



**OBTC 2017 at Providence College
June 14th – 17th, 2017**

Submission Template

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Submission Template for the 2017 OBTC Teaching Conference for Management Educators

1) Title, Abstract & Keywords

Format: 60-minute session

Title:

To Affinity and Beyond: Using Affinity Diagramming as Management Educators

Abstract:

A handy tool for pulling together ideas from a group is the affinity diagram. An affinity diagram is a tool that organizes individual ideas or concepts into categories of related concepts. Affinity diagrams can be used to provide structure to brainstorming process, simplify components of complex problems, and catalyze discussion from a large group of people. In this interactive session, we will demonstrate multiple ways that we use affinity diagrams in the management classroom, and we will provide a framework for using the classroom tool as a means of developing student leadership skills.

Key Words:

affinity diagramming, group decision-making, changes in workplace, leader development

2) Teaching Implications:

Affinity diagramming is a tool used to sort ideas into related categories. The tool is sometimes referred to as the K-J Method, as it was developed in the 1960's by Japanese anthropologist Jiro Kawakita (Scupin, 1997).

Affinity diagramming is an especially popular tool in six sigma exercises (De Feo & Barnard, 2004). Six sigma was originally introduced as a tool used in manufacturing to help organizations identify and reduce sources of error in their processes. Overtime, six sigma and lean management techniques have been referenced in a variety of applications including medicine, hospitality, and education. A major component of the six sigma process is bringing individual users together to identify and agree on sources of error that need to be corrected within the organization (Inozu, 2012).

In this session, affinity diagramming is applied to common issues encountered in the management classroom.

Learning objectives include:

1. Define affinity diagramming as a broad tool used especially in six sigma exercises.
2. Apply affinity diagramming to common topics encountered in the management classroom.
3. Utilize affinity diagramming as a tool to manage classroom processes, like forming a psychological contract and setting norms.
4. Create a new set of questions and situations that can be addressed in the classroom using affinity diagramming technique.

3) Session Description and Plan:

The following description of the session plan also includes an outline for the session.

First use of exercise: 15 minutes

The session will kick-off with an interactive use of affinity diagramming, replicating an exercise that we use during the introduction session of our own management classes. At the start of the session, each participant will be asked to individually brainstorm on a sheet of paper answers to the question “What’s changed in business in the past 30 years?”

After 3 to 4 minutes, participants will form into small groups, and transfer their ideas collectively onto post-it notes. Specifically, participants will be instructed to record each unique idea onto a separate post-it note. Then, a representative from each group will bring the group’s stack of post-it notes to the white board, and organize the post-it notes into categories of ideas.

After all of the post-it notes are organized into categories, a different representative from each group will be asked to come to the white board to work together to provide labels for the categories. For example, a group of post-its containing ideas like “cell phone usage”, “internet”, “email communication”, and “automation” might be classified under one category labeled “technology”.

While this process takes longer in the classroom, we will accelerate it to 15 minutes for the purposes of the session.

Debrief exercise: 15 minutes

The presenters will debrief the exercise with the participants, using the participants to demonstrate how the tool can be used to facilitate discussion of a common topic encountered in the management classroom.

For several minutes, the presenters will lead session participants through a broader discussion of the question, “What’s changed in business?” Like students in the classroom, participants will be asked to make cause-and-effect connections between broad categories. For example, students often make connections between changes in the domestic economy (from manufacturing to service/knowledge) with gender demographics (more women in the workplace because the work is not contingent on height and strength). The process takes longer in the classroom, but for the purposes of the OBTC session, this process will be abbreviated to take less than five minutes.

Afterwards, the debrief will turn to other applications of this tool for the student. Specifically, in our classes after using this exercise to answer the conceptual question,

we talk about the exercise as demonstrating a tool they can use as they advance in the workplace. First, we define affinity diagramming. We highlight the use of the tool to get a quiet group participating (exactly as it was used here!) and to quickly organize redundant ideas, allowing the group to quickly move to talking about more conceptual issues. We note that the tool is popular in six sigma applications, and give the students an opportunity to give examples of encountering the tool in their careers or internships. Finally, we note times that we have used the tool in department meetings to highlight common grounds between disagreeing factions. Just as we lead this discussion in the classroom with our students, we will lead this discussion in the OBTC session with the participants.

In the following segment, we will talk about other applications of the tool as a way to build culture and set boundaries with students.

Other applications: 10 minutes

We have used this exercise for other purposes, not directly related to discussions of management concepts with students. This segment of the session will be used to describe those applications in the classroom.

For example, one of the facilitators has used affinity diagramming as means to set a psychological contract with the students governing their obligations in the class. Another has used affinity diagramming as a way to set rules for student behavior during invited guest speakers.

In both applications, students individually consider the parameters each wishes to see set for the class, then the parameters are recorded individually on post-it notes, and formed into categories on a whiteboard. Many of the parameters overlap, and become clear “rules”. Those that are unique are discussed by the class. Once all parameters are set, each “rule” is posed as a vote to the class before becoming a finalized expectation.

This method allows individuals to propose tough rules, without feeling singled-out for setting high expectations. Students are quickly able to see that the majority of students prefer high standards of behavior. Thus the culture set by the class governs behavior rather than the professor serving as an authoritarian figure to the class.

Using the exercise as a means of classroom management serves throughout the semester as an example when discussing other difficult concepts. For example, students almost always refer to the exercise when discussing participative leadership, and often refer to the exercise when discussing how strong and weak cultures differently influence behavior.

Second use of exercise: 10 minutes

Participants will engage in affinity diagramming a second time. During the second engagement, participants will be asked to consider other conceptual questions and classroom management issues commonly encountered in the management classroom that could benefit from the affinity diagramming technique. As before, the concepts will be recorded on separate post-it notes, then organized into quick categories that can be recorded for future use by the group.

Although we expect that the exercise will generate more creative ideas than our own (that's the purpose afterall!), ideas that may evolve from this component of the session include 1) reasons individuals resist change, 2) interview questions commonly used in organizations, and 3) ways to reward/punish performance in organizations.

We expect that participants will be able to think of a number of different segments of their classes in which affinity diagramming could be used to facilitate class discussion.

Debrief second exercise: 10 minutes

The second debrief will also make a great summary to the session. Specifically, the categories organized on the whiteboard will be presented and discussed by participants. At this point, we also expect that participants will also state any lingering ideas or questions.

To close the exercise, we will review the learning objectives for the session, and highlight how the session met the proposed objectives.

4) Application to Conference theme:

The proposed session fits with the overall OBTC theme of *Navigating the Changing Currents* in a number of ways.

On a superficial level, one of the primary applications of the exercise is to challenge the class to answer the question, "What's changed in business?" Affinity diagrams are excellent tools to allow students to apply these concepts into an organized set of related ideas, adding quick complexity to this discussion.

From a more complex perspective, management educators are tasked with challenging students to consider theoretical and conceptual issues, while giving them practical exercises that they can use in the workplace. This exercise uniquely fills those needs. That is, it can be used as a tool to spark discussion of concepts and theory, but part of debriefing the exercise includes a discussion of how the students can use the tool when facilitating group discussion and conflict.

Finally, the tool underscores a component of the changing currents in management that we sometimes have difficulty navigating as educators. When we use this exercise to form a psychological contract or set rules for the class, we are then able to use ourselves as an example later in the course. In our classes, when we discuss participative leadership midway through the semester, or the role of culture in governing behavior at the end of the semester, this exercise almost always comes up as an example of these concepts. These are concepts difficult to explain to students, but by using this exercise, we allow them to experience the impact of participative leadership and forming a strong culture.

In these ways, the exercise coincides perfectly with the conference theme *Navigating the Changing Currents*.

5) Unique Contribution to OBTC:

We have not presented this idea at OBTC, nor have we submitted this proposal for presentation elsewhere.

References

De Feo, J. A. & Barnard, W. W. (2004). *Juran Institute's Six Sigma: Breakthrough and Beyond*. McGraw-Hill Companies, Inc.: New York.

Inozu, B. (2012). *Performance Improvement for Healthcare* (12th ed). McGraw-Hill Publishing Companies, Inc.: New York.

Scupin, R. (1997). The KJ method: A technique for analyzing data derived from Japanese ethnology. *Human Organization*, 56 (2), p. 233-237.