thought it was. Not because there are no important milestones of significance but rather because there are many and it was choosing the milestone that meant the most to me. When I look back there are many milestones for e.g. Certain promotions, the completion of certain projects, the dealing with of problems found in User groups and finding solutions, recognition of a job well done and on the personal side getting married and personal and professional success.

But the one that stands out in my professional life and I believe will be the turning point in my future career is the successful application for the Retail Academy (RA). Applying for Ra was a big decision and a stressful one too. The sort of thoughts I had before applying varied, from being excited to nervous and a fear of non-achievement. But as we now know I did apply and was successful.

During the application process I was pretty nervous and some times stressed. My colleagues were very positive and supportive through the process and kept on telling me that this is only a small hurdle and that they were positive I would be successful. Even though I kept positive I new that I could only celebrate when I heard that I was chosen. During this time I also told as few people as possible that I has applied and I suppose this was in case I did not get selected. Once I had completed all the interviews I was very excited to know that it was now only time
before hearing the outcome. But the selection process had to be continued, which meant that the list of successful applicants would now only be one month later.

During this wait a lot of things initially went through my mind but I decided to forget about RA for the moment and I got stuck into work. When the final list was released later that month and I heard that I was successful I was over the moon with joy to the extent that I was quite emotional. I immediately told my family and close colleagues who had been waiting for the outcome. They were all very excited for me. Life and everything at this point were wonderful – the sun was shining brighter, the sea was more amazing, everyone was happy and smiling a bit more – it was great. That night I went and celebrated with my wife and close family. At the end of that week it was announced to the group. Mostly everyone congratulated me, which was wonderful to get the recognition. Even though I was excited I did think that some people seemed jealous about my achievement and their congratulations were false. I also felt sorry for all the unsuccessful candidates and found it quite difficult talking to one of them. But never mind I continued to remain positive and extremely proud of this achievement and have since prepared for the upcoming course. I believe that doing this course will put me in extremely good stead for the rest of my career.

Delegate 11:

Success Story:
Think about an event in the past when you were successful.

It was round about 1990 or 1992 when I had few years involved in athletics/road running. I had always received bronze medals. I set myself a goal, which was to get a silver medal in half marathons. I took leave end of December, as this race was ran third week of January. I asked top 5 runners in our club to help me to prepare, advice, as they were silver medallists. I ran with them 3 times a day inclusive of track and field. I ate well balanced diet. A week before the race I was in a top condition. I roused my self-esteem by challenging my team-mates who use to beat me. I promise them that if they beat me I will buy them running shoes. I started the race very
well pacing myself correctly four and a half minute per kilometre. I passed the first guy at the 14km, the second guy at 17km, third one at 18km and the last one at 20km. When I entered the stadium I raised my hands high up in the sky as a sign of victory. The Mc of the event called me and asked me why I was so happy as if I have won the race as everybody was giving me a standing ovation. I replied by saying that I have achieved a personal goal. That moment I will cherish for the rest of my life. I was so ecstatic, so content that I started to believe that as long as I can conceive it I can achieve it and with hard work. I use this event when I sometimes feel down to cheer myself up, I pull it from my memory bank, visualise the event happening. When that happens my body produce endorphins, my state changes from being down or depressed to happiness.

Delegate 12:  

Success Story:
Think about an event in the past when you were successful.

How did you feel?
Initial feeling was if I hid a brick wall (Boss went with who clashed with clients)
Would have preferred to:
1. Establish what client knows about External audit and Internal audit
2. Realised: have to educate client
   a. Build relationship
   b. Prove delivery of project
   c. Process and time span
3. Getting to understand Group, Operations, and Dynamics
4. Perseverance, Determination, hard work
5. Integrity, build personal relationships

What do you see when you feel something is a success?
Positive, encouraged, quietly confident
Next steps:
  - Process to sustain and evolve the relationship
  - Keep building the relationship, increase the department’s image, improvement in perceptions
  - Bring articles
  - Set monthly meetings, attendance of FMC
  - Next level = Category Management

What do you hear – in your mind’s ear?
Clients are more open approachable, accommodating, requesting inputs, gone from almost indifferent to requesting and welcoming inputs and audits, open and honest feedback for personal evaluation.

Delegate 13:

Success Story:
Think about an event in the past when you were successful.

A Happy, Successful Event

It was perhaps not an event as much as it was a process. It started as a frustration in the line function I was performing as a dialler manger.

There were two groups of collection agents performing the same function, both using the same channel of collecting but merely doing it through different methods.

Using technology to perform a traditionally manual function was very exciting. I had learnt to use this technology to maximise productivity and gain efficiencies. It was also a time when the business was feeling the pinch of the recession and hence we were faced with having to work more accounts in collections. The first option to get through the volume was to get the people to work overtime, which have short-term benefits to both the organisation and the staff. This was
most certainly not the solution. The staff working as dialler agents were part-timers hence the welcomed over time. The others were full-time staff that had been employed longer in the organisation. I had identified that as part of the efficiency of the technology, it required “bums on seats”. This meant either hiring more staff or to get the current full-time staff to work more flexible. The latter was decided and I was the champion of the change.

I had done all the necessary planning to effect the change but the most challenging and satisfying was facilitating the workshop with those individuals who had to make the change. In these sessions I had learnt few important lessons. A good plan is not a great plan if you do not have the support of the people who are actually going to perform the function. As a good leader one has to be proactive by listening. Finally the decision once is a better one for having had the benefit of the various inputs.

The change was completed I’d like to think with the minimal of disruption.

This process was a personal triumph. It was a consolidation of some of my strengths. To describe a picture in the mind eye of what the end of the process would be like – it be a joyous occasion of celebration – a party with family and friends – a warm comfortable feeling that has hugs and laughter.

Delegate 14:

Success Story:
Think about an event in the past when you were successful.

Event: All of the following elicited the same feelings.

1. B. Com Graduation
2. B. Com (Honours) Graduation
3. Promotion from Assistant Accountant to Group Financial Controller
Feelings:
1. Strong sense of achievement
2. Strong sense of self worth
3. Inspired
4. Ready to conquer the next challenge
5. Inner Harmony
6. Confidence Boost

Vision yourself as a successful leader in the future.

What are the steps that you need to take to get there?

1. Have a clear vision in mind
2. Set clear and measurable goals/objectives
3. Write down these goals/objectives
4. Be a team player
5. Be proactive
6. Stay focussed
7. Close my competency gaps
8. Enhance my leadership skills
9. Be in touch with my strengths and weaknesses
10. Expand my awareness, insight and perspective
11. Sharpen my skills
12. Ask for feedback
13. Be customer centric
14. Listen and Learn
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