To my wife, Ariel, and my children, Noah, Nell, and Naia, the inspiration for everything that I do.
—Brian J. Flores

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The Association for Talent Development is celebrating its 80th anniversary in 2023, the year that ATD Press is releasing our newest handbook—one on organization development. It is fitting that as the association marks another milestone in its own evolution, we are publishing a book about tools and resources needed for an evolution talent development professionals may make in their own careers—supporting and contributing to organization development (OD).

When the association was formed in 1943, it was called the American Society of Training Directors, and its purpose was to educate practitioners in the emerging field called workplace training. At the time, the association acknowledged that particular skills and knowledge were needed to help adults learn at work and develop capabilities to drive a company’s performance and growth.

Fast forward several decades. As the training and development field evolved, so did the society, eventually becoming the American Society for Training & Development (ASTD). However, that moniker became constraining as the society’s membership grew beyond US borders and the work being done by members grew beyond training programs.

In 2014, ASTD rebranded to the Association for Talent Development (ATD). The purpose of the new name and mission of the organization was to encapsulate—and support—the growing breadth of work in the field and the many countries and cultures in which members of our global community empower growth and unleash human potential.

Another evolution was the development of our Talent Development Capability Model in 2019. When the research for that model was conducted, it became quite clear that there was an important role for TD professionals to play in creating organizational impact. The research showed that there were three domains of capabilities: personal, professional, and organizational capabilities.
Within the Impacting Organizational Capability domain is a specific capability of *organization development and culture*. It is compelling that our global research identified this set of knowledge and skills as important for TD professionals who are interested in contributing to their organizations at a higher and more robust level. For any OD effort to succeed, learning must happen.

In the past three years, we’ve witnessed the value of talent development increase substantially. It was learning professionals who helped companies worldwide navigate the early days of the pandemic as nearly everyone had to adapt to new ways of working, new tools to work with, and new demands to balance. The longed-for “seat at the table” has been mostly achieved; learning and developing talent are now viewed as vital contributors to an organization’s success. It is incumbent on practitioners to continue to add value in strategic ways.

Increasingly, we hear that organizations are asking their TD professionals to contribute to OD initiatives. The reasons for these requests are as varied as the organizations making them. Challenging economic times, as well as times marked with disruption and change, often result in organizations looking for ways to maximize the contributions and engagement of employees, streamline processes, improve efficiencies and effectiveness, and attract and retain talent. This is the place where talent development and organization development should meet and collaborate. However, there’s often been a siloed approach between TD and OD initiatives, to the detriment of organizational impact.

That’s why it is time for this handbook.

Our field is being asked to transform organizations in new and exciting ways. OD is one of them. But—until now—there has never been a resource for TD professionals that connects the dots between the talent development and organization development disciplines with such a broad lens. I am excited to see how this resource serves our field—and organizations worldwide.

It’s time for talent development and organization development to work together to create businesses—and a world—that works better.

Steve Jobs once said, “Great things in business are never done by one person. They’re done by a team of people.” I would echo that and expand it: Great things in business are never done by one department in a silo. They’re done by cross-functional teams focused on harnessing that most precious resource: human potential.
Introduction

BRIAN J. FLORES

The State of Learning and Development's Role in the Organization

Learning and development professionals are naturally curious. Curious about how individuals learn new knowledge and skills. Curious about how they can best design training courses and programs to help individuals get better at their jobs. Curious about how their initiatives affect organizational results.

It's only natural that L&D professionals would be curious about the field of organization development and how the practice can help elevate L&D effectiveness as well as drive overall performance as they work to simultaneously develop the individual and create lasting impact among organizations.

L&D professionals understand that to be most effective they must extend their work beyond designing and developing one-off training workshops or e-learning courses. They are getting more involved in establishing and nurturing an organizational culture that embraces learning—not just as a requirement, a perk, or a punishment—as a necessary element embedded within the organization. To do so, they're crafting L&D strategies that align with the business and, when necessary, influence overall organizational goal setting.

L&D professionals know learning doesn't happen in a vacuum. Rather, it's influenced by what happens back on the job. And so, they have started to ensure that learning transfers. This requires getting a better understanding of what happens outside the classroom, with organizational design and employee dynamics, and focusing on the need to create a learning ecosystem and further partner with neighboring departments.

L&D professionals realize they can play a vital role in building organizational agility. When they understand what technical and workplace transformations the organization may have to undergo to keep pace with the competition, the L&D team can ensure that members of the organization—including themselves—are ready to adapt, reskill, and assume
new roles. L&D professionals can enable their organizations to respond well to disruptions through managing change, leading skilling initiatives, and encouraging employees to adopt a growth mindset.

L&D professionals grasp that when talent development programs aren’t accessible and inclusive to all employees, it undermines more than the L&D function—it suppresses overall employee satisfaction and engagement. As a result, they’re learning more about their organization’s DEI policies and how workplaces are set up to enable all to participate and feel welcome. They are working to position training and talent development as a driver of DEI in the workplace through mentoring, coaching, employee resource groups, and more.

All of this is evidence that L&D is changing, and L&D professionals have to change with it. To keep up, they need new knowledge and new skills—and new resources to help them grow.

Why You Need This Book

ATD’s Organization Development Handbook is a tactical, hands-on book for those in L&D looking to make that first step into organization development or those who are a one-person band doing both. This book aims to meet L&D professionals where they are in their journey today. Although there are many books and textbooks about organization development—the effort to improve an organization’s capability through the alignment of strategy, structure, people, rewards, metrics, and management processes—this volume is the first of its kind to address OD from the talent development and, specifically, L&D perspective.

More than ever, L&D professionals are taking on organization development work to propel organizational effectiveness and performance. Sometimes this happens out of choice when seeking a new career challenge, and other times out of necessity when the organization adds OD to their responsibilities. In either case, L&D professionals need new knowledge and skills—as well as insight into how to use their analysis, design, development, implementation, and evaluation abilities—to become successful in creating OD solutions.

L&D professionals will also benefit from a book on organization development if they’re:

- **Seeking a career pivot.** You already know that you want to contribute to your organization in a different but similar way. You may feel bored and unchallenged in your current role. This book will give you some ideas on how to expand your skill set and seek new endeavors. See if any of the OD initiatives in the table of contents resonate with you.
• **Seeking career advancement.** If you’re looking to grow from an individual contributor to a leader, especially ascending to the director level and above, one path could be moving from specialist to generalist and taking on organization-wide development implementations. Exposure and experience with these often-times high-visibility initiatives can add a new dimension to your L&D efforts.

• **Seeking career security.** Whether it’s imminent layoffs during a recession or your company’s underperformance for the year, seeking to grow your skill set and contribute in new ways to your organization could demonstrate validity in retaining your role. When training budgets get cut, experience in change management or employee engagement may be integral to showcase your ability to continue to provide value.

• **Seeking intrinsic value and purpose.** It can be a great gift to do work you really care about, and some of the categories of OD initiatives may be aligned with your own values. Projects related to diversity, equity, inclusion, and belonging or well-being can provide opportunities for those interested in contributing in ways that personally resonate.

No matter your reason for picking up this book, L&D professionals can benefit from the expert knowledge, key takeaways, practical resources, and lessons learned from actual case studies, to supplement much of the learning that will take place on the job.

**Defining Learning and Development and Organization Development**

Before going further, we need to answer the question that you’re likely asking: How are we defining L&D and OD?

ATD defines *learning and development* as a function within an organization that is responsible for empowering employees’ growth and developing their knowledge, skills, and capabilities to drive better business performance. The function may be organized centrally (either independently or sitting under human resources), decentralized throughout different business units, or it could be a hybrid structure (sometimes referred to as a federated structure).

Examples include:

• Soft or power skills training, like delivering effective feedback or having difficult conversations
• Discipline-based training, like how to close a sale or overcome objections
• Systems or software training, like how to use video conferencing software or an HRIS

ATD defines organization development as the process of developing an organization so that it’s more effective in achieving its business goals. OD is a science-backed, interdisciplinary field rooted in psychology, culture, innovation, social sciences, adult education, human resource management, change management, organization behavior, and research analysis and design, among others. OD uses planned initiatives to develop the systems, structures, and processes in the organization to improve effectiveness.

As a discipline, OD takes a much broader view of the organization’s ability to perform better by looking at several parts, including people growth and development. The core outcome of OD is improvement, which is brought about through change, and change is facilitated through thoughtful learning experiences.

OD initiatives are typically categorized as:

• **Human process initiatives** that include team building, interpersonal and group process approaches, and coaching
• **Techno-structural initiatives** that include restructuring organizations (such as mergers and acquisitions, flexible work design, downsizing, business process engineering, total quality management, quality of work life, Six Sigma, and Agile)
• **Human resource management initiatives** that include employee engagement, employee experience, performance management, employee development, succession planning, coaching and mentoring, career development, and diversity awareness
• **Strategic initiatives** that include organization transformation, culture change, leadership development, and attraction and retention initiatives

While L&D and OD may initially appear quite different, the lines are continuing to blur. Each discipline is continually working toward the same goal as practitioners strive to develop their organization’s capability, from the individual to the greater collective.

Here are some examples of where I’ve seen the overlap and intersection of L&D and OD:

• **Reskilling and upskilling.** How organizations choose to tackle skilling their workforces is a clear intersection of the two disciplines. In the digital marketing space, agencies are facing the reality that more and more clients are taking their budgets and focusing on in-house solutions. In my own past experience, my
company needed to pivot some of our retention efforts to consultation versus activation and that required reskilling a workforce rooted in practical execution to one that was able to speak to theory and strategy. My L&D efforts in this situation were tightly aligned to OD in that I had to understand the updated vision of the department, aid in identifying skills associated with new roles, and craft a learning plan that included changes in philosophy and strategy. This included training team members in consultative skills, as well as product training at scale to ensure everyone from associate to executive was able to identify gaps in a client’s portfolio.

- **Change management.** Increasingly, L&D teams are pulled into organizational change initiatives both directly and as consultants. They have to tap into L&D principles and philosophies, like adult learning theory, and apply them in managing change. In particular, connecting the relevance of the change to the individual is critical. It’s the “so what?” that helps to drive the change in the organization, and L&D teams know how to convey this in a way that is organic to employees and learners.

- **Professional development.** I can personally attest to the opportunity for a seamless transition from L&D to OD. Over my career, I’ve gone from corporate trainer and manager of L&D to talent and OD consultant and, most recently, to senior manager of OD. There are many transferable skills and tangential knowledge, which make it a much smaller leap than you may think. And because of the broad scope that OD encompasses, you’ll have plenty of new avenues and disciplines to explore. One of the goals of this book is to show you how you can transfer these skills and knowledge.

**What’s in This Book**

ATD and I have collected a superb group of in-house experts and consultants from the OD field itself as well as those who crossed over from L&D to OD. Thanks to their rich contributions and varied experiences, the book goes beyond the theoretical information on how to use OD strategies and structures. You’ll explore the actual foundational stepping stones of OD and how to apply those to multiculturalism, upskilling and reskilling, soft skill development, team development, succession planning, and other OD programs. In
addition, the book lays out how OD and L&D differ, the business knowledge you deeply need to be an outstanding OD practitioner, how to measure and evaluate each program, the tools needed to do so, and how to learn through failure.

We’ve organized the book into four broad parts:

- **Part 1. The Foundations of Organization Development**—how to put OD principles into action and develop organizational values that elevate the importance of diversity, equity, inclusion, and belonging and employee well-being.

- **Part 2. Organizational Design**—how to design an organization that meets the business objectives, introduce new processes and methods of working, engage the workforce, and manage change.

- **Part 3. Workforce Design**—how to build a global pipeline of talent, support work in a remote environment, and find skills solutions to workforce challenges.

- **Part 4. Leadership Preparedness**—how to develop leaders and teams and the importance of comprehensive and integrated succession planning efforts.

I hope you’ll enjoy learning about OD from this book as much as I have enjoyed working on this project with my esteemed colleagues. I can tell you that for whatever reason you’ve chosen to pick up this handbook, and whatever made you curious about organization development, you’re sure to find enough knowledge in here to get started.
PART 1

The Foundations of Organization Development
CHAPTER 1

Foundations of Organization Development
ED HASAN

IN THIS CHAPTER
♦ Describe the placement of OD on the organization chart
♦ Address how OD practitioners work with interpersonal interactions to help achieve change results
♦ Summarize how the responsibilities of the OD function are identified
♦ Review the advantages and disadvantages of OD consultants working externally or internally

Introduction
Imagine that you have been experiencing nonstop headaches for several weeks. You decide to visit the doctor with the hopes of finding out the cause and, hopefully, a cure. The doctor spends 10 minutes asking generic questions about your health and stress levels but does not draw blood or run any tests. The doctor seems hurried and doesn’t spend time building a relationship with you or getting to know your overall history.

Your answers indicate some work- and family-related stress in your life. The doctor says you look healthy and that stress could affect you without realizing it. The doctor has seen several recent patients who have also been having stress-induced headaches due to the state of
the economy and other world events. Therefore, the doctor recommends you monitor your stress levels and take acetaminophen when the headaches occur.

Let’s reflect on this scenario:

- Did the doctor attempt to treat your symptoms (the headache) or the root cause (what is causing the headache)?
- Is prescribing acetaminophen alleviating the symptom but covering up a more serious condition?
- Should the doctor have run more tests?
- Is it okay to assume that just because stress has affected some patients it must be affecting you?
- Was the doctor biased based on previous patients?

Do you agree that the doctor focused on the symptom but not the root cause? The doctor’s solution (acetaminophen) could be covering up something more serious that’s actually causing the headaches. In addition, the diagnosis may have been biased due to the assumptions made based on previous patients. Let’s hope this scenario never happens when visiting your doctor, but misdiagnosis is consequential and could worsen an illness, have a long-term impact on quality of life, or result in death.

Unfortunately, when it comes to organizations, focusing on the symptoms of an issue rather than the root cause is prevalent, which can be understandable. The OD process is systematic and exploratory in nature, and discovering the root cause of an organization’s issue requires time and patience. The root cause could be a deeply embedded, systemic cultural issue that is not easily seen, or it could be an ineffective CEO or leadership team, poorly defined goals, or lack of infrastructure and tools. Conversely, symptoms of an organization’s issue—high employee turnover, low morale, burnout, absenteeism, or lack of employee engagement, for example—are often evident and easy to point out. Up and down the organizational chart, in an earnest attempt at solving problems, people will jump at what appears to be the easiest, fastest, and cheapest solution to a problem. However, without proper research and understanding of the issue, this may result in little to no changes or could even compound the issue. In fact, misdiagnosis is not only costly in terms of time wasted, but it could also affect employee morale, lead to employee turnover, or even result in closure. However, with stronger knowledge and skills in organization development, those tasked with addressing the most critical
organizational problems, such as L&D professionals, can better set up their organizations for success. Therefore, it is imperative to understand what organization development is and how OD experts support organizations.

**What Is Organization Development?**

You will find many definitions for organization development. The Association for Talent Development defines OD as “an effort that focuses on improving an organization’s capability through the alignment of strategy, structure, people, rewards, metrics, and management processes” and “involves an ongoing, systematic, long-range process of driving organizational effectiveness, solving problems, and improving organizational performance.”

We can then extrapolate from this definition and state that OD could include the process of identifying the root cause of an issue and correcting it through a series of initiatives (Aaronson and Hasan 2018). Another way to view OD is through the effort of conducting a gap analysis—that is evaluating the gap between an organization’s current state (such as low revenue or poor performance) and desired state (such as, high revenue or positive performance) and implementing an initiative to address the root cause (Clark and Estes 2008; Aaronson and Hasan 2018).

Similar to the patient analogy that was used in the chapter opening, organizations often try to implement an initiative to correct an issue’s symptoms rather than assess the root cause. For example:

- Increasing pay as a way to combat high turnover
- Adding team activities and throwing company parties to boost employee morale
- Hiring more diverse individuals as quickly as possible in response to diversity and inclusion challenges, but failing to launch any inclusion initiatives

While these efforts might alleviate the symptom temporarily, they’re often not enough and the symptom will reemerge. Unfortunately, this also leads to frustration from organizational leaders who don’t understand why the efforts failed to deliver. As an L&D professional tasked with doing OD work or who may want to become an OD professional, it is essential to clearly define and understand OD so that you can implement initiatives that lead to successful change.
Contributing Disciplines of Organization Development

The fascinating part about the OD discipline is that it is an amalgamation of several other disciplines:

- Psychology, which is the study of human behavior
- Sociology, which is the study of society, relationships, and interactions
- Anthropology, which is the study of human beings vis-à-vis culture, social interactions, and environment
- Organizational behavior, which is the study of how people interact in organizations

Phases of the Organization Development Process

The OD process has five phases: entry, diagnosis, feedback, solution, and evaluation (Figure 1-1). However, before we review each stage, here are four things to remember:

- **Never skip or speed through a phase.** It does not matter if someone is rushing you to get the job done, if you think you have a handle on the problem and it's safe to skip steps, or if you become impatient and just want to move on. It is imperative to honor each phase to its fullest. Quite simply, you don't know what you don't know, which can be detrimental to the process.
• **Whether you are an internal or external consultant, you still need to observe all phases of the OD process** (Anderson 2019). For example, Phase 1: Entry may seem superfluous for internal consultants; however, it is a critical step to ensure that all stakeholders are on the same page.

• **Never stop at Phase 4: Solution.** Implementing various initiatives to correct a problem and simply walking away is not enough. They need to be evaluated constantly for efficacy.

• **Leading the OD process can be a time consuming and emotionally draining experience.** If you aren’t careful, the pressure of the OD process could lead to frustration, stress, and burnout. You may constantly be pressured to speed up the process, quickly implement initiatives, or demonstrate immediate results. Moreover, you are invoking change that will affect people’s jobs in some way, shape, or form. Even if the changes are for the betterment of the organization, people are not always receptive and may push back. Therefore, remember to pace yourself, stick to your game plan, remember the bigger picture, and don’t take things personally.

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**Figure 1-1. Organization Development Strategy: Five Phases to Designing and Implementing**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ENTRY</strong></td>
<td>Exploring the problem, opportunities, or situation. Output is an engagement contract or project plan with expectations and agreement on scope.</td>
</tr>
<tr>
<td><strong>DIAGNOSIS</strong></td>
<td>The fact-finding phase. A data collection process where information is gathered, analyzed, and reviewed.</td>
</tr>
<tr>
<td><strong>FEEDBACK</strong></td>
<td>Exploring information for understanding, clarity, and accuracy. Output is an action plan that outlines the change solutions to be developed and defines success indicators based on the information and data analysis.</td>
</tr>
<tr>
<td><strong>SOLUTION</strong></td>
<td>Correcting the problem, closing gaps, improving, or enhancing performance, or seizing opportunities. Output is a plan or suggested training course curriculum.</td>
</tr>
<tr>
<td><strong>EVALUATION</strong></td>
<td>Collecting data to determine if the initiative is meeting goals and achieving defined success indicators. Output is an evaluation report with recommendations for continuous improvement.</td>
</tr>
</tbody>
</table>
Phase 1: Entry

The entry phase is critical because it lays the foundation for the subsequent phases and is when you learn about your client’s needs and culture. Moreover, this is an opportunity for you to clearly understand and define the company’s problem (or assumed problem).

A good trick is to try your best to define the problem in one or two clear sentences. For example, “The company is experiencing high employee turnover, which is affecting our ability to fulfill customer requests.” If the problem statement is unclear, lengthy, or amorphous, you will run into issues in the later phases. It is also imperative for the client to review and agree with the problem statement, which leads us to a key component of the entry phase: documentation.

Create a document that clearly articulates the problem statement, the client’s expectations and needs, your responsibilities, the client’s responsibilities, a data gathering strategy, deliverables and deadlines, a project timeline, and other items. You should view this document as a contract that ensures a mutual understanding between you and the client of the project’s goals. You and the client should also sign the document as evidence that it was reviewed and approved (Anderson 2019).

Phase 2: Diagnosis

The diagnosis phase is a fact-finding mission. At this phase, you decide on the data collection strategy and then collect and analyze data. The aim is to collect data to help assess the root causes of your problem statement from phase 1. Therefore, ensure that the data collection strategy is aligned with the problem statement.

During the diagnosis phase, you must be unbiased, disinterested, and unequivocally objective (don’t forget the doctor scenario earlier in this chapter). We will discuss this phase in more detail in the data gathering section.

Phase 3: Feedback

The feedback phase is essentially a touchpoint. This is when you provide a status update for the project, including accomplishments and challenges and, most important, the results from phase 2. Phase 3 is also an inflection point because the client becomes accountable for the data you’ve provided. Moreover, the client should use the data you provide and partner with you to create solutions that mitigate or eliminate the root cause of the problem, as
well as create key performance indicators (KPIs) that assess whether those solutions are on the right track to success.

**Phase 4: Solution**

People often want to jump straight to the solution phase because it involves taking immediate action to correct a problem. However, if they do, their solution often fails because the other phases were not observed. At this stage, you implement targeted initiatives designed to mitigate or eliminate the problem’s root causes, close gaps, or eliminate barriers to success.

**Phase 5: Evaluation**

The evaluation phase is the final step. At this phase, you assess whether the initiative implemented in phase 4 was successful or is heading in the right direction by reviewing the KPIs. It is important to note that this phase is constant and not an action that occurs at a single point in time. Instead, you should evaluate the efficacy of the initiatives using different metrics or milestones at multiple points in time.

**Data Gathering**

Let’s focus on Phase 2: Diagnosis, which is when data gathering occurs. Data gathering is key to making decisions based on empirical data, called *data driven decision making* (DDDM; Stobierski 2019). DDDM is an objective process that allows you to make decisions based on facts rather than conjecture or anecdotal evidence.

Think back to the doctor scenario provided in the introduction of this chapter. Did the doctor determine the cause of your headache using DDDM or conjecture? Moreover, did the doctor collect enough data before determining the issue? Had the doctor leveraged DDDM correctly, five initial steps would have been followed:

1. Collect initial information from the client and obtain a clear problem statement.
2. Collect data from the client through a series of tests.
3. Evaluate and interpret the data.
4. Provide a determination of the root causes based on the data collected.
5. Provide feedback and offer remedies based on the data.
For OD practitioners, the “series of tests” are the tools used to collect data, such as interviews, focus groups, surveys, questionnaires, and observations (Table 1-1). You can use one tool or a combination of several; each tool has its advantages and disadvantages. No matter which tool you select, it is critical to align your questions with the problem statement you formalized in phase 1.

<table>
<thead>
<tr>
<th>Table 1-1. Data Collection Tools</th>
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<tbody>
<tr>
<td><strong>Approach</strong></td>
</tr>
<tr>
<td>Interview</td>
</tr>
<tr>
<td>Focus groups</td>
</tr>
<tr>
<td>Surveys and questionnaires</td>
</tr>
<tr>
<td>Observations</td>
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</tbody>
</table>

Adapted from Anderson (2019) and Michigan.Gov (n.d.).
Solutions

The solution phase is when specific actions are taken to mitigate or eliminate an organization’s root problem. Possible solutions include 360-degree feedback, assessments, coaching, confrontation meetings, education, job aids, job redesign, mentoring, reorganization, role analysis, team building, and training (Anderson 2019; Clark and Estes 2008; Hasan and Adeleye 2021).

There are four things to remember about the solution phase:

• Jumping straight to the solution phase could do more harm than good, as you may be operating under faulty assumptions or unsubstantiated data.

• Don’t fixate on a single solution—a one-size-fits-all approach is ineffective (Aaronson and Hasan 2018). Instead, view each initiative as a different tool in your toolbox. Just because a solution effectively fixed one issue does not mean it can effectively resolve all problems. Therefore, it’s important to remember that you may be biased toward a particular solution, approach, or tool. Finally, while training is critical, it is not a universal tool for solving all issues.

• As an OD consultant or advisor, you should not be expected to implement initiatives independently; instead, this is a joint effort between you, the company, and the employees (Anderson 2019). As such, key stakeholders must buy into the proposed initiatives and be accountable for implementation. If you are working independently without the appropriate support, you must speak up because failure is imminent.

• Implementing initiatives will invoke change, which people won’t always like and may resist. Resistance to change occurs for several reasons, including fear of the unknown, a feeling of loss of control, comfort with the status quo, lack of understanding of why change is needed, and change fatigue (Anderson 2019).

Solutions generally occur at three levels:

• Individual initiatives target one person and support their individual growth and development.

• Team initiatives target a department or group of people and support their growth and development.

• Organization initiatives target the entire organization to support its growth and development (Anderson 2019).
However, rather than viewing them in terms of levels, ATD compartmentalizes OD initiatives into four categories: human process, techno-structural, human resource management, and strategic (Figure 1-2).

Real-World Case Study

To demonstrate the importance of going through all five phases of the organization development process, I want to share a case study of a company where an OD initiative produced short-term improvements but failed to deliver lasting results.

Background

Company XYZ, a California-based tech company, has around 80 employees. The organization’s makeup is primarily homogeneous with little representation from different races.
and cultures. Moreover, the company has a high turnover rate, specifically with underrepresented minorities, which is particularly alarming.

When the new HR director was hired 18 months ago, she was perplexed as to why the organization lacked the diversity that represented the makeup of the local community. After several weeks on the job, the HR director met with the CEO to request an initiative for the company to become more diverse. The CEO, who had a reputation for being too profit-focused, initially pushed back on the notion of the organization not being diverse enough. Moreover, the CEO feared that the diversity initiative would take away focus from the company’s other business needs. However, the CEO hesitantly agreed to the initiative due to fear of discouraging the HR director and to avoid the optics of not supporting diversity in the workplace.

**Solution**
Based on experience, the HR director knew that the organization needed to adjust its approach to recruitment if it hoped to hire more diverse employees. Accordingly, she made the following adjustments:

- Updated the company’s careers page to give off a more diverse feel
- Added language in the job postings about the importance of diversity
- Posted positions on job boards that were known for their diverse job applicants

**Short-Term Result**
The initiative to become a more diverse company by adjusting its recruitment strategy was successful. In fact, within five months of implementation, the company hired more diverse candidates than ever. Much to the satisfaction of the HR director, the company was finally becoming more diverse.

**Long-Term Result**
Unfortunately, within 12 months of implementing the initiative, the strategy seemed to falter. While the company successfully recruited candidates from various racial and ethnic backgrounds, the turnover rate of those employees was still abnormally high. In other words, the company could hire diverse candidates but not retain them over the long run.
CHAPTER 1

Evaluation
The HR director was dismayed and confused about why the company could not retain employees from different cultures. After weeks of reflection, the HR director decided to reach out to a colleague who was an OD specialist. During their conversation, they addressed several questions. Here is how it went:

**OD Expert:** What was the core issue you were trying to solve?

**HR Director:** The company had trouble hiring and retaining diverse employees.

**OD Expert:** Did you collect any data on why the company was having issues?

**HR Director:** No, not really. I used my past experiences and consulted with some hiring managers. I mean, it was pretty apparent that we were terrible at recruitment.

**OD Expert:** OK, based on your opinion, what was the root cause of the issue?

**HR Director:** We did a poor job at recruiting diverse individuals.

**OD Expert:** That could answer the recruitment portion of your issue, but what is causing the turnover? In any case, what did you do to fix the recruitment problem?

**HR Director:** I updated the company’s careers page to reflect diversity, added language to job postings about the importance of diversity, and posted positions on diverse job boards.

**OD Expert:** So, you fixed the recruitment issue but not the retention issue.

**HR Director:** What do you mean?
OD Expert: Your initiative focused on the issue of recruitment and not retention. So, you were successful in hiring but could not retain them for some reason. The question is, why can’t you retain them?

HR Director: That is a good point.

OD Expert: Tell me about the company’s culture. Is it inclusive, and does it make everyone feel welcome?

HR Director: Absolutely, we have one of the most inclusive cultures I have ever seen.

OD Expert: OK, great, so these individuals who resigned, what did their exit interviews reveal to you?

HR Director: Our exit interviews are pretty generic. It is more of a checklist of items needed before the employee leaves and answers questions the employee may have.

OD Expert: So, there are no questions about their overall experience? For example, how their managers treat them, their view on the company’s culture, and if they believe the company is inclusive or welcoming of their diverse backgrounds.

HR Director: Sighs. No.

OD Expert: OK, tell me about your current employees. Did you interview any of them and ask for their opinion about the company’s culture? Do you conduct stay interviews?

HR Director: I mean, I talk to employees pretty consistently, but it is nothing formal. No, we don’t do stay interviews.
**OD Expert:** So how do you know the issue isn’t the culture or management?

**HR Director:** I just don’t think the culture is the issue. Based on my experience with the CEO, management could be the issue, but I am not sure. There were some rumblings of unfair treatment toward certain employees, but no one ever complained directly to me.

**Commentary**

There is a parallel between the case study and the story shared at the beginning of the chapter. The doctor did not go through the appropriate steps to assess the root cause of the patient’s ailment. Similarly, the HR director did not go through the proper steps to evaluate the root cause of the company’s inability to recruit and retain diverse individuals. In both cases, the parties implemented an initiative based on assumptions; however, neither party validated their beliefs through data collection methods. In the end, DDDM was not used to determine the root cause and appropriate solutions. Therefore, both scenarios serve as a reminder that fixing the symptoms may only offer short-term results; however, fixing the root cause increases the probability of long-term success.

**Summary**

As this chapter noted, organization development is a multifaceted domain that comprises five phases—entry, diagnosis, feedback, solution, and evaluation—with a feedback loop. Each stage is critical to the OD process. Although rewarding, leading an OD process is a high-stakes endeavor that invariably involves people and change, which can be time-consuming and emotionally draining.

**Key Takeaways**

Here are a few things to remind yourself of throughout your OD journey:

- **Focus on discovering the root cause of the organization’s issue and not getting distracted by the symptoms.** Keep in mind that it is often more convenient to focus on the symptoms because they are often easy to point out, while the root cause of those symptoms isn't obvious and requires patience to bring to light.
• **Avoid skipping any of the five phases of the OD process.** You may get impatient with a particular phase or pressured by the client to rush the process. Moreover, people often jump to the solutions (phase 4) or fail to evaluate the efficacy of initiatives (phase 5). However, observing all five phases of the OD process is essential.

• **Leverage data-driven decision making.** It is essential to make decisions that are based on actual data rather than conjecture or opinions that may be biased. Otherwise, you may make consequential decisions based on inaccurate information.

• **Remember that there isn’t a one-size-fits-all initiative that will fix an organization’s issue.** Therefore, be careful not to bias yourself toward a particular initiative, and remember that there is a toolbox of initiatives you could implement to correct a problem.

• **Refrain from implementing initiatives on your own.** Implementing initiatives should be a collaborative effort between you and key stakeholders.
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**Chapter 15**


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**Chapter 16**


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About the Editor

Brian James Flores is a distinguished expert in the field of learning and development, with more than 15 years of experience in the industry. He holds a degree in math and computer science from the University of Illinois–Chicago and a master’s in education in human resource development from the University of Illinois–Urbana-Champaign.

Brian’s career began at Apple, where he discovered his passion for adult learning theory and instructional design. He quickly rose through the ranks, leading and growing the training team and contributing to a multiyear project as part of a global training initiative. During this time, he gained invaluable experience in architecting engaging learning experiences and designing effective learning programs. After almost a decade at Apple, Brian joined Performics as a learning and development leader, where he designed and implemented innovative onboarding programs and industry-specific curriculum. He also discovered the overlap between learning and organization development, working closely with executive leadership to drive company-wide change management efforts.

Brian is a respected thought leader in the industry and has been invited to speak at various live and virtual events for universities, professional groups, and industry organizations. His expertise in both L&D and OD led him to subsequent roles as a talent and organizational development consultant at Zoom Video Communications and a senior manager of organizational development at CommerceHub.

Throughout his career, Brian has remained committed to the development and experience of employees. He believes that the combination of L&D and OD efforts is crucial to the success of any organization and is passionate about sharing his knowledge and expertise with others.

In his free time, Brian enjoys exploring new places and trying new foods with his wife, Ariel, and their three children, Noah, Nell, and Naia. He is grateful for their support and encouragement throughout his career, including in the development of this book.
About ATD

The Association for Talent Development (ATD) is the world’s largest association dedicated to those who develop talent in organizations. Serving a global community of members, customers, and international business partners in more than 100 countries, ATD champions the importance of learning and training by setting standards for the talent development profession.

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