



Teaching Conference for
Management Educators

OBTC 2016 at Walsh University June 8th – 11th, 2016

Submission Template

SUBMISSION GUIDANCE

** Remove all identifying properties from this document **

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Please include ALL supplementary text at the end of this document* *Only one document should be submitted

Submission Template for the 2016 OBTC Teaching Conference for Management Educators

1) Title, Abstract & Keywords

In your abstract, please include a brief session description (not to exceed 100 words), and three to four keywords. If your proposal is accepted, this description will be printed in the conference program.

Integrated Team Milestone Management

This high involvement, hands-on session provides a proven, practical methodology for uniting the commitment and efforts of separate groups in the service of accomplishing integrated team milestones.

The session will involve the audience in learning the process of blending separate yet compatible agendas into combined individual and team commitments, to accomplish over-arching goals, both sequentially and in parallel.

Participants will learn, through a hands-on, high involvement process, how to bring clarity, focus and accountability to team and subteam deliverables and milestones for a 90-day timeframe.

Keywords—Organization decision-making, Integrated team service, Team-based learning, Action learning, Milestone accountability

2) Format

- ☒ Activity or exercise
- ☐ Roundtable discussion (60 minute only)
- ☐ General discussion session

2a) For activities and exercises only, is yours best suited for

- ☒ A traditional classroom
- ☐ An online class
- ☐ Either

2b) For activities and exercises only, is yours best suited for

☐ Undergraduate students

☐ Graduate students

☒ Either

3) Time Requested:

☐ 30 Minutes

☐ 60 Minutes (*Roundtables must select 60 minutes*)

☒ 90 Minutes

4) Planning Details:

Each room contains a white board with markers, computer (PC) with DVD capability and computer projector. Does your session require any other equipment?

I will also need two flipcharts. I will supply masking tape, sticky notes, colored sticky dots and markers.

5) Teaching Implications:

What is the contribution of your session to management pedagogy/andragogy? Specifically, please include your learning objectives, and describe what management and/or teaching topics are relevant to your session, and why. Also, include theoretical, disciplinary, or theoretical foundations that will help reviewers understand how your ideas fit within the broader field of management.

The most high impact and sustainable service initiatives take place when multiple stakeholders, with different yet compatible agendas, are blended in an active negotiation and decision-making process to agree on goals and milestones, and thereby achieve overarching goals. The process described in this session has been used extensively over the past decade in corporate settings, to accomplish complex, difficult and high impact goals, sustained over long periods of time.

For example, the integrated milestone management process was used to bring together a team of 30 Saudi Aramco and Dow Chemical leaders to plan how to achieve a multi-month launch of a large, integrated capital project in Saudi Arabia. Another use has been to combine the allegiance and efforts of 120 leaders representing five companies (traditional marketplace competitors), to launch a multibillion dollar pipeline and refinery

construction project in the Alberta, Canada oil sands, under the overall direction of Royal Dutch Shell Oil Corporation.

This session will explore the application of the process to the classroom, specifically when blending the efforts of disparate stakeholders (depending on the goal, this might include students, instructors, business partners, community sponsors, “clients”, subject matter experts, etc.) to provide service to community and business clients.

This session will involve the audience in the process of combining separate but compatible agendas into blended individual and team commitments, to accomplish overarching goals, both sequentially and in parallel. The session will also demonstrate a follow-up process to ensure ongoing execution.

The approach draws from the theory and practice of Ed Schein (process consultation), Bill Dyer (team action), Larry Michaelsen (team based learning), Richard Beckhard (group confrontation meeting) and others, both theoreticians and practitioners. The approach is informed by a decade of corporate experience with clients such as SaudiAramco/Dow, Chevron Capital Projects (Gorgon Australia, Angola LNG and Lobito Tomboco offshore West Africa). The process has been used to blend efforts of graduate and undergraduate students, industry leaders, clients and academic professionals in various team action settings.

Learning Objectives:

1. Participants will learn, through a hands-on, high involvement process, how to bring clarity, focus and commitment to team and subteam deliverables and milestones for a 90-day period, and assign accountability for each.
2. Participants will learn how to prioritize stakeholder needs and manage each stakeholder interface to win continuing support and ongoing guidance for the duration of a multi-month project or project launch.
3. Participants will learn a follow-up structure to assign ongoing accountability for results for each team and subteam assignment and deliverable.
4. Participants will explore the application of this methodology to the classroom, especially when planning and executing student service projects that depend on the blended efforts of multiple stakeholders for success.

6) Session Description and Plan:

What will you actually do in this session? If appropriate, please include a timeline estimating the activities will you facilitate: how long will they take, and how will participants be involved? Please remember that reviewers will be evaluating how well the time request matches the activities you'd like to do, and the extent you can reasonably accomplish the session's goals. Reviewers will also be looking for how you are engaging the participants in the session.

The session will consist of approximately 70 minutes of participants actively walking through the milestone management process, and 20 minutes of discussion of its application to integrated, team based learning and service in an academic setting.

1. All relevant stakeholders (depending on the goal, this would include students, instructors, business partners, community sponsors, “clients”, subject matter experts, etc.) are assembled in the room. The overall “project leader” (whoever is most accountable for overall results—in some cases this may be a small group) states the purpose and timeframe of the session. Follow-on meetings are also announced, discussed and agreed on. In the session, each person would role-play, as members in up to 5 chosen areas, various functional groups in a typical university or business milestone application.
2. Participants separate into their functional or stakeholder groups/teams, and brainstorm group deliverables (not tasks) to be produced over the next 30, 60 and 90 days on large post-it notes. These items will include all milestones to be accomplished by the entire team, not just their functional team.
3. They post these notes on the wall under the corresponding timeframe (30, 60, 90 days).
4. They also list anything that may be left over from the recent past that still needs to be done, and post it to the left of the 30 day window
5. All in the room (or an appropriate subgroup) look at the chart for completeness, clarity and to combine duplicate items (it may work well to have two or three of the participants come to the wall chart and do a brief review/combining of the post-its before the entire group processes the exercise). The purpose would be to cluster like items, eliminate duplications and make it easier for the larger group to work across the time and milestone chart.
6. Participants identify what is Above-the-Line (the people in this room can personally handle). The spin is usually, “Above the line items belong to all the leaders in the room, as a team. They are collectively responsible to ensure that these things get done.”
7. Each team is asked to appoint a person responsible for each item, but all of the Above the Line items still belong to the team as a whole.
8. Below-the-Line items are also identified. These typically belong to specific, functional groups or individuals who are not in attendance, and should be delegated by the appropriate functional areas in the room, and worked outside the room.
9. Before the end of the session, each functional area is asked to identify, in the room, any needed resources or assistance to complete their functional items.

10. The overall “project leader” continues to select and enroll team members inside and outside the room in appropriate tasks, obtains resources, holds people accountable, moves to completion and reports back electronically or in person.
11. All items are transcribed onto a spreadsheet (typically done offline in the next few days, and vetted with the entire team) and completion and/or progress is reported within 30 days, either in a special meeting or as part of a regular leadership meeting.

7) Application to Conference theme:

How does your session fit with the overall OBTC theme of *United in Service*?

This session provides a proven, practical methodology for uniting the commitment and efforts of separate groups into the integrated accomplishment of team milestones.

This session will explore the application of the process to the classroom, specifically when uniting the efforts of disparate stakeholders (depending on the goal, this might include students, instructors, business partners, community sponsors, “clients”, subject matter experts, etc.) to provide service to community and business clients.

8) Unique Contribution to OBTC:

Have you presented the work in this proposal before? If so, how will it be different? Is this proposal under current review somewhere else? If so, please explain. How will your proposal be different for the OBTC conference?

This work has been presented and refined over two dozen times over the last decade in corporate venues around the world. It was also presented successfully as an invited presentation/workshop for the Heartland (Greater Kansas City) Organizational Development Network. The audience included graduate and undergraduate students, academic professionals and industry practitioners.

This proposal is presented exclusively to the OBTC Conference.