

# CASE STUDY #2

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**Situation:** A growing organization had a change in leadership. Most members of the management team wanted an opportunity to discuss with the new leader what they believed were significant “*burning organizational issues*.” Many felt that the resolution of a particular organizational issue was key to the organization moving forward toward achieving its business goals. Managers’ opinions varied on the “burning organizational issues” and priorities. The new leader believed there would be great value in exploring the diversity of management *points-of-view* on these issues. The goal was bringing the team into the process before making any changes that would result in refocusing the organization’s direction. The desired outcome was to have the management team assess the issues together and define for themselves what was *right* for the organization. The organization had a regular *quarterly* management team meeting coming up. Managers had been very clear that they were hopeful many of the issues could be discussed. It seemed important for them to spend time with the new leader in a *business-focused* meeting. If there were a choice between *business* and *development topics* for the meeting, this time, *business* would be the *first choice*.

**How the Implications Wheel was Applied:** As part of their *learning organization commitment*, the new leader and personnel manager set out to have a *business-focused* meeting with an integrated *learning component*. The Implications Wheel was chosen as a vehicle to explore the implications of the managers’ opinions and recommendations for resolving the “*burning organizational issues*” they had identified. The goal was to take advantage of the interest and ideas to solve business issues, and at the same time, provide a learning experience that would give the managers a *new management tool*.

**Special Preparations:** Managers called

opinions into a voicemail number. The top six issues were then used to formulate the Implications Wheel *Center Statements*. The Implication Wheel teams were chosen before the session. Implications Wheel training and explorations of the “*burning organizational issues*” were incorporated into their regular quarterly management meeting.

Knowing there would be limited time, a *Next Step Assignment* was created to enable the group to continue the Implications Wheel learning experience, beyond the available time during the session.

**The Issues Explored:** Specific recommendations were used to formulate the Implications Wheel *Center Statements* for the topics below:

- Enhancing current information systems support.
- Redefining the business planning process cycle.
- Re-establishing a unifying goal/business objective.
- Redefining a main marketing channel for the future.
- Integrating resources and knowledge across departments to better serve customers.
- Setting aside the individual/departmental agendas to better serve customers as a team.

**The Implications Wheel Experience from the User’s Point-of-View:** Six groups worked simultaneously on the six selected issues. During the session, the groups completed their explorations and did some scoring and interpretation of their wheels. The session was concluded by giving a Next Step Assignment to: ■ Invite team members, not in attendance at the meeting, to join in the process. ■ Complete the interpretation of the wheel results. ■ Form conclusions about the assigned “*burning issue*.” ■ Assess the Implications Wheel learning experience. ■ Develop recommendations for the organization. ■ Prepare to present

recommendations at the next meeting [60 days later].

**Results Achieved:** Each group presented their wheel results, interpretations, and recommendations at the follow-up meeting. The exercise resulted in the recognition that some of the “*burning organizational issues*” were already being addressed through other business and quality initiatives underway. It was also clear some “*burning organizational issues*” were linked to managers taking action or refocusing their own *behavior*. The explorations also *halted* the formation of unnecessary task forces. The process led to better communicating to the entire team, what was already being done. This in turn, prompted ideas of integrating current initiatives to resolve a broader set of issues. Overall, the process brought about a wide range of learning...about the team, about the business, and about exploring the implications of *resolutions*, before acting. It can help an organization see things differently and make the *right* choices.

**Lessons from the Implications Wheel Exploration Process:** ■ The process brought a discipline to thinking and communicating on the controversial issues. ■ The experience was *synergistic*; the whole team participated in the process. ■ It was complex at first; speed and proficiency improved with practice. ■ The more specific the *Center Statement*, the more valuable the *wheel*. ■ The Implications Wheel is a tool that can be used well in conjunction with other quality tools. ■ It was an *empowerment* exercise, because it prompted self-generated issue resolution instead of *issue complaints*.

The Hewlett-Packard custom 1-day management meeting described in this case study, which incorporated Joel Barker’s Implications Wheel, was developed and facilitated in partnership with Homer Wong and Judy Liljenwall of Hewlett-Packard by LEADERSHIP SOLUTIONS, Montara, CA 94037.