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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

Proceeding	91199085
Party	Plaintiff Ramiro Canales
Correspondence Address	RAMIRO CANALES PO BOX 49046 AUSTIN, TX 78765 UNITED STATES rcanales@namelitigation.com
Submission	Motion for Summary Judgment
Filer's Name	Ramiro Canales
Filer's e-mail	rcanales@namelitigation.com
Signature	/Ramiro Canales/
Date	05/24/2012
Attachments	PIMSJ.pdf (18 pages)(337316 bytes) PIExhA-F.pdf (51 pages)(1153673 bytes) PIExhG-Q.pdf (57 pages)(1882750 bytes) PIExhR-V.pdf (48 pages)(1881921 bytes) PIExhW-Y.pdf (48 pages)(1558477 bytes)

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

In the Matter of Application Serial No. 85-069,894
For the Mark POLITICAL INTELLIGENCE
Published in the *Trademark Official Gazette*
On November 23, 2010 at Page TM 335

RAMIRO CANALES,	)	
	)	
Opposer,	)	
	)	
v.	)	Opposition No. 91199085
	)	
REYNOLDS POULSON CONSULTING, LLC	)	
	)	
Applicant.	)	
	)	

OPPOSER'S MOTION FOR PARTIAL SUMMARY JUDGMENT AND BRIEF IN SUPPORT

TO THE HONORABLE TRADEMARK TRIAL AND APPEAL BOARD:

COMES NOW Opposer, Ramiro Canales (hereinafter "Opposer"), an individual doing business under the assumed name Public Trends in Austin, Texas in the County of Travis, and pursuant to Rule 56 of the Federal Rules of Civil Procedure files this Motion for Partial Summary Judgment and Brief in Support on his merely descriptiveness claim and on Applicant's Affirmative Defenses because there is no genuine issue as to any material fact and Opposer is entitled to judgment as a matter of law.

PROCEDURAL HISTORY

Applicant's mark was published for opposition on November 23, 2010 in the *Trademark Official Gazette* at TM 235. Opposer timely filed a Thirty Day Request for Extension of Time to Oppose on December 20, 2010, and it was granted until January 22, 2011. On January 15, 2011, Opposer timely filed a Sixty Day Request for Extension of Time to Oppose for Good Cause to investigate the claim, and it was granted until March 23, 2011. Opposer timely filed his Notice of Opposition on March 22, 2011. On June 30, 2011, Opposer timely served his initial disclosures as required under Rule 26(a)(1) of the Federal Rules of Civil Procedure. This Motion for Partial Summary Judgment and Brief in Support is being filed before the opening of Opposer's testimony period.

STANDING

Opposer is the owner of the registered service mark MyCapitol.com®. (Exhibit A)

The mark was registered on the Principal Register on January 31, 2006 in Class 35 for the provision of "information and news clipping services via local or wide area computer networks, wireless communication networks, global computer information networks and other electronic networks in the fields of government affairs, local, state, national, and international politics, campaigns and elections, campaign contributions, lobbying, public policy, political strategy, legislative advocacy, public administration, business, political ethics, and contemporary political thought." The registration number is 3053781. A Section 8 and Section 15 combined declaration was received and acknowledged by the U.S. Patent and Trademark Office.

Due to Opposer's continuous and prospective use of the mark POLITICAL INTELLIGENCE on the homepage in the MyCapitol.com® website and in the domain names politicalintelligence.com and politicalintelligence.net and the possibility that those rights may be

precluded, impaired, or limited if Applicant acquires the exclusive right to use the mark POLITICAL INTELLIGENCE, Opposer has a real, direct, legitimate, and personal interest in the outcome of this proceeding. *Ritchie v. Simpson*, 170 F.3d 1092, 1095 (Fed. Cir. 1999) (standing requirement met if opposer has a "real interest" in the proceeding and a "reasonable basis" in fact for believing opposer will suffer damage if applicant's mark is registered) *See also* McCarthy, *McCarthy on Trademarks and Unfair Competition*, § 20:11 (4th ed. 2004) ("Standing is presumed when the mark sought to be registered is allegedly descriptive of the [services] and the opposer is one who has a sufficient interest in using the descriptive term in his business.")

STANDARD FOR SUMMARY JUDGMENT

Under Rule 56 of the Federal Rules of Civil Procedure, summary judgment shall be granted "if the movant shows that there is no genuine dispute as to any material fact and the movant is entitled to judgment as a matter of law." FED. R. CIV. P. 56(a); *accord Anderson v. Liberty Lobby, Inc.*, 477 U.S. 242, 247 (1986); *Talavera v. Shah*, 638 F.3d 303, 308 (D.C. Cir. 2011); *Celotex v. Catrett*, 477 U.S. 317, 323 (1986); *Sweats Fashions, Inc., v. Pannill Knitting Co., Inc.*, 833 F.2d 1560, 4 USPQ2d 1793, 1796 (Fed. Cir. 1987). A factual dispute is genuine if, on the evidence of record, a reasonable fact finder could resolve the matter in favor of the non-moving party. *See Opryland USA Inc., v., Great American Music Show Inc.*, 970 F.2d 847, 23 USPQ2d 1471, 1471 (Fed. Cir. 1992); *Old Tyme Foods, Inc. v. Roundy's, Inc.*, 961 F.2d 200, 22 USPQ2d 1542, 1544 (Fed. Cir. 1992). Importantly, summary judgment is properly granted against a party who "after adequate time for discovery and upon motion...fails to make a showing sufficient to establish the existence of an element essential to that party's case, and on which that party will bear burden of proof at trial." *Celotex Corp. v, Catrett*, 477 U.S. 317, 322 (1986).

In ruling on a motion for summary judgment, the Board must draw all justifiable inferences in the non-moving party's favor and accept the non-moving party's evidence as true. *Anderson*, 477 U.S. at 255; *Talavera*, 638 F.3d at 308; *Lloyd's Food Products, Inc. v. Eli's Inc.*, 987 F.2d 766, 25 USPQ2d 2027, 2029 (Fed. Cir. 1993); *Opryland USA, supra.* The Board may not resolve genuine disputes as to material facts; it may only ascertain whether genuine disputes as to material facts exist. *See Lloyd's Food Products*, 25 USPQ2d at 2029, *Olde Tyme Foods*, 22 USPQ2d at 1542. A non-moving party, however, must establish more than "the mere scintilla of evidence" in support of its position. *Anderson*, 477 U.S. at 252. In addition, the non-moving party may not rely solely on allegations or conclusory statements. *Greene v. Dalton*, 164 F.3d 671, 675 (D.C. Cir. 1999). Rather, the non-moving party must present specific facts that would enable the Board to find in its favor. *Id.* If the evidence "is merely colorable, or is not significantly probative, summary judgment may be granted." *Anderson*, 477 U.S. at 249-50 (citations omitted).

STATEMENT OF UNDISPUTED FACTS

In February 2001, Opposer launched MyCapitol.com® using the assumed name Public Trends. (Exhibit A; Attachment A)

Opposer is the owner of the trademark MyCapitol.com®. (Exhibit A; Attachment D)

Opposer's trademark registration covers business services.

Opposer uses the mark POLITICAL INTELLIGENCE on the homepage of the website MyCapitol.com® to promote and describe the website's information services, including business information services. (Exhibit A; Attachment C)

Opposer is also the owner of the domain names politicalintelligence.com and politicalintelligence.net. (Exhibit A; Attachment B)

Applicant uses the mark POLITICAL INTELLIGENCE to provide business services.

Applicant disclaimed the word POLITICAL in the mark POLITICAL INTELLIGENCE because it is descriptive of its services.

PRIORITY OF USE

Priority of use does not have to be proven to show that a mark is merely descriptive. *Remington Products, Inc. v. North American Philips Corp.*, 892 F.2d 1576, 13 USPQ 2d 1444, 1449 (Fed. Cir. 1990) ("The issue here is descriptiveness – and therefore priority of use is not an element in proving the case."); *See also Meehanite Metal Corp. v. International Nickel Co.*, 262 F.2d 805, 120 USPQ 293, 294 (CCPA 1959) ("It is enough to show such interest as will justify the conclusion that damage to it will ensue if the use of such term by it or its customers to describe their [services] is denied."). Thus, priority is not an issue.

LAW OF DESCRIPTIVENESS

"[D]escriptive words must be left free for public use." *In re Colonial Stores, Inc.*, 394 F.2d 549, 157 USPQ 382, 383 (CCPA 1968). A mark that is "merely descriptive" of goods and services is not entitled to protection. *In re Abcor Dev. Corp.*, 588 F.2d 811, 813 (CCPA 1978) (major reasons for not affording federal protection are "(1) to prevent the owner of a mark from inhibiting competition in the sale of particular goods; and (2) to maintain freedom of the public to use the language involved, thus avoiding the possibility of harassing infringement suits by the registrant against others who use the mark when advertising or describing their products"). In determining whether a mark is merely descriptive, the entire mark is considered. *In re Oppedahl & Larson LLP*, 71 USPQ2d 1370, 373 F.3d 1171, 1175 (Fed. Cir. 2004) (citing *Estate of P.D. Beckwith, Inc. v. Comm'r of Patents*, 252 U.S. 538, 40 S.Ct. 414, 64 L.Ed. 705 (1920)).

Importantly, "[i]n considering the mark as a whole, the Board may weigh the individual components of the mark to determine the overall impression or the descriptiveness of the mark and its various components." *Id.*

"A term is merely descriptive if it immediately conveys knowledge of a quality, feature, function, or characteristic of the goods and services with which it is used." *In re Bayer Aktiengesellschaft* 488 F.3d 960, 963 (Fed. Cir. 2007) (citing *In re Gyulay*, 820 F.2d 1216, 1217 (Fed. Cir. 1987). The Trademark Trial and Appeal Board may find that a mark is merely descriptive "even if it does not describe the 'full scope and extent' of the applicant's goods and services." *Coach Services, Inc. v. Triumph Learning LLC*, 101 USPQ2d 1713 (Fed. Cir. 2012) (citing *In re Oppendahl & Larson LLP*, 373 F.3d 1171, 1173 (Fed. Cir. 2004) (slip op. at 38). A mark that describes a single feature or attribute of the relevant goods and services is descriptive. *In re Dial-A-Mattress Operating Corp.*, 240 F.3d 1341, 1346 (Fed. Cir. 2001); *In re H.U.D.D.L.E.*, 216 USPQ 358, 359 (TTAB 1982); *In re MBAssociates*, 180 USPQ 338, 339 (TTAB 1973). "[I]f the mark is descriptive of any of the [services] for which registration is sought," registration must be refused. *In re The Chamber of Commerce of the United States of America*, 102 USPQ2d 1217 (Fed. Cir. 2012) (citing *In re Stereotaxis, Inc.*, 249 F.3d 1039, 1041 (Fed. Cir. 2005)) (slip op. at 7).

"[D]escriptiveness of a mark is not considered in the abstract." *Bayer*, 488 F.3d at 963-964. It is "considered in relation to the particular [services] for which registration is sought, the context in which it is being used, and the possible significance that the term would have to the average purchaser of the [services] because of the manner of its use or intended use." *Id.* at 964.

"That a term may have other meanings in different contexts is not controlling." *Coach Services, Inc. v. Triumph Learning LLC*, 96 USPQ2d 1600 (TTAB 2010) (slip op. at 45); *In re Bright-Crest, Ltd.*, 204 USPQ 591, 593 (TTAB 1979). The proper question of inquiry is "whether someone who knows what the [services] are will immediately understand the mark as directly conveying information about them…" *Coach Services, Inc. v. Triumph Learning LLC*, 96 USPQ2d 1600 (TTAB 2010) (slip op. at 45); *In re Tower Tech Inc.*, 64 USPQ2d 1314, 1317 (TTAB 2002); *In re Patent & Trademark Services, Inc.*, 49 USPQ2d 1537, 1539 (TTAB 1998); *In re Home Builders Association of Greenville*, 18 USPQ2d 1313, 1317 (TTAB 1990); *In re American Greetings Corp.*, 226 USPQ 365, 366 (TTAB 1985). "Evidence that a term is merely descriptive to the relevant purchasing public may be obtained from any competent source, such as dictionaries, newspapers, or surveys." *In re The Chamber of Commerce of the United States of America*, 102 USPQ2d 1217 (Fed. Cir. 2012) (slip op. at 7). Internet evidence from domestic and foreign websites is also considered probative in determining that a term or mark is merely descriptive. *In re King Koil Licensing Company, Inc.*, 79 USPQ2d 1048 (TTAB 2006) (slip op. at 4-5) ("[T]he Board has held that, under appropriate circumstances, web pages posted abroad may be considered probative evidence on how a term will be perceived….We therefore disagree with applicant's essential contention that a general consumer in the United States would not turn to foreign web sites when researching products they may be planning to purchase."); *In re Remacle*, 66 USPQ2d 1222 (TTAB 2002) (Board found that professionals in certain fields, such as medicine, engineering, computers and telecommunications would be likely to monitor developments in their fields without regard to national boundaries, and that the internet facilitates such distribution of knowledge, so evidence from an English language website in Great Britain held admissible); *See also In re Bayer Aktiengesellschaft*, 488 F. 3d 960, 82 USPQ2d 1828,

1835 (Fed. Cir. 2007) ("Information originating on foreign websites or in foreign news publications that are accessible to the United States public may be relevant to discern United States consumer impression of a proposed mark").

A descriptive mark can be registered if it has secondary meaning or acquired distinctiveness by serving as a source identifier of goods or services. *In re The Chamber of Commerce of the United States of America*, 102 USPQ2d 1217 (Fed. Cir. 2012) (slip op. at 6). "To establish secondary meaning or acquired distinctiveness, an applicant must show that 'in the minds of the public, the primary significance of a product feature or term is to identify the source of the product rather than the product itself." *Id.* Significantly, secondary meaning or acquired distinctiveness "is to be tested in an opposition proceeding as of the date the issue is under consideration. The filing date is not a cutoff for any evidence developing after that time." *Coach Services, Inc. v. Triumph Learning LLC*, 101 USPQ2d 1713 (Fed. Cir. 2012) (slip op. at 43) (citing *Target Brands, Inc. v. Hughes*, 85 USPQ2d 1676, 1681 (TTAB 2007) (citing *McCormick & Co. v. Summers*, 354 F.2d 688 (CCPA 1966)); *Harsco Corp. v. Electrical Sciences, Inc.*, 9 USPQ2d 1570, (TTAB 1988)). "[T]he greater the degree of descriptiveness the term has, the heavier the burden of proof to prove it has attained secondary meaning." *In re Bongrain Int'l (Am.) Corp.*, 894 F.2d 1316, 13 USPQ2d 1727, 1728 n. 4 (Fed. Cir. 1990). *See also In re Boston Beer Co., L.P.*, 198 F.3d 1370, 1373-74, 53 USPQ2d 1056, 1058-59 (Fed. Cir. 1999) (common usage of a term by different companies demonstrates the inability of the term to acquire distinctiveness).

THE MARK POLITICAL INTELLIGENCE IS MERELY DESCRIPTIVE AS APPLIED TO APPLICANT'S SERVICES

Two dictionary[1] terms comprise the mark POLITICAL INTELLIGENCE. (Exhibit C)[2]. Applicant disclaimed the term POLITICAL after the trademark examiner determined that it was descriptive of a feature of Applicant's services. Specifically, the examiner noted "Applicant's specimen clearly shows that the services are provided in the field or relate to politics, namely business politics. Therefore, 'political in the mark merely describes a feature of the services and must be disclaimed." *See* Office Action, September 29, 2010. The term INTELLIGENCE is a common dictionary term. One of its meanings is "knowledge of an event, circumstance, etc., received or imparted; news; information." *See* Exhibit C. It too is descriptive of a feature of Applicant's services.

Applicant's POLITICAL INTELLIGENCE mark is descriptive of its services because the mark as whole immediately describes, without conjecture or speculation, a significant characteristic or feature of the services, namely information relating to business and organization politics. In other words, Applicant's services are used to provide individuals with information about how to deal with politics at the workplace and in an organization. Documents from Applicant's website clearly show that the mark POLITICAL INTELLIGENCE is used in a descriptive sense. (Exhibit D)[3]

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[1] The Board may take judicial notice of dictionary definitions, including online dictionaries. *See In re CyberFinancial.Net Inc.*, 65 USPQ2d 1789, 1791 n. 3 (TTAB 2002); *University of Notre Dame du Lac v. J.C. Gourmet Food Imports Co., Inc.*, 213 USPQ 594 (TTAB 1982), *aff'd*, 703 F.2d 1372, 217 USPQ 505 (Fed. Cir. 1983).

[2] Exhibit B is Opposer's declaration authenticating Exhibits C thru Y.

[3] The website printouts show "Stephanie Reynolds Consulting," a sole proprietorship, as the owner and user of the mark. The specimens submitted with the application show "Reynolds Poulson Consulting," a limited liability company, as the owner and user of the mark.

The descriptive nature of the mark POLITICAL INTELLIGENCE when used in connection with providing information about business and organizational politics, business management, and leadership development is confirmed by the descriptive use of the term by third parties.[4] *In re Boston Beer Co. L.P.*, 198 F.3d 1370, 1373-74, 53 USPQ2d 1056, 1058-59 (Fed. Cir. 1999); *In re Tower Tech Inc.*, 64 USPQ2 1314, 1317 (TTAB 2002); *In re Consolidated Cigar Co.*, 35 USPQ2d 1290, 1294 (TTAB 1995). For example, the following third parties use the mark POLITICAL INTELLIGENCE in a descriptive sense to provide their services.

Senior Leader Forum
For Leaders at the Executive Level

"This session is the gateway to building their political intelligence now."

"Political Intelligence and using it wisely."

(Exhibit E)

LeaderXPress Leadership Consultants

"For the past 20 years she has been consulting to and coaching executives, key leaders, and leadership teams in the areas of power and influence, leadership presence, political intelligence, interpersonal communication, building motivated teams across distance and culture, and change management."

(Exhibit F)

[4] Extensive use of the mark by third parties conclusively shows that Applicant's mark is incapable of secondary meaning or acquired distinctiveness. *In re Boston Beer Co., L.P.*, 198 F.3d 1370, 1373-74, 53 USPQ2d 1056, 1058-59 (Fed. Cir. 1999) (common usage of a term by different companies demonstrates the inability of the term to acquire distinctiveness).

Contact Point Associates LLC[5]
Coaching Goals

"Developing strategic thinking, systems awareness and political intelligence."

(Exhibit G)

Your Office Coach®
Six Secrets of Politically Savvy People

"So here are some strategies to adopt if you want to demonstrate more political intelligence."

(Exhibit H)

Organizational Learning Tools Inc.

"Political Intelligence – Introductory Pack"

"Political Intelligence Profile and Questionnaire/Workbook"

(Exhibit I)

Academy for Political Intelligence

"The political intelligence profile/diagnostic"

"The Executive political intelligence Coaching profile"

(Exhibit J)

JS-International

"Developing Your Political Intelligence"

(Exhibit K)

Leadership Development

"PQ – Political Intelligence represents the skills, knowledge and behaviours required to influence and negotiate effectively with others."

(Exhibit L)

[5] The company is located in the same town as Applicant.

Psychometrics

"Political Intelligence Profile®"

(Exhibit M)

TTM Associates

"Political Intelligence & Sustaining Change"

(Exhibit N)

Alchemy for Managers

"Political Intelligence (sample page)"

"The Political Intelligence model"

(Exhibit O)

In addition, the mark is used descriptively in academic journals and articles and other news publications to describe information relating to business and organizational politics and leadership development. Note the following examples:

Change Management Excellence

"An introduction to political intelligence (PQ)"

(Exhibit P)

Executive Presence: Have and Have Nots

"Peter Ciampa, in his article 'How Leaders move Up' (Harvard Business Review, January 2005), outlines the differences between good and elite CEO Candidates. He lists three major areas in which the great excel – management savvy, political intelligence, and personal style."

(Exhibit Q)

Harvard Business Review
Almost Ready: How Leaders Move Up

The Winner's Difference
(Table)

"Political Intelligence"

(Exhibit R)

Articlebase

"The Importance of Political Intelligence"

(Exhibit S)

Journal of Management Development

"Developing political intelligence for making feasible decisions"

(Exhibit T)

Political Savvy: Elusive and Vital

"Political savvy in the workplace, also called political intelligence (McIntyre 2005)……"

(Exhibit U)

Organizational Change and Development

Strategies for Implementing Change

" • *Information* (data, technical knowledge, political intelligence, expertise"

(Exhibit V)

A research agenda on the leaders' political intelligence for effective change management

(Exhibit W)

Development of multiple IQ maps for use in the selection of inpatriate managers: a practical theory

"4.3 Political Intelligence"

(Exhibit X)

What Political Animal Are You?

"The Workplace Politics Pocketbook has a lovely model, allowing you to chart yourself against Political Intelligence and Organisational Goal Alignment."

(Exhibit Y)

Accordingly, based on the evidence of record, Applicant's POLITICAL INTELLIGENCE mark, when viewed as a whole and analyzed in the context of Applicant's identified services, merely describes, without conjecture or speculation, a significant feature or characteristic of Applicant's services. *See, e.g., In re Gyulay*, 820 F.2d 1216, 3 USPQ2d 1009 (Fed. Cir. 1987). Thus, registration on the Principal Register must be refused.

AFFIRMATIVE DEFENSES

Opposer additionally moves for summary judgment on all of Applicant's affirmative defenses.

Unitary Mark

A unitary mark is a mark in which the elements of a "mark are so integrated or merged together that they cannot be regarded as separable units." *In re Kraft, Inc.*, 218 USPQ 571, 573 (TTAB 1983). Applicant's disclaimer of the term POLITICAL confirms that the mark POLITICAL INTELLIGENCE consists of two separable descriptive terms. "If the matter that comprises the mark or relevant portion of the mark is unitary, no disclaimer of an element, whether descriptive, generic, or otherwise, is required." T.M.E.P. § 1213.05.

See, e.g., In re Lean Line, Inc., 229 USPQ 781 (TTAB 1986) (holding LEAN LINE for low calorie foods not unitary; requirement for disclaimer of "LEAN" held proper). Thus, summary judgment is proper on this affirmative defense.

Acquired Distinctiveness; Section 2(f) Registration

As noted earlier, "[t]o establish secondary meaning or acquired distinctiveness, an applicant must show that 'in the minds of the public, the primary significance of a product feature or term is to identify the source of the product rather than the product itself." *Id.* Significantly, secondary meaning or acquired distinctiveness "is to be tested in an opposition proceeding as of the date the issue is under consideration. The filing date is not a cutoff for any evidence developing after that time." *Coach Services, Inc. v. Triumph Learning LLC*, 101 USPQ2d 1713 (Fed. Cir. 2012) (slip op. at 43) (citing *Target Brands, Inc. v. Hughes*, 85 USPQ2d 1676, 1681 (TTAB 2007) (citing *McCormick & Co. v. Summers*, 354 F.2d 688 (CCPA 1966)); *Harsco Corp. v. Electrical Sciences, Inc.*, 9 USPQ2d 1570, (TTAB 1988)). "[T]he greater the degree of descriptiveness the term has, the heavier the burden of proof to prove it has attained secondary meaning." *In re Bongrain Int'l (Am.) Corp.*, 894 F.2d 1316, 13 USPQ2d 1727, 1728 n. 4 (Fed. Cir. 1990). *See also In re Boston Beer Co., L.P.*, 198 F.3d 1370, 1373-74, 53 USPQ2d 1056, 1058-59 (Fed. Cir. 1999) (common usage of a term by different companies demonstrates the inability of the term to acquire distinctiveness). In this case, the evidence is clear that as of the date the issue is under consideration by the Board, Applicant did not have substantially exclusive use of the mark POLITICAL INTELLIGENCE. Additionally, Applicant did not use the mark in commerce for the five years before it filed its Answer asserting the affirmative defense. Thus, summary judgment should be granted.

Standing

As noted above, Opposer has a real interest in this proceeding and thus this affirmative defense is meritless.

No Legitimate Interest - Unrelated Services

This affirmative defense relates to Opposer's standing. As shown above, Opposer has a real interest. Thus, this affirmative defense has no merit.

No Legitimate Interest – No Use of the Mark

This affirmative defense relates to Opposer's standing. Opposer uses the mark POLITICAL INTELLIGENCE and has a real interest in this proceeding. *See* Exhibit A. This affirmative defense has no merit.

Priority of Use

Priority is not an issue in a merely descriptiveness claim. *Remington Products, Inc. v. North American Philips Corp.*, 892 F.2d 1576, 13 USPQ 2d 1444, 1449 (Fed. Cir. 1990) ("The issue here is descriptiveness – and therefore priority of use is not an element in proving the case."); *See also Meehanite Metal Corp. v. International Nickel Co.*, 262 F.2d 805, 120 USPQ 293, 294 (CCPA 1959) ("It is enough to show such interest as will justify the conclusion that damage to it will ensue if the use of such term by it or its customers to describe their [services] is denied."). Thus, summary judgment should be granted on this claim.

Failure to State A Claim

In its Answer, Applicant alleged that Opposer failed to state a claim upon which relief may be granted. This defense is meritless. As this motion for partial summary judgment indicates, Opposer has a valid claim. Summary judgment is proper on this affirmative defense.

CONCLUSION

In light of the aforementioned arguments and authorities, Opposer respectfully requests that summary judgment be granted on his merely descriptive claim. Additionally, Opposer requests that summary judgment be granted on all of Applicant's Affirmative Defenses and sustain Opposer's Opposition.

Dated: May 24, 2012

Respectfully submitted,

RAMIRO CANALES
Attorney at Law
NameLitigation.com
P.O. Box 49046
Austin, Texas 78765
(512) 659-3237
email: rcanales@namelitigation.com

Opposer

CERTIFICATE OF ELECTRONIC FILING

I hereby certify that "Opposer's Motion for Partial Summary Judgment and Brief in Support" was filed electronically with the Trademark Trial and Appeal Board via ESTTA on May 24, 2012.

Ramiro Canales

RAMIRO CANALES
Attorney at Law

CERTIFICATE OF SERVICE

Pursuant to Trademark Rule 2.119, I hereby certify that a true and complete copy of the foregoing "Opposer's Motion for Partial Summary Judgment and Brief in Support" has been served on Zachary A. Wright, Applicant's counsel of record, by sending said copy on May 24, 2012 via First Class Mail to the following address:

Mr. Zachary A. Wright, Esq.
Wright Law PLLC
999 Third Avenue
Suite 3000
Seattle, WA 98104

Ramiro Canales

RAMIRO CANALES
Attorney at Law

EXHIBIT
A

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

In the Matter of Application Serial No. 85-069,894
For the Mark POLITICAL INTELLIGENCE
Published in the *Trademark Official Gazette*
On November 23, 2010 at Page TM 335

RAMIRO CANALES, Opposer, v. REYNOLDS POULSON CONSULTING, LLC Applicant.	))))))))))	Opposition No. 91199085

DECLARATION OF RAMIRO CANALES

Ramiro Canales, pursuant to 28 U.S.C. § 1746, declares as follows:

1. My name is Ramiro Canales and I am over the age of 18 and competent to make this declaration. The facts and attachments herein are within my personal knowledge and are true and correct.

2. I am an attorney licensed to practice law in the State of Texas.

3. In February 2001, I launched MyCapitol.com® and began operating it under the assumed business name Public Trends. I maintain and update the website.

4. Public Trends is an assumed business name registered in Austin, Texas in the County of Travis. True and correct copies of the registrations are attached as Attachment A.

5. The domain names politicalintelligence.com and politicalintelligence.net were registered on June 25, 1999 and April 10, 2009, respectively. They redirect to the MyCapitol.com® website to promote it. True and correct copies of the whois and ownership information are attached as Attachment B.

6. I use the mark POLITICAL INTELLIGENCE on the homepage of MyCapitol.com® to promote and describe the website's services, including information about business politics. A true and correct copy of the homepage of MyCapitol.com® is attached as Attachment C.

7. The mark POLITICAL INTELLIGENCE has not been abandoned and is continuously used on the internet, in the United States, and in commerce.

8. On March 14, 2012, a Sections 8 and 15 combined declaration for the standard character mark MyCapitol.com® was accepted and acknowledged by the U.S. Patent and Trademark Office. True and correct copies of the printouts from the U.S. Patent and Trademark Office's TARR database and the registration certificate are attached as Attachment D.

9. The MyCapitol.com® trademark registration covers business information services.

Further affiant sayeth not.

I declare under penalty of perjury that the foregoing is true and correct.

Dated: May 24, 2012

Ramiro Canales

Ramiro Canales

ATTACHMENT
A
TO
DECLARATION OF
RAMIRO CANALES

DANA DeBEAUVOIR
Travis County Clerk
(512) 854-9188
P. O. Box 149325, Austin, Texas 78714-9325
5501 Airport Blvd, Austin, Texas 78751
www.co.travis.tx.us

TRV 2010154191
2 PGS

Assumed Name Records Certificate of Ownership For Unincorporated Business or Profession

Notice: "Certificates of Ownership" are valid only for a period not to exceed 10 years from the date filed in the County Clerk's Office (Chapter 36, Section 1, Title 4 of the Business and Commerce Code). This Certificate properly executed is to be filed immediately with the County Clerk.

Business Name

PUBLIC TRENDS

Business Address

PO BOX 49046

City AUSTIN **State** TX **ZIP Code** 78765

This Assumed Name will be used for 10 years unless indicated here: _____

Business is to be conducted as (check one):

- [x] Proprietorship
- [ ] Joint Venture
- [ ] Real Estate Investment Trust
- [ ] Joint Stock Company
- [ ] Limited Partnership
- [ ] Sole Practitioner
- [ ] General Partnership
- [ ] Other (name type) _____

I/WE, the undersigned, are the owner(s) of the above business and my/our name(s) and address(es) given is/are true and correct and There is/are no ownership(s) in said business other than those listed herein below. Names of owners:

Name Ramiro Canales Signature Ramiro Canales

Residence Address P.O. Box 49046 City Austin State TX ZIP 78765

Name _____ Signature _____

Residence Address _____ City _____ State ____ ZIP _____

Name _____ Signature _____

Residence Address _____ City _____ State ____ ZIP _____

FOR USE BY NOTARY AND CLERK OF THE COURT, DEPUTY. *The State of Texas and County of Travis:*

Before me, the undersigned authority, on this day personally appeared: Ramiro Canales *known to me to be the person(s) whose name(s) is/are subscribed to the foregoing instrument and acknowledged to me that he/she/they signed the same purpose and consideration therein expressed. Given under my hand and seal of office, on* OCT 18 2010 *, 20* ____.

Signature of Notary Public in and for the State of Texas or Clerk of the Court, Deputy

Michael P. Gonzales

MICHAEL P. GONZALES

Seal of the Notary Public or Clerk of the Court, Deputy

INFORMATION WHERE DOCUMENT SHOULD BE RETURNED (to be completed by applicant):

In the spaces below, clearly print the name, address, city, state, and ZIP code where this document should be returned:

Ramiro Canales
P.O. Box 49046
Austin, TX 78765

Form of identification presented: _____

SEAL OF COUNTY COURT TRAVIS COUNTY, TEXAS

OPP-0001

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00094063

Assumed Name Records Certificate of Ownership for Unincorporated Business or Profession

Notice: "Certificates of Ownership" are valid only for a period not to exceed 10 years from the date filed in the County Clerk's Office (Chapter 36, Section 1, Title 4 of the Business and Commerce Code). This certificate properly executed is to be filed immediately with the County Clerk.

Business Name

PUBLIC TRENDS

Business Address

4210 RED RIVER ST #235

City AUSTIN **State** TX **ZIP Code** 78751

This Assumed Name will be used for 10 years unless indicated here: _____

Business is to be conducted as (check one):

- ☒ Proprietorship
- ☐ Limited Partnership
- ☐ Joint Venture
- ☐ Sole Practitioner
- ☐ Real Estate Investment Trust
- ☐ Other (name type) _____
- ☐ General Partnership
- ☐ Joint Stock Company

Certificate of Ownership

I/We, the undersigned, are the owner(s) of the above business and my/our name(s) and address(es) given is/are true and correct and there is/are no ownership(s) in said business other than those listed herein below. Names of owners:

Name Ramiro Canales Signature Ramiro Canales

Residence Address 4210 Red River St. #235 City Austin State TX ZIP 78751

Name _____ Signature _____

Residence Address _____ City _____ State _____ ZIP _____

Name _____ Signature _____

Residence Address _____ City _____ State _____ ZIP _____

FOR USE BY NOTARY AND CLERK OF THE COURT, DEPUTY. The State of Texas and County of Travis:

Before me, the undersigned authority, on this day personally appeared: Ramiro Canales *known to me to be the person(s) whose name(s) is/are subscribed to the foregoing instrument and acknowledged to me that he/she/they signed the same for purpose and consideration therein expressed. Given under my hand and seal of office, on* 3-24- *,*198*.*

Signature of Notary Public in and for the State of Texas or Clerk of the Court, Deputy

O Ruiz, deputy

O. Ruiz

Seal of Notary Public or Clerk of the Court, Deputy

SEAL OF COUNTY COURT • TRAVIS COUNTY, TEXAS

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Ramiro Canales
4210 Red River St. #235
Austin, TX 78751

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PAID BY: CASH

OPP-0003

ATTACHMENT
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Gene Wu for State Rep. Candidate for House District 137 in Southwest Houston. GeneForTexas.com

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www.NetBoots.net

Committee FEC Tools
FEC reporting made

Whois Record | Site Profile | Registration | Server Stats | My Whois

Reverse Whois: "Ramiro Canales" owns about 58 other domains
Email Search: ramiro@canales.com is associated with about 14 domains
Registrar History: 2 registrars
NS History: 8 changes on 6 unique name servers over 7 years.
IP History: 10 changes on 10 unique IP addresses over 7 years.
Whois History: 36 records have been archived since 2001-06-25 .
Reverse IP: 285,638 other sites hosted on this server.

Log In or Create a FREE account to start monitoring this domain name

```
Domain Name: POLITICALINTELLIGENCE.COM
Registrar: MONIKER

Registrant [3595328]:
        Ramiro Canales ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US

Administrative Contact [3595328]:
        Ramiro Canales ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US
        Phone: +1.5126593237

Billing Contact [3595328]:
        Ramiro Canales ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US
        Phone: +1.5126593237

Technical Contact [3595328]:
        Ramiro Canales ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US
        Phone: +1.5126593237

Domain servers in listed order:

        NS1.MONIKERDNS.NET
        NS2.MONIKERDNS.NET
        NS3.MONIKERDNS.NET
        NS4.MONIKERDNS.NET
```

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Country TLDs | General TLDs

Available domains for registration:

PoliticalIntelligence.at Register
PoliticalIntelligence.be Register
PoliticalIntelligence.ch Register
PoliticalIntelligence.cn Register
PoliticalIntelligence.de Register
PoliticalIntelligence.dk Register
PoliticalIntelligence.es Register
PoliticalIntelligence.eu Register
PoliticalIntelligence.fr Register
PoliticalIntelligence.in Register

Register All Selected > Show all (18) >

easy PAC or Candidates
www.trailblz.com

Presidential Candidates
Who do you want as the next president of the US
pulseping.com

```
Record created on:        1999-06-25 15:40:36.0
Database last updated on: 2011-06-02 15:46:24.57
Domain Expires on:        2012-06-25 15:40:36.0
```

Backorder This Domain

Whois Directory

a b c d e f g h i j k l m n o p q r s t u v w x y z 0 1 2 3 4 5 6 7 8 9

Searching for **PoliticalIntelligence.com**

1. 24 Hour Emergency Center
   4000 Washington AveSuite 100, Houston, TX 77007
   www.mhehc.com
2. River Oaks Emergency Care
   2320 S. Shepherd Drive, Houston, TX 77019
   www.RiverOaksEmergency.com
3. Synergy Vein Clinic
   1200 Binz, Ste 120A , Houston, TX 77004
   www.synergyvein.com
4. Vital Allergy Center
   1213 Herman Drive Ste 480, Houston, TX 77004
   www.VitalAllergy.com

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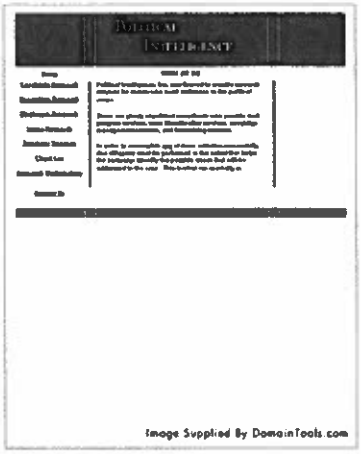
Whois Record | Site Profile | Registration | Server Stats | My Whois

Reverse Whois: "Ramiro Canales" owns about 58 other domains
Email Search: ramiro@canales.com is associated with about 14 domains
Registrar History: 3 registrars with 1 drop.
NS History: 14 changes on 9 unique name servers over 9 years.
IP History: 14 changes on 10 unique IP addresses over 7 years.
Whois History: 34 records have been archived since 2002-07-21 .
Reverse IP: 285,638 other sites hosted on this server.

Log In or Create a FREE account to start monitoring this domain name

```
Domain Name: POLITICALINTELLIGENCE.NET
Registrar: MONIKER

Registrant [3595328]:
        Ramiro Canales  ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US

Administrative Contact [3595328]:
        Ramiro Canales  ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US
        Phone: +1.5126593237

Billing Contact [3595328]:
        Ramiro Canales  ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US
        Phone: +1.5126593237

Technical Contact [3595328]:
        Ramiro Canales  ramiro@canales.com
        P.O. Box 49046
        Austin
        TX
        78765
        US
        Phone: +1.5126593237

Domain servers in listed order:

        NS1.MONIKERDNS.NET
        NS2.MONIKERDNS.NET
        NS3.MONIKERDNS.NET
        NS4.MONIKERDNS.NET
```



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Country TLDs | General TLDs

Available domains for registration:

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PoliticalIntelligence.be Register
PoliticalIntelligence.ch Register
PoliticalIntelligence.cn Register
PoliticalIntelligence.de Register
PoliticalIntelligence.dk Register
PoliticalIntelligence.es Register
PoliticalIntelligence.eu Register
PoliticalIntelligence.fr Register
PoliticalIntelligence.in Register

Register All Selected > Show all (18) >

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Sign the DGA petition and stop Rick Perry's attacks on women!
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Fight Citizens United

Sign Progressives United's petition against corporate corruption today:
pac.ProgressivesUnited.org

Obama's Broken Promises

The USA Deserves Better. Help The RNC Elect A Republican President.
support.gop.com

```
Record created on:        2009-04-10 02:12:33.0
Database last updated on: 2012-05-11 09:59:47.12
Domain Expires on:        2013-04-10 02:12:33.0
```

Backorder This Domain

Whois Directory

a b c d e f g h i j k l m n o p q r s t u v w x y z 0 1 2 3 4 5 6 7 8 9

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ATTACHMENT
D
TO
DECLARATION OF
RAMIRO CANALES

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Serial Number: 78477469 Assignment Information Trademark Document Retrieval

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Standard Character claim: Yes

Current Status: A Sections 8 and 15 combined declaration has been accepted and acknowledged.

Date of Status: 2012-03-14

Filing Date: 2004-09-01

Transformed into a National Application: No

Registration Date: 2006-01-31

Register: Principal

Law Office Assigned: LAW OFFICE 107

If you are the applicant or applicant's attorney and have questions about this file, please contact the Trademark Assistance Center at TrademarkAssistanceCenter@uspto.gov

Current Location: L70 -TMEG Law Office 107

Date In Location: 2012-03-14

LAST APPLICANT(S)/OWNER(S) OF RECORD

---

1. Canales, Ramiro

Address:
Canales, Ramiro
P.O. Box 49046
Austin, TX 78765
United States
Legal Entity Type: Individual
Country of Citizenship: United States
Phone Number: (512) 659-3237

GOODS AND/OR SERVICES

International Class: 035
Class Status: Active
Providing information and news clipping services via local or wide area computer networks, wireless communication networks, global computer information networks and other electronic networks in the fields of government affairs, local, state, national, and international politics, campaigns and elections, campaign contributions, lobbying, public policy, political strategy, legislative advocacy, public administration, business, political ethics, and contemporary political thought
Basis: 1(a)
First Use Date: 2001-02-19
First Use in Commerce Date: 2001-02-19

ADDITIONAL INFORMATION

(NOT AVAILABLE)

MADRID PROTOCOL INFORMATION

(NOT AVAILABLE)

PROSECUTION HISTORY

NOTE: To view any document referenced below, click on the link to "Trademark Document Retrieval" shown near the top of this page.

2012-03-14 - Notice Of Acceptance Of Sec. 8 & 15 - E-Mailed

2012-03-14 - Section 8 (6-year) accepted & Section 15 acknowledged

2012-03-14 - Case Assigned To Post Registration Paralegal

2012-01-30 - TEAS Section 8 & 15 Received

2012-01-30 - TEAS Change Of Correspondence Received

2006-01-31 - Registered - Principal Register

2005-11-08 - Published for opposition

2005-10-19 - Notice of publication

2005-09-19 - Law Office Publication Review Completed

2005-09-16 - Assigned To LIE

2005-09-12 - Approved for Pub - Principal Register (Initial exam)

2005-09-12 - EXAMINERS AMENDMENT E-MAILED

2005-09-12 - Examiners Amendment -Written

2005-08-09 - Priority Action E-Mailed

2005-08-09 - Priority Action Written

2005-08-08 - Previous Allowance Count Withdrawn

2005-08-05 - Withdrawn Before Publication

2005-05-12 - Law Office Publication Review Completed

2005-05-06 - Assigned To LIE

2005-04-29 - Approved for Pub - Principal Register (Initial exam)

2005-04-22 - Teas/Email Correspondence Entered

2005-04-13 - Communication received from applicant

2005-04-13 - TEAS Response to Office Action Received

2005-04-04 - Non-final action e-mailed

2005-04-04 - Non-Final Action Written

2005-03-30 - Assigned To Examiner

2004-09-10 - New Application Entered In Tram

ATTORNEY/CORRESPONDENT INFORMATION

Correspondent
Canales, Ramiro
P.O. Box 49046
AUSTIN TX 78765

Phone Number: (512) 659-3237

Int. Cl.: 35

Prior U.S. Cls.: 100, 101 and 102

Reg. No. 3,053,781

United States Patent and Trademark Office

Registered Jan. 31, 2006

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SER. NO. 78-477,469, FILED 9-1-2004.

MICHELLE DUBOIS, EXAMINING ATTORNEY

EXHIBIT
B

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

In the Matter of Application Serial No. 85-069,894
For the Mark POLITICAL INTELLIGENCE
Published in the *Trademark Official Gazette*
On November 23, 2010 at Page TM 335

RAMIRO CANALES, Opposer, v. REYNOLDS POULSON CONSULTING, LLC Applicant.	)))))))))	Opposition No. 91199085

DECLARATION OF RAMIRO CANALES

Ramiro Canales, pursuant to 28 U.S.C. § 1746, declares as follows:

1. My name is Ramiro Canales and I am over the age of 18 and competent to make this declaration regarding the attachments to the Motion for Partial Summary Judgment. The facts herein are within my personal knowledge and are true and correct.

2. Exhibit C are true and correct copies of the definitions of the terms "political" and "intelligence" obtained from Dictionary.com.

3. Exhibit D are true and correct copies of Applicant's documents displaying the mark POLITICAL INTELLIGENCE obtained from http://www.reynoldspoulson.com.

4. Exhibit E is a true and correct copy of the event "Senior Leader Forum" obtained from http://www.lxlearning.com.

5. Exhibit F is a true and correct copy of "LeaderXpress Leadership Consultants" obtained from http://www.leaderxpress.com.

6. Exhibit G is a true and correct copy of "Contact Point Associates, LLC" obtained from http://www.contactpoinstassoc.com.

7. Exhibit H is a true and correct copy of "Six Secrets of Political Savvy People" obtained from http://www.yourofficecoach.com.

8. Exhibit I is a true and correct copy of "Political Intelligence – Introductory Pack" and "Political Intelligence Profile and Questionnaire/Workbook" obtained from http://shop.oltcatalog.com.

9. Exhibit J is a true and correct copy of "Academy for Political Intelligence" obtained from http://www.tafpi.com.

10. Exhibit K is a true and correct copy of "Developing Your Political Intelligence" obtained from http://www.js-international.com.

11. Exhibit L is a true and correct copy of "Leadership Development" obtained from http://www.thestairway.co.uk.

12. Exhibit M is a true and correct copy of "Political Intelligence Profile®" obtained from http://www.ashridge.org.uk.

13. Exhibit N is a true and correct copy of "Political Intelligence and Sustaining Change" obtained from http://www.ttm-associates.com.

14. Exhibit O is a true and correct copy of "Political Intelligence (sample page)" obtained http://www.peoplealchemy.co.uk.

15. Exhibit P is a true and correct copy of a chapter titled "An introduction to political intelligence (PQ)" found in the book *Change Management Excellence* (2004).

16. Exhibit Q are true and correct copies of "Executive Presence: Haves and Have Nots" and "HarvardBusiness.org – Almost Ready: How Leaders Move Up" obtained from http://www.centerpointforleaders.org and http://www.bnet.com, respectively.

17. Exhibit R is a true and correct copy of "Almost Ready: How Leaders Move Up" by Dan Ciampa published in the *Harvard Business Review* in January 2005.

18. Exhibit S is a true and correct copy of "The Importance of Political Intelligence" obtained from http://www.articlebase.com.

19. Exhibit T is a true and correct copy of "Developing political intelligence for making feasible decisions" obtained from http://www.emeraldinsight.com.

20. Exhibit U is a true and correct copy of "Political Savvy: Elusive and Vital" by Daniela Truty obtained from http://www.umsl.edu/~conted/education/.../A/Truty_Political_Savvy.pdf.

21. Exhibit V is a true and correct copy of "Organizational Change and Development" obtained from http://jeritt.msu.edu/documents/TalimanWithoutAttachment.pdf.

22. Exhibit W is a true and correct copy of "A research agenda of the leaders' political intelligence for effective change management" published in the African Journal of Business Management (2011) and obtained from http://www.academicjournals.org/ajbm.

23. Exhibit X is a true and correct copy of "Development of multiple IQ maps for use in the selection of inpatriate managers: a practical theory" published in the International Journal of Intercultural Relations (2002) and obtained from http://www.elsevier.com/locate/ijintrel.

24. Exhibit Y is a true and correct copy of "What Political Animal Are You?" obtained from http://www.managementpocketbooks.com.wordpress.com/tag/political-intelligence/.

Further affiant sayeth not.

I declare under penalty of perjury that the foregoing is true and correct.

Dated: May 24, 2012

Ramiro Canales

Ramiro Canales

EXHIBIT
C

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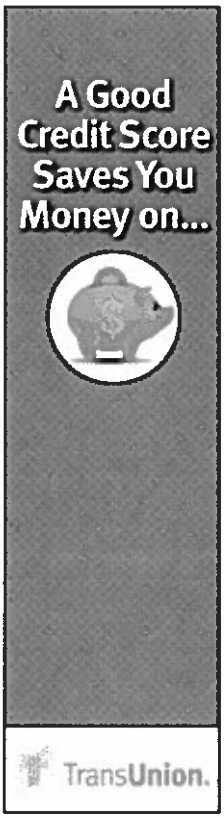

political [puh-lit-i-kuhl]

Origin

Conservative Politics
www.daviddewhurttexas.com/
Dewhurst is too moderate for TX. Learn more here.
The New York Times
www.nytimes.com/
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www.myhomemsn.com/
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po·lit·i·cal [puh-lit-i-kuhl] Show IPA

adjective

1. of, pertaining to, or concerned with politics: *political writers.*
2. of, pertaining to, or connected with a political party: *a political campaign.*
3. exercising or seeking power in the governmental or public affairs of a state, municipality, etc.: *a political machine; a political boss.*
4. of, pertaining to, or involving the state or its government: *a political offense.*
5. having a definite policy or system of government: *a political community.*

EXPAND

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Origin:
1545–55; < Latin *politic* (*us*) civic (see politic) + -al[1]

Related forms
po·lit·i·cal·ly, *adverb*
an·ti·po·lit·i·cal, *adjective*
an·ti·po·lit·i·cal·ly, *adverb*
non·po·lit·i·cal, *adjective*
non·po·lit·i·cal·ly, *adverb*

EXPAND

Can be confused: 1. politic, **political** ; 2. **politically,** politicly.

Dictionary.com Unabridged
Based on the Random House Dictionary, © Random House, Inc. 2012.
Cite This Source | Link To political

Political is always a great word to know.
So is slumgullion. Does it mean:

- a printed punctuation mark (‽), available only in some typefaces, designed to combine the question mark (?) and the exclamation point (!), indicating a mixture of query and interjection, as after a rhetorical question.
- a stew of meat, vegetables, potatoes, etc.

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World English Dictionary — *Collins*
political (pə'lɪtɪk ˈ l) ?

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Adams	left wing
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Matching Quote

*"I have given the best of myself and the best work of my life to help obtain **political** freedom for women, knowing that upon this rests the hope not only of the freedom of men but of the onward civilization of the world."*

-Mary S. Anthony

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Did you know: Only one word in English has an M followed by a T. Try to guess, then look here.

intelligence [in-tel-i-juhns] Origin

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in·tel·li·gence [in-tel-i-juhns] Show IPA

noun

1. capacity for learning, reasoning, understanding, and similar forms of mental activity; aptitude in grasping truths, relationships, facts, meanings, etc.
2. manifestation of a high mental capacity: *He writes with intelligence and wit.*
3. the faculty of understanding.
4. knowledge of an event, circumstance, etc., received or imparted; news; information.
5. the gathering or distribution of information, especially secret information.

EXPAND

Origin:
1350–1400; Middle English < Latin *intelligentia*. See intelligent, -ence

Related forms
hy·per·in·tel·li·gence, *noun*
non·in·tel·li·gence, *noun*
pre·in·tel·li·gence, *noun*
su·per·in·tel·li·gence, *noun*

Synonyms
1. See mind. **2.** discernment, reason, acumen, aptitude, penetration.

Antonyms
2. stupidity.

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Intelligence is always a great word to know. So is bezoar. Does it mean: 00:04

- a scrap or morsel of food left at a meal.
- a calculus or concretion found in the stomach or intestines of certain animals, esp. ruminants, formerly reputed to be an effective remedy for poison.

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Matching Quote

*"One definition of man is "an **intelligence** served by organs.""*

-Ralph Waldo Emerson

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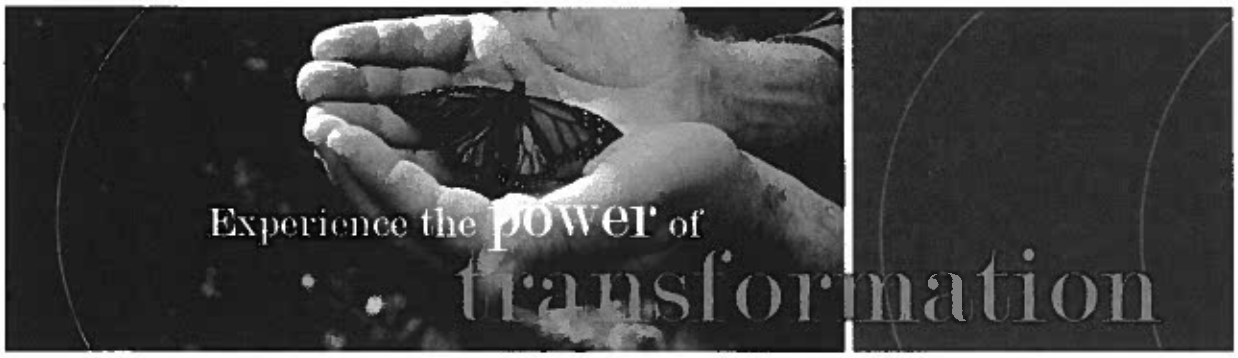

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Stephanie Reynolds Consulting offers a portfolio of leadership development solutions for executives, emerging leaders, teams, and organizations that includes:

Political Intelligence ™

This program teaches participants how to navigate the landscape of organizational politics and get beyond obstacles to achieve their goals, while continuing to maintain solid relationships. Learn about Political Intelligence>

-

Political Intelligence ™ for Sales Success

This program teaches sales professionals how to navigate the landscape of organizational politics and get beyond obstacles to win the business, while continuing to maintain solid relationships. Learn about Political Intelligence for Sales Success>

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OPP-0020

"When my group went through the program, it turned into a real "hands on" strategy session that helped us break through some roadblocks toward achieving on our commitments. The content was directly applicable to our challenges."

Randy Wootton, GM, US Specialist Sales, Microsoft Advertising

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Stephanie Reynolds Consulting

Scaling Executive Performance, Transforming Business Results

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Are Organizational Politics standing in the way of your success?

When "organizational politics" are present, do you feel like you are facing an invisible force beyond your control and you just have to accept the limitations it places on your ability to achieve your goals? How much would your performance and results improve if you could successfully manage politics?

How can you up-level your Political Intelligence?

Successful business leaders know how to navigate the landscape of organizational politics to get beyond obstacles to achieve business results, while continuing to maintain solid relationships. *Political Intelligence* breaks through restrictive thinking and provides a roadmap for assessing organizational politics. It provides the critical skills needed to help participants navigate and influence an organizations' political environment. Instead of avoiding or blaming politics for a lack of results, participants learn how to embrace and use organizational politics to achieve their goals.

Political Intelligence

Political Intelligence is delivered in one or two full-day workshops that develop and refine political acumen to enable business leaders to be more effective within their organization. Each workshop is highly interactive and provides "real world" skill practice that has immediate application for participants, who bring their challenges to the workshop. Intact teams experience the added benefit of collaborating on their strategies. The program is divided into four modules that are designed to provide participants with new concepts, models, and processes. Each module can be tailored to meet group needs.

Module 1: Introduction to Political Intelligence	**Module 2: Mapping the Political Landscape**
Module 3: Planning Your Campaign	**Module 4: Mastering Effective Influence**

Political Intelligence ™

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MODULE ONE – Introduction to Political Intelligence

This module focuses on defining terms, understanding the inevitability and impact of organizational politics, and introducing program models and processes. Participants explore their personal biases and tendencies that inhibit the development of political skills through a PI-Q self-assessment and a simulation.

MODULE TWO – Mapping the Political Landscape

Participants learn to analyze the political landscape to understand the powerbase. They learn to identify and define all the key power roles and influences involved in executing initiatives and how they shift and change. Participants create a map of their own political terrain, so they can select the best type of campaign strategy for their initiatives.

MODULE THREE – Planning Your Campaign

Step by step, participants design a campaign with communication strategies and tactics for their particular case. They gain clarity about the overall strategy, the order and priority in which to engage, and the most effective messaging for different target groups. They capture their strategy and plan in a comprehensive tool.

MODULE FOUR – Mastering Effective Influence

Participants learn about the nine types of influence and how to maximize effectiveness. They analyze how those in key power roles make decisions and how to better influence them. They assess the impact of their personal influence tendencies and learn to expand their repertoire. Participants practice the fundamentals of positioning and messaging that link to the needs and motivations of those they are trying to influence.

Tool, Concept, Model	Description of Tool Use and Benefit
Simulation	• Uncover motivations and biases regarding politics through a simulation • Identify your Leadership Story about politics
PI-Q Self-Assessment	• Assess participant level of political adepteness, and identify opportunities for closing the gap
Powerbase Map	• Beyond organizational charts, identify key power roles in systems • Locate spheres of influence, system interconnections, and opposition
Campaign Plan	• Apply a framework for successful campaigning • Understand distinct campaign strategies
Assessing People Readiness	• Utilize models to assess interest and concerns
Messaging	• Develop a campaign message and identify ways to adapt to different audiences
Effective Influence Models	• Expand skills and develop repertoire in influencing key players • Identify ways to connect with people, learn about their interests and concerns, and link your interests to their interests
Action Plans	• Apply tools, concepts, and models to participant situations • Create action plans

About Stephanie Reynolds Consulting

Stephanie Reynolds Consulting is a premier provider of breakthrough executive coaching, team facilitation, organizational development, and training solutions. We offer a successful track record working with clients ranging from start up to Fortune 500 such as Amazon, Genie, Microsoft, Philips, and T-Mobile. We specialize in designing and delivering programmatic solutions to scale individuals, teams, and organizations. We are respected for our client commitment, business acumen, trusted advice, and remarkable results.

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Are Organizational Politics standing in the way of your sales success?

When a client's "organizational politics" are present, do you feel like you are facing an invisible force beyond your control and you just have to accept the limitations it places on you to capture the business? How much would your sales results improve if you could successfully manage internal and external politics?

How can you up-level your Political Intelligence ?

High performing sales professionals know how to navigate the landscape of organizational politics to get beyond obstacles and win the business, while continuing to maintain solid relationships. *Political Intelligence for Sales Success* breaks through restrictive thinking and provides a roadmap for assessing organizational politics. It provides the critical skills needed to help participants navigate and influence an organizations' political environment. Instead of avoiding or blaming politics for a lack of results, participants learn how to embrace and use organizational politics to achieve their sales goals.

Political Intelligence for Sales Success

Political Intelligence for Sales Success is delivered in one or two full-day workshops that develop and refine political acumen to enable sales professionals to be more effective within internal and external organizations. Each workshop is highly interactive and provides "real world" skill practice that has immediate application for participants, who bring their challenges to the workshop. Intact teams experience the added benefit of collaborating on their strategies. The program is divided into four modules that are designed to provide participants with new concepts, models, and processes. Each module can be tailored to meet group needs.

Module 1: Introduction to Political Intelligence ™	**Module 2: Mapping the Political Landscape**
Module 3: Planning Your Strategy	**Module 4: Mastering Effective Influence**

Political Intelligence ™ for Sales Success

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MODULE ONE – Introduction to Political Intelligence
This module focuses on defining terms, understanding the inevitability and impact of organizational politics, and introducing program models and processes. Participants explore their personal biases and tendencies that inhibit the development of political skills through a PI-Q self-assessment and a simulation.

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Participants learn to analyze the political landscape to understand the powerbase. They learn to identify and define all the key power roles and influences involved in executing campaigns and how they shift and change. Participants create a map of their client's political terrain, so they can select the best type of strategy for winning the business.

MODULE THREE – Planning Your Strategy
Step by step, participants develop a client campaign with communication strategies and tactics for their particular case. They gain clarity about the overall strategy, the order and priority in which to engage, and the most effective messaging for different target groups. They capture their strategy and plan in a comprehensive tool.

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Tool, Concept, Model	Description of Tool Use and Benefit
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PI-Q Self-Assessment	• Assess participant level of political adepteness, and identify opportunities for closing the gap
Powerbase Map	• Beyond organizational charts, identify key power roles in systems • Locate spheres of influence, system interconnections, and opposition
Campaign Plan	• Apply a framework for a specific successful client campaign • Understand distinct campaign/sales strategies
Assessing People Readiness	• Utilize models to assess interest and concerns
Messaging	• Develop a campaign message and identify ways to adapt to different audiences
Effective Influence Models	• Expand skills and develop repertoire in influencing key players • Identify ways to connect with people, learn about their interests and concerns, and link your interests to their interests
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Senior Leader Forum

For Leaders at the Executive Level

Allan Milham, MA, MCC
President, BoldMoves Enterprises

Denise Brouillette, MBA, BCC
President, LeaderXpress

Denise Brouillette

Speaker, Executive Coach,
Leadership Consultant, Author

Invite Denise Brouillette to speak at your next leadership event.

With her humorous and direct presentation style, Denise Brouillette is a motivating and inspirational speaker. She has shown thousands of men and women how to be successful in every company, in any industry, and in any career, whether they're mapping their first 5 years, gearing up to take on bigger leadership roles, or succeeding where they're at but wanting that something extra that turns good leaders into outstanding leaders.

Speaking Topics

Topics are offered as 1-hour keynotes or in 3-hour workshop format.

6 Ways to Power

Power equals influence. Influence equals results. If your leaders at all levels aren't players in the power game, they're probably not getting much done beyond their own team. And that's not enough to move them into the leadership roles that they should be taking on for you. But in order to get anything done with power, your leaders need to know the 6 sources they have available to them, and then be clear about how and when to use each source appropriately. They will when they attend this session. Our Power Assessment is included.

Key Accomplishments
Speaking Engagements
Testimonials
Speaker Bio

Influence Matters

When the stakes are high – and they nearly always are when vital requests are on the agenda - your leaders need to be at the top of their influence game. Long gone is the time when all someone had to do was present a logical, convincing case and everyone would jump on board. Today, skillful influencers not only have to know how to present a compelling argument, they have to pitch it to the right people, in the right way, at the right time, and all while masterfully managing the power dynamics and hidden agendas. They have to be more curious than George, leave nothing to chance, and keep a calm clear head when up against the powerful. There are 3 components to masterful influence: Master Your Plan, Master Your Delivery, and Master Yourself. Your leaders will learn the key points of each in this presentation. Our Influence Assessment is included.

Get in the Game: Politics Without Compromise at Work

Wherever there's power, there's politics. It's unavoidable. The higher up your leaders go, the greater the exposure to the inevitable political back-and-forth that accompanies every leadership role. If your leaders aren't strategizing every move they make and every conversation they have with the political savvy of a leader, success will elude them AND your company. Why? Because leaders who lack political savvy have trouble using the power and influence they need to get the results you are expecting they will accomplish. Why risk having the potentially great leaders in your pipeline lose their way? They won't if they learn the 5 must-knows of the politically wise. This session is the gateway to building their political intelligence now.

You Are Your Brand

Personal brand is where power begins. It's the leader's gestalt -- that collection of personal characteristics and professional results that broadcast a message to others about who they are and how they lead. It's what people instantly think of when the leader's name comes to mind or the impression they immediately have when that leader walks into a room. Just about everything a leader says or does sends a message about them, and it's generally a lasting one. If the message speaks "leader," people jump on board and results are produced. If it says anything other than that, there's a problem. The challenge then is for leaders to be the master of their own personal brand identity. In this session leaders are introduced to the 4 key components of personal brand: Value, Attitude, Presence and Positioning, and given a road map for developing the brand that reflects their unique value-add. Our Brand Assessment is included.

Think Like A Leader

The world of work is a series of power exchanges. Your leaders are managing up, down and across the organization through complex channels with people around the world. They're expected to get what they need fast and do it with tact and skill. Every interaction is an opportunity to have their opinions considered or not, to influence outcomes or not, to be regarded as a respected and informed leader or not. Each time any of your leaders falls into the "or not" category, they lose the power to be effective. And that translates into important missed opportunities. This session gives your leaders the 5 leadership practices they must focus on in order to transition from managing to leading. By the end of this session your leaders will be clear about what they need to do to think and act like the leaders that they are and the leaders you need them to be.

Senior Leader Forum

For Leaders at the Executive Level

Allan Milham, MA, MCC
President, BoldMoves Enterprises

Denise Brouillette, MBA, BCC
President, LeaderXpress

What the Forum's About

The Forum Experience

The Senior Leader Forum delivers a powerful solution to a leader's requirement for continuous learning that produces high-value results and actionable strategies with every meeting.

In this confidential and thought-provoking milieu, you come together virtually with a small, select cohort of leaders from organizations outside of your own. With this objective and engaged group of your peers, collectively you strengthen your leadership practices and find an array of solutions to many of those thorny leadership dilemmas you might not have previously sought advice about.

The benefit derives from the leadership content that's brought to every meeting, the combined intelligence of the group in discussing the real-time application of those topics to your leadership challenges, and the longer-term advantage of ongoing access to new ways of thinking, best practices, and above all, on-the-spot counsel and advice.

Focus & Content

The Forum focuses on eight aspects of leadership that those in senior positions rarely get the opportunity to explore and discuss with others at their level. These content areas are used as the jumping off point for individual discussions of problems and solutions relative to participants' specific leadership challenges.

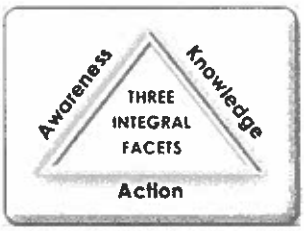
1. Leadership Presence
2. Leadership Style and Impact
3. Power and Influence at the senior level
4. Political Intelligence and using it wisely
5. Leading Change in fluctuating organizational systems
6. Talent and Team Development
7. Career Management
8. The Art of Integrating Work and Life

The timing and format of the Forum result in segments that fit demanding schedules. Over a period of one year leaders meet twice in person as well as in 10 monthly virtual sessions for 90-minutes of laser discussion. The objective of every Forum session is to increase awareness, add to knowledge, and foster deliberate action. Senior leadership strategists Allan Milham and Denise Brouillette provide the content map, structure, facilitation, and executive coaching in order for that to happen. Content application, individual executive coaching, and peer consulting between sessions both enhance the experience and keep leaders on track with their Executive Leadership Performance Plans.

Apply

Core

THREE INTEGRAL FACETS form the nucleus of the Senior Leader Forum



1. **Awareness** of self and the related impact on others
2. **Knowledge** of leadership practices that achieve the right outcomes
3. **Action** that produces a powerful professional and personal leadership practice

Components

- 12 Sessions. First and last are in person; 10 are monthly, virtual and 90-minutes long
- Leadership Style Profile and report
- Leadership Practices Assessment
- Tailored Executive Leadership Performance Plan
- Eight Leadership Content areas
- Leadership Articles (Harvard Business Review, Fortune, Forbes, Fast Company, etc.)
- Peer Consulting Match-Ups, rotated quarterly
- Individual Executive Coaching
- Access to recorded virtual meetings

Forum Calendar

Next Forum begins in Fall 2012. 9:00-4:00 in person (initial date TBD with leaders) followed by 10 monthly virtual 90-minute

The application process assures that all leaders in the Forum share a similar depth and breadth of experience and current responsibility. Contact us to have a conversation about the experience and to see if you'd like to apply or simply apply on-line here. >>

meetings, and ending Fall 2013, 9:00-4:00 in person.

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Senior Leader Forum

For Leaders at the Executive Level

Allan Milham, MA, MCC
President, BoldMoves Enterprises

Denise Brouillette, MBA, BCC
President, LeaderXpress

How to contact us

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5505 Connecticut Avenue NW, #167
Washington, DC 20015

You can reach Allan and Denise via phone, email, or snail mail or you can use the form below to send along your comments or requests to us at the Senior Leader Forum.

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Learn Fast. Lead Well.

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Denise Brouillette, MBA, BCC, President & Founder

Denise Brouillette is a strategic leadership consultant, executive coach, author, and president and founder of LeaderXpress. Denise honed her leadership development experience at two teaching hospitals of the Harvard Medical School system and as vice president of a consulting firm in Boston before moving to San Francisco. For the past 20 years she has been consulting to and coaching executives, key leaders, and leadership teams in the areas of power and influence, leadership presence, political intelligence, interpersonal communication, building motivated teams across distance and cultures, and change management. Denise holds an MBA from the Simmons School of Management, a BS with honors from Boston University, the Board Certified Coach (BCC) designation through the Center for Credentialing and Education, an affiliate of the National Board for Certified Counselors, Inc., and has additional certifications in a number of world-class leadership assessments. Denise has written more than 40 leadership articles, writes a leadership blog, and is authoring *Influence Matters: 31 Ways in 31 Days® to Master Influence at Work.* In addition, she teaches the courses *Power and Influence: Women & Leadership* and *Women and Negotiation* at U.C. Berkeley Extension, and leads a workshop on Leadership Development Planning in the U.C. Davis MBA program. She divides her time between San Francisco and New York City. Full bio >>

Allan Milham, MA, MCC

Allan Milham is an international human performance development consultant providing top level coaching and consulting in leadership and career development. Having climbed more than one corporate ladder, Allan has a key understanding of the dynamic relationship between the needs of individual leaders and the objectives of organizations. He has more than 20 years' experience-impacting top performing teams and individuals in corporate settings ranging from start-ups to Fortune 100 companies. Prior to starting his own company, Bold Moves Enterprises, Inc., Allan's professional experience included serving as a consultant for Drake Beam Morin, one of the world's leading career transition firms. He also held key leadership roles for Marriott International and with TMI USA, an international human resources consulting firm. Allan holds a Masters degree in Counseling Psychology and is a Master Certified Coach through the International Coach Federation. He serves on the Board for TeleCommuniting Advantage Group of San Francisco. Allan is the co-author of the Amazon Top 100 bestseller, *Bold Moves - Jump to Outstanding Self-Managed Action* and the corporate workbook, *Empathy: Connecting with the Customer.*

Jane Cranston, MS

Jane Cranston is an executive career coach, management consultant, outplacement advisor and talent developer for leaders in finance, technology, media, the law, fashion, consumer goods, and health care. Her coaching helps organizations, leaders, and individuals assess talent, determine objectives, develop strategic plans and execute. Jane is particularly skilled at working with a global and diversified group of highly intelligent people who are success-driven and need to develop or enhance their people management skills and communication style. As the first Director of Stores for Liz Claiborne's newly-formed Retail Division, it was her responsibility to translate and transmit the culture of the parent organization to new employees and develop a unique, united impactful team of 600 employees nationwide. Jane earned Master

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What Clients Say

and Bachelor degrees from New York University. She is a graduate of the Executive Coach Academy and served on the adjunct faculty of NYU's School of Professional Studies and at the Fashion Institute of Technology. She has been seen and heard on CNN, WNBC, WABC TV, The Street.com, WNYC FM, Voice America, WOR710, Ceslie.com and Blog Talk Radio. She was interviewed and quoted numerous times in the Wall Street Journal, NY Post, the Daily News, Reuters, Newsday and Metro NY. Her coaching business, ExecutiveCoachNY, is located in Midtown Manhattan.

Linda Kane, MBA

Linda Kane is an executive coach and human resources consultant with a successful track record and results orientation in both internal and external positions as a business partner and service provider. Formerly the Managing Director at the Bank of NY Mellon with overall responsibility as HR Business Partner for Global Institutional Services, Linda brings several years of expertise to her coaching engagements. Linda works with senior leaders in both line and staff positions who need specific skills beyond their technical expertise to produce results in areas where they have direct control or indirect influence. Her work includes international and domestic firms in growth, start up, streamlining, and turnaround situations. She coaches for both organizational and individual success to enable executives to build impactful, productive and satisfying careers. She has taught at the under-graduate and graduate levels in the United States, Europe and Asia, including executive development programs for women in the U.S., the Netherlands, and for US Army Central Command, Europe. Linda holds a BS from Boston University and an MBA from the Simmons Graduate School of Management. She serves on the boards of several not-for-profit organizations.

Joanne Brem, PCC

Joanne Brem is an executive coach who brings seasoned, hands-on expertise to the field of organizational leadership development and education. She works with executives as well as senior and emerging leaders to develop the skills and strategies to achieve high levels of productivity, achieve business goals, and effectively lead needed changes in their organizations. This leads to her clients producing high impact, sustainable results while experiencing professional and personal success.Joanne specializes in leadership development, cultivating executive presence, strategic planning and thought-partnering, development of effective interpersonal skills including communication and conflict resolution, building long-term strategic partnerships and stakeholder relationships, navigating the political landscape, and organizational and personal transition. Her coaching combines strong business acumen and insightful intuition, and an engaging and energizing personal style with a direct and results-oriented approach. Prior to executive coaching, Joanne spent 17+ years in the information technology industry. As a top-performer in this extremely high-paced, competitive environment, she learned and integrated into practice the principles, dynamics and skills of sustainable high-impact performance and collaborative teamwork, which intrinsically informs her coaching methodology. Joanne received her education at Arizona State University where she was a high honors graduate in psychology and business administration. She is a Professional Certified Coach (PCC) with the International Coach Federation (ICF) and a Certified Professional Co-Active Coach (CPCC) with the Coaches Training Institute. She is Myers-Briggs Type Indicator (MBTI) qualified.

Michele Caplette, PhD

Michele Caplette is an executive coach and leadership and organization development consultant who, as the director of executive development at Applied Materials, designed highly-successful leadership learning experiences for leaders and executives. Her focus is on achieving outstanding results through effective leadership and specializes in high-impact communicaiton, socially and emotionally-intelligent leading, masterful influence, developing the leadership pipeline, and building strong, successful teams. Michele is certified in several world-class leadership feedback instruments, including the Booth 360 and the Lominger Leadership Architect ® Suite of products. She earned a doctorate in sociology at the State University of New York at Stony Brook, has has written several articles on leadership development and teams, and is a leadership coach in the Leadership Essentials program at Stanford University.

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Contact Us

Our name was officially changed to LeaderXpress on January 1, 2011 after 16 years as The Innovative Edge.

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105 West 55th Street, #6F, New York 10019

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- *Facilitation*
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Executive Coaching

Executive coaching provides a one-to-one confidential relationship between a highly qualified coach and the business executive. The purpose of the coaching engagement is to facilitate professional and personal development of the executive or valued employee.

The coaching relationship is collaborative. The individual and coach work shoulder to shoulder to create learning, integrate new behaviors and successfully achieve development goals.

The role of the coach is to help identify those areas that are strategic to the success of the executive, to offer feedback and encouragement. And when appropriate, the coach will also offer advice and counsel. The mature coach often acts as trusted advisor and thought partner.

Coaching Goals

Coaching will reliably link emotional, relational and political intelligence with the business context. Coaching goals are quite varied and could include issues such as:

- Adjusting rapidly to the performance demands of a new position
- Developing a more resilient leadership style
- Navigating political mine fields in a changing organizational structure
- Working more effectively cross–culturally or cross–functionally
- Developing strategic thinking, systems awareness and political intelligence
- Work-life effectiveness
- Expanding executive presence, personal power and influencing skills
- Identifying and resolving inhibitors to success in the long run
- Conflict resolution and difficult conversations
- Conducting effective one-on-ones and managing accountability with direct reports

Logistics

Coaching clients can reach Barbara between meetings for short phone calls and quick email support.

Barbara can come to your business, see you in our office, or work by phone. Coaching by phone is often very effective and convenient.

Stages of Coaching

The initial meetings are designed to establish an understanding of what is needed, to outline initial goals, create a plan for working together and to begin making changes.

As the client makes initial changes, more data is gathered, often in the form of interviews and assessments. This information often shows where further work is needed and sheds light on more complex issues.

As issues are reframed, action is taken and learning is consolidated, the coaching deepens. Plans are then made for anchoring and stabilizing the new changes.

"Barbara helped me put all the pieces together so I could develop an effective strategy for my organization. It feels empowering and very positive to have tools I can apply to the remainder of my career, tools that are essential to my career. I wish I had these 10 years ago!

She gave me a strategy to analyze a specific goal, understand the situation and players, to prepare and approach the individuals and to close the deal. We walked through specific scenarios of what I was going through at the time. I prepared, then took action, then we debriefed after the fact.

She was very good at intertwining several objectives at once. Everything we worked on was immediately applicable. It all dovetailed into a skill set I needed to improve."

--Director, Supply Chain, Forbes International Top 100, Electronics Company

Click here to read the full case study of this person's work with Barbara.

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Email: Barbara Bouchet with questions, comments or feedback.

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Advice on difficult bosses, cranky coworkers, office politics, and career issues.

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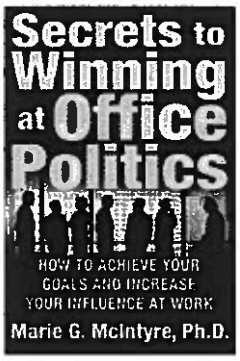

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Check your local paper for Marie's workplace advice column, either in print or online.

Six Secrets of Politically Savvy People

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Sometimes people complain that a coworker is "too political". This may mean that the person is seen as a groveling toady or backstabbing manipulator. But most politically successful people are simply being smart about their career. Like athletic ability, political savvy seems to come naturally to some people, while others have to learn. So here are some strategies to adopt if you want to demonstrate more political intelligence.

1. Partner with your boss.

Unless you have unique and irreplaceable knowledge or skills (or are related to the CEO), your boss has more power than you do. Your manager also has greater access to key decision-makers. So it's better to have your boss as a cheerleader than an adversary. Politically savvy people know how to "manage up".

2. Be a 360° team player.

With a wide network of relationships, you will have more information about what's going on. And if people are willing to cooperate and collaborate with you, you will produce better results. Politically savvy people develop positive relationships in all directions – with management, peers, and employees.

3. Understand the "power map".

Organizations are power hierarchies. And from time to time, that power shifts. To succeed, you need to know where the leverage lies – who has influence (formal or informal), who doesn't, and how much you have yourself. Politically savvy people always understand the leverage equation and recognize when it may be changing.

4. Practice subtle self-promotion.

No one can appreciate you if they don't know what you're doing. But that doesn't mean you should become an insufferable braggart. Find natural ways to mention achievements

and challenges, like sending regular progress reports to your boss or chatting about your projects at lunch. Politically savvy people share information without being obnoxious.

5. Connect with the power people.

The big decisions about your career will be made (or endorsed) by people above your boss, so you need to be sure they know who you are. Since you may have limited access, look for interaction opportunities and be ready with a question to ask or information to share. Politically savvy people enjoy talking to folks who have power (which is not the same as sucking up).

6. Commit to the business.

An indifferent, apathetic attitude never impressed anyone. If you want decision-makers to think well of you, you need to be interested in and excited about the business – because you can bet that they are! Politically savvy people choose a career that they find interesting and energizing. You can't fake enthusiasm for long.

You may also be interested in these topics . . .

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What Should You Look for in a Mentor?

How to Manage Your Boss

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Advice on difficult bosses, cranky coworkers, office politics, and career issues.

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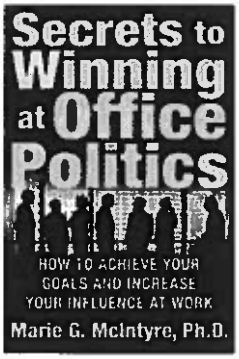

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Check your local paper for Marie's workplace advice column, either in print or online.

YourOfficeCoach.com is a web-based coaching and consultation service operated by Your Office Coach®, a training and consulting business owned by Dr. Marie G. McIntyre. Our purpose is to help people resolve the inevitable difficulties and dilemmas that arise on the job. For most of us, work takes up about half of our waking hours, which is way too much time to be unhappy. So if you are frustrated by your boss, aggravated by your colleagues, perplexed by your projects, or stuck in a dead-end career, we want to help. Our goal is to make your working life as enjoyable and productive as possible!

Marie G. McIntyre, Ph. D.

Marie McIntyre operates Your Office Coach®, a training and consulting business that specializes in helping people work together more effectively. Her background is in management and organizational psychology. Marie conducts workshops related to leadership and teamwork, does individual career coaching, and offers a variety of individual and organizational assessments. She has worked with such clients as Home Depot, Prudential, BellSouth, and Panasonic. Marie has also held management positions in both business and government, including director of human resources at a Fortune 500 company, and has more than twenty years' experience in management, organizational development, and training. She lives in Atlanta, Georgia, and is the author of Secrets to Winning at Office Politics and The Management Team Handbook. Marie can be reached at mmcintyre@yourofficecoach.com. **[Click here for a complete bio.]**

Julie Dobrinska

Julie Dobrinska is the survey administrator and webmaster for Your Office Coach®. She is also in charge of on-line assessments for Your Office Coach® and is responsible for technical aspects of website administration. She assists clients with taking such instruments as the Myers-Briggs Type Indicator, FIRO-B, Strong Interest Inventory, and others. She has ten years' experience in administering all types of surveys, including 360° feedback processes, employee opinion surveys, team development surveys, and customized surveys to achieve specific organizational objectives for clients. Julie also manages website design and content for YourOfficeCoach.com. Julie can be reached at jdobrinska@yourofficecoach.com.

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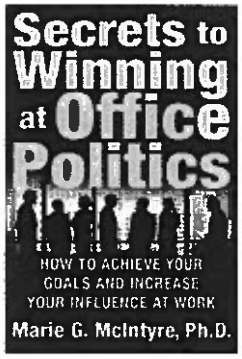

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Contact **Marie McIntyre** about services offered through Your Office Coach:

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- *Technical problems with our online testing site*

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Political Intelligence - Introductory Pack

Political Intelligence 3D Training and Development "Politics is not what I do" "itÂ´s why you think I am doing it" What is the Political Perception Diagnostic? The Political Perception Diagnostic (PPD) is an easy-to-use self-scoring instrument that will provide insights into the respondent?s understanding of organizational decisionmaking and influencing. "The way things get done around here" often bears no relation to organization structures or hierarchies. Savvy managers need to understand the reality of organizational life and the PPD helps them do so. It is not a test, and is non-judgemental ie power and politics are not seen as "bad". The PPD can help the respondent - identify personal preferences about political behavior - understand their personal view of the organization culture - increase their awareness of how to behave effefctively - align personal objectives with those of the organization. The PPD can help the organization to increase productivity by using a common language to describe some of the ways in which things get done, politically. Make sure that your managers are able to deal with the REAL world of organization life effectively and ethically. Product format: Self-scoring questionnaire and workbook Suitable for: All organization members

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Political Intelligence Profile and Questionnaire/Workbook

In today's increasingly complex work environment,'traditional' leadership skills are no longer sufficient to guarantee personal and organizational success. research indicates that sucessful 21 st century Managers need to develop what has been described as 'the missing leadership competency' of political intelligence. Help your manager develop the skills needed to manoeuvre effectively around the political lanscape using a set of best practice behaviors and techniques, aimed at delivering personal and organizational goals.

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Academy for Political Intelligence

Welcome

The Academy exists to develop a range of tools and processes to help people in organisations to manage the political landscape more effectively.

Our belief is that by applying a set of appropriate skills and strategies the politics of your organisation can be a positive force for good and assist you and your colleagues to be even more effective.

Our products:

- The 1 day positive organisational politics workshop - an in house or public programme (details here)
- The political intelligence profile/diagnostic (details here)
- The Executive political intelligence Coaching profile (details here)
- Our One to One Executive Coaching on organisational politics (details here)
- The 'Workplace politics' Pocketbook (details here)

Free Resources

Have a look at our 'Free Resources' page where you will find a number of useful downloads on organisational politics.

Free political environment Check-up

Try out the 'How political is my organisation?' questionnaire to see how well your organisation is doing in this critical area.

Are you a Trainer...?

Join a worldwide network of like minded professionals who are licensed to use our political intelligence products.

Click here for more accreditation information.

Read our client feedback here

Our political intelligence solutions

To find out what type of political animal you are and how you can become politically intelligent to manage the politics in your organisation, then you need to complete our political intelligence™ diagnostic. This will give you practical information on how to develop additional skills and behaviours to make you and your organisation more productive. Click on the picture opposite to access

the diagnostic questionnaire. You will then receive a comprehensive 36 page development profile.

To discover, as a Manager or Coach, about the benefits of using the Executive political intelligence Coaching profile click on the picture opposite. This political intelligence™ diagnostic is to be used in one to one Executive Coaching sessions where your Coachee needs to improve their capabilities in and around organisational politics. The diagnostic provides information on the beliefs and behaviours of the Coachee and a comprehensive development profile which provides full and practical information on what needs to change in the workplace to be more effective.

Purchase the 'Workplace politics' Pocketbook by David Bancroft-Turner of The Academy that covers a range of practical tools and techniques to more positively manage the politics in your organisation. This link takes you to an external website - Click on the picture of the book opposite.

The one day 'Positive organisational politics' workshop venues and dates:

London, Amsterdam and Manchester

2012

July 23/24

September 24/25

November 26/27

Click here to organise a specifically designed in house workshop

The one day 'Positive organisational politics' **SPECIFICALLY DESIGNED FOR THE NHS** Venue and dates:

- London
  7th September

Book your place here

Don't want to attend a training programme?

- Short of time?
- A Senior Manager?

OPP-0047

- Click here to book your own personal Coach to work with you individually

Licensing dates

In 2012

- July 9/10 - London
- November 12/13 - Glasgow

Tip of the day

Before asking key people for their support, connect with people who know them to find out how they are likely to respond.

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DEVELOPING YOUR POLITICAL INTELLIGENCE

An insightful programme for leaders and managers who need to be able to influence effectively at all levels and get things done in spite of the "politics".

Why would you want to be more politically intelligent?

When asked about the word politics over 90% of responses will be typically negative. The political game is therefore construed as being negative and therefore many leaders and managers "opt out" and miss out on key processes to leverage influence in their organisation. This Programme offers a model of positive organisational politics, behaviours and skills which leaders and managers can subscribe to with integrity.

How can we deliver this Programme to you?

Our aim is to tailor our Programme to meet the specific needs of the participants and to encourage you to bring your own political issues to be resolved.

Your first contact with JS-International, after we have designed the Programme for you, will be with one of our internationally renowned Coaches. You will have a personal telephone conversation with this Coach who will determine your needs. Our Coach will clarify the potential content of the Programme with you, jointly agree your outcomes and then agree how the Programme might be adapted to meet your needs. Some pre-work and pre-reading will also be involved.

The Programme is normally over 3 days.

Each day we will cover innovative new techniques that you will be able to apply to resolve your own presentation and communication issues.

Participants will gain an insight into what political intelligence really is and be able to identify different types of political behaviour. The whole purpose of the workshop is to enable participants to be able to respond positively and flexibly to different types of behaviour that they may currently consider negative, obstructive or difficult. The workshop will help participants navigate their way through the organisation and be able to create effective working relationships. Stress and frustration concerning relationships will be a thing of the past.

The workshop may cover:

- What is corporate politics?
- How political is your part of the organisation?
- Political perceptions
- The model for making sense of office politics
- A politician – who me?
- Political behaviours
- Constructing appropriate and productive responses
- Practice real life political dilemmas
- Managing power and conflict with integrity

Each participant will benefit from a self-analysis tool, which will help them understand their own preferences.

What if you would like to know more?

We will be pleased to discuss your personal needs about this Programme and how we can tailor it to your business. If you would like to know more, please call or e-mail either Jan Versteeg or Sally Jackson.

JS-International contact details:

Jan Versteeg
tel: 00 34 951 702 935
mob: 00 34 600 073 475
Click here to email

Sally Jackson
tel: 00 34 951 702 936
mob: 00 34 637 730 357
Click here to email

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EXHIBIT
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Leadership Development

We provide tailor-made leadership and management development training courses aimed at senior, middle and first line leaders and managers.

Leadership skills are more critical than ever in influencing the attainment of organisational goals. Stairway adopts a results-orientated approach to leadership development. We use a mixture of practical application and experiential learning to drive behavioural change and improve business performance.

The leadership programmes we design are bespoke to each organisation, strongly linked to its vision, strategy and values and include both behavioural and skills development.

We place great emphasis on individuals taking personal responsibility for their own development. The leadership development activities we design and deliver adopt a blended learning approach. This includes work-place assignments, 360 degree feedback, facilitated workshops, action learning groups, one to one coaching, webinairs, e-learning and the development and review of personal action plans.

Typically our Leadership Development Programmes encompass three aspects:

This model covers topics such as:
- **Self Awareness**
- **Leadership Style**
- **Personal Impact and Influence**

This can include topics such as:
- **Creating a High Performance Team**
- **Performance Management**
- **Holding Tricky Conversations**

These interventions focus on topics such as:
- **Creating a Company Organisational Vision and Strategy**
- **Commercial Awareness**

Leadership Intelligences Compass™

We often use the Leadership Intelligences Compass™ as a diagnostic framework and to help us develop leaders' skills, knowledge and behaviours. This is a model that helps identify leaders' development gaps which fall into the following four areas:

SQ - Spiritual Intelligence represents the areas of self awareness and self development.

EQ - Emotional Intelligence comprises the interpersonal qualities needed to build effective relationships.

PQ - Political Intelligence represents the skills, knowledge and behaviours required to influence and negotiate effectively with others.

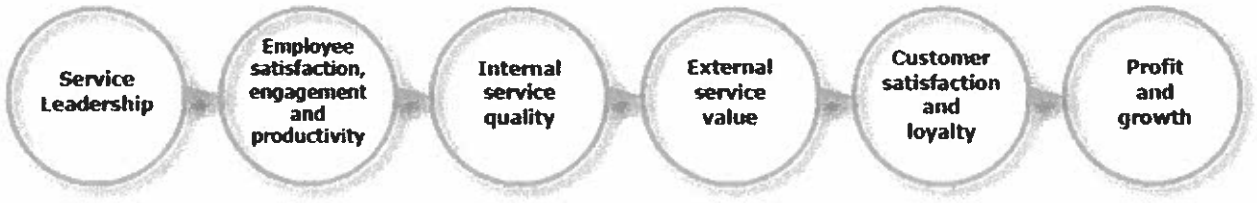
BQ - Business Intelligence are the skills, knowledge and behaviours

needed to be commercially aware and business focused.

Service Leadership™

It is commonly acknowledged that the quality of leadership in a service organisation influences the service orientation of its people.

Stairway offer specially designed service leadership programmes aimed at increasing the customer orientation of leaders in service organisations. We use the principle of the service value chain (developed by Professor Schlesinger, Heskett and Sasser of Harvard Business School) to illustrate the pivotal role service leaders' play in creating value and growth for the organisation.



We work collaboratively with service leaders to design leadership interventions which enhance service leaders' skills, attitudes and behaviours.

For further information on how we can customise Leadership Development training for your organisation, email us or call us on 01628 526 535.

Leadership Development Centres and Executive Coaching

We design and facilitate assessment centres for existing and potential leaders. We also provide expert executive coaching. For more information email us or call 01628526535.

More Information and Material for Leadership Development

The Stairway Consultancy offers a range of in-depth information and training materials on and around leadership development. Follow the links below to find out more:

Leadership Skills Training
Management Skills Training
Performance Management Training
Leadership Development Books & Articles

For more information on how we can help your organisation develop its leadership capability, please email us or call 01628526535.

Political Intelligence and Change

Managing politics intelligently can have a positive impact on the success of any change you are leading and build up the necessary support and commitment.

Why is political intelligence important during change?

Politics are most apparent when change is mooted and when is there not change these days? Managers need high level political skills to deal competently with open and covert opposition to change. This might take the form of people agreeing to change in word but not in action, forming cliques or 'going slow'.

Wise handling of friends and enemies can lead to a more shared understanding of the need for change, acknowledgement of the difficulties of change and better handling of winners and losers. It should enable a more mature understanding of the impact of change and potentially greater commitment to the outcomes.

We define political intelligence as the ability to manage proactively -

- Reactions to change
- Levers of power and influence

Typical reactions during change

In order to recognize why politics occur particularly during change, it is helpful to understand typical reactions to change, such as denial, ignoring the change, self-doubt and later as the reality of change becoming apparent a willingness to consider experimenting with change. During change the emotional climate can be both volatile and fast-moving, especially in the early stages. Later on during changes, some groups will start to benefit from change and some will perceive they are losing out. They may well take action to preserve that power or enhance it and politics becomes rife.

Consider your own reactions to change in the past. These may be a helpful insight into the future reactions of others. A manager with political intelligence will take account of the stance stakeholders may take during change. He or she needs to keep asking who are the winners and losers? If there will be resistance, what form will it take? Who are supporters and how can they be encouraged?

Preparing politically

In any transition, change impacts people. These people who have a 'stake' and are affected by change, influence to a great extent the effective implementation of the change. Think externally also - customers need to be on your side, too. It is important to be aware of the reactions to underlying driving forces and the restraining forces within your organization and your industry generally, such as the impact of changes in legislation, movements in competition and industry structure and shifting customer needs

+ A T T	YES MEN	CHANGE CHAMPIONS
I		

T U D E	VICTIMS	TERRORISTS
-	INACTION	ACTION

Taking account of the stance stakeholders may take during change; consider the following questions to help you identify possible approaches to some intended change you wish to make:

• What happened during the last change?
• How ready are people for change?
• What do they know about any proposed changes?

Understanding individuals

In order to gauge the political influence that individuals have during change, the politically intelligent change navigator can observe distinct types of behaviour:

CHANGE CHAMPIONS have a positive attitude to change and are action orientated. Viewing change as both challenge and opportunity, change champions tend to feel comfortable with the need for change

TERRORISTS respond to change by arguing against changes. Rebellious, they are determined to block change they do not own

YES MEN deal with change by passively agreeing with everything, though not being proactive, they let things ride, acknowledging good ideas but are reluctant to change themselves

VICTIMS take on board change by feeling hard done by and complaining.

It pays to have worked-out distinct strategies for dealing with Change Terrorists, Victims and Yes Men. However, your biggest assets are Change Champions. Do not forget to encourage and stretch them.

What do these descriptions tell you about yourself during change? How can you put this knowledge to good use? Consider people on your team and their reactions to change. What does this mean for maximising your team?

As well as recognising likely stances and reactions to change, in order to influence change effectively the political change navigator needs to also recognise and appreciate the sources of their own and others' power, since the extent of power bases has a considerable influence. An organization we know had difficulty in implementing a culture change programme, despite unanimous board approval. It turned out that a clique on the board were apparently agreeing to support change, but were quietly undermining it at grassroots level. As a useful exercise, consider someone whom you need to influence to change, what will be their likely stance, how can you enhance their motivations?

Political strategies during change

Further political strategies you can use to influence others during change include:
• Physical changes e.g. location, can have strong and visible impact
• Symbolic changes such as change of title or logo can drive home the importance of change
• Internal change agents, who are respected and know the ropes, can flexibly implement because of their know-how
• External consultants can sometimes be used as an influence tactic, unrestrained by history and culture
• Role models can be selected and promoted to communicate best practice

Political Intelligence Checklist

As a reminder, use this checklist to manage your next change with political acumen
- Consider the key stakeholders and what their reactions to the change may be
- Allow for resistance to change
- Consider how employees are responding
- Reward and recognise those who lead the change
- Introduce physical changes e.g. location
- Make symbolic changes which support your change

About the authors

Sarah Cook and Steve Macaulay specialise in the development of managers and organisations to achieve change. They are the authors of the book -'Change Management Excellence, published by Kogan Page price £16.99. They can be contacted through Sarah Cook at the Stairway Consultancy on 01628 526535

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Political Intelligence Profile®

The Political Intelligence Profile® is an easy-to-use self-scoring instrument that will provide insights into the respondent's understanding and use of organisational power and politics.

In today's increasingly complex work environment, 'traditional' leadership skills are no longer sufficient to guarantee personal and organisational success. Research indicates that successful 21st century Managers need to develop what has been described as 'the missing leadership competency' of political intelligence. The Political Intelligence Profile® will help you, and your colleagues, develop the skills needed to manoeuvre effectively around the political landscape using a set of best practice behaviours and techniques, aimed at delivering personal and organisational goals.

The Political Intelligence Profile® is a 32 page, easy to use, self-scoring instrument that measures the respondent's current political preferences. It contains a scoring and profile interpretation guide that can be used as a stand-alone instrument or as part of a wider leadership development programme.

The Political Intelligence Profile® provides a unique six stage process for developing higher levels of political intelligence, specifically giving the user:

- A model to understand and identify the different types of political animals that exist in an organisation
- Clarity on how to manage the politics in the organisation more effectively
- An interpretation of the respondent's current political profile and its implications
- A process to develop skills and behaviours that are critical in successfully managing the politics in the organisation
- A set of tools and techniques that will make the workplace more politically positive
- A range of behaviours and skills that will improve personal and team performance
- An understanding on how to manage the different types of political animals that exist in all organisations.

Time required to complete: 15-20 minutes (although untimed)

Format: Self-scoring paper tool

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Submitted by Lia Papakyprianou on Thu, 07/04/2011 - 06:25

Start: 21/11/2011 09:00

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Political Intelligence & Sustaining Change

By attending this program, participants will be able to know:

- How to navigate the maze of organizational politics"without becoming a politician in the negative sense"
- How to plan an effective influencing strategy that is politically intelligent, logically sound and emotionally people sensitive
- How to build a support for your ideas / decisions through building coalitions across the organization
- How to set up a professional network of contacts who can give you information and advice (and whom you will help in return)
- How to deal constructively with resistance spots from various stakeholders (Strategic stakeholders, your colleagues and staff)
- How to set-up a cooperative relationships with key stakeholders and proactively build up your own stakeholders map/ influencing strategy
- How to lead through period of instability and sustain change; and fundamentally to build high Impact teams to effectively deal with crisis situation

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Key Words :

Political intelligence defined, Link between PE and EI, Strategies to be politically influencer, Sources of leaders Credibility, Role of Culture in choosing your influencing strategy, proactive stakeholders mapping, Networking, Lobbying, Coalition building, Sustaining change and communication, handling resistance spots!

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- How to navigate the maze of organizational politics "without becoming a politician in the negative sense"
- How to plan an effective influencing strategy that is politically intelligent, logically sound and emotionally people sensitive
- How to build a support for your ideas / decisions through building coalitions across the organization
- How to set up a professional network of contacts who can give you information and advice (and whom you will help in return)
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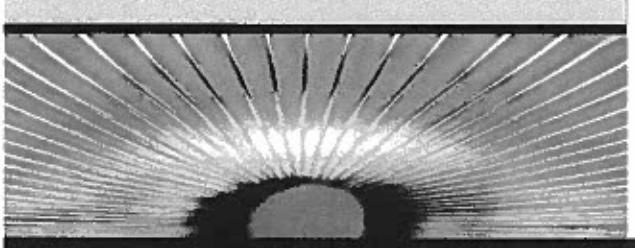
- How to lead through period of instability and sustain change; and fundamentally to build high Impact teams to effectively deal with crisis situation



Program Contents Overview :

Module 1:
Assessing your credibility and power in the organization

- Credibility is about perception!
- How Tools to assess your credibility
- Factors that influence your credibility rating
- Selecting the best approach depends on your credibility!
- How to avoid taking it too personal!

Module 2:
Choosing your basic Politically intelligent influencing strategy:

- Political intelligence defined!
- The commonly used influencing strategies
- Basis for choosing your influencing strategy
- Benefits and pitfalls of using BUILD approach
- Benefits and pitfalls of using a DIRECT approach
- When to combine the two approaches for best-possible results
  - Assessing the credibility and power base
  - Assessing the nature of the problem you are trying to solve
  - Assessing the organizational context

Module 3:
Preparing and building your coalitions:

- The SPLASH MODEL: 6 key stages in coalition building
- Where to start
- How to plan and prepare
- The importance of timing and flexibility
- Understanding and managing politics
- Planning your own coalition

Module 4:
Building networks and cooperative relationships across the organization

- Definition of networking, its applications and advantages
- Assessing and auditing your network
- A networking code of conduct
- How to identify and approach new networking contacts

Module 5:
Working with key stakeholders and dealing with resistance:

- Identifying your class I, II, III relationships
- Guidelines to consolidating successful relationships
- Guidelines to handling sensitivities and managing conflicts
- What is resistance? What are the symptoms of resistance and its causes?
- Group resistance and the organizational myth behind it!
- Dealing with resistance and helping people to adjust

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Who Should Attend?

This program is suitable for managers across the organization that are:

o Senior executives, senior managers as well as any manager in charge of creating, making and/or deploying complex and fundamental changes and decisions in their sphere of influence

o All managers in support functions (HR, L&D, IT, Supply chain, Marketing, Finance).

Duration, Venue & Date:

This 2 days program is available on in-company customized solution as well as public seminars. We will be further happy to discuss your needs and deliver the workshop to suit your organization and people.

Duration, Venue & Date :

Paula Cook

Paula Cook has been working in the management development field for 17 years. Previously she worked in the area of sales and key account management. Paula was employed by Management Centre Europe (MCE), an organisation offering training and development to companies across Europe. During this time she held positions of Key Account Manager and Project Manager and gained experience of managing global projects across three continents for organisations such as Nokia and Finnair. Paula is a senior consultant in TTM associates and managed many projects for the regional office in the Middle East, with Vodafone, Etisalat and others! She is also a core faculty member at the Suez University, the corporate university of the French industrial group of the same name. Paula has worked also for organisations such as the Helsinki School of Economics and the Swedish Institute of Management (IFL). Today Paula's portfolio comprises companies that include SCA, Bank of New York, Solvay and Egmont. Some of the most enriching projects that Paula undertakes is with an international NGO, which works with children in developing countries. Paula's competency includes facilitating groups to build on existing strengths and develop new skills. This sometimes involves training in management and interpersonal skills, as well as teambuilding and individual coaching. An important part of this work involves coaching teams to cope with change and challenging situations. The majority of teams that Paula works with are culturally diverse and are often faced with the complexity of not being co-located. In terms of style, Paula is a firm believer in experiential learning. Wherever possible, learning is accompanied by exercises that involve movement, music, role plays or activities that simulate the work environment. This helps to create learning that is integrated and more easily translated into action in the workplace. Paula works primarily in English and French. She also speaks German, Swedish and Spanish and has basic understanding of Dutch.

Terri McNerney

From her London base, Terri McNerney specialises in leadership, team and organisational development. Her work includes coaching, facilitation and project/workshop design, with a key focus on senior leaders and cross organisational teams.

Terri McNerney's work includes transition, change, creativity and post-merger workshops and interventions. Terri has more than twenty years experience with Global 500 companies. She has consulting experience in a variety of industries including petrochemical, broadcast media, pharmaceutical, energy, telecommunications and general merchandisers, as well as government and education sectors. Terri held an organisational consulting role in BP Amoco's UK Merger Team and was a key player in the start-up of Amoco's European Shared Services (ESS) organisation, presenting at numerous European conferences. Previously, Terri worked for Barings Bank (ING) and Conoco (ConocoPhillips) in a variety of organizational development, change management, training and human resources roles.

Terri holds an MSc in Organisational Consulting from Ashridge School of Management and is a firm believer in continuous development and as such she is a Clean Language, Dialogue, Gestalt and Appreciative Inquiry Practitioner, trained in the Myers Briggs Type Indicator (MBTI), the Ned Herrmann whole brain profile (HBDI) and is an accredited NLP Master Practitioner. Clients include BP, BBC, Talkback Thames TV, Starbucks, Droga Kolinska, Wyeth Pharmaceuticals and NFU Mutual. Working with people, energising them to creative action and creating opportunities for inclusive conversations; this is what Terri does at work - and it's what gives her energy, too. Terri radiates warmth and energy, and works with her head, her heart and her gut feelings.

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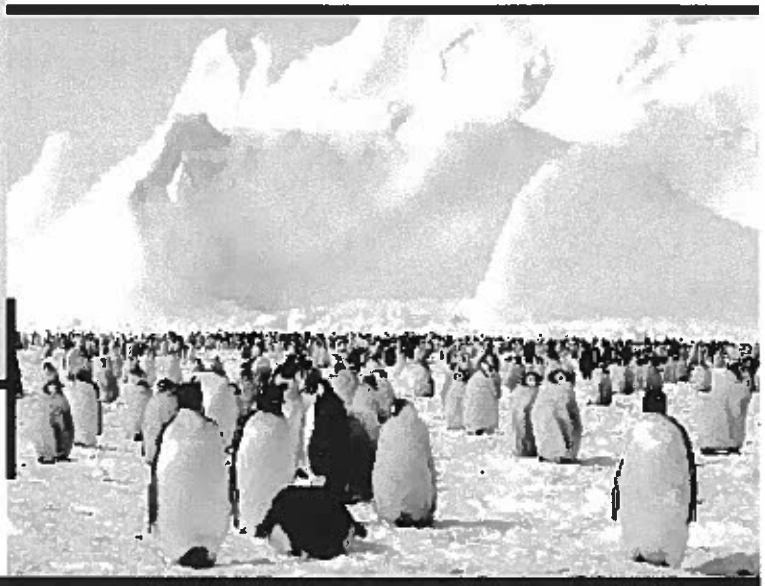
Magdi A. Hassan

Magdy is Egyptian by birth and currently lives in Cyprus where he manages the TTM associates regional office, based in Nicosia. Magdi resided in Egypt & Saudi Arabia and works across many countries in the Middle East, including, Kuwait, Bahrain, Oman, Lebanon, Jordan, Syria, Saudi Arabia and Egypt.

He studied pharmaceutical sciences and commenced his entrepreneurship adventures in the early 90s, while he was still studying in the Faculty of Pharmacy. Magdi started his practical life early, when he still a student, opened his retail pharmacy in order to secure a good future for himself. Magdi's Career thereafter focused on the fields of corporate branding and PR, Marketing, sales and customer management, in the pharmaceutical industry. For the past 17 years he followed his career development in various international companies, including (Rhone Poulenc (Sanofi-Aventis), Organon NV, in the Middle East, and then joined TTM associates in 2005 and successfully launched the business in the Middle East region.

During this period, he got the experience of Launching and marketing many products in the Middle East. Also Magdi combines pragmatic knowledge and experience of managing and doing business in the Middle East, while at the same time, he has the awareness and understanding of the international business culture. He currently consults global organizations in the Eastern Mediterranean countries, on Time to market, Strategy formulation and implementation, Customer Management and Portfolio Management. Magdi is a subject-matter expert and a consultant for TMC and he currently manages TTM associates regional office in the Middle East.

He holds degrees in Pharmaceutical Sciences, and MBA from Henley Management School, UK. Magdi also is a member of the chartered institute of Marketing and a certified practitioner for the Herrmann Brain Dominant Instrument, France. Magdi's latest certification was on Cross-cultural management and leading remote teams globally.



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Political Intelligence (sample page)

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The political animals at large

How can you tell which colleagues are politicking and which are not? Even if you know they are, can you tell if their political efforts are based on self interest or for the benefit of the organisation as a whole? This model provides a simple but powerful illustration that will enable you to recognise the four political animals at large in most organisations – fox, owl, donkey and sheep.

OPP-0062

Political animals

This four-animal model, developed back in the 1980s by Simon Baddeley and Kim James, provides a vivid means of differentiating between political movers within organisations.

Sheep

An implied innocence underlies the sheep approach. Other words that spring to mind might be naive, easily led and loyal. They are the types who say (providing they recognise what is happening in the first place), 'I have no time for politics' or, 'I don't want to play that game.' They believe that organisational processes and procedures should always be followed and that only the formal channels exist. They cling to the notion that the best idea or person will always win. They always observe the organisational structure and the levels of authority within it. Many of us start our working life with this viewpoint and some will even maintain it for an entire career.

Donkey

Words such as stubborn and inept might sum up the donkey character, but it goes deeper than this. We have all encountered the colleague who thinks he's on the inside track, is fond of mentioning connections to the senior staff and is convinced he plays a smart game. Sadly, this is often an illusion, and as a result donkeys can get used or taken advantage of by other, more ruthless, individuals. They also deny themselves the support and collaboration of team members when it comes to doing the job they are really paid for. This is a bitter pill to swallow for those who pride themselves on thinking they have worked out how to get ahead of others, or the organisation, in pursuit of their personal goals.

Fox

Cunning, sly and clever, foxes know their way around. They are really quite adept at

negotiating the corridors of power, getting support and being tuned in to the bigger picture. They recognise and take advantage of the weaknesses of others in order to get ahead and further their cause. Unfortunately, it is 'their cause' that they invariably put first in their decisions and strategies. The objectives of the organisation tend to be neglected, even ignored when it suits.

In recent years, several major corporate failures have almost certainly been precipitated by extreme fox-like behaviour among senior managers.

Owl

Wise and highly observant, the organisational owls are well placed to succeed. They differ from the fox in that 'succeed' for them means positive outcomes for both themselves **and** the organisation. They use their highly developed networking and communication skills to generate support and build alliances. They can take the difficult decisions, but work hard to ensure that the outcomes are not counter-productive. Unlike the foxes, they are overt, and they demonstrate this by listening and disclosing appropriately. They are visible and approachable, yet powerful and focused.

No doubt you can recognise examples of these four 'animals' within your own organisation. They all have a place in the four-quadrant Political Intelligence model, which provides the foundation for understanding organisational politics and learning how to build appropriate skills and behaviours for effective performance.

Other sections from this topic

Political Intelligence

Introduction
In a nutshell
Common questions
The importance of perception
The causes of organisational politics
Tackling negative perceptions
The political animals at large **(shown above)**
The Political Intelligence model
How Politically Intelligent are you?
What are your goals?
Your profile – the implications
Communicating – the first key skill
Influencing – the second key skill
Networking – the third key skill
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Change Management Excellence

Using the four intelligences for successful organizational change

Sarah Cook,
Steve Macaulay,
Hilary Coldicott

KOGAN PAGE
London and Sterling, VA

OPP-0066

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13

An introduction to political intelligence (PQ)

As the world business climate changes, so the rules of the competitive race are being rewritten. The effect is to make people and relationships more than ever the key to sustainable success. Only through deepened relationships with – and between – employees, customers, suppliers, investors and the community will companies anticipate, innovate and adapt fast enough, while maintaining public confidence.

Tomorrow's Company

One of the four key points on the change compass is PQ. Specifically this chapter considers:

- What is PQ?
- Why is it important during change?
- Reactions to change.
- A model of political awareness.

At the end of the chapter you will find a model to help you identify your own level of PQ. The subsequent chapters provide guidance on how you can increase your PQ.

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DEFINING PQ

Politics has a poor reputation amongst the general public. Political intelligence in the context of change is not about parliamentary politics or elections, rather the focus is on politics at work.

All organizations are political entities. Although it is often not acknowledged or discussed openly, politics are largely endemic to every business. As many people do not respect politicians, politics is generally regarded as unhealthy, underhand and egocentric. Yet, as this chapter will demonstrate, PQ can have a positive impact during change.

PQ is about working with integrity towards the common good of the organization, rather than for personal gain. It is not about the abuse of personal power. In order to be politically intelligent individuals need to recognize the power bases and sources of influence that they possess as well as those others possess. Their negotiation skills need to be well developed.

People with high levels of PQ know who to influence in order to gain buy-in to change. They know when to do this and the best methods for gaining acceptance to change.

PQ as we define it involves:

- being aware of power bases;
- understanding sources of power;
- recognizing levers of influence during change;
- developing strategies for influence;
- gaining buy-in from stakeholders.

THE IMPORTANCE OF PQ DURING CHANGE

Politics are most apparent when change is mooted. Cassani, in her book *Go: An Airline Adventure*, describes her time leading the low cost airline Go, then part of British Airways, where she was closely aligned with her boss, Robert Ayling. When he left, the new Chief Executive took a different view of the low-cost subsidiary. Before long Barbara Cassani was isolated and unable to influence successfully key stakeholders. It was decided to sell the business and Cassani lost her job; she left feeling bitter and a victim of politics over what she saw as good business sense.

When David Henshaw took over as Chief Executive of Liverpool City Council in October 1999, he had his work cut out. The council was third from bottom of the local authority performance league table with only the London boroughs of Hackney and Lambeth deemed to provide poorer services to their residents. Not only that, but Liverpool also had the most expensive council tax in the country.

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Henshaw's brief was to cut costs and bureaucracy, stabilize the council tax, and improve services and information for the local community and the council's staff. Henshaw set in motion a modernization process that saw the authority's eight directorates condensed down to five portfolios, a new executive team and 2,700 jobs shed – 10 per cent of its workforce. Henshaw's political intelligence gave him the skills to influence and negotiate this major change by gaining buy-in from vested interest involved. (Source: an article entitled 'A Dynamic Duo' by Dominique Hammond, published in *People Management* on 21 March 2002.) Symptoms of negative politics at work include behaviours that demonstrate resistance to change such as:

- open opposition to change;
- behind closed door lobbying;
- blocking proposals through arguments and counter arguments;
- back-stabbing;
- blaming others;
- self-interest;
- covert alliance forming;
- denying that change is taking place;
- agreeing to change in word but not in action;
- unspoken resentment;
- lack of cooperation;
- building power bases;
- inward focus;
- deterioration in productivity;
- lack of motivation;
- poor morale;
- being 'economical with the truth'.

However, politics can have a positive impact during change. It can create:

- a shared understanding of the need for change;
- a common sense of purpose;
- acknowledgement of the difficulties of change;
- disagreement aired openly and seen as positive;
- debate sharpening the quality of decision making;
- recognition of winners and losers during change;
- understanding of vested interests – who will help and who will hinder during change;

OPP-0070

- feedback and recognition of the impact of change;
- change agents who influence others positively to accept change;
- experimentation and testing;
- win–win outcomes.

TYPICAL REACTIONS DURING CHANGE

In order to recognize why negative politics occur during change, it is helpful to understand typical reactions to change. These are linked to the transition curve discussed in Chapter 8.

Think of a time when you have been involved in change, no matter how big or small. It could be moving home, a change at work, having your children going to school for the first time or leaving home, a change of partner or bereavement. Listed below are the seven phases of the transition curve and the symptoms that you may see in each. Tick those that you have personally experienced:

1. Shock

A sense of unreality and being overwhelmed.

- What is happening? ☐
- Numbness ☐
- Is this really true? ☐
- A bolt from the blue ☐
- Disbelief ☐
- A kick in the teeth ☐

2. Denial

Ignoring the change. Focusing on the past. Building up your defences to minimize the disruption. Denial can even result in a temporary increase in performance.

- It will soon be over ☐
- I don't believe this ☐
- Apathy ☐
- In the past we… ☐
- If I bury my head in the sand it will go away ☐

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3. Self-doubt
The reality of the change becoming apparent and causing uncertainty. A decrease in performance. Depression.

- I'm sinking rather than swimming ☐
- I'm not sure what to do ☐
- I can't sleep at night ☐
- I feel angry ☐
- I gave my all and now look what I get ☐
- I don't feel like mixing with other people ☐

4. Acceptance
Letting go of the past and focusing more on the future. A willingness to consider experimenting with change. More optimistic.

- I feel more hopeful about the future ☐
- I can see where things went wrong in the past ☐
- Maybe I could try … ☐
- I want to take advantage of … ☐
- OK, so I'm in this situation, I need to make the most of it ☐

5. Testing
Trying out new ways of doing things. Productivity starts to improve. Lots of activity and energy. Experimenting. Mistakes may occur.

- I've so much to do ☐
- I've lots of ideas ☐
- I can't concentrate ☐
- I'm frustrated that I can't get everything done ☐
- I'm trying out new things ☐

6. Internalizing
Reflecting on why and how there was a change. Searching for the meaning of what happened and why.

- Withdrawal from activity ☐
- Quiet times, reflection ☐
- Sharing of insights ☐
- Talking it through with friends ☐
- Searching for meaning ☐

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7. Integration
Stability. High performance. Change has been thought through and new and better ways developed. Increased self-esteem.

- Team work ☐
- Confidence ☐
- Clear focus and plan ☐
- I'm happy with where I'm at ☐

The extent to which individuals experience each phase will be different. At the death of Princess Diana, there was public outpouring of grief, including shock, denial ('Was she really killed?') and uncertainty and self-doubt for some people, for example.

The length of time that people remain in each phase of transition is variable. Some people may be in denial during change while others are in the testing phase, for example. Some may never move to integration. Typically managers who are involved in creating change may be further on in the transition curve (see Figure 8.1) than their teams who are affected by change and may not yet be coming to terms with it. We have worked in many organizations who have encountered so much change that managers report becoming 'numb' towards it.

Organizational politics comes into play both in the descendant and ascendant parts of the curve. Why should this be so? People become unsure of their position, they may wish to protect their territory, they wish to influence others in certain directions, or scarce resources need to be acquired.

At the initial stages of shock, denial and self-doubt, the emotional climate of the organization will be highly charged. This can lead to 'huddling' into fragmented groups, complaining and blaming in a destructive way. Later on during changes some groups will start to benefit from change and some will perceive that they are losing out. Politics of influence will again be at the fore and new coalitions formed while old ones diminish. There will emerge the politics of winners and losers. The stages of acceptance and performance will lead to the establishment of regular processes for communication and settling differences. A more cooperative, orderly climate will often start to emerge.

A MODEL OF PQ

A model that helps us identify people's PQ uses animal metaphors. It was originally devised by Simon Baddeley and Kim James. It describes two components of PQ – ability to read the situation, which can be low or high; and integrity: people can be egocentric and seeking their own gain or unselfish and focused on the good of the organization.

OPP-0073

There are four quadrants on the model that describe individuals' possible positions in relation to PQ. In the top left-hand quadrant are individuals who do have the ability to read the political situation – they know who to influence and how. Nevertheless they do this for their own self-interest. These are the wolves that have little integrity and are prepared to kill to survive. Sometimes hunting in packs, they can also operate alone – as a lone wolf. In the bottom left-hand quadrant are the asses. They, like the wolves, have low integrity and seek to further their own gain. However, unlike the wolves, their ability accurately to read the political situation is poor. They can make fools of themselves by trying to influence the wrong people, or influencing inappropriately.

In the bottom right-hand quadrant are the lambs. Their ability to read the political situation is low yet they have integrity and do want the best for the organization. Unfortunately, lambs can be herded, fleeced or slaughtered by wolves.

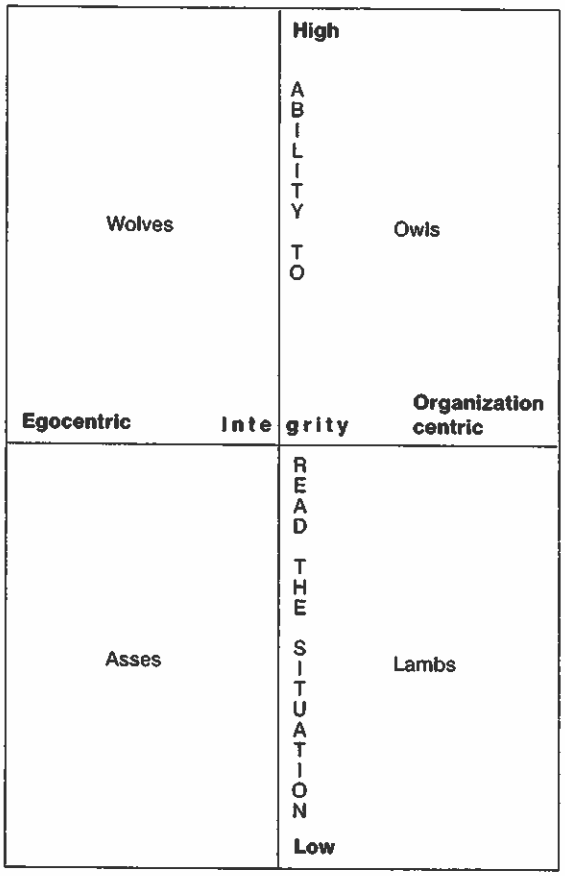

Figure 13.1 A model of political intelligence

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In the top right-hand quadrant are the owls. Their ability to read the political situation is high and so is their integrity: they want the best for the organization. Wise owls, they are able to fly above the ground and see what is happening below.

Consider the organization in which you work and look at the model shown in Figure 13.1. Identify people who you consider to be:

- owls;
- wolves;
- lambs;
- asses.

Next, consider your own ability to read the political situation at work. Is this ability high or low? Are you aware of different stakeholders' needs? Do you know who to influence or are you largely ignorant of power bases and politics? Plot where you sit on the 'Ability to read the situation' axis.

Now consider your own level of integrity during change. Do you act for the good of the organization or are you interested in your own gain? Do you work for the good of all employees or are you more interested in getting the best for yourself? Plot where you sit on the 'Integrity' axis.

The key message from this model is the need to 'wise up' to organizational politics. Many people see themselves as lambs, not interested in politics and prepared to go with the crowd. Taking a 'neutral' or 'disinterested' stand is in itself a political statement. Therefore because we are part of the organization, we cannot help but be affected by politics.

The following chapters aim to help you increase your PQ. The intent is to be positive and helpful during change, to work for the good of the organization and its people.

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Executive Presence: Haves and Have Nots

By Ron Crossland

Michelle Conlin, in her article concerning female executive presence, "She's Gotta Have It," *BusinessWeek*, July 22, 2002, concluded executive presence "refers to that ability to take hold of a room by making a polished entrance, immediately shaking people's hands, and forging quick, personal connections instead of defaulting to robotic formalism and shrinking into a chair. When leaders with executive presence speak, people listen - because the talk is filled with conviction instead of equivocation. They inspire that I'll-follow-you-anywhere loyalty, conveying an aura of warmth and authenticity to everybody from the receptionist to the CEO."

Peter Ciampa, in his article "How Leaders Move Up" (*Harvard Business Review*, January 2005), outlines the differences between good and elite CEO candidates. He lists three major areas in which the great excel - management savvy, political intelligence, and personal style. He concludes the elite candidates help constituents feel appreciated, don't appear to be self-serving, make the right judgments concerning where to expend energy, and make success look effortless.

I reviewed several websites of companies conducting executive presence training. Several seemed to only provide this service; others provided this in conjunction with other developmental services. What was intriguing to me in the review was the content of the training.

In some cases, the work focused nearly exclusively on communication issues such as techniques for relaxing under pressure, managing energy, using expression to add the "human touch" to messages, organizing messages, and delivering emotional impact. Some included assessments geared to helping individuals focus on their specific communication issues through practices designed to help them learn new behaviors. Some literally specialized in helping managers gain more upward influence, navigate corporate politics, gain access to promotions, and solicit greater support for projects and programs. Nearly all of them appealed to those who had aspirations for gaining top leadership positions.

Nick Morgan, former editor of the *Harvard Management Communication Letter* and author of *Give Your Speech, Change the World: How to Move Your Audience to Action and Working the Room: How to Move People to Action through Audience-Centered Speaking* has worked in the arena of effective communication and the issues of presence for over twenty years. In his April, 2001, article in the *Harvard Business Review*, he wrote concerning the ineffectiveness of many managerial presentations. It seemed his article was a precursor to the field of inquiry known as executive presence. Morgan argues

that when a manager does deliver an effective presentation, it "can have an emotional impact. It can win people's trust and motivate them to act, thereby sparking organizational insight and change. And, on a personal level, the ability to move an audience can shape the trajectory of a manager's career."

As I reviewed these websites, scoured past issues of scholarly magazines, and looked through various business periodicals, it seemed the consensus concerning executive presence centered on two major ideas. One was the ability to communicate--the other, how to use presence to better your career. While I wouldn't niggle with the communication idea, I do wonder about the career argument.

Is the purpose of executive presence to aid a manager's ascent, trajectory, and ultimate landing upon the highest job they can attain? Or is it to create greater alignment, stir passion for formidable work, and create an engaged workforce that wants to do something special? I am not insensitive to the idea that a person who develops executive presence will likely find their career enhanced. But what are they using their presence for: personal gain or organizational success?

The late John W. Gardner, former Secretary of Health, Education, and Welfare and leadership expert once wrote, "Leaders conceive and articulate goals that lift people out of their petty preoccupations, carry them above the conflicts that tear a society apart and unite them in pursuit of objectives worthy of their best efforts." For a short time, I considered Gardner a mentor of mine. On several occasions I traveled to and from Cincinnati, where I live, to Washington, D.C. to meet with this accomplished man in his office close to the center of national government.

His office appeared to be part library, part personal museum. Photos of Gardner with dozens of distinguished world leaders, many of whom certainly possessed executive presence, adorned the walls. Floor to ceiling bookshelves completely enclosed the office like a fortress of knowledge. Towards a large window an oversized desk with stacks of books and papers, writing instruments, and a large clock seemed to tell a story of a man who both gave his time to others, and was conscious he only had so much time to accomplish what he felt was important. Casually placed amongst the memorabilia was the Medal of Freedom he had been awarded by President Lyndon Johnson, who enacted John F. Kennedy's nomination of Gardner.

In that office one day, he told Boyd Clarke, my late partner, and I that communication between leader and follower was at the heart of everything. It caught our attention like all our discussions with Gardner. They were never long and always insightful. Though calm, approachable, and engaging, Gardner's energy seemed restless, and he got to key issues quickly.

As a man with a degree in psychology, I would imagine Gardner wouldn't argue that executive presence was very helpful for organizational ascension. But I believe he and most other students of leadership would argue that this ability must be put to work towards the betterment of constituents, or it simply unravels as a political version of a PlayStation or Xbox multi-level game. Executive presence and the ability to communicate should be directed towards what Kouzes and Posner describe in their book, *The Leadership Challenge*, as "enlisting others ... to find and focus on the very best that the culture - group, unit, project, program, agency, community, organization, government, or nation - shares in common and what that means to its members. This communion of purpose, this commemoration of our dreams, helps to bind us together."

Currently there are many men and women in executive positions who seem to have little of this dynamism, this "presence" of the leader. While many of the programs, articles, and information concerning developing more presence are well intentioned and likely successful, I often wonder if those who have attained positional power without a sense of "presence" will be able to change. Can training alone develop the personal authenticity and communication ability required to "lift people out of their petty preoccupations?" Can individuals who define executive success solely in terms of execution, financial success, and personal reward truly develop the type of executive presence we all really long for? How many truly "elite" candidates, according to Ciampa's criteria, or Conlin's "conviction and authenticity," exist and how can training or coaching help the good candidate move into the elite category? To what degree do leaders use their presence for what Morgan calls sparking organizational insight and change versus altering the trajectory of their career? Fundamentally, can we infuse the authentic, well intentioned good woman or good man with greater dynamism and communication ability if these abilities have not been well developed previously? In a way I'm reframing an age old quote, "You can lead an executive to an audience, but can you make him have presence?"

Howard Gardner, author of several books on leadership, and an accomplished student of human behavior, development, creativity, and leadership, has written at length on the topic of leadership communication. He concludes in his book, *Leading Minds: An Anatomy of Leadership*, that when "linguistic intelligence is yoked to considerable personal intelligence, one has the makings of an effective communicator and, perhaps, a promising leader." Reading his material thoroughly, I believe Gardner supports the idea that highly developed communication ability is essential to promising leadership. But this ability must be accompanied by interpersonal intelligence and even then does not guarantee a person to become a leader. When great communication ability collides with an authentic leader who has genuine heart for constituents and the organization's collective aspirations, then, I think, we have individuals who have the potential to move from good to elite.

I'd love to publish your comments in a follow up article to this in a later edition. Send me your thoughts on the following;

1. A definition of leadership presence
2. Persons who seem to have executive presence
3. What it takes to develop executive presence in those able and well intentioned leaders who seem to lack it
4. Is the purpose of presence building to aid the individual's career, enable the organization's constituents, or both?

Ron Crossland is Vice Chair of Bluepoint Leadership Development. Email Ron Crossland

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Almost Ready: How Leaders Move Up

Key ideas from the Harvard Business Review article By Dan Ciampa

The Idea in Brief

It's a popular approach to ensuring a smooth leadership transition: Hire a second-in-command who is designated as the next CEO. But the practice rarely works — of would-be CEO successors hired externally, 75% don't become chief executives or, if they do, don't last more than two years.

The fault lies largely with boards that neglect the succession process and incumbent chiefs who don't coach potential successors. But Ciampa says aspiring CEOs can surmount these obstacles by understanding and mastering the unique skills required for success at the top. Those skills — including understanding the current chief's leadership style and managing political nuances without appearing "political" — are very different from the ones that got them into the number-two spot.

Follow Ciampa's recommendations and you'll be far more likely get to the top, stay there, and excel.

The Idea in Practice

Here are guidelines for CEO designates seeking to make it to the corner office and succeed there:

Manage Your Boss

To build a strong working bond with the incumbent CEO:

- Analyze what the CEO pays attention to and expects from senior people.
- Adapt to his leadership and decision-making style: Does he ask questions to verify his conclusions or gain new input? Does he make decisions by talking with people one-on-one or in groups?
- Search for clues indicating the best way to relate to him: How does he want to be kept informed? Which people influence him most?
- Appreciate how difficult it is for him to hand over the reins.

Manage the Political Environment

To succeed politically without seeming political:

- Grasp the hidden alliances and patterns of loyalty in your organization: Figure out who was most responsible for successes and failures, what happened to them, and how they formed influential groups. Understand who must be won over to your viewpoints.

- Be willing to move your better people to other parts of the organization: They broaden their skills; the company gets talent where it's needed; and you seed the company with people who know you and can help you when you need it — by offering feedback or pointing out potential problems.
- Find ways for your virtues to be touted by others, so you don't shine the spotlight of attention too brightly on yourself. And give credit to others contributing to successes.

Demonstrate Your Readiness to Become CEO

To show that you have the wisdom and maturity to move into the top spot:

- Rather than jumping in to solve your people's problems, lay out what has to happen. Hold your team leaders accountable for finding solutions.
- Resist any urge to get dragged into immediate details. Instead, continually look ahead three or four years with larger concerns in mind. For example, consider where your company's competitive edge may be threatened. Find out what the firm's major competitors are doing that leaders in your company haven't thought about yet. And test your people to see if they can step up to the next level.

- Purchase the full-length Harvard Business Review article here.
- Visit Harvard Business Online.
- See more on Leadership & Managing People at HBR Online.

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Dan Ciampa (DC@danciampa.com) is an adviser to senior executives, particularly during leadership transitions. He is the coauthor, with Michael Watkins, of *Right from the Start: Taking Charge in a New Leadership Role* (Harvard Business School Press, 1999) and "The Successor's Dilemma" (HBR, November-December 1999).

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Almost Ready: How Leaders Move UP

At the very top of a company, a subtle sorting process reveals who might become CEO and who won't. The irony is, what makes you a contender isn't enough to make you a winner.

by Dan Ciampa

Shortly after being elected U.S. president in 1960, John Kennedy offered Robert McNamara, then president of Ford, the post of treasury secretary. McNamara turned down the offer, saying he wasn't qualified for the job. Then, Kennedy offered him the job of secretary of defense. When McNamara demurred again for the same reason, a frustrated Kennedy exclaimed: "Bob, there is no school to learn to be president, either!"

Leadership at the top is never easy for even the most experienced people. For someone taking on the job of CEO for the first time, mastering the new skills and sorting out the uncertainties that go with the position can be an overwhelming challenge. So it should come as no surprise that the corner suite has a revolving door. The Center for Creative Leadership has estimated that 40% of new CEOs fail in their first 18 months. What's more, the churn rate is on the rise: In a 2002 study, the center found that the number of CEOs leaving their jobs had increased 10% since 2001. As a recent report from the outplacement firm Challenger, Gray & Christmas points out, "The

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biggest challenge looming over corporate America [is] finding replacement CEOs."

That's a problem for aspiring chief executives. Look at what we know about the experiences of designated CEO successors – talented and hardworking executives who were successful at each stage in their climb to the number two position. Research conducted in the 1990s (by Michael Watkins, of Harvard Business School, and me) showed that, when promoted from within an organization, less than half the people who reached the number two spot expecting to win the CEO title actually ended up in the position. We also saw more organizations going outside their own ranks to hire designated successors–but disturbingly, once hired, only one-quarter of these candidates were successful at either being named CEO or at staying in the CEO job for more than two years.

Clearly, there is an urgent need for CEOs and boards of directors to have an efficient and effective succession process, but few do. While HR departments should be driving the process, most have neither the skills to translate best practices nor the credibility with boards to make an impact. Many corporations–even family-owned businesses, where the financial security of generations is at stake – don't even get as far as having a plan. A 2002 survey by the MassMutual Financial Group and the George and Robin Raymond Family Business Institute showed that although 40% of the polled chairmen and CEOs planned to retire within four years, 55% of the ones age 61 or older had not settled on a succession plan.

But would-be CEOs must also bear responsibility for their success. All too often, they fail to recognize that the qualities they must demonstrate to make the leap from likely successor to CEO are different from the skills they relied on to get to the number two position. In addition to excelling at running their businesses, aspiring CEOs must master the art of forming coalitions and winning the support of people who are competitors. These are elements of what psychologist Gerry Egan has called the "shadow organization"–the political side of a company, characterized by unspoken relationships, alliances, and influence exerted by coalitions. Because, in most cases, aspiring CEOs receive little actionable feedback once they become designated successors, they must sharpen their self-awareness as well as their sensitivity to the wants and needs of bosses and influential peers; they must learn to conduct themselves with a level of maturity and wisdom that signals to boards as well as CEOs that they are ready–not just almost ready–to be chief executive.

Dan Ciampa (DC@danciampa.com) is an adviser to senior executives, particularly during leadership transitions. He is the coauthor, with Michael Watkins, of Right from the Start: Taking Charge in a New Leadership Role *(Harvard Business School Press, 1999) and "The Successor's Dilemma" (HBR, November–December 1999).*

The CEO Succession Difference

How is top-level succession unique? To answer that question, take the case of Dennis (names in examples throughout this article have been changed). Dennis was on the fast track from the start. An Ivy League graduate, he spent three years in an industry leader's sales-training program, got his MBA at a top school, and completed a finance-training program in another industry-leading company. After 18 months, he moved to the marketing department there, then to a branch manager job for a few years. Next, he jumped to a competitor to become a country manager ("I had to get my international ticket punched"); sales records were set in his market. Five years later, he was named senior vice president for emerging markets.

Not long after that, Dennis left to become the designated CEO successor at a company in a different industry, where he was unfamiliar with the products and technology. "I wasn't looking," he said, "but I knew I could run something bigger. I was ready. I was 44 years old, and [the COO and CEO of the company I had left] were in their midfifties...and there were some talented people between me and them. Leaving there was the way to be a CEO faster." In business school, he had set a goal to become a CEO by age 50. "As I got closer to the top, I became more confident that I'd reach that goal. I had been in four successful companies where I'd seen CEOs up close. I'm not saying that I'm better than they were, but I knew I could do their job."

The succession plan approved by the board was for Dennis to enter as COO, with marketing, sales, manufacturing, engineering, and service reporting to him while the senior staff people (the head of HR, the CFO, and the general counsel) plus R&D stayed under Harvey, the chairman and CEO. The role of president remained unfilled. If things went well over the first 18 months, Dennis would take on that title. In another year, he would become CEO, and six months after that, Harvey would retire.

While successful over the years, Dennis's new company had seen its growth rate slow as market share eroded. "It was all about the numbers," Dennis said. "I was brought in because everyone knew I'd find a way to make them. I didn't need to know the technology as long as I could take cost out, manage the brand, and get service to be more responsive. It was right up my alley." In less than 18 months, he rationalized manufacturing, reorganized to speed up decision making, replaced many people he believed could not perform at a higher level, and helped the balance sheet through a new just-in-time inventory program. He admitted that there was more resistance to changes than he had anticipated and that Harvey had recommended moving forward more gradually and involving some of the older managers to a greater degree. Dennis complained to me: "I filled [Harvey] in on everything, and he never said no.... He could have vetoed any of

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these things, but he never did.... He knew that they would pay off."

But before Dennis was there two years, Harvey asked for his resignation, saying that things just hadn't worked out as everyone had hoped. He said that he and the board had decided to promote the CFO to president. Harvey did not give Dennis any feedback, explaining that there "really would be no purpose served" in doing so. He added that Dennis had brought much value for the shareholders and should feel good about what he had accomplished – that he was still young and would be a CEO somewhere.

Although the company provided a generous severance package, Dennis was angry, contending that he had been misled and used. I asked him why he believed he had failed to get the job he had so carefully prepared for. "You know, Dan," he replied, "I did all the right things...the things the business needed. To me, it was all because of politics. The engineering guy and the head of manufacturing and [the head] of R&D were all against the changes that I was making.... They wanted to keep things the way they were so they could hold on to their power...and they turned people against me. And Harvey doesn't like conflict. He could have told these guys to get with the plan, but he avoided that because it was going to be a tough conversation."

Dennis is a talented executive, but his reaction is a sign of why he failed. He is unlikely to reach his goal until he stops blaming others and considers what he did or did not do to cause his predicament. To start with, his conviction that making the numbers is what it takes to secure the top job is off the mark. While this is important, it's not enough to differentiate one talented CEO candidate from another. Also, Dennis's time as COO was not meant to showcase the abilities that got him to the number two spot. Rather, it was a test of his ability to manage his most important relationships and alliances. In a sense, therefore, Dennis was right – politics undid him. But political skills are essential for a CEO. Dennis neglected to see that he needed other people's help to succeed at this level and that his test was to prove he was capable of embracing a new culture, finding value in it, and appreciating perspectives other than his own. Dennis was also wrong to expect Harvey to clear away the opposition – or even to point to its existence. Understanding who must be won over to your point of view is a key part of managing the succession process.

Pitfalls of CEO Succession

When CEO hopefuls concentrate on doing more of what they have done to succeed, they typically spend too little time cultivating important relationships, especially with their bosses. Consider Vince, a manager who turned around the largest division of a struggling consumer company in less than a year. The company had developed a corporate culture where length of service counted more than performance. Vince made progress toward a performance mentality by replacing some of the people who most resisted change and introducing a performance measurement system that made it clear to those in his organization what was expected of them. At the same time, his informal style and accessibility conveyed to people that he valued them and their contributions. Employees quickly came to trust Vince and lined up behind him and what he wanted to do.

The trouble was that Vince never developed a relationship with his boss. Their regular one-on-one meetings soon became mechanical, and over time, Vince even gave up preparing for them. "He doesn't talk about strategic things. He just does check-ins on what I'm already doing," Vince complained. "It's like he thinks I'm not taking care of these things." After 18 months, discouraged that the CEO was not treating him as a successor, Vince was looking for another job. He had not stopped to analyze what the CEO paid attention to or expected from senior people. In particular, he didn't grasp that it was more important to develop a relationship with his boss than it was for his boss to create one with him. Vince didn't understand that his test was to show that he was perceptive and flexible

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enough to adapt to his boss's style, which differed from what he was accustomed to.

Even if would-be CEOs succeed in relating well to their bosses, some don't display enough ability to "elevate"–in other words, to gain the perspective expected of CEOs. Consider Leigh, a talented executive who had risen internally through a succession of operating management jobs in a technology-dependent manufacturing company. Because she was not an engineer, Leigh had to work harder and be more prepared than most of her technically trained peers. Although she saw it as unfair, she admitted that it had "made me a more complete, well-rounded manager.... I had to learn a lot more just to get my job done because I wasn't sure I could get support [I needed]." Her hard work and uncomplaining style were noticed by the CEO years before Leigh was promoted to the number two spot. "I knew what she was going through," the CEO said, "but she never showed how difficult it was for her. I think it made her tougher, more mature.... It broadened her; she was learning two or three jobs at a time, not just one."

But soon after Leigh became COO, her boss began to wonder whether she could handle the top job. "I didn't

The Winner's Difference

The following table lists the capabilities of people who have a good chance of becoming CEO–and what elite candidates do in addition in order to get the edge.

	The Good Candidate:	The Elite Candidate:
Management Savvy	> knows what is required operationally for short-term results > motivates others to do it	> avoids jumping in personally to solve problems others can handle
	> uses time well > prioritizes among issues that are all important	> makes the right judgments about what to expend energy on
	> frequently delegates tasks > has a history of developing subordinates and exporting talent	> maintains control of the key decisions and a full pipeline of talented people
	> organizes and mobilizes talent toward most significant problems > pushes people to achieve more than they think they can	> makes people feel appreciated and stay loyal
Political Intelligence	> accurately reads political currents	> isn't labeled "political"
	> understands patterns of relationships quickly in an unfamiliar environment	> recognizes how relationships are likely to affect early success
	> builds relationships with peers and subordinates	> gets peers and subordinates to go out of their way to help
	> makes sure the CEO and the board know what he or she is capable of doing	> doesn't seem self-serving
Personal Style	> is a star performer	> makes success look effortless
	> is intense and driven to excel	> allows others' performance to be recognized, too
	> is hardworking, usually putting in more time and effort than peers do	> manages energy to stay on the "rested edge" and to avoid the "ragged edge"
	> enthusiastically backs initiatives that will help the business succeed	> knows when to hold back and when to let go
	> is a leader among peers	> enables peers to improve their performance
	> understands new ways of doing things and makes important connections	> stays grounded and makes sure basic needs are met while mastering new concepts

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worry that she couldn't handle the men she beat out [now peers or subordinates] or that they'd resist doing what she told them.... They understood Leigh's strengths as well as I did. It's because I was not sure if she could elevate." He went on to describe complaints from Leigh's managers about not having enough freedom to run their operations. "[Her] being too controlling wasn't my experience with her, so I checked it out myself. I found out that she was jumping in to solve the problems rather than making sure her people solved them. Doing things herself was the way she had gotten ahead, but she didn't understand that at this level it was going to drag her into too much detail. If a task force was not moving fast enough, she would meet with it to get things moving instead of staying above it, laying out what had to happen, and holding the leader of the committee accountable. It was the same with her [direct reports]. If one of them came to her with a problem, she'd give him the answer instead of guiding him to find it himself." Although Leigh was "running a real tight ship, and all the right things were happening, the way she operated kept her from looking out three or four years, seeing where our [technological] edge was threatened, asking what [our major competitor] was doing that we hadn't thought about yet, and really testing her people to see if they could step up to the next level."

If they had been filled in regarding their bosses' concerns, both Vince and Leigh could have turned their situations around. But when it was suggested that Leigh's boss give her feedback, he said unenthusiastically, "I may mention it to her." Vince's boss said, "No, I want to see if Vince gets it on his own." These reactions underline a subtle reality of life at this level: Would-be CEOs can't expect much help in moving to the top spot. Boards and chief executives will give only the slightest indications of the behavior they expect. It is not that they want the number two to come in knowing all the answers. Rather, they want to see whether a candidate is sensitive to subtle cues and can adjust her behavior accordingly. CEOs and chairmen are more likely to test than to counsel.

Cue awareness is more than window dressing when it comes to trying to win the number one spot. That's because relationships at the top are so heavily scrutinized and the aspiring CEO is always in the spotlight. At this level, a senior manager gets an edge by being concerned with what is best for the whole company as well as with what's good for the units that report to her. Take Helen, a leader in a large, global corporation at the head of its industry. Some saw her as the logical successor to the CEO. She had strong interpersonal skills complemented by charm and humility – rare qualities in her company. Her climb up the ladder was swift; in her midforties, she was reporting to the CEO and running the most profitable part of the corporation. That's when Helen's career plateaued.

Her CEO explained that she was "important to this company in so many ways, but one big reason that she could probably never be a CEO was the downside of loyalty." Although she often talked about the need for teamwork among her peers, she didn't always act as a team player. She made loyalty to her and her agenda the price of admission to her inner circle. She resisted allowing her better people to move to other parts of the corporation, especially if it meant they would be working for another CEO contender. The CEO had a few concerns about her. First, her behavior revealed that she cared more about the success of her own unit than about the success of the organization overall. Second, she kept her better people from jobs in other areas of the company, denying them chances to broaden themselves and robbing other departments of new talent. Third, while she enjoyed intense loyalty within her organization, she had not gained the political support from her peers she would need as CEO, nor had she seeded other parts of the organization with people who knew her well and could help her when she needed it.

Good CEOs and boards are experts at assessing an aspiring CEO's ability to master the nuances of the top job. For Dennis, the test was to find value in the culture of the company whose performance he was improving; for Vince, to gauge what was important to his boss; for Leigh, to point people toward solutions rather than solving all the problems herself; and for Helen, to help others succeed and to concentrate on improving the organization as a whole, not just her unit. These potential successors did not understand the tests they faced, so they missed subtle cues and were set back in their quest for the top position.

Winning Criteria

Each of the designated successors in the examples above failed to establish sufficient credibility for their bosses to stand aside. The signs that they were failing were not easy for them to recognize because they were well matched with the strategic and technical needs of their jobs; indeed, these people were talented, accomplished managers who contributed much to their organizations. What extra ingredients should they have brought? What criteria should CEOs and boards use in judging CEO candidates? (For a more complete list, see the exhibit "The Winner's Difference.")

Watching and analyzing successes and failures at the number two level suggests that executives vary in the degree to which they have the qualifications to win the top job. At one end of the spectrum are managers who have the capabilities they need to be considered as CEOs. Managers on the other end, however, are the elite few who have honed these capabilities with the subtlety and sophistication required for operating effectively at the CEO level.

The capabilities fall into a few broad categories. The first set has to do with senior management best practices – for example, the ability to prioritize the things that will make

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the difference operationally. At this level, managers must use time wisely, delegate the right tasks, and develop people; these are basic abilities expected of everyone. But the people who make it to the top tend to proceed in subtly different ways than do the senior managers who remain stuck at number two. For instance, winners know what is required for short-term results, and they can direct others to do it. But unlike Leigh, they avoid getting too involved in solving problems that others should handle.

The second set of capabilities has to do with managing the political environment. At the less-sophisticated end of the spectrum are those who accurately read most political currents, while those with better-honed abilities will do so in a way that avoids their being labeled "political." Most senior executives build good working relationships with peers (which Helen did), but the ones who become CEOs garner active peer support. Often, their peers and subordinates will go out of their way to offer feedback or to point out potential problems (which Helen's colleagues didn't do). Most people close to the top also know how to show the CEO and the board what they are capable of doing. But the ones who don't make it to the number one job tend to believe that they haven't received the recognition they deserve. (This is true of both Vince and Dennis.) As a result, they come across as too concerned with getting credit. Executives at the other end of the continuum receive credit by finding ways for their virtues to be touted by others, so they don't need to shine the spotlight of attention too brightly on themselves.

The third category has to do with personal style. The number two works hard, sacrificing personal time and expending significant effort to achieve impressive results. But the winner never makes a big deal of the success he is responsible for (unlike Dennis and Vince). Of course, being intensely competitive and driven to be the best is a given among high-level managers, but those who are furthest along the spectrum manage to give credit to others involved in successes without diminishing their own recognition. Being a leader among peers is what all senior executives have done to get where they are; elite executives have learned how to do it so that their peers become better performers.

Rules of Engagement

Success at winning the CEO title always depends on the situation, the organizational culture, the types of people and relationships involved, and the personality and style of the candidate. While there are no hard-and-fast rules, a few basic guidelines can help the aspiring CEO shape his own destiny.

Understand the boss's point of view. Whether the CEO has earned your respect is not the issue here. All that matters is that you respect his position and get to know what is important to him. Start by understanding what contributed most to his success: Who helped him along the way, and are those advisers still valuable to him? How did he handle failures?

Then try to understand the type of person he is. What is his leadership style and approach to decision making? What types of questions does he ask? Does he ask questions to verify what he has concluded or to gain input he has not considered? How does he respond to the answers? Does he tend to make decisions by talking with people one-on-one or in a group? Also, search for clues that indicate the best way to relate to him. Which people influence him the most? How does he manage their advice? How does he want to be kept informed? What behavior does he expect from senior people? How does the boss's style differ from yours and from the styles of others you have worked for?

It's essential to appreciate how difficult it is for him to hand over the reins. Years ago, I was the designated successor for a CEO who I believe was passing the chairman and CEO titles to me only reluctantly. I was determined to work harder and be more productive so he would have no excuse to back away. The founder of the Boston Consulting Group, Bruce Henderson (who had retired and thus gone through his own transfer of power to a successor), was one of my advisers. When I asked him for feedback on what I should be doing differently, I expected a pearl of strategic wisdom about accelerating top-line growth to increase our market share. But he simply said, "Be more understanding about what [the chairman] is going through." Instead of thinking that Bruce had lost a bit of his edge and being disappointed that he did not say something about what I was going through, I should have taken the time to understand what he meant. If I had, my transition would have gone more smoothly.

Know your limitations. There are many incentives for board members, CEOs, HR people, or executive search consultants to encourage a potential CEO to believe that he is more prepared than he really is. While these people are often well-intentioned, if he believes them, he might pay too little attention to cultivating the particular abilities most important for his success.

Take the case of Wayne, who moved from a *Fortune* 50 global corporation to a smaller company because of the opportunity to become CEO years earlier than if he had stayed put. The incumbent chairman and CEO was ill, and the lead director of the board had taken over most of his duties. Wayne was recruited aggressively by the board members, partly because he had much of what they believed their company needed, but also because the corporation where he had become a rising star was among the world's best performers and was known for producing very good managers. The board reasoned that Wayne would impress investors and employees alike.

In his first year after joining, Wayne worked hard to master new technologies, markets, and customers. He

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learned how to impress analysts and institutional investors. His operational skills turned out to be just what the company needed, bringing remarkable bottom-line results and cost savings. His upbeat style was refreshing, and his encouragement to try new approaches motivated employees to innovate at a rate the company had not seen before. After 11 months, the lead director said, "The board believes things are going really well and wants to accelerate your move up to CEO.... You're our guy."

Wayne was surprised, pleased, and anxious all at the same time. He appreciated the vote of confidence, but, although he took care not to appear as though he believed the top job exceeded his capabilities, he was unsure that he was ready for such a step. He was still learning the business, and there were challenges (such as acquisitions and technical alliances) with which he had little direct experience and where the managers in charge had not impressed him.

Over the next month, several of the directors spent more time meeting with Wayne than they had in his entire tenure at the company. At first he thought they were testing him, but he soon realized that they were trying to persuade him to take the CEO spot. They were selling.

Wayne lasted 15 months as CEO. He was not ready and should have stayed in the number two spot for another couple of years. It is difficult to blame him for taking the opportunity to be CEO – his failure was really more the fault of the board. Eventually, he would have had the self-confidence and experience to be very effective as head of that company. The board members were more concerned about image and getting someone in the CEO spot quickly. In other words, they cared more about what was good for the board than about what was good for Wayne or even the company.

Manage the shadow organization. In order to get a CEO position, it's important to grasp the alliances and political realities that aren't apparent right away but come with top-level jobs. Whether entering a new organization or being promoted to headquarters, the wise manager will find ways to understand how this often-hidden network of relationships and norms can influence her success.

One way to gain such understanding is to trace the histories of successes and failures. Who were the people most responsible, and what happened to them? How did they help form influential groups? What patterns of loyalty emerged? Were there attempts to isolate lessons and ensure they were understood? Is such learning reflected in who has been hired, in performance management, and in training and development programs? In getting to the core of reality, it is useful to look to Japanese manufacturers of the 1970s. They adopted the habit of asking "why" five times when they discovered an important production or distribution problem, because they believed that root causes lay at least four levels below the surface.

Another way to grasp the political climate is to understand what is actually valued. Most CEOs have endorsed a list of values that are prominently displayed on office walls. In most cases, though, these bear little resemblance to actual behavior or to how the most important decisions are made. To determine whether values are meaningful, find out how they came into existence. They mean something when they have been created over a long period, evolving from ethical wins and mistakes. They stand the test of time. The most cherished are passed from one generation to the next. Values are sure to be superficial, however, when they have been created by outsiders for a fee. Here is a particularly ironic example: One company unveiled a new set of values written by a consulting firm that in the same week admitted its role in another client's financial scandal.

>>Most senior executives can read political currents, but only an elite few do so without being labeled "political."

• • •

Most people who get close to the top are talented, hard-working, and smart enough to go all the way – but fail because they don't know how to approach this entirely new challenge. A good number of these failures are avoidable. That we have allowed this to happen in organizations that are otherwise excellent performers is a disgrace; it exacts a huge cost in terms of time, money, and wasted potential. The price is paid by many people: employees depending on a smooth handoff at the top, investors expecting continuous leadership, and families uprooted when jobs do not work out as hoped. Among those at fault are boards of directors that do not oversee the succession process or hold CEOs accountable for a smooth transition, human resource organizations that should have the capacity to help but are not up to the task, and CEOs who do a poor job of coaching potential successors.

In spite of these obstacles, the aspiring CEO can dramatically increase his chances of success by sharpening his perception of the organization's culture and politics, by mastering the art of building winning relationships, and by improving his self-awareness. Most of all, he must learn to conduct himself with the maturity and wisdom that demonstrate to those making the decision that he is, indeed, ready.

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The Importance of Political Intelligence

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Key Learnings

- Using political intelligence to develop effective workplace relationships and improve performance levels
- Political intelligence training educates employees in the positive application of organisational politics

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Many organisations invest heavily in their 'talent pool' by developing their EQ and IQ to assist in their rapid rise up the corporate ladder. They however, fail to acknowledge the need for PI (political intelligence), which gives them a far greater chance of survival when they get there. Intelligent Behaviour is almost useless unless you understand the political territory you are entering.

Organisational politics gets a bad rap. So much has been said against it that even those who believe in its merits talk in hushed voices. While political intelligence has done its rounds, it no longer remains a go-go area in most organisations. Speak of emotional intelligence, competitive intelligence, even artificial and digital intelligence; these receive far more attention from the human resources academia than political intelligence.

The Definition

The best definition of political intelligence calls it "*the art of managing politics and developing an understanding of what politics is and what type of political 'animals' exist in today's workplace, together with strategies on how to manage.*" This intelligence is also about gathering information about people you work with, and using it to work effectively with even those people one perhaps dislikes.

In Favour of Political Intelligence

It is both official and down in writing that "*political behaviour can be used to make things happen, unlock barriers to change, create greater buy-in to key projects, produce organisational cohesion and speed up decision making*".

Moreover, sufficient anecdotal evidence ranks the ability to manage politics as one of the top skills needed by managers today. This nonetheless has failed to elevate political intelligence to its full glory. Not surprising perhaps, as most managers have nothing nice to say about organisational politics. Unfortunately, their opinion is a product of their 'political' experiences.

A study conducted by **Roffey Park Institute** revealed that nearly 70 percent of managers complain of bearing the brunt of organisational politics. Such negative experiences adversely affect the trust between employees at nearly all organisational levels making the organisation a seedbed of ineffective working relationships.

Worse is when such relationships affect overall organisational performance. While the percentage of complainants is rather high, the good news is that this has more to do with the bad reputation that precedes

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organisational politics; a reputation based solely on misguided perceptions.

The Other Side of the Coin

Most managers have heard only the bad 'political' stories. The reality is that the negative application of political intelligence is what prevents both individuals and organisations from maintaining productive relationships and achieving business objectives in turn.

Since this is the case, managers need to see the positive side of organisational politics. This includes creating organisation-wide awareness of the merits of organisational politics, developing an understanding of how it can be used effectively and educating managers in the skills and practices to enable them to adjust their behaviours.

All this can be done by waving the training wand! 3D Training and Development, an enterprise committed to improving organisational performance conducts 'positive organisational politics' workshops to provide manages with an insight to what political intelligence is and can do. What follows is an outline of components of these workshops. This could serve as a guideline for organisations interested in the positive application of political intelligence.

Training Sets it Right

The workshop begins with a series of diagnostic tests to identify the levels of politics that goes on within the organisation. Asimple question such as, "What causes politics?" leaves maagers in no doubt that politics is an integral part of organisational functioning and that it does affect workplace behaviour either to a large or lesser extent.

This diagnostic is followed by a 'political perceptions questionnaire' where individuals are asked select options from a series of paired statements that cover the positive and negative aspects of organisational politics. With each negative alternative comes an explanation of how adversely it affects workplace relationships and performance.

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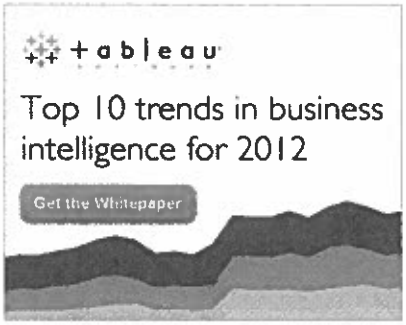

Seeing is Believing

The objective of such diagnostics is to make individuals aware that what they choose to see is basically what they want to see! This self-created smokescreen colours how they perceive what a co-worker or colleague is doing and what is motivating them. In most cases these individuals end up misinterpreting the behaviour of others and politics takes the blame!

The main cause for 'dirty' politics in most organisations is when individuals spot the negatives more easily than the positives. It also is common for employees to view one person's manoeuvring as conniving manipulation. Additionally some organisations unwittingly stimulate negative politics by creating processes that fuel internal conflicts. For instance, a race to get bigger budget allocations, awards and recognition. Such aspects that make politics negative come to surface during the diagnostic tests.

Goal

The entire emphasis of these workshops is to get managers to apply political intelligence to redefine the way they see others and interpret behaviour. Behavioural experts believe that by viewing others differently employees can change their beliefs about them. Better still, this will help them alter their own behaviours and gain self understanding and self acceptance of the different political 'animals' that exist in their organisation.

Last lap

The final set of diagnostics measures an individuals' political quotient. An individual with higher political intelligence succeeds in aligning his goals with those of the organisation. That is because he understands what constitutes political behaviour, manoeuvres his way around it and therefore encounters lesser conflicts and divergent interests.

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One with low political intelligence focuses primarily on self goals thereby limiting the range of development choices that he can explore. This interferes with his performance, which in turn affects his workplace relationships.

With these measurements in place the workshop then aims to improve the levels of political intelligence. Individuals go through a series of courses that cover key areas such as communication, networking and influence and are equipped with skills: tips to develop high levels of political intelligence.

The Merits of Political Intelligence Training
Conducting political intelligence workshops helps employees:

- Identify personal preferences regarding political behaviour and assess their level of political intelligence
- Determine the extent to which their goals can be aligned with those of the organisation
- Understand the strengths and weaknesses of different political behaviours and formulate appropriate responses for each
- Consider the changes they need to make to improve their levels of political intelligence
- Create productive and meaningful workplace relationships
- Share a common language while interacting with other on organisational politics
- Get things done inspite of prevalence of organisational politics
- Work well with even those they dislike

Happy organisational politicking!

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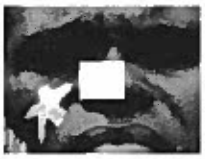
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Developing political intelligence for making feasible decisions

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Abstract:

Purpose – The purpose of this research is to propose a model for acquirir political intelligence by describing steps for assessing feasibility that can b used to systematically evaluate a situation. The paper also aims to discus individual and situational biases to acquiring an accurate political feasibilit assessment.

Design/methodology/approach – A pre- and post-test method was used tc compare a sample of novice managers who received training with the fea: assessment model to experienced, politically savvy managers.

Findings – Assessing the political feasibility of a decision is a skill that can developed to acquire the political intelligence necessary for today's politic: laden, uncertain competitive environment.

Originality/value – Political intelligence is at the heart of avoiding political blunders and conflict in organizations. When time and money are spent

promoting decisions that are unlikely to succeed, managers can derail the careers from backing initiatives from a declining dominant coalition rather an emerging one. Yet, these blunders are avoidable. While previous autho agree on the need for political intelligence, little is offered about how to ac it. This paper offers a model that helps managers acquire the information needed to make politically feasible decisions that develops political intellig

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Political Savvy: Elusive and Vital

Daniela Truty

Organizational politics are not legitimated by institutional leaders, so skills for managing them successfully are rarely discussed. The literature suggests that political savvy is a necessary component for everyone's career success, but instruction or coaching seems to be offered to a privileged few, namely students in select MBA programs or executives, managers, and professionals in the workplace. I argue that formal skills development for political savvy ought to be offered to students and workers at all organizational levels. Instruction should be a legitimate component of higher education curricula across disciplines and particularly for students in HRD because of the applied nature of the field and practitioners' responsibilities for career development.

Introduction

"He just doesn't get it!" When spoken by a powerful organizational agent about a less powerful other, these words can herald negative career repercussions or even job loss itself. Yet, *it* is not easily articulated by the accuser—*it* is just known. From my own observations, experiences, study, and reflection, I have learned that this expression in similar conversational contexts conveys exasperation about an underdeveloped pivotal competence called *political savvy*.

This summer, I developed an undergraduate course on political savvy. The many sources I reviewed in search of an appropriate text provided evidence that the expression above and political skill were somehow connected. In this paper, I draw from the burgeoning literature in the popular business press about office politics and political savvy in the workplace. After defining political savvy and describing its component skills, I discuss why political savvy awareness and behavior are important for career success. I then summarize the literature on how political savvy skills are generally learned and who ought to master them. Finally, I argue that development of skills for political savvy ought to be formally offered to workers regardless of organizational level. Because organizations tend to avoid discussion about organizational politics, instruction could begin for students in high school and definitely continue for all students in the ideological safety of higher education.

What Is Political Savvy and What Does It Look Like?

Political savvy in the workplace, also called political intelligence (McIntyre, 2005), political astuteness (DuBrin, 1990; Reardon, 2005), political ability (McIntyre, 2005), and political acumen (Reardon, 2005), represents the totality of skills for successfully navigating the political dynamics of an organization to accomplish one's goals. Political savvy assumes the existence and inevitability of "office politics." DeLuca (1999) defines office politics as "how power and interests play out in the organization" (p. 43). Reardon (2002) adds,

> Politics in organizations involves going outside the usual, formally sanctioned channels, something nearly every successful manager has done at one time or another. The real

> political moves are the ones not written down anywhere. Simply put, *politics is an illegitimate means of getting things done* (p. 2).

For many, office politics holds a negative connotation, conjuring up self-serving manipulative ploys (DeLuca, 1999) and backstabbing antics (Cardillo, 2005). In fact, DeLuca (1999) has found that although many have the political skills, they choose not to deploy them for rational (good work should speak for itself) or moral (playing organizational politics is manipulative and therefore immoral) reasons. DeLuca counters that although Machiavellian types do exist in organizations, there are also those who choose an ethical, albeit sometimes difficult, approach to political savvy.

The literature suggests that it may be impossible and unwise to avoid playing politics:

> To ignore office politics is to ignore those underlying forces that account for the differences in success between equally talented people. People who understand and use office politics to their advantage are much more likely to succeed than their politically naïve counterparts" (DuBrin, 1990, p. vi).

To successfully manage office politics, the savvy worker must develop and use a complex set of political skills, including but not limited to intuition (Reardon, 2005); the ability to quickly assess who holds power in a situation and who "is just faking it" (McIntyre, 2005, pp. 24-5); focus and goal orientation, relationship expertise, "an ability for bring[ing] up controversial issues without provoking or offending anyone," and the ability to develop and appropriately use political self-defense techniques when necessary (McIntyre, 2005, pp. 24-5); impression management and an ability to "leverage power" and obtain support for one's ideas (DuBrin, 1990); wisdom and discipline to "avoid the troublemakers, know—and follow—the chain of command, [be] friendly, but cautious, with coworkers, [not] gossip, support [one's] boss… socialize with…coworkers" (Cardillo, 2005, para. 3, 4, 5, 7, 8, 9); and the ability to use the organizational "grapevine" wisely (DeLuca, 1999, pp. 45-6).

Why Is Development of Political Savvy Important and For Whom?

Development of political savvy is important from workers', organizational, and societal, perspectives. Workers need political savvy for employability, including enhanced potential for gaining and retaining employment or advancing as desired. Workplaces are affected by various socioeconomic and demographic forces, producing a shortage of resources and fueling competition. According to Klimas (2006), technical skill is no longer sufficient for career success, requiring well-honed political skill as well. DuBrin (1990) contends that people need political competence in order to defend and protect themselves from others' devious political tactics. Additionally, they must be able to successfully identify politically dangerous situations and effectively avoid committing "political blunders…avoiding blunders in an era of downsizing is very important because managerial and professional workers are often squeezed out for minor reasons" (p. 215). DeLuca (1999) explains, "Political savvy has little to do with one's place in the hierarchy….anyone can have political savvy regardless of position in the company" (p. 117).

DeLuca (1999) and Gilley (2006) believe that political savvy is critical to the development

of organizational leaders and managers. For DeLuca (1999), *managers* are those who manage projects, people, and things and therefore all workers who wish to impact the organization in a positive way; and leadership is needed at all levels of the organization--not only at the top.

DeLuca (1999) asserts that political savvy "is an essential leadership skill" (p. xiv). He explains that unlike leadership that is visible, leadership behind the scenes is mostly not. Political savvy is required for those who wish to understand how behind-the-scenes leadership is conducted. Reardon (2002) claims that developing political savvy is critical for acquiring the secret handshake. She explains that the "secret handshake" refers to the acknowledgement one in-group insider gives another, conveying their shared distinction as members of the business inner circle" (p. xvii). Reardon (2002) believes that political savvy is particularly important for those at higher organizational levels because positions at the top are so rare that competition for them is strong: "Political warfare at this level is subliminal and more often comprised of hidden minefields and stealth bombers than hand-to-hand combat" (p. 2). However, workers at all organizational levels must negotiate power. Those with less power engage in political behavior to get things done. DuBrin (1990) notes that power is important because some talented people have been known to exit prematurely when they were unable to acquire the necessary authority to get things done. Those in the bottom or middle layers of the organization need power to gain power; and power is often required to move into plum developmental and visible assignments.

Albrecht (2006) discusses social intelligence in the workplace and its promise for development of society's leaders. He defines social intelligence as "the capacity to get along with others and to get them to cooperate with you" (p. 222). Albrecht adds: "As the concept of social intelligence finds its way into the public consciousness, and into the public discourse about our leaders and the leadership they offer, we may increasingly hold our leaders in all sectors of society to a higher standard" (pp. 229-30).

DeLuca (1999) urges, "the basic message is: choose to become an active player in the human system, put the organization first, play above board, and most important of all, *legitimize the task"* (p. 49

How Is Political Savvy Learned—Or Not—and Who Learns It?

Development of political savvy appears to be left largely to chance. It does not yet seem to be a regular component of employee development in the workplace or in high school or university curricula. When formally taught for the workplace, it tends to be presented by external consulting groups for purposes of leadership remediation or development. In my own business experience, I have noted that other staff members, usually in managerial positions, might be offered instruction on individual political skills, but it tends not to be explicitly or effectively connected to power and politics in an organization. Inadequate instruction in political skill could place certain segments of the workforce, such as women, at a particular disadvantage in the workplace:

> Ceasing to do well in their boss' eyes, they get such vague feedback as, 'you're not being a team player.' Most women fail to realize that employees are judged on interpersonal and not technical skills as they progress in their careers. And interpersonal skills often rise and fall on the nuances of male and female cultural differences (Heim & Golant, 1992, p. 6).

The literature provides evidence that political savvy is not systematically taught in the workplace because organizational politics tend to be covert. They are not legitimate conversational topics among institutional members. DuBrin (1990) explains that the subject of office politics has been "exposed" since the 1970s, many textbooks discuss ways for navigating power in the workplace, and some Ivy League business schools "including Cornell and Harvard, offer courses in power and politics" (p. 4). However, "although the art and practice of office politics have become somewhat public, it is still a topic surrounded by secrecy and denial" (DuBrin, 1990, p. vi). DeLuca (1999) suggests that those who might not see the political behavior that happens behind the scenes might be operating from the "political blind spot," which prevents them from believing and paying attention to such invisible behaviors. They believe that behavior must be rational and ethical and that workplace decisions should be based on "technical merit" alone. Reardon (2002) points out that largely because of the competitive business environment with limited executive posts, leaders vying to acquire or hang on to such positions deliberately withhold information about how to successfully earn the secret handshake.

DeLuca (1999) stresses that before developing a strategy for accomplishing one's goals in the workplace, one must learn about the culture and "work with the culture of the organization" (pp. 123-124). Wood (2001) cautions that different cultures can coexist in different areas of the same organization, and political skills may not be taught because office politics are not easily detected. Over time, they tend to become embedded in organizational culture and therefore taken for granted. Unfortunately, Wood (2001) complains, "there is little or no coaching by more experienced employees to guide the newer ones [in an organizational culture]" (p. 4).

Workers' prior instruction has taught lessons of meritocracy based on rational arguments and neglected the existence of office politics. Most management texts continue to represent the workplace as a rational site, supposedly operating in the way things should be done in an organization instead of representing how things are actually done (DuBrin, 1990). In fact, some executives continue to believe that organizational decisions are based on concrete and rational facts (DuBrin, 1990). Wood (2001) points out that schooling teaches that,

> rewards come with the right answer, for example, that rewards are not contingent on relationships forged with the instructor and significant people at school. You didn't have to invest in the relationship. You didn't have to worry about your social skills. Social skills were generally developed and displayed by hanging out with friends, our peers (p. 1).

Additionally, Wood (2001) claims, "results are '*secondary*'...It was the total opposite of everything I had learned and been conditioned to do up until this point in my life" (p. 14).

In Western business culture, reliance on individualism blurs the need for collaboration. Wood (2001) posits, "the danger in believing we can be successful on our own is that it becomes an excuse for not forging important relationships" (p. 96).

Finally, some believe that political savvy is just "common sense." As DeLuca (1999) explains, these Savvy people are not aware of their skills, they do not question them, and see no need to teach them. "In truth, however, what is common sense for the intuitively Savvy is actually uncommon sense for the bulk of practicing managers (p. xiv). DeLuca adds that "conceptualizing behaviors and attaching labels to them is an essential part of turning unconscious competence into conscious competence" (p. 217). Still, knowing about political savvy and its concepts is not the same as being politically savvy (DeLuca, 1999).

Learning about office politics in the workplace and developing political skill, therefore, are largely by trial-and-error or self-development. Cardillo (2005) claims that most people were taught how to behave in various contexts, i.e., the library, church, school, home, in public, and so on, from young, but most were never taught how to behave in the workplace. "Therefore, many of us must fend for ourselves and learn the rules the hard way, often with dire consequences" (para. 2). The good news is that all authors of works I have consulted believe that political savvy can be developed.

To develop one's skill in political savvy, one can turn to self-improvement sources, such as those that inform this article. DuBrin (1990), however, cautions that despite proliferation of materials about office politics, most people who read about "self-improvement" rarely adopt what they read. For those who would heed the messages in these sources, development of skills for political savvy must begin with awareness of one's own as well as others' political styles (DeLuca, 1999). This is followed by an assessment of who holds power in an organization so that a strategy for influencing those people could be developed (DeLuca, 1999). Those for whom these sources just do not work could perhaps "hire a personal coach" (Deep & Sussman, 1999, pp. 10-11).

Conclusion, and Implications

Given the importance of political savvy for all workers, I believe that raising awareness about and teaching political skill cannot be left up to chance. Unsystematic approaches to navigating political workplaces assume and require that workers begin their journey equipped with powers of observation, reflection, communication, negotiation, conflict resolution, goal setting, self-directedness, critical thinking, learning from experience, and learning how to learn. However, educators know that student preparedness is much more complex. Merriam & Caffarella (1999) report that a major reason for adults returning to formal education is work-related. In light of forces shaping the business environment, including globalization, competition, and shrinking resources or opportunities, failure to systematically, thoroughly, and formally offer instruction in the workings of power, influence, and political skills in the workplace is tantamount to imposing a survival of the fittest approach to all who would be workers. The appropriate places for such instruction are the high schools and certainly institutions of higher education, especially those that seek to provide access to a socioeconomically, culturally, ethnically, and otherwise diverse student body. Additionally, because overt articulation of office politics continues to be taboo in the workplace, it is incumbent upon higher education institutions to provide a safe place for free and deliberate unveiling, exploration, discussion, strategizing, and critiquing of office politics.

This paper holds implications for additional scholarship and practice in political savvy. For example, none of the popular press sources cited herein interrogate structural forces and ideologies, such as patriarchy, rationality, capitalism, institutionalization, and individualism, and their roles in the creation and maintenance of the need for political skills. Most books on these shelves leave out important implications for development of political savvy for societal benefit, yet possibilities for political skill at the service of Freireian conscientization and democratic participation abound. Few works discuss political savvy in pursuit of a collective—not just individual-organizational—goal. I found no sources that question why only some MBA programs in privileged universities seem to offer formal instruction in organizational power and politics. Discussions regarding different perspectives about political savvy focus on gender.

None of the sources I cite in this paper surface perspectives rooted in cultural differences, religious preferences (although there is mention about workers' refusal to play office politics *based on moral objections alone*), ethnic origin, sexual orientation, and issues of race and class. Important work could be done to question the "inevitability" of office politics. Interesting scholarship could focus on the language and metaphors of war, the jungle, and gamesmanship used to articulate the concept of political savvy. Furthermore, research is needed to unravel implications for and interrelationships among impression management, impostorship, and authenticity with regard to political savvy. Scholars and practitioners must continue their collaboration in the study of concepts such as political savvy in the workplace. In this case, popular press sources are invaluable conduits of practical knowledge from the workplace to academia.

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EXHIBIT
V

ORGANIZATIONAL CHANGE AND DEVELOPMENT

Introduction

Change is a constant, a thread woven into the fabric of our personal and professional lives. Change occurs within our world and beyond -- in national and international events, in the physical environment, in the way organizations are structured and conduct their business, in political and socioeconomic problems and solutions, and in societal norms and values. As the world becomes more complex and increasingly interrelated, changes seemingly far away affect us. Thus, change may sometimes appear to occur frequently and randomly. We are slowly becoming aware of how connected we are to one another and to our world. Organizations must also be cognizant of their holistic nature and of the ways their members affect one another. The incredible amount of change has forced individuals and organizations to see "the big picture" and to be aware of how events affect them and vice versa.

Organizational development (OD) is a field of study that addresses change and how it affects organizations and the individuals within those organizations. Effective organizational development can assist organizations and individuals to cope with change. Strategies can be developed to introduce planned change, such as team-building efforts, to improve organizational functioning. While change is a "given," there are a number of ways to deal with change -- some useful, some not. Organizational development assists organizations in coping with the turbulent environment, both internally and externally, frequently doing so by introducing planned change efforts.

Organizational development is a relatively new area of interest for business and the professions. While the professional development of individuals has been accepted and fostered by a number of organizations for some time, there is still ambiguity surrounding the term organizational development. The basic concept of both professional development and organizational development is the same, however, with an essential difference in focus. Professional development attempts to improve an individual's effectiveness in practice, while organizational development focuses on ways to improve an organization's overall productivity, human fulfillment, and responsiveness to the environment (Cummings & Huse, 1988). These goals are accomplished through a variety of interventions aimed at dealing with specific issues, as well as through ongoing processes.

This chapter provides an overview of both change and organizational development. Educators, including those in the judiciary, must be familiar with the dynamics of organizational change, since all educational activities, both at the individual and organizational level, deal with effecting change. Organizational development and change efforts go hand-in-hand; judicial educators who are interested

in effecting change within their organizations must first thoroughly understand the dynamics of change. They must think in terms of the court system and the judicial education apparatus as organizations for which they may play a role as change agent. Within different parts of these systems, judicial educators may play different roles in the change process.

Organizational development will also be discussed in this chapter. One specific OD strategy, team-building, will be examined in some depth. This strategy, if institutionalized effectively, can reduce the need for outside consultants.

It is important to include a chapter on organizational change and development in this manual to address issues within the larger frameworks that exist for most judicial educators. Change affects every individual and every organization. Moreover, all of the components of the program planning sequence discussed in this manual are administered within the setting of an organization, a committee or board, or some type of team. As more and more work gets accomplished through teams, it becomes increasingly important to learn how to translate organizational concepts to the small group environment. The team approach is often being used to accomplish short-term projects, such as planning programs, conducting a needs assessment, or developing a new curriculum. A team's capacity to create a shared vision for the task at hand and work together in the midst of a turbulent environment underlies its ability to be effective. Organizational change and development is a fitting summary chapter for this judicial educator's manual since it deals with both effecting change (underlying much of education) and managing change.

Change in Organizations

Organizational development efforts, whether facilitated by an outside expert or institutionalized and conducted on an ongoing basis, bring about planned change within organizations and teams. However, they are but one type of change that occurs in organizations, for change can be both planned and unplanned and can occur in every dimension of the universe. A change in chief justice, appropriations, or staff support can dramatically alter the character of a judicial education organization. Institutional alignment of the state bar, local law schools, area colleges and universities, and judicial professional associations may yield similar impacts.

Planned change takes conscious and diligent effort on the part of the educator or manager. Kanter (1983) originated the concept of the ***change master***: a person or organization adept at the art of anticipating the need for and of leading productive change. As a way to reinforce the judicial educator's role in the change process, this term will be used to refer to educators and managers who are interested in effecting change in their organizations or work teams.

Change will not occur unless the need for change is critical. Because individuals and organizations usually resist change, they typically do not embrace change unless they must. One OD consultant describes how "pain" drives change (Conner, 1990). Pain occurs when people pay the price for being in a dangerous situation or for missing a key opportunity. As such, change is needed to relieve the pain.

According to this perspective, change will not occur just because "it's a good idea." It will only occur when the pain of an individual or an organization is sufficiently high to justify the difficulties of assimilating change. Therefore, a change master must focus on the absolute need of the organization to change, rather than simply on the benefits of the anticipated change. Effective change masters understand this, and they then assist others in recognizing that the organization has no choice but to change. The organization cannot afford to maintain the status quo; change is simply that critical. The Ohio Judicial College's movement to full funding emerged from such a catharsis. In other states, mandatory training saved the office of justice of the peace. Court administration emerged as an independent vocation out of exigent circumstances. These examples of change in state judicial education provide evidence that effective change masters have perceived a critical need for change and then helped to make that change happen.

Planning for Change

Before embarking on an organizational change initiative, it is wise to carefully plan strategies and anticipate potential problems. One useful method of planning comes from an early researcher on change, Kurt Lewin (1947), who developed the concept of ***force-field analysis***. The term describes analysis that is deceptively simple and can be used to help plan and manage organizational change.

Lewin believed that behavior within an organization was a result of the dynamic balance of two opposing forces. Change would only occur when the balance shifted between these forces. ***Driving forces*** are those forces which positively affect and enhance the desired change. They may be persons, trends, resources, or information. Opposing them are the ***restraining forces***, which represent the obstacles to the desired change. As these two sets of forces exist within an organization, they create a certain equilibrium. That is, if the weights of the driving and restraining forces are relatively equal, then the organization will remain static. As changes occur and affect the weight of either one of the forces, a new balance will occur, and the organization will return to what Lewin called "quasi-stationary equilibrium." Individuals practicing their vocation in the context of a political organization may intuitively employ these concepts in defining and redefining what change is possible. Judicial educators operate in such a context.

What is the usefulness of this perspective? Force-field analysis assists in planning in two major ways: (a) as a way for individuals to scan their organizational context, brainstorming and predicting potential changes in the environment; and (b) as a tool for implementing change. In the former, force-field analysis becomes a method of environmental scanning (which is useful in strategic planning), whereby organizations keep abreast of impending and potential changes -- from societal trends and potential budget constraints to staff turnover and purchases of new office equipment. The more change can be anticipated, the better individuals and organizations are prepared to deal with the resulting effects. The second use of force-field analysis is similar, offering a way to systematically examine the potential resources that can be brought to bear on organizational change and the restraining forces that can be anticipated. This advance planning and analysis assists in developing strategies to implement the desired change.

An example may help illustrate this point. A judicial educator wishes to introduce a computer class for a particular group of judges. In her role as a change master, she identifies the driving forces as follows: (a) most judges are presently obtaining the necessary equipment, (b) software and databases are available that are user-friendly and appropriate, (c) computers can help judges handle information quickly and efficiently, and (d) the use of computers as information sources allows court personnel to perform other functions. On the other hand, restraining forces may include the following: (a) judges have limited time for attending additional courses; (b) they appear to be intimidated by computers, so they passively resist using them; and (c) they feel more comfortable utilizing human resources for their judicial research rather than a computer and databases.

Force-field analysis provides the necessary information for the judicial educator to plan most effectively for change. If he or she is more aware of some of the potential pitfalls that can accompany the planned change, steps can be taken in advance to overcome them. One strategy for successfully implementing change is to confront the potential obstacles at the outset. In order for the educator to be proactive, however, the positive driving forces and the negative restraining forces must be listed, so that a strategy for change can include enhancing or adding to the positive forces, while decreasing or minimizing the negative forces. In this process, skills such as coalition building, networking, conflict resolution, and the appropriate utilization of power are necessary.

The Process of Change

A method such as force-field analysis is the beginning step of any planned change. There are many different models for the change process in the literature; the following is a simple, straightforward one proposed by Egan (1988, p. 5). He delineates three steps:

- The assessment of the current scenario.
- The creation of a preferred scenario.
- Designing a plan that moves the system from the current to the preferred scenario.

It is evident Egan has been influenced by Lewin, in the emphasis on both planning and assessment. Additionally, Egan argues that planning must lead to an action that produces valued outcomes or results for the organization. Thus, both planning and change must be directed toward a specific goal.

Once the need for change has been determined, one follows the steps of the model in sequence. While these steps could each be examined in detail, only step three will be discussed in an in-depth manner here. The first step, "assessing the current scenario," can be accomplished through a mechanism such as force-field analysis. It provides the necessary information on the forces that can facilitate the desired change and the forces that will resist and deter the change. Step two, "creating a preferred scenario," is often accomplished through team effort in brainstorming and developing alternative futures. While the need that precipitates the change is clearly compelling, there may be several ways in which the change could actually occur within the organization. It is important to examine the various alternatives thoroughly.

The third step of the process, "devising a plan for moving from the current to the preferred scenario," includes the strategies and plans that educators and managers must develop to overcome the restraining forces in an organization. This is a political process, requiring individuals to harness and utilize power. Power is necessary for change to occur. It is neither inherently good nor bad; it simply assists individuals in accomplishing their goals. In his recent book *Mastering the Politics of Planning*, Benveniste (1989) notes that even well-thought-out plans for change can be derailed when the politics of implementation are not considered. Change masters must gather support for the desired change throughout the organization, using both formal and informal networks. The multiplier or "bandwagon" effect, he notes, is often necessary to rally enough support for the change.

Key Roles in the Change Process

During this stage of planning, it is useful to distinguish the different roles associated with the change process. These roles must remain distinctive in order to implement planned change effectively. However, within different settings or systems, a judicial educator may play more than one role. The various roles that individuals can play, as described by Conner (1990), are:

Change Sponsor:	Individual or group who legitimizes the change.
Change Advocate:	Individual or group who wants to achieve a change but does not possess legitimization power.
Change Agent:	Individual or group who is responsible for implementing the change.
Change Target:	Individual or group who must actually change.

One of the most critical tasks for the educator in implementing change is to harness the support of an effective ***change sponsor***. The sponsor is in a position to legitimize the change. Sponsorship is critical to implementing the desired change. Directly or indirectly, pain can motivate the sponsor to foster the planned change. Within the state judicial system, this sponsor may be the chief justice, the head of the education committee, or the state court administrator. Conner (1990) argues that weak sponsors should be educated or replaced, even by someone at a lower level in the organization, or, he emphasizes, failure will be inevitable.

Educators and managers are often in the position of ***change advocates***, who perceive the need for change and desire and advocate the change, but who do not have the necessary organizational power to implement the change. Alternatively, these individuals may function as the ***change agent***, with the responsibility (but again, not the power) to implement change. And, of course, in an organizational change effort, educators and managers may be part of the group affected by the change, or the ***change target***. It is useful to consider each of these roles in planning strategies not only for implementation, but for gathering support for the change effort.

Strategies for Implementing Change

In order to move an OD effort from the idea stage into implementation, educators and managers must also rally the resources and support of the organization. Kanter (1983) describes how the following three sets of "basic commodities" or "power tools" can be acquired by members of an organization to gain power:

- *Information* (data, technical knowledge, political intelligence, expertise).
- *Resources* (funds, materials, staff, time).
- *Support* (endorsement, backing, approval, legitimacy).

The first strategy in implementing a change would be to collect as many of these power tools as possible. As this occurs, individuals can "plant seeds of support" for the planned change. This is particularly important in helping others see the critical need for the planned change. It may be possible to plant these seeds before sponsorship of the change is sought so that the sponsor feels he or she is proactively responding to a critical need.

Another strategy is to "package" the change in a way that makes it less threatening and, therefore, easier to sell. For instance, it is easier to implement change of a product or a project when it is: (a) conducted on a trial basis; (b) reversible, if it doesn't succeed; (c) done in small steps; (d) familiar and consistent with past experience; (e) a fit with the organization's current direction; or (f) built on the prior commitments or projects of the organization (Kanter, 1983). This packaging should be completed prior to submitting the OD effort to the designated change sponsor, although that person needs to be involved in further assisting in the packaging and selling of the planned change.

Building coalitions is a strategy that often occurs throughout the entire phase of implementing the change. Support must be gathered from all areas which will be affected by the desired change, across different levels of the organization. It is always advisable to get the support of an immediate supervisor early on, although this may not always be possible. In such instances, other support could be gathered across the organization to influence the supervisor to reconsider lending support to the change efforts.

Effective change masters use their informal networks and deal with any concerns or questions of supporters individually rather than in formal meetings. "Pre-meetings" can provide a safer environment for airing concerns about implementing change. In such settings, an individual may have the opportunity to "trade" some of the power tools that he or she has acquired in order to generate support. Additionally, some individuals will support a project or change effort for reasons that are fairly reactive: "If so-and-so supports it, then I will, too," or "If such-and-such state is moving in that direction, then we should, too." Obviously, the more change masters know about how particular individuals may react, the better able they are to plan for ways to garner support.

Resistance to Change

With every major and minor change, resistance typically occurs. Every judicial educator has seen this tendency, whether the change involves a certain speaker or a particular topic, a customary time of year or time of day to meet, a favorite location for conferences or planning sessions, or a given style for delivering a speech or organizing a paper. This resistance should be accepted as a "given," so that the educator can predict and plan for effectively dealing with inevitable resistance. This section will address some of the causes and types of resistance to change, particularly at the organizational level.

Individual Resistance

Why does resistance to change occur? The primary reason is that people fear change. They are not usually eager to forego the familiar, safe, routine ways of conducting their business in favor of unknown and possibly unsafe territory. As humans, we tend to prefer routines and accumulate habits easily; however, fear of change may be attributed to more than a tendency toward regularity. Change represents the unknown. It could mean the possibility of failure, the relinquishing or diminishing of one's span of control and authority, or the possibility of success creating further change. It might be that the planned change has little or no effect on the organization whatsoever. Any one of these possibilities can cause doubt and thus fear, understandably causing resistance to the change efforts.

Additionally, the transition between the present state and the changed state is difficult for both individuals and organizations. On an individual level, people must be reminded that every transition or change effort begins with an *ending* -- the end of the current state. The first step toward change is going through the process of ending. Endings must be accepted and managed before individuals can fully embrace the change. Even if the impending change is desired, a sense of loss will occur. Because our sense of self is defined by our roles, our responsibilities, and our context, change forces us to redefine ourselves and our world. This process is not easy. William Bridges does an excellent job of discussing the process of individual change in his book *Transitions* (1980). In describing the process of ending, Bridges presents the following four stages that individuals must pass through in order to move into the transition state and effectively change:

- ***Disengagement***. The individual must make a break with the "old" and with his or her current definition of self.
- ***Disidentification***. After making this break, individuals should loosen their sense of self, so that they recognize that they aren't who they were before.

- ***Disenchantment***. In this stage, individuals further clear away the "old," challenging assumptions and creating a deeper sense of reality for themselves. They perceive that the old way or old state was just a temporary condition, not an immutable fact of life.
- ***Disorientation***. In this final state, individuals feel lost and confused. It's not a comfortable state, but a necessary one so that they can then move into the transition state and to a new beginning.

In this process, it is important to recognize how the change was initiated. While all change is stressful, it is easier to go through the process of ending and into the transition if the change was internally driven, rather than if it was initiated by an external source. When we make changes in our lives (e.g., marriage, a new home, or new career), there is a greater sense of control over the change; therefore, we feel more capable of coping with the unpleasant aspects of transition. This is not necessarily true when the change is driven or mandated by an external source (e.g., new job responsibilities, unexpected changes in finances, or job relocation). In externally driven change, the process of transition is more difficult, and there is more resistance as individuals refuse to begin the ending process and make the initial break with the past. This almost innate resistance to externally driven change makes a convincing argument for the change master to facilitate "ownership" of the change efforts by both the change sponsor and the change target. In other words, we should assist others in perceiving the change as desirable and internally driven, rather than an externally driven mandate that is thrust upon them.

Organizational Resistance

With even this very brief discussion on the difficulties involved in individual change, it should be apparent that this phenomenon occurs at the organizational level as well. Organizations, regardless of size, are composed of individuals. The extent to which individuals within the organization can appropriately manage change represents the overall organizational capacity for change.

However, there are other factors peculiar to the organizational setting that can act as barriers to implementing change. These include:

- *Inertia*. One of the most powerful forces that can affect individuals and organizations is inertia. The day-to-day demands of work diminish the urgency of implementing the change effort until it slowly vanishes within the organization.
- *Lack of Clear Communication*. If information concerning the change is not communicated clearly throughout the organization, individuals will have differing perceptions and expectations of the change.

- *Low-Risk Environment*. In an organization that does not promote change and tends to punish mistakes, individuals develop a resistance to change, preferring instead to continue in safe, low-risk behaviors.
- *Lack of Sufficient Resources*. If the organization does not have sufficient time, staff, funds, or other resources to fully implement the change, the change efforts will be sabotaged.

These factors, combined with others characteristic to the specific organization, can undermine the change effort and create resistance. A wise change agent will spend the necessary time to anticipate and plan for ways to manage resistance. Techniques such as force-field analysis, discussed earlier, are useful tools to assist in developing strategies for overcoming organizational resistance to change.

Organizational Development: A Neglected Need

Judicial educators may be in the best position to sense the need for organizational change and development efforts within their committees, boards, or work teams. While they may not have the organizational power to ensure that appropriate efforts are implemented (the role of a change sponsor), they can certainly "raise the consciousness" of the organization and advocate that OD needs be addressed. Healthy organizations are willing to commit time and energy toward improving both the individual and the organization as a whole. A synergistic effect can be created when professional development and organizational development efforts are simultaneously put into place.

However, many organizations and teams unfortunately overlook the need for organizational development, often because of their unfamiliarity with the concept or their emphasis on professional development. While "professionals" are generally considered to be independently-based practitioners, the majority of professionals function within an established organizational setting. Judicial personnel are no exception. While members of a judicial office may make decisions in an independent fashion, they are still part of the larger system in which they work (e.g., the state justice system) and are related to the organizational context in which they function (e.g., Administrative Office of the Courts). Judges in particular work in a highly independent fashion. Yet, they too are part of an overarching system. The system itself must have the benefit of development as well as the individual professionals who are a part of the system. However, judicial educators may unwittingly neglect the needs of the organization or system in favor of professional development alone. Indeed, some observers have argued that this is a fundamental part of conflict between state judicial educators and state court administrators.

With this focus on improving the practice of individual professionals, educators and managers may overlook the equally important needs of the organization to support its institutional mission as well as individual vocational growth. Individuals can improve only as much as their organizations "allow" them to grow. Nowlen, among others, has discussed this challenge in *A New Approach to Continuing Education for Business and the Professions* (1988). He believes that the most effective professional development is holistic in nature, involving not only the practitioner, but the individual's organization as well, so that new behavior and learning can be integrated into the work setting. Nothing is more frustrating than continuing education that is stopped at the point of entry of the practitioner's work setting. Judicial educators may often feel the limitations of working with professionals whose practice setting does not encourage their professional growth. Organizations, as well as individuals, must be committed to the concept of lifelong learning and continual growth and development. Again, we see this holistic perspective of not only individuals and organizations, but of the learning process itself. Learning is not a discrete process that occurs only through individual effort. Implementation of the learning in practice depends upon a receptive work environment, as well as effective teaching and interaction in the actual learning environment.

What is Organizational Development?

According to Middlemist and Hitt (1988, p. 493), organizational development is:

> A systematic means for planned change that involves the entire organization and is intended to increase organizational effectiveness.

Cummings and Huse (1988, p. 1) define OD in broader terms:

> A system wide application of behavioral science knowledge to the planned development and reinforcement of organizational strategies, structure, and processes for improving an organization's effectiveness.

Several parts of the above definitions are particularly worth emphasizing. The first is that organizational development is a *systematic activity*, an ongoing process that can help organizations deal with current and anticipated problems, putting leaders in a proactive, rather than reactive, stance. This stance differs from the "putting-out-fires" approach that so many groups and organizations have relied upon historically.

The second noteworthy item is that OD involves *planned change* within an entire organization or work team. This means that a proactive stance is absolutely necessary for change to be effective; otherwise, the planned change effort will lag too far behind the need that it is intended to address. For example, judicial employees who have recently come under the jurisdiction of the State Court

Administrator's Office may find difficulty in adjusting to new procedures, new channels of communication and authority, and new roles. Concurrently, existing staff within the Office will experience their own difficulties in assimilating the new group, sharing information, and performing roles that also may have changed. Is it then time for a "team-building" session? While it's often "better late than never," the real effort should have already occurred before the organizational changes were enacted. Staff from all areas ideally should have been brought together and the job restructuring discussed, procedures and policies formulated, and team-building efforts begun. After changes have taken place, it's often too late to begin organizational development efforts. This fact makes planning even more critical and highlights the advantage of institutionalizing the concept of team-building so that staff are empowered and able to cope with changes in the work team.

The third part of an OD definition to keep in mind is the *rationale for organizational development* – to improve organizational effectiveness. Organizations and work teams must be effective and efficient, particularly in the current environment of limited resources. In thinking about effectiveness, every organization and team would be well-advised to adopt a "quality" mentality regarding OD efforts. Ongoing, institutionalized OD strategies are akin to continuous quality improvement. Quality concepts originated in the manufacturing sector, but today, the quality movement is being incorporated into service organizations as well. While not as technically oriented, work teams providing services can effectively determine quality standards and work proactively as a team to insure that standards are met. Concepts of quality can be applied in the educational arena. For instance, the National Association of State Judicial Educators (NASJE) has recently developed a set of "Principles and Standards for Judicial Education." This endeavor signifies commitment not only to quality, but also to the professionalization of the field. Ensuring quality, like strengthening an organization's effectiveness, is an ongoing task.

Organizational development can, of course, occur in groups or teams, as well as within an entire organization. Effective OD is ongoing and systematic, strengthening both the individual and the group. Many organizations today accomplish their tasks through a project management approach that brings together teams for a short period of time. Members of the team may be brought from various parts of the organization, representing different constituencies and levels within the organization. These work teams do not always have a unified focus or vision of the task to be accomplished; therefore, they can falter in their responsibilities because of conflicting perspectives, communication difficulties, or lack of clear objectives. An ongoing system of organizational development strategies is useful in this situation. Team-building in particular is effective when incorporated and supported by the organization. This concept will be discussed later in the chapter.

A Model for Organizational Development

Now that we have examined the major emphases associated with organizational development, a broad picture of the actual process is needed. While there are variations on any model, Figure 1 represents the major components of a planned OD effort.

Figure 1

MODEL OF ORGANIZATIONAL DEVELOPMENT

Recognition of need for change

Diagnosis of cause(s)

Development of change alternatives

Implementation of change

Reinforcement of change

Evaluation of change

Further change action taken, if required

Feedback

[Middlemist and Hitt (1988), p.493]

The first step of the model is critical. Often, educators and managers will recognize the need for change before others who have decision-making power do. In such instances, these decision-makers, or change sponsors, will need to be convinced of the need for change. Ongoing diagnosis and systematic examination of the environment can provide a rationale for planned OD efforts. An environmental scanning program, strategic planning, employee or "customer" feedback survey, or similar methods can

detect changes in the internal or external environment that will have impact on the organization. Organizations can also examine the quality of their products and/or processes to determine whether OD efforts need to be directed toward specific areas within the organization or work team.

It is often advisable for an organizational development expert to assist in the implementation of change efforts. For many organizations, this consultation is not always an option due to limited resources, the unavailability of consultants, or political reasons, among others. Various strategies are available for use within organizations. Some can be used in an ongoing fashion, while others are "one-shot" efforts. Two major types of strategies that can be used are:

- ***Process Strategies***: team-building, quality circles, sensitivity training, survey feedback, career planning.
- ***Structural Strategies***: job redesign, job enrichment, management by objectives, organizational restructuring, flextime options.

The change strategy chosen should relate appropriately to the organizational or team need. Political, technological, or legal factors may cause an organization to move in directions that require OD efforts. All too frequently, however, interpersonal change efforts are chosen as the appropriate strategy. For instance, a simple problem such as the overuse of a particular piece of office equipment may result in disgruntled employees. This problem may be solved by purchasing more equipment or restructuring the use of the equipment, rather than developing a team-building program. Interpersonal or even process strategies cannot adequately equip an organization to deal with these types of external pressures.

Team-Building as an Integral OD Strategy

Now that we are more familiar with organizational change and development, we can look at one OD strategy that is being successfully employed in many organizations. ***Team-building*** is an OD strategy that is often used in organizations to make work groups more cohesive, committed, satisfied, and productive. A variety of assessment tools and exercises are available for groups to diagnose their capacity as a team and improve their team functioning. Attachment A lists characteristics of an effective team, which can be used as a benchmark to evaluate the level of team functioning within an organization or committee. Assessment is the first step in attempting to build an effective team. However, team-building efforts are most effective when perceived as an integral concept within an organization and not merely as a sporadic intervention. These efforts then become part of the shared vision of that organization, a priority to which leaders are committed.

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f institutionalized by a work group, team-building shapes the way everyone within that group thinks about his or her role in relationship to others and to the organization. Understandably, many organizations, as well as many small work teams or committees, have difficulty orienting themselves to a team approach rather than an individual approach. Individual, rather than team, effort is traditionally recognized and appreciated within organizations. Figure 2 lists several suggestions that an organization can implement to overcome this tendency toward individual effort and to encourage a team culture. The list has been adapted for judicial education organizations.

Figure 2

Rx FOR THE DEVELOPMENT OF A TEAM-PLAYER CULTURE

1. Public statements by leaders on the importanc e of team players -- not just the
2. State court administrators, judges, and other leaders serving as models of team players.
3. Promoting people who are both technically competent and team players.
4. Giving important assignments to positive team players.
5. Incorporating team-player behaviors in the performance appraisal system.
6. Offering training workshops on the skills of effective team players.
7. Giving higher salary increases to positive team players.
8. Developing incentive systems that reward team effort.
9. Designing flexible compensation programs that pay individuals for their contributions to a team approach.

[Adapted from Parker (1990), pp. 146-147.]

Leaders as Followers

In organizations, attention is typically directed toward leaders within the group through leadership training, self-assessments, style inventories, and the like. Most believe that sound leadership is the key to

an effective work team. There is no doubt that the abilities of the leader can affect the team as a whole, but some of our traditional notions of leadership include outdated modes of behavior or unrealistic expectations. Even if we have moved from thinking of leaders in the John Wayne stereotype, we may still expect leaders to create an inspirational work setting by producing vision statements that motivate and unify the organization. Recently, however, some authors have discussed the concept of leadership in different terms, moving the leaders even further from the grandstand and closer to the audience.

In a recent talk to educators and business leaders, Dr. Badi Foster, President of AEtna Institute for Corporate Education, discussed how the mission of the organization must be connected to all members of the team and how leaders are needed to develop this connection. Everyone needs to believe in something bigger than just "making a buck" at work; people need to feel that they are contributing to "the big picture." Their gifts or talents brought to the work setting should be connected to an organizational vision so that they feel an integral part of the team. He prefers "vision" over "mission," believing that the first implies *impelling* people, while the second term connotes *compelling* employees in their work environment.

How can organizations develop congruence between individual team members' vision and a larger organizational vision? Leaders must first encourage all employees to create their own personal vision, motivating and inspiring them in their work setting. Secondly, leaders must discern these personal visions, as well as the particular gifts that employees bring to work. Foster's belief is that leaders can help "bring forth that which is already there" within individuals. Leaders can work with team members to help make the connection between their personal visions and goals and the vision of the organization. In some instances, organizations may be restructured, job descriptions may be altered, or jobs may be redefined to provide the employee more responsibility. Empowering employees creates an environment in which they can feel more connected and committed to the organization. If there is clearly no congruence between team members and the organization, then something must change; however, these changes will ultimately benefit both the individual and the organization.

Lee (1991) takes this idea even further and argues that often the best leaders are the best followers:

> [Leaders] can create an environment in which followers can develop their own goals (in other words, a culture of empowerment), as well as provide the training to develop competence. It then becomes the leader's task to sense where followers want to go, align their goals with the larger goals of the organization, and invite them to follow. (p. 33)

In this conception of teams, the leader does not set himself or herself apart from the other members of the group but is intimately connected to them, helping them to align their goals with the organization and providing motivation through empowerment.

Followers as Leaders

What, then, is the role of the follower within a committee or work team? Team members are not merely waiting for inspiration and direction from leaders; rather, they are active participants in creating the vision and direction of their organization. They have "ownership" in their work setting, are involved in making it effective, and feel a connection between themselves and that vision. They speak the truth, take responsibility for themselves, and have both personal integrity and organizational loyalty. In short, they behave in ways traditionally considered behavior of "leaders."

Team members who strive for these characteristics within a supportive organization will find that their personal satisfaction in the work environment increases. Many organizations are now embracing the "self-directed work team" concept and truly dispersing leadership throughout the organization. In small groups, this concept may already be a reality. However, it takes some managers a considerable amount of time to rethink their role in the group and move from "boss" to "enabler" or "coach." At the same time, members of a team may not initially feel comfortable taking on more responsibility and accountability. New ideas and behaviors require some adjusting on everyone's part. But the result may be worth the effort – teams become more effective and productive, and team members experience greater satisfaction with their work and feel more connected to the organization and other team members.

Team-Building Strategies

The literature on developing more cohesive teams is vast. However, in addition to the organizational strategies to encourage a team culture, there are some strategies that team leaders can use to help build effective teams. Specific team-building efforts vary depending upon a number of variables, including the nature of the team, its duration, the task at hand, and the organizational culture. Team-building efforts can range from T-groups to outdoor adventure weekends, from self-assessments to team assessments, and from one-hour team-building videotapes to multi-day workshops by OD consultants.

The general strategies listed below relate to the characteristics of an effective team, noted in Attachment A. Therefore, they may serve as guidelines to leaders for achieving a high level of team functioning. According to Parker (1990, pp. 108-110), successful team-building strategies for team leaders are:

- Get to know the team.
- Define the team's purpose.
- Clarify roles.
- Establish norms.
- Draw up a game plan.
- Encourage questions.
- Share the limelight.
- Be participatory.
- Celebrate accomplishments.
- Assess team effectiveness.

A Learning Organization

In considering these perspectives on the roles of the team leader and team members, it is helpful to bring these ideas together into a more comprehensive view of organizations. For instance, how can teams work together in an integrated whole, rather than as a group of individuals? How can the capacities of each member interact with the talents of other members to maximize the organization's productivity?

Peter Senge's (1990) book *The Fifth Discipline: The Art and Practice of the Learning Organization* offers an inspiring look at how organizations can focus on growth and renewal, overcome threats from the external environment, and develop the capacities of individuals within the organization. He argues that changes in our "mindset" are needed to truly develop a learning organization. In the earlier discussion on change, we noted that changes in one area of the world affects others. Senge recognizes this phenomenon and emphasizes the concept of systems thinking, which he calls the "fifth discipline." This is a holistic way of viewing organizations, as well as individuals, and provides a perspective useful in planning and change efforts. Senge writes:

> The tools and ideas presented...are for destroying the illusion that the world is created of separate, unrelated forces. When we give up this illusion - we can then build "learning organizations," organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together. (p. 3)

One of the disciplines that characterizes the learning organization is team learning. Senge discusses how unaligned teams produce a great amount of wasted energy. While individuals within the team may work diligently, the team effort is low. He writes:

> By contrast, when a team becomes more aligned, a commonality of direction emerges, and individuals' energies harmonize. There is less wasted energy.... There is commonality of purpose, a shared vision, and an understanding of how to complement one anothers' efforts.... Individuals do not sacrifice their personal interests to the larger team vision; rather the shared vision becomes an extension of their personal visions. (p. 235)

Again, this congruence of personal and organizational vision can only occur when visions have been developed by both the organization and the individual. A shared vision is a necessity in this type of context. Neither the organization nor the individual can shirk responsibility in developing a vision.

Senge notes three critical dimensions of the concept of team learning that have implications for judicial educators, as well as other teams. First, he believes that teams need to tap the minds of individual members in order to think insightfully about complex issues. Everyone must take responsibility for contributing to the group. Secondly, there is a need for coordinated action, through which team members can trust and expect certain behaviors from one another. He likens this to jazz musicians playing together in spontaneous, yet coordinated, action. And thirdly, team learning is dispersed throughout an organization through the actions of team members. Each member of a team will also be a member of other teams; his or her behavior can therefore encourage team learning in other areas as well.

It is clear that these new ideas can radically change the way we look at teams. Changing our perspective and our expectations of teams can transform organizations and the way that work gets accomplished. Active participation is required of both team leaders and followers, as well as commitment. Effective teams need a vision for the organization, but, additionally, each member must feel connected to it and perceive it as part of his or her own personal vision. Through both organizational and individual clarity of vision, organizations can expect commitment, diligence, and a passion for work from its members. Individuals and organizations who can find a passion for work will not only flourish and be productive, but will also find an excitement in carrying out even the most mundane functions in everyday work.

Summary

This chapter has provided an introduction to organizational change and development. Change is clearly inevitable, and mastering change is, therefore, fundamental to the success of any organization. Organizations which can cope with change and harness its energy will be vital and effective. Judicial organizations are no exception. In fact, the judiciary not only reflects many of the changes occurring in our society today, but it is an institution that also creates and "enforces" change. If the judiciary can become even more effective in managing change, it can create a powerful impact on society as a whole. The challenge for judicial educators is to continue their efforts, often accomplished behind the scenes, to encourage their organizations to anticipate change, to understand the nature of change, and to manage change.

DEFINITIONS

Change Advocate: individual or group who does not possess legitimization power, but desires a change.

Change Agent: individual or group responsible for implementing the change.

Change Master: people and organizations adept at the art of anticipating the need for and of leading productive change; a term coined by Rosabeth Moss Kanter.

Change Sponsor: individual or group who legitimizes the change.

Change Target: individual or group who must actually change.

Disengagement: a part of Bridges' (1980, 1988) process of ending; here the individual must make a break with the "old" and with his or her current definition of self.

Disidentification: a part of Bridges' (1980, 1988) process of ending; after the individual makes the initial break, individuals loosen their sense of self, so that they recognize that they aren't who they were before.

Disenchantment: a part of Bridges' (1980, 1988) process of ending; in this stage, individuals further clear away the "old," challenging assumptions and create a deeper sense of reality for themselves.

Disorientation: In this final stage of Bridges' (1980, 1988) process of ending, individuals feel lost and confused. It is a necessary state so that they can then move into the transition state and to a new beginning.

Force-field Analysis: a concept developed by Kurt Lewin, this analysis looks at two types of forces within organizations that either support or oppose change. Change will only occur when there is a shift in balance between these two forces. The forces are:

Driving Forces: those forces which positively affect and enhance the desired change.

Restraining Forces: obstacles to the desired change.

Organizational Development: an overall strategy which focuses on improving an organization's overall effectiveness, often through the use of planned change efforts.

Process Strategies: organizational development strategies that focus on interpersonal approaches to change, such as team-building, quality circles, or sensitivity training.

Structural Strategies: organizational development strategies that focus on more structural approaches to change, such as job redesign, job enrichment, or management by objectives.

Team-building: an organizational development strategy used to make work groups more cohesive, committed, satisfied and productive.

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EXHIBIT
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Full Length Research Paper

A research agenda on the leaders' political intelligence for effective change management

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This paper presents a construct and model of the organizational leader's political intelligence to conceptualize the role of political intelligence in effectively managing organizational change. Pertinent approaches to political intelligence that scholars have taken were reviewed with the aim to build a theory. Basing our model on the dimensionality of political intelligence identified in light of literature, the chief proposition is that political intelligence can help facilitate organizational change effectively. The politically intelligent leader is capable of steering the stormy waters of organizational change using his political intelligence. Based on this theoretical model, a case is made for an empirical investigation. This paper sheds light on the implications of this theory for change leaders.

Key words: Political intelligence, change management, leadership, change leader.

INTRODUCTION

What makes a leader has always been a subject of relevance; hence, leadership has always been an area of interest for researchers. Initial studies attempted to grasp the behavioral or personality aspect of leaders, while recently scholars have focused on leadership styles (Nawaz and Bodla, 2010). Despite the abundant literature devoted to understanding leadership (Pienaar, 2009), successful leaders are deficient in organizations and hence more research needs to address the issue of leadership and leaders (Schafer, 2010). In recent literature, the so-called 'new-paradigm' leadership models are based on a leader's capacity to deal with the realism of persistent change (Alimo-Metcalfe and Alban-Metcalfe, 2005). The leader's role throughout the entire change process is crucial and a challenging responsibility (Yukl, 2007). In fact, it is leadership that initiates change (Owen and Demb, 2004), and plays a central role in its success (Gill, 2001; Miller, 2002; Oakland and Tanner, 2007). Hence, organizational change is a leadership goal, that may be pursued via the use of political intelligence (PI) of the leader. Yet, how change leaders may use their PI to affect organizational change is not well comprehended today. Specifically, leadership theories today have recognized the significance of politics for leaders and organizations, yet they have failed to examine how a leader may employ PI to affect change. Leader PI has been studied in relation to employee trust, organizational cynicism, job satisfaction (Treadway et al., 2004), yet, no study so far has explicitly addressed effective change management as an outcome of the leader PI. Additionally, several studies have highlighted the significance of emotional intelligence for leadership (Radhakrishnan and Udayasuriyan, 2010; Groves et al., 2006; Palmer et al., 2001), as well as for change management (Vakola et al., 2004; Chrusciel, 2006; Groves, 2006). Yet, PI is a leadership intelligence that holds implications for change management but is largely overlooked in the conceptual as well as in empirical sense. This paper aims to bridge these gaps in the existing literature by offering a model that proposes how leaders may employ PI to bring change in organizations.

The purpose of this paper is to conceptualize PI and to develop a research model that proposes relationships between dimensions of PI and effective change management. The study builds on the existing literature on PI and change management and sets a research agenda for

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empirical evidence. The purpose behind a construct and theoretical model in the area of political intelligence and change management is three-fold. Firstly, the focus is on enhancing awareness of how PI can be used to facilitate change in organizations. Organizational leaders can use this awareness to bring change. Secondly, this study will highlight the positive side of politics. Thirdly, this theoretical model is aimed to recommend empirical research into this area. Scholars and practitioners have realized the existence and significance of organizational politics. At the same time, the inevitability of organizational change is also realized. The need of the hour is to investigate how organizational change may be affected using PI. This study takes a leadership perspective on this issue, since change is primarily top-driven.

LEADERSHIP, CHANGE MANAGEMENT, AND PI: THEORETICAL REFLECTIONS

Scholars have highlighted the need to re-assess our understanding of leadership in context of the technological, economic, social, and political changes of the 21st century. It is leadership that endorses organizational change and so researchers have attempted to assimilate leadership theories and organizational change (Eisenbach et al., 1999; Yu et al., 2002). At the same time, researchers have examined leader behaviors in the context of change (Herold et al., 2008). Researchers have also turned to emotional intelligence with the pursuit of enhancing understanding of organizational change (Huy, 1999). Since leadership is complex, it has been studied in several ways (Lussier and Achua, 2010). The question that still remains today is: what makes change management leadership successful? We believe that it is the leader's PI that helps steer the squally waters of organizational change.

Leadership entails essence successfully influencing followers so as to achieve goals (Bass and Bass, 2008). Our main argument is that it is the political successful leader, who organizes resources to achieve goals via the use of power and influence (Lussier and Achua, 2010). Conversely, the ability to successfully manage change is a most sought-after managerial skill (Anderson and Anderson, 2001). Simply put, it is a practicing leader who facilitates an organization in adjusting to change (Mostovicz, 2009), thereby giving life to organizational change. Contemporary leaders have to be more capable on the political, amongst other, fronts (Peled, 2000). The implication for change leaders is plain - they need to be politically intelligent to be effective at bringing change (Perrewe et al., 2000). Moreover, regardless of their role and title, effective leaders need certain qualities that Cook and Macaulay (2004) term as the 'four intelligences' essential for effectively managing change. While not denying the importance of other intelligences for organizational change, the importance of PI for effective change management needs to be verified. Gill (2001) importantly points out that certain political facets of an organizational change initiative such as self-interest and shifts in power and influence can be a cause of failure of a change initiative, yet his leadership model overlooks the political aspects of change and focuses on the cognitive, spiritual, emotional and behavioral dimensions and necessities of change only.

PI gains weight to the extent that in order to bring successful change, leaders must be able to influence others in the organization and be able to recognize the stakeholders in change and initiate ways to influence them aptly for the change. However, leaders may shy away from the reality of PI, and therefore from its usefulness; this is so because the word 'politics' bears certain negative implications such as selfish exploitation. At the same time, leaders may exemplify positive organizational politics and so lessen the dysfunctional side of politics (Vredenburgh and VanFossen, 2010). Moreover, the ability to influence others in the organization is what lies at the heart of PI and so is established the necessity of this particular intelligence in effectively bringing change in organizational settings. Hence, it is necessary to examine how PI can be deployed to effectively manage change in a dominantly changing organizational environment.

Political intelligence

Generally, the word 'politics' has an infamous undertone, especially since politicians are usually not well-regarded. However, in the perspective of change, the focus is on politics at the workplace rather than elections or parliamentary behavior. Politics prevails in every organization (Perrewe et al., 2000; Cook and Macaulay, 2004) and leaders work in politically sensitive roles (Schmidt, 2010). Although the word 'politics' bears a negative undertone and points to the 'unprofessional games' in organizations, yet researchers believe that intelligently exercising this skill is evermore essential in organizations (Ferris et al., 2000) and is certainly not about stabbing people in the back (Lussier and Achua, 2010). In the context of change, politics helps change leaders recognize the stakeholders in change and how to influence them appropriately (Cook and Macaulay, 2004). PI is generally compared with social intelligence(s) or skills, yet none of the social intelligences clearly addresses interpersonal interactions in organizational settings. PI represents a distinct social dexterity in the context of organizational settings that especially addresses influence behavior at work (Ferris et al., 2000). Ferris et al. (2008) identified the four dimensions of the political skill construct to be social astuteness, interpersonal influence, networking ability, and apparent sincerity. Peled (2000) views that a manager's ability to deploy his/ her interpersonal relationships with employees, colleagues, clients, and supervisors, defines the manager's political skill.

Scholars have used the terms 'intelligence' and 'skill' interchangeably in studies (Cook and Macaulay, 2004; Adams and Zanzi, 2005). The former have abbreviated political skill or intelligence as PQ (political quotient) and similar is the treatment by other authors. Throughout this study, the term 'political intelligence' has been abbreviated as 'PI'. In addition, coining the term 'political intelligence' has implications of the theoretical tools for various disciplines (Orbell et al., 2002). Further discussion describes these dimensions in depth and then proposes that each of these dimensions helps in facilitating organizational change effectively.

Social games

Taking an evolutionary stance, the distinct 'political brain' has evolved from our sociality, in particular, from the socio-political games that we play. Here, it is essential to distinguish PI from the Machiavellian and social intelligences. While Machiavellian intelligence specifically concerns the trickery, dishonesty, and bluff that is a part of social games, it does not involve the benevolence and compassion, which too has possibility in social games. On the other hand, social intelligence is unconcerned with conflict as well as with co-operation that are innate to social games (Orbell et al., 2002). Whereas Machiavellian intelligence employs guile and not very honorable means of leadership (Zaccaro, 2004), PI engages social as well as Machiavellian intelligence and so it has been studied by political scientists (Orbell et al., 2002).

Leaders build interpersonal relations with their interpersonal skills (Pienaar, 2009). From the political stance, two important social games are co-operation and competition and an individual may choose either. Here, two competencies work in favor of an individual's benefit in such games: the ability to manipulate, that is, to pass on such information to others that will result in acts that will be of benefit to the manipulator's self-interest and the ability is to 'mindread', that is, the ability to judge the truth of indications given by others. In addition, these two capacities of manipulating information for self-interest and reading others' minds differ among individuals. It is also interesting to note that research in the past has demonstrated strong evidence in favor of reasoning abilities specialized to the sphere of 'cheater detection' in social exchange relationships. Although cheater detection is one amongst the several political games that humans play, it is an ability that can be adapted. In fact, past research has also established that there is a relation between cheater detection and role-taking, status relationships, and even memory. The ability to make one's lies believable is what has been termed as self-deception, and falls within the parameter of manipulation (Orbell et al., 2002).

In the same context, role-taking allows one to understand others' perspectives by recognizing the dependencies, coalition needs, and alternatives that exist for others and foreseeing the outcomes of a proposed decision from an individual position. One reflects on the possible response of stakeholders and comprehending the shifts in power during a decision making process (Adams and Zanzi, 2005) and hence role-taking ability facilitates one in understanding others' views (Perrewe et al., 2000). Research on how to enhance PI is scarce, but it can be developed within limits and role playing is one way to enhance PI (Perrewe et al., 2000; Adams and Zanzi, 2005).

People who are politically intelligent are good at negotiations, and negotiations are helpful during change, as they enable the leader to gain buy-in from those with vested interests (Cook and Macaulay, 2004). In fact, besides deal-making and exchanging favors with others for an aim that exemplify acts of PI, negotiations or bargaining also symbolize the politics that exists in organizations (Ferris et al., 2008; Lussier and Achua, 2010). To negotiate effectively, parties must have mutual respect and also realize the rules of give and take, opt for what is desired and what can be exchanged for it (Cook and Macaulay, 2004). Likewise, those high on PI are also certain about their ability to control social situations (Ferris et al., 2000). Moreover, being high on self confidence, their confidence is not related to the self only but extended to their interpersonal relations as well (Ferris et al., 2008). In the specific context of organizations, this confidence generates a positive and optimistic attitude and manner in them, leading to effectiveness in social situations at work as well as affecting change in organizations (Ferris et al., 2000). In addition, the politically intelligent are not only capable of behaving appropriately in social situations at work, but are also capable of behaving in a manner that is apparently sincere; apparent in that they can conceal manipulative intentions if any (Ferris et al., 2000, 2008).

Ingratiation, which is defined as flattery, complimenting, and offering support to others so as to influence them, enables the actor to appear loyal and sincere for the person whom he/she intends to influence. PI also helps leaders in recognizing the stakeholders involved in change and how to influence them effectively (Cook and Macaulay, 2004). Plainly, the concerns of stakeholders need to be addressed first in order to influence them.

It is interesting to note that PI includes the ability to network well, which is forming informal as well as formal coalitions (Adams and Zanzi, 2005). In fact, networking is a dominant activity that successful managers engage in and includes socializing and politicking. Consequently, it requires effective social and political skills (Ferris et al., 2000). Reasonably, building vast network of relationships and ties across the organization allows one to create circumstances for agreement amongst persons, hence fulfilling goals and accomplishing synergy (Perrewe et al., 2000; Ferris et al., 2008).

We propose that the social games of co-operation, competition, manipulation, mindreading, role-taking, exchanging favors, controlling social situations, appearing sincere, and networking well, help leaders manage organizational change.

P_1: Adeptness at social games helps leaders in managing organizational change effectively.

Power dynamism

Political behavior usually refers to the acquisition, development, and use of power in relation to other entities, where power is viewed as the capacity of social actors to overcome the resistance of other actors (Boddewyn and Brewe, 1994). It has also been defined as the daily mechanism of social existence with the ability to influence behavior and change events (Adams and Zanzi, 2005). PI requires the leader to possess either formal or informal power base and use it to exert influence. Thus, power which is exercised without PI fails to exert influence (Perrewe et al., 2000). Hence is highlighted the importance of weighing up power dynamics or vulnerabilities for a 'politically intelligent' decision. Power dynamics are products of the way people think and act in organizations (Kleiner, 2003), though these are not apparent to all – apart from the natural politician. As organizations become more political, the need to understand power dynamics is enhanced. Since traditional concepts of authority and line of command have weakened, managers tend to employ political deals to fill this power vacuum. It is also interesting to note that a new power holder has to meet with the resistance posed by existing power holders and that happens over a considerable time period (Adams and Zanzi, 2005), and that power is a relative concept as it is determined by the inequality of relationships (Weissenberger-Eibl and Teufel, 2011). In fact, it is the exercise of power in organizations that makes them what literature refers to as 'political arenas'.

As such, they are characterized by the exercise of power and influence (Ferris et al., 2000) vis-à-vis awareness of power bases and understanding sources of power. Therein, it is the politically intelligent leader who is aware of how to gain and use power (Lussier and Achua, 2010). It is essential to note that PI is not about the abuse of personal power, as those who are politically intelligent do not work for personal benefit but for the benefit of the organization.

Hence, power dynamics enables those who want to bring about change in the organization to gain buy-in to change by being aware of and building power bases (Cook and Macaulay, 2004).

Reputation is really a political concept and it has been argued that PI enables persons to effectively develop and sustain 'good' reputations. Hence, it holds that politically intelligent leaders are astute and calculating about their personal investments and aspire to enhance success (Ferris et al., 2000). Arguably, reputation can also help in affecting organizational change through the leader's reputational capital. Since investment in one's reputation leads to success in job or career, we include reputation in the sub-dimension of power dynamics.

Power is a notion that needs to be clearly understood in order to act effectively in organizations (Kleiner, 2003). Bradshaw-Campbell and Murray (1991) have highlighted an innate power structure in their study that is embedded in games of language – gestures, myths and even humor. These highlight the components of politics – the leader may gain power or the lever to influence through the use of language games for fulfilling aims. Again, power bases need to be assesses before playing games of the language to exercise influence. Since the structural elements of politics are defined through the use of language, information, metaphors, symbols, myths and humor, then is may be argued that politically intelligent leaders are aware of how to use language, information, and humor to their advantage. This is consistent with the views of Orbell et al. (2002) who suggest that information is manipulated by the politically intelligent for their advantage – specifically to affect change; hence power is exercised over the powerless even without their knowledge (Bradshaw-Campbell and Murray, 1991). Moreover, apart from the traditional bases of power, the inter-unit dependency that has emerged in organizations as a consequence of complexity in the environment too, is a power base. While defining power in terms of dependency, an actor would have power over another actor to the extent of the latter's dependency upon the former, whereas this dependency can be for resources or for defining problems and solutions (Adams and Zanzi, 2005). Moreover, upwards appeal (Cook and Macaulay, 2004; Ferris et al., 2008) also assigns power to an actor; if an actor is difficult to convince, the other actor can overcome his resistance by influencing his boss.

Thus, we propose that power dynamism that comprises of overcoming others' resistance, awareness and understanding of power bases, reputation, using language, information and humor to derive benefit, inter-unit dependency, and upwards appeal help leaders manage organizational change effectively.

P_2: The leader's understanding of power dynamism helps in affecting organizational change.

Political persona

While studying political behavior from the bio-cognitive perspective of humans, Peterson (1985) asserts that situational factors are often overlooked while arriving at conclusions about behavior. Since situational factors relate to the political side of decisions, (Adams and Zanzi,

2005) they gain weight while studying PI. Moreover, since PI has to do with interpreting the political situation in the organizational milieu (Cook and Macaulay, 2004), the ability to read or interpret the situation is significant. Thus, the role of the situation in drawing political judgments has also been discussed in literature (Marcus et al., 2005). To describe politically relevant personality traits and behaviors, it may be argued that the underlying political psychology of leaders, political as well as managerial, can be expected to be at least comparable. Hence, the content and style of political decision making is influenced by the elements of motives, beliefs, decision style, and interpersonal style that may be applied to the realm of PI in light of the above argument. From the motives and beliefs standpoint, politically intelligent leaders work with integrity for the collective good of the organization rather than for individual benefit (Cook and Macaulay, 2004). Hence they are altruistic, focus on the good of the organization and are not selfish. Whereas, inter-personal style defines the manner in which people relate to others, specifically how their dealings, deliberate or not, affect others as well as their underlying attitudes and how they cater to their own needs through others (Immelman, 1993). Notably, the politically intelligent have a distinct interpersonal style that is appealing (Ferris et al., 2000) and that enables them to grow while working with and through others (Perrewe et al., 2000). Indeed, the leaders of today openly connect with others, proactively seeking change to improve things (Ng, 2011). Such leaders view interpersonal interactions as carrying prospects, and in turn are able to inspire trust and confidence in others. Owing to the interpersonal influence capability of the politically intelligent, they have an overpowering persuasion ability, which has also been referred to as 'flexibility' (Ferris et al., 2008). This makes sense as politics is a game of language and persuasion (Hillygus, 2005). Hence, to be able to persuade with success, one must be able to use one's language skills for one's aim. One concludes therefore, that to influence others, the actor's communication - of which language, tone and words are an important part - must be fitting with the preferred impact as incongruent messages are sent to others if the impact and intention are different (Cook and Macaulay, 2004).

Interestingly, a proactive nature has been found to be relevant to political skill (Ferris et al., 2008). The focus of the politically intelligent is proactive, which helps them in managing change (Cook and Macaulay, 2004). Thus, we contend that proactive nature is an attribute of politically intelligent leaders. The locus of control concept tells about an individual's attribution of rewards and punishments to either self (internal locus of control) or others (external locus of control). Past research provides evidence that individual with an internal locus of control perceive more social support, are skilled at influencing others, initiating social relationships, etc. Further, the internals develop enhanced relations with their supervisors, have more favorable work outcomes, and positive social experiences. Thus, locus of control has been shown to relate with political skill (Ferris et al., 2008).

Focused attention gains importance here since it helps the leaders in understanding the stances of stakeholders as well as in recognizing and identifying the information revealed via symbols, conduct and remarks (Liu et al., 2007). Therefore, it may be argued that politically intelligent leaders have the ability to keep their attention focused.

We propose that a political persona that comprises of the ability to interpret a political situation, persuasion, using language to one's benefit, pro-active focus, internal locus of control, and focused attention ability help leaders in affecting organizational change.

P_3: The leader's political persona contributes to affecting organizational change.

Effective stress management

Politically skilled leaders are capable of working with flexibility in changing environments, especially which implicate stress. PI has been rendered as being an antidote to stress at work. While sources of stress at work may be rising competition, scarcity of skills and resources, and varying technology, PI allows for a certain interpersonal control that helps prevent stress and manage things successfully. Additionally, those high on PI believe they can make effective use of resources. Such individuals have a sense of confidence and they predict success for themselves. Their confidence extends to controlling impressions and interactions at work. In fact, stress at work is reduced for them as they enjoy showing their political skill. Arguably then, the ability to effectively manage stress at work characterizes an individual's PI, which reduces strain (Perrewe et al., 2000).

We propose that effective stress management that comprises of interpersonal control, belief in effectively using resources, confidence in controlling impressions and interactions, helps leaders in affecting organizational change.

P_4: The leader's effective stress management ability helps in affecting organizational change.

Practical knowledge

Tacit knowledge pertains to the individual and is difficult to verify (Alwis and Hartman, 2008). It is action-oriented relevant knowledge that allows people to achieve goals they personally value; one acquires this knowledge on one's own, it is procedural and relates directly with one's goal. Moreover, it is the knowledge one acquires without

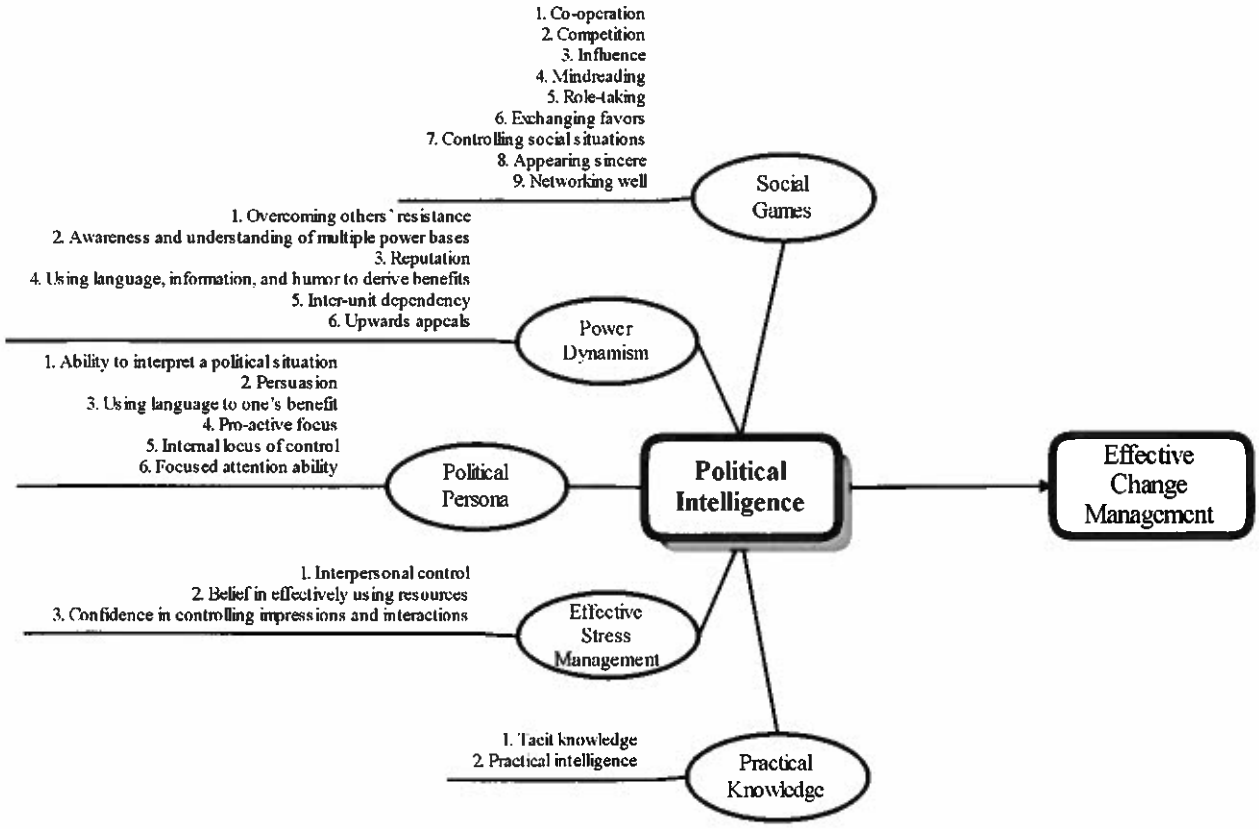

Figure 1. The proposed research model depicting relation between PI and effective change management.

being aware and guides people's behaviors and certainty in those behaviors (Alwis and Hartman, 2008; Janson and McQueen, 2007), whereas, practical intelligence is about counting on the implicit guidelines at work (Ferris et al., 2000). Moreover, tacit knowledge has been deemed important for leadership (Janson and McQueen, 2007). Since it has been advised that in order to build PI, managers must recognize potentially conflict -laden exchanges and then develop and prepare political responses; from reason, this requires tacit knowledge (Perrewe et al., 2000). Given that tacit knowledge relates to practical intelligence and both tacit knowledge and practical intelligence relate to PI (Ferris et al., 2000), arguably then, tacit knowledge and practical intelligence form part of the PI construct.

We propose that practical knowledge, which comprises of tacit knowledge and practical intelligence, can help bring organizational change.

P_5: Practical knowledge of the leader helps in affecting organizational change.

The proposed research model

Following exploration of pertinent literature, we propose a research model (Figure 1) that attempts to study the link between dimensions of PI and their relative importance for managing organizational change. On the left side are dimensions of PI that are proposed to be helpful in effectively facilitating change.

The political theory of organizations views that human activity revolves around negotiating, forming coalitions, game playing, power struggles, and differences in interests (Pondy, 1966; Schirmer, 2007). Decisions made in organizational settings are political in nature and are made so as to achieve a desired result (Gray and Ariss, 1985). Change in particular, entails political pursuits as it disrupts the status quo (Agboola and Salawu, 2011). For change leaders, it implies that to promote change in an organization, power assessment is essential to grasp the political side of things (Adams and Zanzi, 2005). Specifically, change leaders use PI so to manage change in the preferred manner (Ferris et al., 2000). Moreover, though politically intelligent leader may employ differing approaches to bringing organizational change – from flattery and exchanging favors with others, to using upwards appeal and forming coalitions, to logically arguing for the management of change, yet their underlying motive is to bring organizational change (Cook and Macaulay, 2004).

We have rendered power as being a crucial feature in organizations and have therefore described its importance. Hence change leaders need to contemplate the aspect of power when considering resistance to change (Cook and Macaulay, 2004). Power has been defined as a skill for changing events and is certainly not about misuse. It may be argued then, that change leaders can skillfully use power effectively to alter events. Moreover, aptly using power can lessen resistance to change (Agboola and Salawu, 2011). Since the motives of the politically intelligent are to work for organizational benefit, power can be used to bring organization change with success (Cook and Macaulay, 2004). Owing to the fact that power is unequally distributed in organizations and those holding power have different interests, it holds that change leaders can have their views accepted by others by exercising influence to bring organizational change. By analyzing and achieving social leverage within organization settings, change leaders can bargain and exert influence to lead change. Likewise, the more the power imbalance, the more the reliance upon decisions through influence and forming social coalitions during change (Gray and Ariss, 1985). Considering the contemporary turbulent environments that are characterized by downsizing, restructuring and redesign, and rapid technological change (Perrewe et al., 2000) there exist a competition for important and scarce resources of the organization. Here, one significant power base is achieved via the skill to deliver or manage resources. This power base includes the reputational aspect as well (Adams and Zanzi, 2005).

In the context of change, PI can help change leaders in reducing negative social outcomes such as conflict (Cook and Macaulay, 2004; Adams and Zanzi, 2005) and hence ease the change process. Social adaptability is also boosted by PI that enhances the capability to work in changing work settings, whereas the confidence in one's ability to control social situations at work leads to an optimistic, assured manner that logically helps change leaders in being successful in bringing change (Ferris et al., 2000). It is therefore strongly indicated that PI is a necessary skill for change leaders in that it gives support in decision making through assessing the environment (Cook and Macaulay, 2004). Moreover, change leaders may resort to manipulation tactics to foster change when other options have failed or are unfeasible (Agboola and Salawu, 2011).

Executives continue to face more stress, given the intensified competition, scarce skills and resources, and added responsibility (Perrewe et al., 2000). Simply, the ever-changing environment has created stress for change leaders and PI is really a mechanism that serves as a remedy for the post-change stressful work environment. The more change an organization experiences, the more the predicted level of stress for those undergoing change. This is especially true for the stress that ensues from role conflict, which is an in-built outcome of change. The implication for change leaders herein is that PI helps in coping with stress, enabling them to survive in a highly changing environment.

DISCUSSION

This paper was aimed at presenting a theoretical model of the organizational leader's political intelligence to conceptualize the role of political intelligence in effectively managing organizational change. We reviewed relevant approaches to political intelligence to build our model, which is based on the dimensions of political intelligence identified in light of literature, while the chief proposition was that political intelligence can help facilitate organizational change.

Though there have been studies that have related the two streams of organizational politics and organizational change (Gray and Ariss, 1985) our study proposes that dimensions of PI are valuable in predicting the effectiveness of organizational change. Additionally, the conceptualization of PI is not totally new. Ferris et al. (2005) identified four dimensions of the political skill construct to be social astuteness, interpersonal influence, networking ability, and apparent sincerity. They initially developed and validated political skill (Ferris et al., 2005), and then refined the same and further validated it (Ferris et al., 2008). Our five-factor model of PI measures the construct from the change leadership perspective, on basis of dimensions established in light of relevant literature of PI with the aim to build theory, as pointed out earlier. As per our definition, our five-factor model of PI comprises of adeptness at social games, power dynamism, political persona, effective stress management, and practical knowledge.

IMPLICATIONS, LIMITATIONS AND FUTURE RESEARCH

Implications that result from an enhanced scholarly understanding of PI, and specifically how PI relates with effective change management are several and exist for scholars as well as for practitioners. For the organizations, an increased understanding of PI enhances organizational success, lessens anxiety, and improves external relationships. For organizational leaders, the implications is that with change as a persistent phenomenon, it becomes even more necessary for them to develop their skill to read employees and be capable of persuading them to act in ways so as to meet organizational objectives. Politically intelligent leaders have the ability to enhance their team's performance (Ferris et al., 2005). Adams and Zanzi (2005) provided the implications of PI for organizational decision making, and suggested its implications for and career planning. As for employees, we believe that PI is essential for those who aspire to thrive in organizations. Specifically, PI helps the employee in understanding the dynamics of power, conflict, and values during change ((Waddell et al., 2000).

A limitation of this paper is that it does not offer empirical evidence for the research model it suggests, since it employs theory-based exploration of the literature. Moreover, empirical research is essential to examine the role of PI in effective change management. Research in organizations where change has recently occurred, or is a persistent happening, can address whether their leaders use PI in facilitating effective organizational change. Empirical research should focus on testing the propositions put forth in this paper. Confirmation of the suggested propositions in an empirical investigation would provide evidence for the present conceptual framework that our study suggests. Moreover, since PI can help achieve flexibility in terms of resources and demands, thereby reducing conflict, future research needs to investigate if PI reduces conflict in organizations since change situations carry conflict.

Conclusion

This paper has demonstrated how change leaders may use their PI to facilitate organizational change – an issue overlooked in literature. We have proposed a model that addresses effective change management as an outcome of the leader PI. Our research model has conceptualized PI and offered relationships between dimensions of PI and effective change management. We respond to relevant and important views as those of Agboola and Salawu (2011), that organizational change in particular involves political pursuits, while the leader's responsibility during the change process is a test (Yukl, 2007). In addition, our research puts forth an agenda for empirical research to focus on the issue. Change leaders must exhibit adeptness at social games, grasp of power dynamism, have a political persona, be capable of effectively managing stress, and expend practical knowledge, in order to effectively manage organizational change. PI is an important leader intelligence that is short of attention in literature, and this paper has emphasized the significance of PI for effective change management. Leaders may be provided with PI through training and workshops to create awareness of, and enhance their PI skills. In addition, human resource managers may prefer to identify change leaders who are high on PI, while training may be imparted to those executives who are low on PI. These efforts would help ensure maximal performance of organizations, given the reality and persistence of organizational change.

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Development of multiple IQ maps for use in the selection of inpatriate managers: a practical theory

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Abstract

The rate of expansion into the global marketplace by multinational corporations has begun to accelerate at a pace where international human resource managers are unable to meet the demand for managers to serve in global assignments. This shortage of qualified managers is exacerbated by a number of societal trends, such as, dual-career professional couples, increased number of high qualified female executives who have not been used extensively in international assignments in the past, and the changing format and sequencing of the overseas assignments beyond the traditional single 3–5 year assignment term.

The complexity of global management tasks is increasing requiring multi-talented managers capable of acting as knowledge-integrating boundary-spanners in global network organizations. Inpatriate managers (i.e., host-/third-country nationals relocated to the home organization on a semi-permanent to permanent basis) have been identified as a potential pool of global managers to complement the supply of expatriates for emerging markets. This paper develops a means for selecting inpatriate managers based on a multiple IQ approach that attempts to match the inpatriate managers' portfolio of abilities with the type of assignments that they might have in global organizations.
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Keywords: Inpatriation; Multiple intelligences; Selection for global assignment; Global mindset

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1. Introduction

The rate of globalization of businesses headquartered in the United States and in other developed economies, is increasingly becoming contingent on having a sufficient number of qualified global managers (Gregersen, Morrison, & Black, 1998; Ghoshal & Bartlett, 1997). In a recent survey of the *Fortune Global 500*, conducted by Authur Andersen and Bennett & Associates, 81 percent of the respondents to the survey, indicated their companies intended to rapidly expand their interests throughout the world (Expatriate, 1997). In another survey of *Fortune 500* companies, researchers found that 85 percent of the human resource managers did not believe they would have an adequate number of global leaders (i.e., managers) to implement their company's global expansion plans (Gregersen et al., 1998).

There appears to be a growing consensus among international human resource managers, that their organizations' global competitiveness and ultimately their global core competencies will be contingent on the uniqueness of their organizations' cadre of global managers. It is envisioned that the management team must develop a "global mindset" that incorporates perspectives that are diverse, yet compatible in their basic philosophies (Kefalas, 1998; Kedia & Mukherji, 1999). Therefore, it becomes imperative to develop a global human resource system for selecting, training, and motivating global managers. This system will provide a basic foundation for organizations to gain a global competitive advantage (Bartlett & Ghoshal, 1994, 1995; Ghoshal & Bartlett, 1997; Minehan, 1998; Prahalad & Hamel, 1990, 1993).

The effective global organization of the 21st Century will have to become a repository of skills, competencies, routines, and dynamic capabilities that are managed by multicultural management teams in a manner difficult for global rivals to replicate (Barney, 1991; Grant, 1998; Prahalad & Hamel, 1990). The development of global management multicultural teams should insure effective knowledge acquisition and dissemination in global organizations (Earley & Mosakowski, 2000; Millman, 1999; Napolitano, 1998). It is projected that global managers of the future must develop a pluralistic mindset (i.e., developing and maintaining multiple perspectives in a coherent way in order to solve complex global problems) and not be ethnocentric or "Westernized" when managing as team members in the global competitive arena (Aguirre, 1997; Harvey, Novicevic, & Speier, 1999a; Reynolds, 1997).

These global managers will have to posses a complex amalgamation of technical, functional, cultural, social, and political skills to successful navigate the intricacies of changing responsibilities (Fish, 1999; Nohria & Ghoshal, 1997; Pucik & Saba, 1998). Amassing a sufficient number of global managers for multicultural teams has been characterized as a "contest" for talent on a global scale. The ultimate prize in this contest provides the winning organization with the ability to compete effectively by developing core competency based upon firm-specific multicultural team management that would be difficult to match by global rivals (Heene, 1994; Hamel & Heene, 1994; Rumelt, 1994; Sanchez, Heene, & Thomas, 1996). How to select managers from across the globe for inclusion into these multicultural teams in order to develop

a corporate global mindset is the critical issue in knowledge-based competition that has not been adequately addressed in the literature (Montgomery & Yip, 1999; Napolitano, 1998; Yip & Madsen, 1996).

The objectives of this paper are fourfold. First, a knowledge-based view of selecting global managers is developed with particular attention to selection for the positions responsible for the newly emerging markets. Second, the rationale for increasing the pool of potential global managers through the use of inpatriation is discussed explaining why their selection process should be different than the one used for expatriated managers. Third, the development of selection process for inpatriate managers based upon multiple managerial IQs is proposed. Fourth, a practical selection format, predicated on the multiple IQ logic, is developed to assist international human resource managers in designing the selection process for inpatriate managers. Each of these objectives of the paper will be explored in separate sections in an attempt to develop a flexible means to select inpatriate managers.

2. Developing a knowledge-based view of selecting global managers

The knowledge-based theory views the firm as an efficient mechanism for integrating knowledge diffused across a number of different sources (Grant, 1996). The focal variables of the knowledge-based view of the firm describe the modes of acquiring knowledge through learning, the coordinating mechanisms for knowledge transfer, and the mechanisms for dissemination of knowledge among the constituents of the organization. Specific to this theory is the assumption that knowledge resides at the individual level which, when shared, becomes a common knowledge in the organization. It is argued that common knowledge facilitates the dynamic processes of acquiring, transferring, institutionalizing, and acting on new knowledge, which, in turn, contribute to the development of organizational capabilities (Zaheer, 1995).

If enhancing and modifying scarce common knowledge effectively reflects a dynamic organizational capability, then it follows that selecting individuals, who possess unique talents valuable to building the common knowledge base of the organization, is critical for the firm competitive advantage (Teece, Pisano, & Shuen, 1997). The scarcity of these unique talents becomes a key concern when the firm is competing in the hyper-competitive global marketplace and growing in emerging markets, where specific local knowledge is imperative to "act locally". Therefore, from a knowledge-based perspective, developing a stock of knowledgeable global managers with specialized tacit local knowledge allows the organization to learn faster than competitors and effectively match the needs of the local markets with the firm responsive strategies. In global learning contexts, the individual and team ability to manage the transfer and integration of local tacit knowledge at the operating decision-making level of common knowledge becomes a distinctive competency that ultimately leads to global competitive advantage (Downes & Thomas, 2000).

Emerging markets represent a context-specific impediment to knowledge acquisition, transfer and integration in a global organization because of the tacit operating nature of the formal and informal institutions that govern business in these countries (Zaheer, 1995). This tacitness permeates operating systems of the formal societal institutions that govern not only banking and commerce but also legal and political procedures (Barkema, Bell, & Pennings, 1996). The acquisition of local tacit knowledge is particularly challenging for cultural "outsiders" because it is very difficult to perceive or accurately interpret policy changes of institutions in emerging markets without extensive local training and years of direct experience (Eriksson, Johanson, & Majkgard, 1997). As a result, the transfer of local knowledge to the common knowledge base of the global organization is often distorted, thus limiting the development of a global mindset of the firm management (Harvey & Buckley, 1997). Therefore, the selection and transfer of managers with local knowledge may likely stimulate the formation of common internal understanding of the tacit knowledge being gathered in the emerging markets (Birkinshaw & Hood, 1998). The appropriate selection of managers with experiences from across the world is likely to lead to a reduction in distortion of specific knowledge acquired in and transferred from emerging markets.

A knowledge-based view of the firm suggests that the corporate human resource function does not add value if merely administering procedures for managing human resources across foreign subsidiaries. Rather, the corporate HR must design valuable processes of knowledge transfer facilitation, which integrate local human resource competencies into unique organizational capabilities (Kamoche, 1996; Oliver, 1997). In particular, the role of the corporate HR function in the development of the managerial resources embodying the context-specific knowledge is critical to facilitate the integrative process of creating a collective experience base. In this way, the human resource function contributes to the process of developing the firm-specific learning capability that is difficult for competitors to duplicate because the competitive difference is based on the managers' tacit capabilities (Taylor, Beechler, & Napier, 1996; Roth & O'Donnell, 1996).

The demand for an efficient and feasible identification of managers capable of transferring idiosyncratic knowledge from complex emerging markets necessitates developing a method of selection that takes into account the various domain-specific types of knowledge (i.e., political, cultural, social, institutional and the like) that must be possessed to assess opportunities in these markets. To map these various specific knowledge domains on to the common knowledge base of the global organization, a comprehensive insight into a candidate's "multiple IQs" needs to be developed given the different domains of learning and knowledge that must be combined to exploit opportunities in emerging markets.

3. Global managers in demand: where and how to source them?

There have been a number of studies that have attempted to determine the reasons for the "success" or "failure" of expatriate managers in overseas assignments (see

Fig. 1). Success in expatriate assignments has been examined in many empirical studies and attributed to a number of critical traits of successful expatriates: empathy, respect, interest in local culture, flexibility, tolerance, technical skills, initiative, open-mindedness, sociability, and positive self-image (Kealey & Ruben, 1983). While it has been helpful to know what traits successful expatriates possess, the difficulty comes in how to assess these attributes in the selection process. Additional problems that arise when selecting candidates for expatriate assignments include: (1) lack of reliability and validity of assessment tools to measure expatriate characteristics; (2) difficulty of assessing the impact of job, institution, and cultural change on expatriate success (i.e., the characteristics beyond the personal traits of the expatriate); (3) lack of a standardized and integrated process for preparing candidates for expatriate assignments; (4) unreliable assessment of the impact of the expatriate spouse and family on the expatriate success; (5) uncertainty in predicting adjustment demands (i.e., success in making the change) and predicting effectiveness (i.e., ability to accomplish the goals of the assignment) of the expatriate manager; and (6) the impact of the "reality shock" on the candidate as no assignment can be designed in terms deemed important for successful expatriation (Kealey, 1996). Therefore, the past research on expatriate success (and failure) has

Expatriate Performance	Individual	Organizational	Environmental	Systemic
SUCCESS	• Big "5" personality characteristics • technical competence • cultural adaptability • previous cultural adjustments • extensive foreign travel	• cross-cultural training • repatriation program • knowledgeable IHRM managers • separate IHRM process/procedures • mentoring program	• relocation to similar economy/culture • reduced government restriction • similarity of languages	• planning perspective • integrated IHRM system • increased use of technology • flexibility of IHRM system • consistency of systems globally
REPRESENTATIVE RESEARCH	Caligiuri, 2000; Stroh & Caligiuri, 1998; Ones & Viswesvaran, 1999; Spreitzer, McCall & Mahoney, 1997	Feldman & Bolino, 1999; Harvey et al., 1999; Katz & Seifer, 1996; Selmer, Torion & Leon 1998	Bartlett & Ghoshal, 1997; Tung & Miller, 1990	Lado & Wilson, 1994; Harvey, 1996b; Becker, Huselid, Pickos & Spratt, 1997; Harris & Brewster, 1999; Ferris et al., 1999; Fish & Wood, 1996
FAILURE	• family issues • unwillingness to be relocated • dual career issues • commitment to assignment • lack of language capabilities	• lack of career planning • inadequate orientation • inadequate compensation programs • inadequate training programs	• emerging markets • restrictions on HR by government • hostility (climate, healthcare, etc.) of environment • cultural taboos (women, minorities)	• "centric" IHRM orientation • ad hoc case-by-case negotiations with candidates • inadequate career development process during foreign assignment • ineffective performance appraisal system
REPRESENTATIVE RESEARCH	Caligiuri, Hyland, Joshi & Bross, 1998; Harvey, 1998; Fish & Wood, 1997; DiCieri Dowling & Taylor, 1991	Brewster & Pickard, 1994; Brewster, 1995; Chen, 1994; Florkowski & Fogel, 1999	Harvey et al., 1999; Dowling et al., 1998	Harris & Brewster, 1999; Pucik & Sabar, 1998; Fish, 1999; Brewster & Scullion, 1997.

Fig. 1. Predicting success/failure of expatriate managers. (Bartlett and Ghoshal (1997); Becker, Huselid, Pickos and Spratt (1997); Brewster (1995); Brewster and Pickard (1994); Brewster and Scullion (1997); Caligiuri (2000); Caligiuri, Hyland, Joshi and Bross (1998); Chen (1994); DiCieri, Dowling and Taylor (1991); Feldman and Bolino (1999); Fish (1999); Fish and Wood (1996); Fish and Wood (1997); Florkowski and Fogel (1999); Harris and Brewster (1999); Harvey (1996b); Harvey (1998); Harris and Brewster (1999); Katz and Seifer (1996); Lado and Wilson (1994); Ones and Viswesvaran (1999); Pucik & Saba, 1998; Selmer, Torion and Leon (1998); Spreitzer, McCall and Mahoney (1997); Stroh and Caliguiri (1998); Tung and Miller (1990)).

not found consistent answers to the key questions that remain unanswered for global assignments: Which are the key individual attributes? For which foreign settings? To accomplish what set of tasks? In what time period?

Also, expatriation has been widely viewed in past research as the headquarters-to-subsidiary management transfer Many of the factors influencing the success of expatriation (i.e., to mention a few: escalating cost, low productivity, failures, difficulties to expatriate professional dual-career couples) have been analyzed within this paradigm (Cauldron, 1991; Harvey, 1996a, b; Wederspahn, 1992). However, the one latent issue that has received less attention is that the nature of cross-border transfer has changed in the new global competitive landscape. In particular, the managers in global organizations are transferred not only from the headquarters to a foreign subsidiary (i.e., expatriates) but also increasingly from one foreign subsidiary to another foreign subsidiary (i.e., third-country nationals or "trasnpatriates") and from a foreign subsidiary to the headquarters (i.e., inpatriates).

This evolving change of cross-border transfers is caused by the growing globalization-fueled interdependence of subsidiaries and their markets that need to be coordinated on a global scale through global assignments. The major driver of the globalization of assignments is the increasing strategic importance of the emerging country markets (e.g., China, Russia, India, Indonesia, Malaysia, Turkey, Philippines, and select Eastern European countries) (Garten, 1996, 1997a, b) in the background of the growing regional integration of developed country economies (Govindarajan & Gupta, 2000).

These emerging country markets will constitute 7/8s of the world population in 2025 and are considered to be the prime targets for the growth of global organizations (The State, 1995; World, 1995). The emerging markets are frequently culturally distant, normally have significantly lower levels of economic development and for the most part, represent a potential hardship to expatriates coming from developed countries. The reluctance of expatriates to take assignments in these less attractive locations may limit the organization in future expansion opportunities and global managers' development. IHRM experts have begun to examine a number of alternatives to the exclusive use of expatriates to meet the management manpower needs for growth in emerging markets (Gregersen et al., 1998).

One of the complementary pools of candidates that have been given considerable attention recently is the use of inpatriate managers (i.e., home country nationals transferred to the headquarters organization on a semi-permanent or permanent basis to serve as "linking-pins" to global markets) (Harvey, 1997; Harvey & Miceli, 1999; Harvey, Speier, & Novicevic, 1999b). Inpatriate managers have the tacit local knowledge of the emerging market and at the same time are developed to establish credibility in the headquarters organization for control of emerging country subsidiaries (Harvey, Speier, & Novicevic, 2000; Harvey et al., 1999a). The tacit knowledge of inpatriate managers is a very valuable input for a global organization in developing locally adapted strategies (i.e., improving local effectiveness) while at the same time, remaining aligned to global goals and strategies (i.e., improving global efficiency). Such a distinctive corporate "signature" to act locally based on tacit understanding of local opportunities aids to insure local acceptance of the firm

products/services without reducing the efficiency necessary for global competition (Ghoshal & Bartlett, 1997).

The inpatriate managers responsible for emerging markets will be expected to develop effective local control and coordination by maintaining: (1) an external focus on local government relations; (2) cultural leadership of indigenous employees and relational partners (i.e., channel-of-distribution members, suppliers, customers and the like); (3) social networking; (4) teamwork; (5) a keen sense of the dynamics of the local market in conjunction with the global perspective of the organization; and (6) a high level of local social knowledge of institutions and key functional counterparts (Bartlett & Ghoshal, 1990; Caligiuri & Stroh, 1995; Martinez & Quelch, 1996; Sohn, 1994). If the "soft" skills, derived form the context-specific social knowledge of emerging markets, are becoming the key determinants of successful country managers it appears that inpatriate managers could be a worthwhile complementary pool of candidates to expatriates (Harvey, 1997; Harvey et al., 1999b). When a normative comparison of expatriate and inpatriate is made for global assignments in both developed and emerging country markets, it becomes readily apparent that inpatriate managers have a distinct competitive advantage in social knowledge and the resulting "soft" skills necessary to be effective in emerging markets (see Fig. 2).

An additional contribution of inpatriate managers to the management team of global organizations is their diversity of background and pluralistic orientation to global competition. The plurality of their education, training and business experiences in emerging economies adds new perspectives to the management team of the global organization. The recognition of the need for cultural diversity in global management has recently become a topic in boardrooms throughout the world. Matsushita's president has explicitly stated that, "to become a truly global company, we have to have diversity in top management" (Harvey & Buckley, 1997). Sony sells approximately 80 percent of its products in foreign markets and recognizes the need to have a pluralistic strategic orientation. Therefore, Sony's board-of-directors has appointed two non-Japanese members to its member body and has plans to hire more foreign nationals for executive positions in Japan and many of its overseas subsidiaries. The European global organization, Royal Dutch-Shell, has 38 nationalities represented in it London headquarters, exemplifying multicultural globalism. This multiculturalism engendered by inpatriation reinforces the development of a "global mindset" of managers throughout the organization (Kefalas, 1998; Kedia & Mukherji, 1999; Paul, 2000).

As global organizations move away from dependence on a single pool of potential candidates (e.g., expatriates) for global managers, an opportunity is opened for inpatriate managers to serve as a "linking pin" between the domestic and foreign operations. Functioning as boundary spanners in the global network organization, inpatriate managers can provide the tacit knowledge necessary to effectively communicate and develop new perspectives on emerging markets (Harvey & Novicevic, 2000; Harvey et al., 1999b). The diversity of perspectives is important throughout the global organization but is of particular value in the top management team (TMT). Without the in-house knowledge of the differences among markets and the significant discrepancies between the emerging and developed economies, the

Candidate Characteristics	Location of Assignment			
	Expatriate		Inpatriate	
	Developed*	Emerging	Developed	Emerging
Renewable resource (extended assignments)	L**	L	H	H
Willingness to accept overseas position	M	L	H	H
Motivation to participate in global assignments	M	L	H	H
Relative cost characteristics	H	H	L	L
Flexibility (social/cultural/family)	M	L	H	H
Organizational cultural "fit"	H	L	M	H
Level of peer acceptance	L	M	M	H
Headquarters confidence	H	M	M	H
Level of stress	M	H	M	L
Internal political understanding	H	L	M	H

* = developed economies : emerging economies

** = Level of Appropriateness of Pool of Candidates
H = High
M = Moderate
L = Low

Adapted from: Harvey, M., C. Speier & M. Novicevic 1999, "The Role of Inpatriation In Global Staffing," *International Journal of Human Resource Management*, vol. 10, #3.

Fig. 2. Expatriate/inpatriate appropriateness analysis.

TMT is dependent on outsiders (i.e., remote local and third-country nationals) to communicate inputs for strategic intent formulation and the design of control mechanisms for the subsidiary operations (Harvey et al., 1999b; Miller, Burke, & Glick, 1998).

If inpatriate managers are a necessity for the globalization of the organization's leadership (i.e., due to shortage of other candidate pools and because of the need to acquire local knowledge of the emerging markets) the question becomes, "how can these inpatriate managers be selected? Can the same "recipe," traditionally used for the selection of expatriate managers, be used in the selection process for inpatriate managers? Given the tacit knowledge that is necessary to compete in emerging markets, it appears that inpatriate managers should rather be selected based upon "multiple IQs" which indicate various skill levels as well as the learning capacity of inpatriates. If acquiring knowledge to effectively compete is a requirement in the new global competitive arena, then selection could be guided by the various learning capacities of the inpatriate manager.

4. Developing a selection process for inpatriate managers

Inpatriate managers could present a unique set of problems to the corporate HR function relative to their selection, in that, this pool of candidates is so diverse

(i.e., geographically, education, socially, and culturally) that attempting to utilize existing selection processes and procedures could be problematic. Therefore, some safeguards should be designed against the potential of use of a "Westernization" criterion by the corporate HR (i.e., the assumption that the traditional expatriation policies are equally applicable to inpatriates). The safeguards should also be designed to mitigate the potential and/or tendency among the headquarters line managers to hire inpatriates in "one's own image" (Harvey, 1997). Therefore, it would appear an alternative focus in the selection process is needed to assess the various candidates for inpatriation. This is not to imply that the process being developed could not be used in the selection of expatriates for the increasingly complex global assignments where the candidates' mental abilities are the critical variable.

In general, the capacity of international assignees (i.e., expatriates, trasnpatriates and inpatriates) for achievement as potential future global managers can be viewed as the product of: (1) cognitive abilities; (2) personality traits; and (3) environmental variables (Eysneck, 1998). While the researchers from the individualistic countries of North America and Europe tend to emphasize the personality variables (i.e., in particular, the five-factor or "Big Five" structure), the researchers from the collectivist countries of Asia, Europe and South America tend to emphasize the environmental variables (i.e., in particular, culture-specific values). These research streams sometimes take the form of a divergent debate (i.e., of a "nurture vs. nature" type), and sometimes that of a convergent dialog (i.e., of a "nurture-through-nature" type). What is common both streams of past research is that cognitive abilities do not have a relatively salient role in the selection process.

It is argued in this paper that cognitive abilities should take a salient role in the selection process when: (1) the organization takes a form of an integrated global network; and (2) the knowledge flows across borders, supported by dynamic cross-border transfers of managers, become the key resource of the organization's global competitiveness. In other words, cognitive abilities become critical when: (1) international assignments evolve into increasingly complex global assignments for all pools of assignees; and (2) the developmental demands for future global managers are to be upfront-mapped into the selection process.

There are at least two logical explanations why the introduction of cognitive abilities in general, and intelligence in particular, has been neglected in the past research in the selection of expatriates. First, most past research contributions, focused on international assignments originating from the parent organization, were based on the assumption that cognitive abilities had been addressed for the job position of the candidate prior to the foreign assignment. Therefore, these researchers did not consider the assignment-specific cognitive abilities. Second, as it was also assumed that the assignment-related tasks were of mostly analytical nature, the validity of the general factor of intelligence (i.e., "the g factor") was also assumed as job-generalizable.

However, they did not take into consideration a number of research programs examining how conceptions (i.e., implicit theories) of intelligence vary not only across occupations (i.e., across analytical, practical and creative dimensions) but also

MULTIPLE IQs

I.
- **COGNITIVE IQ:** The traditional measure of intellectual ability. This IQ measures the ability to reason, learn, and think analytically.
- **EMOTIONAL IQ:** The ability to use one's own effective state to tap the effective state of others to accomplish objectives. The ability to display an appropriate emotional state and to respond to others' emotions in an effective manner.

II.
- **POLITICAL IQ:** The ability to use the formal and informal power in the company to accomplish objectives. The ability to know how to prudently, judiciously, and artfully use power in the organization.
- **SOCIAL/CULTURAL IQ:** The extent to which one is adequately socialized in a society, an organization, or a subculture. Recognition and understanding of roles, norms, routines, and taboos in various settings.
- **ORGANIZATIONAL IQ:** Having a detailed and accurate understanding of how the organization operates both functionally and the time that is needed to accomplish certain tasks in the company. The detailed knowledge of how to get "things" done in the company.
- **NETWORK IQ:** The ability to get things done when working with multiple organizational units. Accomplishing the goals of the company by effectively recognizing, understanding, and managing inter-organizational relations.

III.
- **CREATIVE IQ:** The ability to diverge/innovate in thinking and create fresh novel ideas and solutions to problems. The ability to address problems/issues with insight and resourcefulness and to find unique solutions.
- **INTUITIVE IQ:** The ability to have quick insights into how to solve problems or to address situations without past experience with the problem and without actively or formally processing information [i.e., street smart].

Fig. 3. Definition of managerial IQs.

differ in many places around the world from those in the United States (Sternberg & Kaufman, 1998). In particular, empirical findings provide initial support for: (1) cross-cultural differences in the display of intelligence (Greenfield, 1997); (2) cross-cultural differences in the socialization of intelligence (Rogoff, 1990); and (3) differences in the socialization of intelligence across the US ethnic groups (Heath, 1983).

Building on this line of research, the selection of inpatriate managers could center on using a multiple IQ approach given the demand for knowledge transfer to compete in global hyper-competitive markets and for possession of unique social knowledge to adapt strategies to individual emerging markets (i.e., thus increasing the firm global leadership capital). Fig. 3 provides three categories with a total of eight different IQs that could provide the foundation for the selection of inpatriate managers. The three categories of IQs are modeled after the triarchic theory of human intelligence (Sternberg, 1985, 1996) and can be classified as:

I. *Analytical intelligence*—the planning, implementation, evaluation of problem solving processes and knowledge acquisition: (1) *cognitive intelligence* (Binet & Simon, 1916; Wechsler, 1939); (2) *emotional intelligence* (Cooper & Sawaf, 1997; Gardner, 1999; Goleman, 1995).

II. *Practical intelligence*—tacit knowledge that can be derived from common sense, intuition, and "street smarts" resourcefulness to adapt to an unknown environment or in shaping/selecting the environment to the problem facing the manager: (3) *political intelligence* (Ferris, Fedor, & King, 1994; Ferris, Perrewe, Gilmore, & Anthony, 2000); (4) *cultural/social intelligence* (Cantor & Kihlstrom, 1987; Sternberg & Smith, 1985); (5) *organizational intelligence* (Davenport & Prusak, 1998); (6) *network intelligence* (DeBurca & McLaughlin, 1998; Ford, 1998).

III. *Creative intelligence*—the ability to develop innovative solutions to new problems and environments given the rate of change and the unique context of global business: (7) *innovative intelligence* (Lubart & Sternberg, 1995; Sternberg & Lubart, 1995, 1996); (8) *intuitive intelligence* (Parikh, 1994; Shirley & Langan-Fox, 1996; Weick, 1998).

Each of these categorized IQs will be briefly discussed individually and then mapped into an integrative inpatriate manager selection matrix.

4.1. Cognitive intelligence

Given the complexity and ambiguity associated with managing global network organizations, it would seem logical that a meaningful reference point for selecting inpatriate managers to manage the expansion into emerging markets would be to focus the selection process on the cognitively superior inpatriates. This cognitive IQ approach (i.e., the "g" factor of general intelligence) favors their problem solving abilities (Sternberg, O'Hara, & Lubart, 1997; Sternberg & Kaufman, 1998). The elements of general intelligence are: (1) higher level of abilities (such as abstract reasoning, problem solving); (2) the ability to learn more/faster than others; (3) the ability to learn what is valued by society; and (4) the ability to adapt and meet the demand of the environment effectively (Sternberg, 1997a). A perpetuating theme in the study of general intelligence over the last 100 years has been the ability of an individual to adapt to a changing and progressively complex problem environment (Barkow, Cosmides, & Tooby, 1992; Buss, 1995; Wright, 1994). The progressive complexity of the changing emerging market environments would support the concept of selecting inpatriate managers on the basis of the "g" abilities.

It is generally accepted that, to perform well in highly complex, fluid, or novel jobs &/or environments, a high IQ is a distinct predictor of job performance (Gottfredson, 1997). But general intelligence may not predict intelligent behavior in a given environment. This difference not only speaks to potential cultural differences of what constitutes valued intelligence, but at the same time points out that multiple aspects of intelligence may be needed to successfully adapt or in some cases to influence specific environment. Therefore, even the common core of mental processes, captured as general intelligence, may have different behavioral manifestations in different cultural contexts (Sternberg, 1985).

While there appears to be some degree of invariance in "g" across cultures, there is also a degree of variability that could have an impact on selecting inpatriate managers for global organizations. This variability can be observed by illustrating the different Western and Eastern (a large number of transition and emerging nations) conceptualizations of intelligence. The Western concept of intelligence centers on: (1) practical problem solving, (2) verbal ability, and (3) social competence. In contrast, the Eastern conceptualization is focused on: (1) a general cognitive factor such as a general "g" score; (2) interpersonal intelligence (i.e., ability to interact and work well with others); (3) intra-personal intelligence (i.e., knowing one's self and the basic strengthens and weakness an individual has at various phases of their lives); (4) intellectual self-assertion (i.e., a willingness to act upon one's

capabilities); and (5) verbal and non-verbal reasoning ability (Chen, 1994; Yang & Sternberg, 1997a, b). The differences relative to what intelligence represents among cultures may be dependent to a degree on the types of skills valued by the various cultures. Therefore, in constructing an inpatriate manager selection process, it is important to go beyond general intelligence and include multiple "IQs".

Measurement. There has been a long history of measuring cognitive intelligence with such measures as: Binet and Simon (1916) Basic Intelligence Test; Thurstone (1919) Intelligence Test IV; Wechsler (1950) Intelligence Test; Cattell (1949) Personality Factor Questionnaire; Golf and Ackerman (1992) Intelligence-as-Typical Performance Test.

The following research proposition relative to cognitive intelligence and the selection of inpatriate managers could provide guidance for future research:

Research Proposition 1. *The higher the complexity of opportunities to be explored in the market of the emerging country subsidiary, the higher the relative importance of cognitive intelligence factor in the inpatriate selection process in global organizations growing in emerging country markets.*

4.2. Emotional intelligence

Beyond the cognitive intelligence of an inpatriate candidate, it is important to determine the emotional maturity of the individual. Emotional intelligence is categorized with cognitive IQ within the analytic category of multiple IQs because the emotional development and maturity are viewed as necessary to allow managers to effectively utilize their cognitive capabilities. The importance of emotional intelligence increases with the level of authority in an organization. At the highest level of authority, technical skills become less important than emotional control in fulfilling the manager's role (Goleman, 1998). In particular, the ability to control affect in the face of competing values becomes critical to assert authority. The emotional stability of inpatriate managers in complex, novel environments, where there is a salient social/cultural difference and little formal guiding parameters, is an important enabler of these managers to develop effective heuristics difficult for managers from other organizations to duplicate.

While not exhaustive (see Dulewicz & Higgs, 2000a, b, for comprehensive documentation on elements to be measured in emotional IQ), the list of commonly identified elements in emotional IQ includes: (1) being aware of one's feelings and having the ability to effectively manage feelings in a variety of situations; (2) having the ability to "handle" pressure and stress so that emotions do not reduce skill performance; (3) having the personal energy and drive to be able to strive for and reach goals; (4) having the stability and interpersonal ability to communicate and influence others to accept one's proposals; (5) the ability to adjust decision making to complex settings and having the ability to make decisions in unique environments (i.e., personal self-efficacy); (6) consistency in social interactions and in maintaining appropriate behavior compatible with the prevailing cultural/social mores; and (7) showing sensitivity and empathy towards others, particularly when these individuals

are culturally/socially different (Dulewicz & Herbert, 1999; Goleman, 1998). Emotional IQ can be viewed as a composite of interrelated personal issues that reflect the ability of an individual to control their affects in a variety of different situations and environments.

These elements of emotional IQ are organized into a classification schemata composed for three categories: (1) Drivers–Motivation–Decisiveness—emotional traits that energize individuals and guide them towards achieving goals...frequently referred to as positivism or emotional energy; (2) Constrainers–Conscientiousness–Integrity–Emotional Resilience—emotional controls which counterbalance the Drivers of emotional intelligence especially in novel, stressful &/or difficult interpersonal or social/cultural situations; and (3) Enablers–Self-Awareness, Sensitivity–Influence—those emotional traits that facilitate performance, by maintaining emotional stability during periods of stress and not allowing emotions to rule one's decision-making processes (Dulewicz, 2000; Dulewicz & Higgs, 1998). By using this type of classification scheme, researchers are making efforts to develop an instrument for measurement of emotional IQ.

The outcomes of emotional maturity (i.e., high emotional IQ) include a well-developed self-awareness which is internally or self-regulated by the individual, high positive energy derived from emotional stability, understanding for and empathy with others, and possession of a highly developed set of social skills (Goleman, 1998). These qualities are necessary to aid managers in addressing the complexities of managing cross-culturally, and therefore are an integral enabler for employing one's cognitive IQ to solve managerial problems (Cooper & Sawaf, 1997; Dienstbier, 1989). Therefore, mental toughness can be viewed as the emotional "glue" of analytical intelligence. By combining both cognitive and emotional IQs into the analytical intelligence of managers, the ability to operationalize the concept is enhanced.

Measurement. A variety of tests in psychology and education have been developed to measure emotional IQ (Damasio, 1994; Goleman, 1998; Steiner, 1997). For measuring emotional IQ in organizational settings, an EQ scale of 16 relevant competencies has been developed in the Job Competencies Survey developed by researchers (Dulewicz, 1998; Dulewicz & Higgs, 2000a, b).

The following research proposition relative to emotional intelligence and the selection of inpatriate managers could provide guidance for future research:

Research Proposition 2. *The more salient the demand for affect control and coping skills to manage often-competing values of internal and external stakeholders in the headquarters and emerging country subsidiary contexts, the higher the relative importance of emotional intelligence factor in the inpatriate selection process in global organizations growing in emerging country markets.*

4.3. Political intelligence

Organizational politics involves attempts of organization members to manage, create or modify shared meaning in social settings (Sederberg, 1984). The belief that

organizations are often social political arenas, where competing interest groups vie for scarce resources through the exercising of power and influence, is a widely held perception (Fandt & Ferris, 1990; Ferris et al., 2000). To "engineer" social/economic situations conducive to outcomes that favor the initiator of the act, requires political intelligence to accomplish socially complex tasks. The level of ambiguity primarily influences the amount of organizational politics in accountability in organizations. As ambiguity increases in an organization or situation, managers will tend to exercise power to gain political influence (Ferris & Judge, 1991). Managers in these ambiguous environments attempt to put a "spin" of the events to gain disproportionate scarce resources and create a "shared" meaning of an event. This symbolic manipulation transpires through the manager's persuasive communication and image management (Russ, 1991). Therefore, a manager's political IQ is one's ability to gain resources though exercising political power in situations were ambiguity and accountability levels allow for a shaping (i.e., spin) of attitudes and images among those being influenced.

Political skill is the intuitive savvy to operate within an organization and gain scarce resources beyond one's position or functional skills. A political IQ refers to knowing how to get things done in an organization in the manner that may not follow the formal organizational procedures or routines. A high political IQ refers to having a sense about the social infrastructure and the individuals that occupy key positions that can be instrumental in exercising influence to change resource allocation or direction of the decision making (Ferris et al., 2000).

Political IQ in global organizations becomes imperative when addressing local stakeholders in the host country. In particular, external constituents (i.e., channel-of-distribution members, suppliers, logistic providers, as well as, governmental institutions) can play a significant role in the success or failure of organizations operating in emerging countries. Managers who have well-developed political IQs have the ability to obtain support and cooperation from local institutional counterparts and government entities. This political skill enables the organization to develop competitive routines, which are difficult for competitors to duplicate. The organization's image or reputation in the emerging economy my hinge on the political IQ of key inpatriate managers with contacts with external institutions. The resulting "reputational capital" established by inpatriates in the host country provides the organization with a unique and valuable source of market-based power that is difficult for competitors to imitate (Fombrun, 1996).

Political IQ of inpatriate managers can also be useful when attempting to influence the interface between the foreign subsidiary and the headquarters in the home country. Managers who possess the political insights and knowledge to build organizational coalitions with headquarters management provide an internal resource for the subsidiary. The strategic latitude or operating discretion of the subsidiary may be directly influenced by the political network and savvy of key inpatriate managers in the foreign subsidiary (Birkinshaw & Morrison, 1996; Birkinshaw & Hood, 1998; Birkinshaw, Hood, & Jonsson, 1998). The political IQ provides the inpatriate manager with operating latitude that goes beyond routine

policies and procedures and allows for the customization of strategies to local emerging markets.

Measurement. A measure of political IQ, which contains 11 items, has recently been developed reflecting an individual's ability to exercise influence on others beyond one's functional and resource bases (Ferris et al., 2000).

The following research proposition relative to political intelligence and the selection of inpatriate managers could provide guidance for future research:

Research Proposition 3. *The higher the demand for informal resources and means to manage internal and external stakeholders in the headquarters and emerging country subsidiary contexts, the higher the relative importance of political intelligence factor in the inpatriate selection process in global organizations growing in emerging country markets.*

4.4. Cultural/social intelligence

A cultural/social IQ, based upon an inpatriate manager's knowledge of a particular country or area, encompasses five categories: (1) material aspects (i.e., technology, economic development, available level of standard-of-living) of a society; (2) social institutions—educational, political, and religious; (3) aesthetic values in a society; (4) the official and unofficial languages of a culture; and (5) the cultural belief or philosophy of local groups of influence. In order to have a high social/cultural IQ, managers need to have insights into the foreign country's culture/social context and how to "translate" or integrate the specific cues of that culture with the general frame in the home country of the headquarters of the organization. The cultural and social discrepancy between two countries increases the stress experienced by managers responsible for the foreign culture market, resulting in difficulties to effectively manage strategy implementation in the foreign culture (Searle & Ward, 1990; Ward & Chang, 1997; Ward & Kennedy, 1993; Ward & Searle, 1991).

To assess cultural/social IQ of an inpatriate manager, the following comparisons between the two cultures must be determined: (1) the degree of cultural variability or stability in each of the national culture; (2) the level of cultural complexity (i.e., high vs. low content) of each culture; (3) cultural hostility—the degree to which conditions in the foreign culture are threatening to the individual (or organization's culture) in terms of norms, goals, values and the like; (4) the level of cultural heterogeneity or level of differences between the two cultures; and (5) cultural interdependence or sensitivity of one culture to changes or differences in the other culture. The level of socio/cultural adaptation an inpatriate manager has to make when relocating to the headquarters country impacts the rate and severity of adjustment for that individual. When two countries are culturally distant it is anticipated that socio/cultural adjustment will be great and there will be a negative impact on the inpatriate manager's performance (Ward & Kennedy, 1999). The more "hostile" the headquarters culture is to the inpatriate, the more the inpatriate

cultural learning and social skills acquisition will be retarded (Ward & Kennedy, 1994; Berno & Ward, 1998). Therefore, the cultural impact on low social/cultural IQ inpatriate managers could directly impact their performance over an extended period of time making them of less value for actions in the emerging country.

Inpatriate managers with high social/cultural IQs are those who understand how the organization functions and the role organizational culture plays in operation of the entity (Kotter & Heskett, 1992). The organizational culture may vary across organizational units, and therefore the internal culture of the foreign subsidiary can prove to be an impediment to those corporate managers who do not have tacit knowledge of how variations in the organizational culture operate. The commonly held overt behaviors that constitute the subsidiary-specific organizational culture are: (1) behavior regularities, the language, customs and traditions of interactions in the organization; (2) group norms; (3) the espoused values; (4) formal philosophy of the organization; (5) the rules (i.e., policies, procedures and processes) by which the organization operates; (6) the climate or atmosphere (i.e., degree of formality among various groups within the organization); (7) embedded skills and core capabilities of the management and employees of the organization; (8) mental models or decision-making heuristics used by the organization as a whole and by individual groups within the organization; and (9) shared meanings, norms and beliefs of the organizational culture (Schein, 1992). Differences between headquarters and subsidiary cultures can be significant particularly when there is a high level of external cultural distance between the two national cultures.

An inpatriate manager who understands the headquarters organizational culture and has insights into the differences and similarities between the headquarters and the subsidiary's internal culture can provide valuable insights to the TMT. As these managers have social knowledge (i.e., one's ability to understand and predict the others' general pattern of behavior) of both organizational units, foresight about the foreign subsidiary management's decision-making frame-of-reference can derived. (Frank, 1988, 1989). These high social IQ inpatriate managers can provide additional value, when the mechanism of social control is designed, by helping to predict the behavior of subsidiary employees and managers in emerging markets (Sohn, 1994; Tolbert, 1988).

Measurement. The Sociocultural Adaptation Scale (SCAC) was developed in the last decade (Searle & Ward, 1990). This scale was developed based on earlier social skills scale (Trower, Bryant, & Argyle, 1978). Most recently the SCAC has been expanded to include cognitive as well as behavioral domains (Ward & Kennedy, 1999).

The following research proposition relative to cultural/social intelligence and the selection of inpatriate managers could provide guidance for future research:

Research Proposition 4. *The higher the demand for social knowledge to assess the differences in cultural variability, complexity, and hostility between the headquarters and emerging country subsidiary operating contexts, the higher the relative importance of culturallsocial intelligence factor in the inpatriate selection process in global organizations growing in emerging country markets.*

4.5. Organizational intelligence

Inpatriate managers' organizational IQ is predicated on their knowledge of how "things" officially are accomplished in the organization. This would include an understanding of the policies, procedures, planning processes, auditing formats and any other types of formalized prescribed activities/events that take place in the organization. Rather than reflecting an understanding of the informal process, discussed under social/cultural IQ, the organizational intelligence is the corollary to that notion by reflecting an understanding of the official formal "rules" of management. The rationale for inclusion of organizational IQ into the composite of IQs for selecting inpatriate managers is that the "fit" and "flexibility" issues between headquarters and subsidiaries and among subsidiaries in global organizations involve a complex web of policies and processes designed to coordinate resources and activities in the various organizational locations (Milliman, VonGlinow, & Nathan, 1991).

Knowledge of how the organization formally operates is of particular relevance when managing the coordination of organizational units in different countries. As the local institutional context and the nation-state play a role in how organizational units operate, the "official" operational dimensions across the organization may be different or in conflict with each other (Lewin, Long, & Carroll, 1999). Each nation-state legitimizes local business systems in terms of the acceptable design of the organization's governance structure, employment requirements/relations, and management practices (Baron, 1996; Djelic, 1998; Guillen, 1994; Kieser, 1994). These variations across countries require coordination among the various operating units of the firm. Organizational IQ means not only having a systemic understanding of the required differences but also knowing how to compensate for differences between operating units while maintaining compliance with the nation-state requirements.

A general system of business values across emerging market countries differs procedurally from the accepted ways of operating in the global organization as a whole (Polos, Carroll, Hannan, & Pell, 1998). To resolve the potential conflict and to address the seeming incompatibility of the two "official" operating systems for the same organizational network is the reason why organizational IQ of inpatriate managers is considered formally to be a critical IQ. The "fit" and "flexibility" issues of maintaining consistency in the global organization and at the same time, accommodating the local "content" requirements of emerging countries is a difficult requirement to place on managers of subsidiaries in these emerging countries (Kostova & Zaheer, 1999; Sparrow, Schuler, & Jackson, 1994).

Measurement. The ability to effectively "get things done" in an inter-organizational context has a proxy measure of a team member's tacit knowledge (Sternberg & Wagner, 1986). Instruments that measure tacit knowledge in managers (Wagner & Sternberg, 1991) and other occupations (Sternberg, Wagner, & Okagaki, 1993) have been developed and tested for validity and reliability.

The following research proposition relative to organizational intelligence and the selection of inpatriate managers could provide guidance for future research:

Research Proposition 5. *The higher the demand for specific knowledge and systemic understanding of compatibility in the headquarters and emerging country subsidiary formal policies, employment relations, and acceptable management practices, the higher the relative importance of organizational intelligence factor in the inpatriate selection process in global organizations growing in emerging country markets.*

4.6. Network intelligence

Very closely akin to organizational IQ is a manager's understanding of how the entire global network of organizations works as a whole. But, with network IQ one is attempting to ascertain the abilities of inpatriate managers for inter-organizational management, as opposed to intra-organizational management skills that were examined in organizational IQ. Global networks are visualized as a set of multiple connected business relationships among collective actors (Anderson, Hakansson, & Johanson, 1994; Emerson, 1981). From a social exchange perspective of business networks, the importance of the informal nature of network relationships among individuals in different firms becomes central as the network activities evolve over time (Granovetter, 1985). The quality of these personal relationships (i.e., the level of mutuality) and the scope of relationships (i.e., number of professional/business ties) in the emerging country can be used as a quasi indicator of an inpatriate's network IQ.

In many ways, the inpatriate social networks can be envisioned as the sets of personal contacts through which an inpatriate maintains his/her social identity and receives social support, aid, services, information, and new social contacts (Freeman & Wellman, 1995). The measure of an inpatriate manager's personal network IQ would center on determining: (1) the size—the number of interpersonal business relationships that could provide network support in the host country; (2) density—the connectedness amongst the people within a given inpatriate network (Albrecht & Adelman, 1987); (3) cliques—the subsets of the larger network in which inpatriates have deeper more intimate interpersonal sub-networks (i.e., relationships that go beyond membership in a broad business relationship network) (Scott, 1991); (4) clusters—arrangement of inpatriates into groups of hierarchical nature based on similarities/dissimilarities in the status of the individuals in the group (Borgatti, 1995); (5) centrality—the positioning of the inpatriate in the network relative to information exchange (i.e., whether the individual's role is central or peripheral to information flows); and (6) link reciprocity—the degree of mutual exchange of resources and favors across the links within the inpatriate network members (Albrecht & Adelman, 1987). The ability of inpatriate managers to effectively use their personal network within the emerging market country, as well as in the headquarters organization, becomes another means for the firm to develop a competitive advantage. This is of particular importance in emerging economies where there is a high impact of personal network relationships on the critical events in the business arena (Garten, 1997a).

Measurement. Network intelligence measure in personal relationships crossing organizations, which includes the number of nodes and ties in personal nets, has been developed (Albrecht & Adelman, 1987). This work has recently been expanded beyond the norms established for members of Western social system (Smith, 1997).

The following research proposition relative to network intelligence and the selection of inpatriate managers could provide guidance for future research:

Research Proposition 6. *The higher the demand to develop/possess both institutional and individual networks of relationships in the headquarters and emerging country markets, the higher the relative importance of network intelligence factor in the inpatriate selection process in global organizations growing in emerging country markets.*

4.7. Innovative intelligence

The ability to think in abstract terms, to develop business ideas and concepts that have not been conceptualized by others, constitutes business innovation. The embodiment of ideas/concepts into new processes, products, services, and technologies is a valuable outcome of innovation. An inpatriate manager's innovative IQ is composed of six components: (1) basic knowledge—innovative creativity is generally directed by one's knowledge of a topic or specific area of expertise; (2) the intellectual ability—to synthesize connections, reframe complex problems and assess the value or potential of creative innovative actions (Sternberg, 1997a–c); (3) inventing thinking/learning style—innovative managers have a preference for thinking in novel ways that they have constructed in idiosyncratic ways (Andersen, 2000); (4) motivation to focus on the task/problem and its solution...ideas in and of themselves have value and are rewarding; (5) risk-taking attitude—creative innovativeness frequently conflicts with present convention and therefore, the individual has to have the willingness to "stand alone"; and (6) dependence on supportive environment—for creative innovation to occur, the environment has to be supportive of challenging to the status quo in order to promote change and accept cognitive diversity (Beir, 1995; Stein, 1991). A higher innovative IQ is difficult to measure up-front, but over time, individuals who exhibit higher than average innovativeness can be recognized in an organization. The problem may be that these individuals are generally prone to challenge the conventional management wisdom and therefore, may be ostracized or leave the formal organization.

The highly innovative IQ inpatriate managers are likely to pay attention to context and details in the emerging market environment. One of the key considerations in assessing the innovative IQ of inpatriates is to examine their ability to recognize patterns and/or to be able categorize people, events, environments into classification schemes of opportunity. Patterns are also useful when attempting to integrate two systems or organizations (i.e., home and host country). By recognizing similar patterns between two entities in different environments, the inpatriate manager is

able to determine what aspects do not need to be relearned or modified (Ray & Myers, 1989). The inpatriate manager's creative use of tacit knowledge reduces the firm learning time relative to the emerging country culture allowing for the organizational effort to be focused on substantive issues. The ability to classify items enables inpatriates to pay selective attention to exceptions or problems in emerging markets that need creative solutions. Innovativeness in inpatriate managers may be one of their primary qualities, which must be activated by their intuitive IQ when attempting to effectively integrate the operations of the domestic and foreign organizational entities.

Measurement. A measure of innovative intelligence has been developed based on the investment theory of creativity (Sternberg & Lubart, 1991, 1995). The following research proposition relative to innovative intelligence and the selection of inpatriate managers could provide guidance for future research of the issues:

Research Proposition 7. *The higher the demand for tacit knowledge exchange between the headquarters and emerging country subsidiaries that is instrumental to develop change initiatives in emerging markets, the relative importance of innovative intelligence factor in the selection process in global organizations growing in emerging country markets.*

4.8. Intuitive intelligence

It might be argued that nowhere in business arena is intuitive IQ more important than in the global environment. Inpatriate managers, who have to address multiple sets of global environmental differences, while attempting to balance the organizational anomalies found between countries, almost need to have this "sixth sense" (da Cunha, da Cunha, & Kamoche, 1999; Khatri & Ng, 2000). The benefits of using intuition of inpatriate managers to manage subsidiaries in emerging markets are: (1) expedited decision-making process; (2) qualitative improvement of decisions aided by tacit, informal knowledge that is not generic to the organization; (3) facilitated personal development by building personal self-efficacy of an inpatriate decision-maker (i.e., having insights and confidence that others do not have in making decisions in complex environments); (4) facilitated decision compatibility with local institutional environment and within the host-country organization (Burke & Miller, 1999). The intuitive IQ of inpatriates provides experiential insights into specific local decision processes or routines. The insights that are provided by the inpatriate's intuition make it difficult for competitors to replicate as the thought processes being used to develop strategies in emerging markets.

The difficulty in assessing an inpatriate manager's intuition is its subconscious origin. Its tacit nature makes it very difficult for the inpatriate manager to justify his/her recommendations (i.e., "I don't know why or how, I just know that it is"). The manager draws upon innumerable local experiences that have been stored for automatic retrieval and thus cannot be well articulated (Agor, 1990; Parikh, 1994). In many ways, intuition suspends the bounds of rationality in unstable and complex

environments like emerging market countries to allow inpatriate decision-makers to know how to frame particularly complex problems and potential solutions (Kleinmuntz, 1990). Inpatriate managers have to trust their judgments and overcome their fear to use intuition, in that, it is not merely an emotional reaction to complexity but rather an evolved means to estimate how to address "unknowns" in the firm decisional framework (Vaughn, 1990). The most important element of using inpatriate intuition is the speed with which decisions can be made implying that intuition is critical for local agility (Harper, 1990; Khatri & Ng, 2000).

There are some behavioral researchers that relate the concepts of creativity and intuition to one another. At least some sort of preconscious activity is involved in creativity by guiding or alerting an inpatriate manager to pursue novel creative prospects (Finke, Ward, & Smith, 1992). This notion would support the contention that creative and intuitive IQs should be assessed in conjunction with each other. An additional element in the composite picture of intuition is that of tacit knowledge. There is research evidence that supports the contention that tacit knowledge of an environment (i.e., of the local emerging market) stimulates the use of intuition and provides the incentive for inpatriate to be an action-oriented decision maker (Andersen, 2000). When inpatriate managers are faced with complex unfamiliar decisions, but yet have tacit knowledge as well as intuition, they can successfully improvise in their decision-making processes.

Managerial improvisation is the conception of action as it unfolds, by drawing on available material, cognitive, affective and social resources (Cunha et al., 1999). Improvisation has a deliberate intentional element as well as an extemporaneous unplanned dimension that is based on "acting on the moment" (Miner, Moorman, & Bassoff, 1996; Weick, 1998). Improvisation is a critical concept relative to inpatriate intuitive IQ in that it provides foresight for decision making in unexpected situations or when the dynamics of the environment does not allow for a preplanned course of action. In these situations, the intuitive IQ activates the inpatriate manager's ability to use improvisation to develop strategies on the "run" (Moorman & Miner, 1998). This ability to reflect and act simultaneously is sometimes referred to as "street smarts" or "gut knowledge" that differentiates excellent from average global managers (Harper, 1988; Mintzberg, 1994; Sujan, 1999). Intuitive IQ becomes the mechanism for inpatriate managers to improvise when the complexity of the environmental change is very high and there is limited past experience for making decisions.

Measurement. The Keegan's Type Indicator Form B (KTI), which has 16 items referring to the function of sensing and intuition, was developed in the 1980s (Keegan, 1982). It has also been suggested that the KTI instrument be used in conjunction with the Myers–Briggs Type Indicator (MBTI), first developed by Myers and Caulley in 1985 (Myers and Caulley, 1985; Andersen, 2000).

The following research proposition relative to intuitive intelligence and the selection of inpatriate managers could provide guidance for future research:

Research Proposition 8. *The higher the demand for exploratory learning to acquire insights into specific local routines in emerging markets and to improvise when*

implementing local strategies, the higher the relative importance of intuitive intelligence factor in the inpatriate selection process in global organizations growing in emerging country markets.

5. Inpatriate manager selection spreadsheet matrix

In an effort to incorporate the multiple IQs into the selection process of inpatriate managers, a decision spreadsheet matrix shown in Fig. 4 has been developed. This matrix is a means to map the eight IQs on to the key issues influencing the selection of inpatriate managers. As there is little empirical research done on the variables influencing inpatriation, the categorical grouping of variables, that could impact the selection of inpatriate managers, is specified at three levels (see Fig. 4): (1) Individual Level—the level of authority in the organization (i.e., supervisory–top management) and type of authority (i.e., line or staff; (2) Organizational Level—the extent of ownership (i.e., wholly owned or affiliated structure like a joint venture or strategic alliance) and the type of control over the subsidiary (i.e., outcome or process controls); and (3) Type of Environment—developed or emerging economy and the cultural distance between the home and host countries. It should be noted at this point, that other inputs thought to be of more and/or additional assistance in the selection of inpatriates, could also be included in the selection spreadsheet matrix. In general, the matrix is to be viewed as a default map of how a selection process could be assembled using the eight IQs discussed in the paper. If management thought that other issues were key to the selection of inpatriates, they could be substituted for the ones in the matrix or additional elements could be added to the ones illustrated in Fig. 4.

Each of the IQs can then be rated by the management or by international human resource managers from 1–5 (i.e., least important–most important) for each of the cells in the matrix. By doing so, a profile of the desired abilities of various types of inpatriate managers could be developed. In addition, the most critical IQs could be identified as being requirements for each of the positions to insure some commonality among inpatriates for particular jobs at the same level in the organization and for similar environments. This approach illustrates the dispersion in the desired abilities of inpatriate managers depending on what level in the organization they are being hired as well as the type of position (i.e., line or staff), and the type of environment they would be responsible for in the headquarters organization. The matrix allows for development of consensus on what are critical IQs, so that there can be a degree of consistency among the selection criteria for inpatriate managers in different categories.

The final step in operationalizing the selection of inpatriate managers on the basis of multiple IQs is to use the information from the inpatriate selection matrix (Fig. 4) as the reference against which is compared each specific inpatriate manager's multiple IQ profile (see Fig. 5). In that way, the desired profile for each type of inpatriate manager can be mapped on to the profiles of the actual candidates who are being assessed on multiple IQs. In this step of the inpatriate evaluation/selection

Managerial IQs	Individual				Organization				Environment			
	Level				Ownership				Type of Environment			
	Supervisory		Top Management		Wholly Owned		Strategic Alliance		Developed		Emerging	
	Staff	Line	Staff	Line	Formal	Social	Formal	Social	Low Culture	High Culture	Low Culture	High Culture
I. Analytical Intelligence												
- Cognitive IQ												
- Emotional IQ												
II. Practical Intelligence												
- Political IQ												
- Social/Cultural IQ												
- Organizational IQ												
- Network IQ												
III. Creative Intelligence												
- Innovative IQ												
- Intuitive IQ												

Fig. 4. Inpatriate selection matrix.

process, the strengths and weaknesses of candidates relative to their multiple IQs can be visually displayed and used to compare individual candidates against a standard as well as to assess differences among the candidates for the same position. The multiple IQ screening can also provide the basis for a management development plan for individual managers and provide input to the development of a succession planning system for inpatriate managers.

6. Summary and conclusions

The irreversible forces of globalization are shaping a new competitive landscape in which the decisive strategic leadership plays an increasingly important role. The global leadership capability evolves from developing a global mindset by the human resource management systems that encourage boundary spanning structures and processes across borders and organizations. Traditionally, the route to global leadership development has been paved by the developmental expatriation of selected high-potential managers to control international operations. Today, as "global thinking is what's important today, not international operations" (Kantor, 1994, p. 232), a complementary practice of inpatriation of local and third-country managers into the home country operations has been gaining prominence in global HRM systems.

Inpatriation is envisioned as a corporate boundary spanning process designed to enhance the multicultural cosmopolitanism in the management culture of multinational corporations (MNCs). The cosmopolitan component of global mindset is a necessary condition for the development of dynamic organizational capabilities to

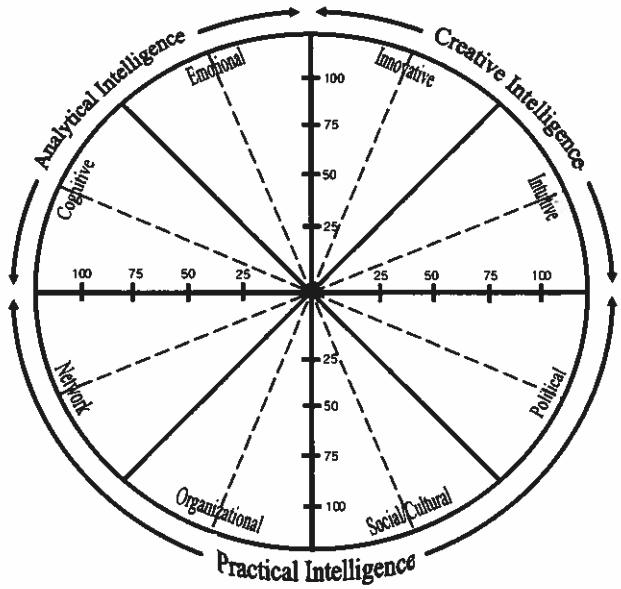

Fig. 5. Inpatriate manager multiple IQ profile.

resolve cognitively complex problems of growing in emerging markets. The development of dynamic capabilities in a MNC necessitates selection of those inpatriates who possess a unique and valuable portfolio of abilities (i.e., "multiple IQs") to facilitate the access to and integration of local tacit knowledge from complex global environments like emerging markets.

In this paper, we propose a theory-grounded selection process for inpatriates based on their multiple IQs. In addition, a practical matrix to map the inpatriate IQs onto the relevant dimensions of a global organization is developed. This study illustrates how the selection practice in the global HRM systems should be adapted to respond to the demands for global mindset development. The proposed inpatriate selection process is designed to increase the learning capacity of a global organization necessary for its renewal through effective exploration and exploitation of neglected opportunities in emerging markets.

Future research should focus on empirical and practical testing of the model proposed in this study. In particular, it would be interesting to elicit cognitive maps of managers in high-performing global organizations to identify how the corporate strategic vision of global growth imposes firm-specific demands for the selection process based on the candidates' multiple IQs. These maps may reveal how a global organization can effectively use inpatriation to meet the needs of the neglected strategic imperative for global growth—worldwide learning. The inpatriation-focused worldwide learning, developed from the firm-specific selection process, contributes to the improved organization's dynamic efficiency for global knowledge acquisition and sharing based on "what we do not know", rather than on "what we know" (Harvey & Novicevic, 1999, 2000; Santos, 2000).

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EXHIBIT
Y

A pocketful of management thinking

What Political Animal Are You?

5 April, 2011

Tomorrow and Thursday are days out for us

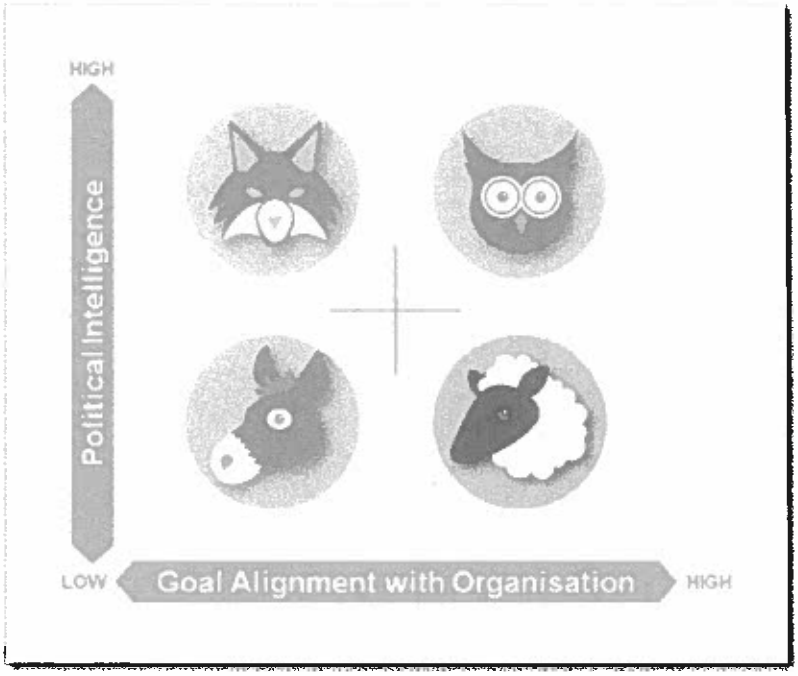
Well, actually, we're working. We are at the Chartered Institute for Personnel and Development annual HR Development Exhibition at Olympia, London.

If you are there too, come and see us on **stand 571**, and maybe pop to the Learning Arena at 10am on Wednesday and hear 'How to understand resistance and handle it effectively' (http://managementpocketbooks.wordpress.com/2011/03/29/handling-sales-objections/), based on the Handling Resistance Pocketbook (http://www.pocketbook.co.uk/display.asp?K=9781906610234&st_01=resistance&x=4&y=14&sf_01=keyword&sf_02=series&st_02=teachers&sp1=and%2Bnot&m=1&dc=5).

So let's have some fun

The Workplace Politics Pocketbook has a lovely model, allowing you to chart yourself against Political Intelligence and Organisational Goal Alignment. It is most useful for helping you to spot and work with others, but it lends itself to a quick and easy diagnostic for yourself.

OPP-0166



(http://managementpocketbooks.files.wordpress.com/2011/03/image1.png)

Have some fun and answer the questions, recognising that most of us will be a combination of all four types, behaving differently in different circumstances.

Quick Questionnaire

For each of the six groups, select the one that describes you best.

- A: Clever
- B: Observant
- C: Determined
- D: Trusting

.

- A: Adaptable
- B: Swift
- C: Sure-footed
- D: Loyal

.

- A: Vicious
- B: Ruthless when necessary
- C: Bad Tempered at times
- D: Gentle

.

- A: Cunning
- B: Wise
- C: Hard-working

OPP-0167

- D: Innocent

.

- A: Resourceful
- B: Silent
- C: Noisy
- D: Naive

.

- A: Sly
- B: Aloof
- C: Put-upon
- D: A follower

Time to count your scores…

Mostly As: You old Fox, you!

Foxes are politically intelligent and use their cleverness for personal gain – they are often known for playing games.
Grrrr

Mostly Bs: What a wise Owl you are

Owls understand the politics and use their wisdom to work for the benefit of the organisation.
Tuwooo

Mostly Cs: You've grown up to be a Mule

Mules are determined to get what they want, and will ignore the established politics of the organisation.
Hehawww

Mostly Ds: You're a trusting Sheep

Sheep are suspicious of politics and only want everything to work out well for all concerned.
Baaa

This may be a bit of fun, but it has a serious side

Workplace politics trips many of us up, so understanding how to read the signals and play the game is important, and David Bancroft-Turner's Workplace Politics Pocketbook (http://www.pocketbook.co.uk/display.asp?K=9781903776902&st_01=politics&x=0&y=0&sf_01=keyword&sf_02=series&st_02=teachers&sp1=and%2Bnot&m=1&dc=2) is an excellent guide for the novice, with some great tips and hints for seasoned politicians too.

OPP-0168

Workplace Politics Pocketbook (http://www.pocketbook.co.uk

/display.asp?K=9781903776902&st_01=politics&x=0&y=0&sf_01=keyword&sf_02=series&st_02=teachers&sp1=and%2Bnot&m=1&dc=2)

It is filled with skills to develop and a proper analysis of our four feathery/furry/hairy/woolly friends. Apologies to David for simplifying his ideas for fun!

This – and all of the Management Pocketbooks Titles are available at special show prices during the CIPD HRD Exhibition. You can get £1 off any book and if you buy five, you can get a sixth one free – that's six pocketbooks for £34.95.

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