

Master's Series on Field Research

A series of interviews with major figures in field research conducted in the early 1980s by Peter
Blanck

Transcript of meeting with Arthur Turner and Students



Burton Blatt Institute
SYRACUSE UNIVERSITY

Arthur Turner: Listen, before you start telling me what happened in the meeting you had, remind me where we were at the end of our last meeting here, what it was you were going to do.

Student 1: At the last meeting we had reached a tentative stage of bringing both the operations manager and chief financial officer, AM, together for a meeting to present what we consider to be our consulting contract for the rest of the project.

Arthur Turner: Yeah, and you had never met with the two of them in the same room before.

Student 1: No, they had not been together. We had some extensive meetings with them separately...

Arthur Turner: Individually, yeah.

Student 1: ...and with other key members of the station, personnel, which I don't think we gave you a capsule about - that might be useful to talk about - the short meetings that we had with the support personnel.

Student 2: Well, I had a meeting with the cable operations director and there was some apprehension on her part to fully participate candidly in the meeting with me, simply because she is relatively new and, having been there six months, didn't quite understand what a consultant's role was in coming into this new operation, and was a little fearful about saying things that may step on some toes. I was able to get some basic information from her about what she intends to do, and in the process of the conversation, when we talked, Professor Turner, earlier about a specialized project that was to become a private subsidiary of the company that we had no knowledge of from anyone else, that came up, and that person who was over that happened to be in the next office and she called him right over and we discussed the background of that particular project, which gave us some additional insight after I came back and shared it with the rest of the team.

Arthur Turner: Yeah. So you had that interview after our last meeting here as a group.

Student 2: Yes.

Arthur Turner: OK. So, I guess the main thing you want to tell me about and we want to work on now is how did this contacting meeting go and what did you put into it and what came out of it? You want to bring me up to date on all of that?

Student 2: Well, everyone seems to be waiting who's going to start. Brian played a key role in making an introduction to our assessment and our memo that was put together on where we were in terms of the project and I think I'd like for him to kind of expand on that.

Student 1: All right. We started - we had a bit of a technical problem at the start because the schedules of the two principals didn't match and the operations manager was late for the meeting, leaving us in a little bit of a lurch initially. Although I don't think that that was planned, it did add a little bit of friction and tension to the beginning of the meeting when the chief financial officer said, "Well, maybe you should tell me all of your findings, and then we can meet separately later."

Arthur Turner: And, see, your whole point was to do it with them there together.

Student 1: Yeah. And so that was a little bit of a point of tension. Although it, after a little bit of discussion and stressing the fact that we felt it was very important to have the two of them together since they were going to be talking about issues that would affect both finance and operations, then it was very important. So, we started with just a little bit of background information on what we had found as potential problems in the station and management problems, touching first on their need to expand their financial accounting system to look at specific items on the capital budget. That was met with - I'd say I was probably the least amount of surprise or resistance of any of the initial findings that we found. The second one met with a bit more resistance. That was our finding that it was quite important, in view of the fact that the station goals included a lot of external leasing arrangements, that marketing, cable, special telecommunications operations, and so forth should all be brought into some kind of a decision-making process on the capital budget. And at that point we....

Arthur Turner: Let's see if I understand why that's important. In other words, in a way, then you as a consultant were giving them a picture of what you will be doing that was different than what they expected because in effect you were implying one of the objectives of this project is going to try to be to increase the coordination between these different departments.

Student 1: Absolutely.

Arthur Turner: And that wasn't really what you were asked to do.

Student 1: No, and at the same time it was also a bit more of an organizational critique than simply...

Arthur Turner: In effect you're saying...

Student 1: ...looking at a financial accounting system.

Arthur Turner: It's almost like the consultant saying to the client, "Look, you asked me to do this other thing, but in fact your real problem is you don't have good communication between you different departments," and that makes...

Student 1: And that caused some friction.

Student 2: I also wanted to add to your initial comment that there was a little tension. From my perspective there was a lot of tension.

Student 1: [Laughs]

Arthur Turner: At the beginning?

Student 1: At the beginning. Because here these two people have not been totally candid with us - they have played some corporate games with us in terms of not releasing certain information that would be very instrumental for us to do an effective job, and here one is telling us that he's got to leave and go pick up his daughter so therefore he can only meet with us a half hour, and

the one whose was just called into a meeting at the time of the meeting we had set a week ago. And it just seemed as if, to me, that there was some manipulation going on there, and I simply didn't like it. I had a lot of reservations about that.

Student 3: Some of it though, do you remember the planning by the operations manager, is not good. The prior meeting that we had with him, he was thirty-five minutes late for. I think it's - we could interpret as being putting us in our place, or, which is a defensive interpretation, or we can simply say "the man simply does not know how to plan his time and gets caught up in these crisis situations, which is a little more believable if you take a look at where they are with their capital budgeting procedure. So I'd like to give them the benefit of the doubt.

Student 2: Well, my feeling also was because of this natural adversarial relationship that takes place between these two guys, it was as if we were getting caught in the middle of a situation that wasn't too good in the first place, and neither of them really had a desire to meet with each other in our presence.

Student 1: Yup.

Arthur Turner: Still got to me as true that if you back away from your own involvement in it and kind of think about this as a case that's going on among some other people, the consultant is entering this meeting with some anxieties about, you know, whether it's going to work all right and can we make the relationship between these two people a being part of our agenda, and not just be working first with one and then the other.

Student 2: That's right.

Arthur Turner: And then one person is late and the other person tells you he's going to have to leave early, it's kind of natural for the consultant to begin feeling irritated.

Student 2: I did.

Arthur Turner: And so but Judy you were sort of seeing the same thing, but you were sort of thinking, "But wait, let's not jump to conclusions."

Student 3: See, I had gone to the washroom and they were ushered into his office when I was in the washroom. So when I came in, I immediately interpreted that the other fellow was not going to show. But they had begun. He had forced them into the position to begin, or they had begun. But the meeting had begun. And there I was sort of left wondering what's going on? At which point the financial officer turned around and told me that the other gentleman wouldn't be there for a while, and I just - it, it, made me chuckle. It made me laugh. Because the reason for this meeting was to bring the two of them together and get a consensus and here we were. And I felt that at that point we should have stuck to our guns and simply said, "O.K. When you two can get together, we'll come back." And instead there was sort of consensus among Brian and Gatsby that we should just stick with the financial gun. But I - if...

Arthur Turner: You felt like kind of saying, calling the shots.

Student 3: Yeah. I felt like saying, "O.K. When you people quit playing games with each other, we'll come back in here" and maybe that's an adversarial position to take for a consultant, but at some point these two need to be manipulated into the same room together so that they can duke it out.

Arthur Turner: I don't know what they should have done, but it sure illustrates the point the Block and some of the others... Oh, exactly. Yeah, we were talking about: How open is a consultant going to be with the feelings that he's – that they're having about being manipulated by the client? Whether and when and how to confront.

Student 1: Well, at that point it was irritating and I think we made a fairly forceful presentation that this was serious. We were spending a lot of time on the project, we were in a position to really help the client, and if they weren't going to get together in the same room and discuss some of the problems, then we couldn't proceed. And really...really help them.

Arthur Turner: Oh, you said that.

Student 1: Yes. We said that explicitly.

Student 2: Right.

Student 1: At which point the CFO became apologetic and attempted to make a couple of outside phone calls to find the other party and so on, backed off, and then eventually, I'd say maybe fifteen to twenty minutes later...

Student 2: Yes. Twenty minutes.

Student 1: Breathlessly, the operations manager runs into the room and says, "Oh, I was held up. I was having a meeting with the general manager of the station.

Student 3: Who, by the way, happened to call the financial officer when we were there. So I'm wondering what's going on at this point.

Arthur Turner: What's the point – you mean you're wondering whether he had in fact had the meeting?

STUDENTS 1 AND 2: Yeah.

Student 1: Although I think I favored Judy's position a little bit more. I think that rather than having any method in the madness, I think it may just be madness. I mean it just may be difficulty in scheduling and problems they have, and the possibility that they're putting us on a bit lower priority because it's an unpaid consultative.

Arthur Turner: But you're not quite as important as the boss.

Student 2: That's for sure.

Student 3: Except one doesn't know whether or not he's meeting with the boss if the boss happens to call the guy that you're talking with.

Arthur Turner: Gave you the feeling that that was just...

Student 1: Um hum.

Student 2: Yeah, a lot of skepticism.

Student 1: Yeah, yeah.

Student 2: It created a climate for skepticism to come about in terms of others' motives. However, as the meeting did progress and the financial officer mentioned that he was very apologetic, this was something that came up at the last minute, he had to pick up his daughter who was quite a ways away from the office, and he certainly didn't want to keep her waiting. He said that he would have to leave by 4:00 but he wound up leaving at 4:15 and I certainly did empathize with his feelings of having to perform this personal task, and his feelings of wanting to stay in this meeting with this other guy now that they're both together, because the meeting by that time had started to proceed quite well.

Arthur Turner: It's funny to say – somehow you got over all this...

Student 1: Well, the interesting thing, the third point that we made in terms of trying to present initial studied facts, before making specific recommendations, before really looking at specific consulting goals, we tried to discuss with both the CFO and the operations manager the importance of some kind of strategic planning in the organization, with regard to the capital budget. And that's very, very interesting. Because they both had independently thought about it, and I don't think they had explicitly at one particular point been forced to address the fact that there really was not coordination in their planning process.

Arthur Turner: I'm sorry because I got so interested in the processing that I've kind of lost the substance, What were the three major...

Student 1: The first was a simple technical goal. We started with the simplest technical problem, which was the lack of an adequate financial accounting system.

Arthur Turner: O.K.

Student 1: One that we thought was most easily remedied. And the second was...

Arthur Turner: Let me just look back – even back me on them, because it's interesting to remember that the initial request was help us but do a better job of prioritizing our capital budget items so that we know whether we should get a new – whether it's more important to invest money in a new something or other, or in a new something different. Now you are, in effect, saying, before they can do a better job at that, they need one thing in place, which is an adequate financial accounting system.

Student 1: Well, I think more important that we were stressing the fact they do have a total organizational financial accounting system. It's a simple cost-accounting system on their digital computer. And it's effective in covering all branches of the organization, giving a complete blueprint of the organization. It gives the CFO far more control than he's had in the past. The system's only been in for a couple of years. But the problem was in trying to set up a capital budget in which operations would be both the prime consumer of the budget items, and also would be responsible for coming up with a prioritized budget and presenting it to the financial officer. There was clear evidence at our interviews that operations needed a hands-on system that would allow them to do a little bit better capital budgeting projection, in other words something that would give them a way to look at paybacks in 1-, 3-, and 5-year periods. Put depreciation in. Also insert other items such as the lease-back rate schedule would be available on the outside and so on. These were very critical points that the assistant to the operations manager was really being saddled with.

Arthur Turner: Other than having a good way of dealing...O.K. So that was fairly easy for them to accept.

Student 1: That was the simplest one because that was the thing that had come to the surface and in fact I think was one of the main reasons that they requested outside consulting. It was the...

Arthur Turner: Right. So on that one we have the consultant suggesting a need for something that the client is perfectly willing to admit there is a need for.

Student 1: Um hum.

Arthur Turner: But then as you move to 2 and 3, you get farther – you get into things that's more difficult for the client to acknowledge...

Student 1: Exactly, yeah.

Arthur Turner: I, I'm pretty much forgetting about that we're doing a thing and just doing what they would be doing. I'm just trying to get into my head the three things and how they are increasing...

Student 1: Well, let me move into the second one, then. The first one being fairly straightforward. The second was the beginning of a critique that there was not an – a strong organizational communications network between the special divisions that they were putting in place – the marketing and sales manager, for example, who had just been in his position for less than 2 weeks at the time of our meeting with the two principals. And also the fact that an entire special telecommunications unit existed, had far – principals there had far better knowledge of individual cable operations, and understood the external private market and could provide information. And so in a sense we were being critical of the fact that since all of these key people were in place, there wasn't any organizational communications network to bring them together in any kind of capital budgeting decision. And the operations manager was forced to just go down to individual production units and have them present a wish list of capital budgets, which then moved up, the assistant would correlate in some reasonable fashion on just a 1, 2, 3 priority basis.

Student 2: Yet all of these entities have real importance in formulating the capital budget.

Student 1: Yeah, yeah.

Student 2: And they're not really talking.

Student 1: So that's how we led in. That's how we built the foundation to lead into what we thought was really the most important thing, and that was talking to them about developing really the strategic planning process. To try and move up to this higher level of consulting after we left the project, so that they could get some mechanism.

Arthur Turner: But on two – you're not telling them that the two of them are not talking with each other very well. You're just saying that the two of them are not talking with these other special – with these two new functions – the marketing sales manager and the special telecommunications thing. Or are you saying the trouble is... that you two guys are...

Student 1: Well and yet there's tension. I think that's where you were breaking it out of – describe a little bit the tensions between the two.

Student 2: Well, the tension between the two is something that has been inherited...

Student 1: Yeah.

Student 2: ...by the chief financial officer who, by the way, has not been there very long, and the operations manager had had a very bad relationship with the former chief financial officer.

Arthur Turner: That's right.

Student 2: Therefore, this new guy is experiencing a lot of that tension, a lot of carryover, and he's feeling that this carryover is unjust because he's trying to do all that he can to create a good atmosphere. So that kind of is the backdrop of the interpersonal relationships between those two. And further we're saying, "Listen. Your people are not talking to each other. You both have ultimate control here. And therefore that means that your people aren't talking. That does point directly to your communications functioning, or lack of it.

Arthur Turner: That's interesting. So it's that history of the bad relationship in the past that makes it even more touchy to bring this up now.

Student 2: Um hum.

Student 3: History is part of it, but in general in the entire organization there's no communication. So even laterally and – both laterally and vertically the communication is wrong.

Arthur Turner: So it's like it's not like you're telling a client something that they don't know. It's like you're telling a client something they do know and don't like to remember.

Student 3: They know it. They don't like to remember. Everybody's got their special bailiwick.

Arthur Turner: It's a sore point. Yeah.

Student 3: Yeah. And so you have a radio person who's very different from a television person, and both of them think that they should be getting the bulk of the money. Or...why should they talk with one another?

Arthur Turner: And the financial people don't understand creative people any more,

Student 3: So you've got in place, basically, what most major organizations that have large organizations with different kinds of functions- those same kind of communication problems across lines.

Student 2: But if these two guys were friendly enough where they were going to lunch together every now and then, even, and having some type of relationship, their people would be talking to each other at this point because they could see where they would interface better and make a better overall operation.

Arthur Turner: Well that's good. Now, before we go on to three, which I already forgotten what it is (laughter) um, what might have happened under 2 would have been that one or both of them would say, "Well what do you want us to do about it?"

Student 1: In essence, yes. The third point, really, this idea of getting them together and bridging the gap...

Arthur Turner: Ah, the third point is giving them an agenda where they're going to have to work together, because...strategic planning.

Student 1: And of course this was a real concern to us because that point really could have – could have broken the project. I mean they could have simply said, "No, we're not absolutely doing this. We want you to stick with the financial accounting system, that simple; in the shortest amount of time and so forth; and we really don't think we need this kind of strategic planning." And so it was a calculated risk to put that, especially to put it in a written memo that we were giving them that they were going to use and also circulate to other people in their departments. And yet it was very, very interesting, because they both conceded the fact that they were in trouble and that they needed strategic planning. And the CFO finally admitted, in fact, it's the first time I have heard him directly admit that the system really was not going to work that they had in place, that it's on the wish list - prioritizing a budget just with one, two, and three-tier priorities and so on was simply not going to work if they were trying to – to enter outside leasing arrangements. And at the same time, then the operations manager came in saying he knew that he was making mistakes in certain budget items because they didn't have a technical enough system of accounting or prioritizing. And so he was sure that they were making decisions that were wrong strategically for the organization, but they _ _

Student 2: I'm trying to remember: Did he say that in the presence of the other person?

Student 1: Yes. He said that we are making mistakes and we want to be sure that we are going to have proper direction for operations in the future. And I thought that was – it wasn't an

admission in the sense that he was, was trying to accept blame in the face of the finance department, no. But...

Student 2: I'm going back to his comment, and it's very interesting, as the person who had to leave, had to pick up the daughter, he was about to leave and I asked to other one, I said, "Did you have anything to say to us before, he has to leave?" He said, "No, but I do have a lot to say after he leaves."

Arthur Turner: That's the finance guy.

Student 2: No, this was the operations manager, yes.

Arthur Turner: Who was going to leave early.

Student 2: No, who came late.

Arthur Turner: I get mixed up: Which was the one that came late and which was the one that came...

Student 2: (Laughing.) The operations manager came late and the chief – the CFO had to leave early.

Student 1: Which also, just as an aside, it's quite interesting and I thought was very consonant with the way the organization worked. See, the operations manager is forced to leave his shop, come over to the CFO's office, and ...

Arthur Turner: I remember we discussed, yeah.

Student 1: ...and he comes in late and is embarrassed because he's late and been held up in some other meeting and so it's very, very interesting. And that increased the tension level that – when they first met.

Student 3: The most interesting admission, though, in the entire meeting for me was listening to the chief financial officer not in the presence of the operations guy talk about how he hadn't spent enough time thinking about the problem. And sort of offering that up as a main excuse, but never, when the operations manager came in, never even hinting at, at, at...

Student 1: I think that's a very good point. The second thing is that the operations manager made it quite clear that he expected the CFO and his administrative staff, which included EDP, to be a big part of helping unbridge the gap. And come up with some solution of the problem without specifically saying "It's your fault that we don't have this system in place – that we need for capital budgeting." It was quite clear that he was stressing that his people didn't have the technical background to come up with the kind of system that was necessary to do the capital – capital budget.

Arthur Turner: So you've really got quite a transition right in this one meeting, in terms of getting increasingly central and, kinds of issues raised and, and quite a growth in what they're asking you for help on. Quite a change.

Student 1: Yeah. Yeah. Let's turn – it might be useful to turn to out specific goals...

Arthur Turner: How did you – I want to...

Student 1: ...that we then presented afterwards. This was our specific contract,...

Arthur Turner: You presented it when the two of them were there?

Student 1: When the two of them were there. Also included in the memo...

Arthur Turner: Had you handed out this memo?

STUDENTS 1 and 2: Oh, yes.

Arthur Turner: At the beginning of the meeting?

Student 1: Um hum.

Arthur Turner: And then you just sort of walked through this.

Student 1: Um hum. Though they said, "Please take us through this" a little bit of a jolt to them. Some of the, some of the points. And...

Student 2: Well, one of the points that we thought would be most difficult was this plan for our session, and our session with the representative from McKinsey. And that locking them in the room, kind of theory, and making them come up with consensus, was something that we kind of hammered out and felt it would be effective for this group. And decided that we would get some type of conference room over here and see if that would be agreeable. Now we had decided beforehand this is absolutely going to be the hardest thing that we are going to get out of them.

Student 1: Absolutely.

Student 2: Because they're not going to want to take four hours out of their schedule and come over and do this. That happened to be the easiest thing, in my mind. They said, "O.K. Four hours. Fine."

Arthur Turner: Is that right. Let me just for the record kind of be clear about that, how that idea happened: That idea happened to you after the class last week?

Student 2: Yes.

Arthur Turner: And you had your own meeting, and you said, "Gosh. What we ought to aim for is to get these people to commit four hours in which they work together."

Student 2: Um hum.

Student 1: Well, we thought, especially in view of the fact that one of the big problems was a lack of strong communication in the individual units, that a good strategy would be at the end of the project, when we had some results to show, to bring some of the - not just the two main

clients, operations and finance, but also bring some of the ancillary people who would be involved in the strategic process later. Bring them in to a neutral setting here. And really have a four-hour nuts and bolts working session with them to discuss not only what will be a final project report, but really what the organization can do after we're gone, in terms of trying to resolve some of these problems. And we were fairly specific. As you can see here with our contract goals. We attempted to split them so that each of us could concentrate on one particular subpart of it.

Arthur Turner: The three of you? How are you dividing that up?

Student 3: If we could move back before you go into that.

Arthur Turner: Sure.

Student 3: I think the notion - I'd like to explore this meeting a little more.

Arthur Turner: Um hum.

Student 3: The notion being that if they can't communicate and come to the meeting in the same room, maybe we can get them on neutral territory and force them to communicate and there was some division amongst us whether or not we were going to do it in two two-hour session or one four-hour session, and what we could get from them. And the primary notion here being that maybe they won't like each other, but maybe they'll gain some respect for each other if you lock them in a room for four hours with each other. And...

Student 1: Which was really brought home by Alan Kennedy's remarks. And he was saying the consultant doesn't have to be the nice person in the setting. It's to bring some kind of change to the organization. And if you lock yourself in a room, and even if you are the target of all the venom of the parties that are assembled, you're going to come to some kind of consensus - even if it's a consensus that they're not crazy about the consulting team, but the organization has to move (laughter) in some other direction. And...

Student 2: In fact, we even did discuss, Professor Turner, we need your input quite a bit on this, on whether or not we could get someone from one of the McKinsey, or someone from the consulting group to come in to be a consultant to the consulting group and observe this 4-hour session in some way and provide feedback. What do you think?

Arthur Turner: I don't know.

(laughter.)

Arthur Turner: This is - you're imagining this to be happening when? Towards the end of the engagement?

Student 1: Um hum. And...

J&G It would be the middle of April.

Arthur Turner: You would certainly ask them if it's alright if I sit in on it.

All Oh, absolutely. Yes, of course.

Student 1: You were explicitly mentioned as a party. But we were curious about the possibility of having someone from McKinsey, since it was a McKinsey-style session, it wouldn't be Alan Kennedy, but one of the - from the Boston Office, it might be interesting.

Arthur Turner: Now I want to get a better feel for the process of the meeting that led to what Gatsby said kind of was a surprise, of them sounding as though this whole thing was a good idea. I mean, in other words, how did it happen that the consultants go in with these questions about whether this is going to be a high-risk strategy, and do we dare suggest this, that, and the other thing? And you have the behavior of, one being late to the come, and one being early to leave and all of that going on, and yet you come out of the session pretty much with your objectives having been achieved, as far as I've heard. That is, it worked out the way you were hoping.

Student 2: Well, the ability to answer their questions certainly did help. We had it in our minds that we were going to approach this in the most professional manner we could muster. We dressed accordingly, we all had on suits and had done our homework and decided that each of our individual areas of responsibility would be addressed by each of us individually. And if there were any questions, we answered them to the best of our ability, and I think that honesty and approach number one was very much respected.

Arthur Turner: What kind of question, you mean questions...

Student 2: On how we were going about the implementation process, what did we mean by certain key phrases, and when those things were explained, there seemed to be consensus, agreement that that was an alright approach.

Student 1: I think we also forced them, which was something we did in our strategy session before this meeting, or planning. That if they were really going to accept any kind of consulting work or study that we did, they were going to have to be receptive to meeting and looking at some, some goals beyond just the simple mandate approach. Otherwise it was just going to be a simple EDP study to help them solve simple accounting problems. So it was just going to be really first stage. But the second stage they were never going to really address the difficult problems that they were grappling with in terms of entering a highly competitive private market with some of their equipment and trying to strategically plan a budget that they both realized was changing dramatically, but really didn't know how to rationalize it.

Arthur Turner: Yeah.

Student 1: So it was a gamble. In a sense, if they hadn't agreed to have a final meeting or in some sense come together and look at the long-range goals for the organization, then I think our project would have been quite different. We would have had much more limited engagement than we do now. Now we have a consensus that for four hours half a dozen very important people in the organization are going to come to neutral territory, sit down in the room with copies of the report that we make. But not with the real goal of just reviewing point by point the report, but talking about where they're going along after we put the report on the shelf. And

that's what we tried to stress. That the report would be nothing more than a bookend if they didn't attempt to go beyond it. And that's where I think we achieved some consensus at this meeting, which was surprising to me personally. That we...

Student 3: I think that - it's surprising in a way, but I think that their back is up against the wall.

Arthur Turner: Their back is up against the wall.

Student 3: Yeah. I think that they have a real need to get this together and to get a process in place, and to have that change quickly because they're going into this capital budget - what's the term - where they're getting outside money. So they have - that at least have to be able to manage this time. And they got the federal cutbacks. And so there's real reason now for a change, as opposed to maybe even six months ago, when it wasn't clear where the funding was going to be cut or not.

Arthur Turner: O.K. So these are the three things that you're going to work on between now and that meeting.

All Yes.

Arthur Turner: And you're dividing this up among the three of you in some way?

Student 2: Yes. Judith has number 1, I've taken number 2, and Brian has number 3.

Arthur Turner: O.K. And these don't sound like things you can do by yourselves.

Student 1: Well, we'll be continuing to meet - we're not going off completely independently for six weeks and then meeting back. They'll be a great deal of contact between. But we thought it would be easier in organizational terms if sub-clients, as they were, individuals who were reporting to the principals of the project, could see one face and to meet with them.

Arthur Turner: That's really what I'm trying to get at. We might have...

Student 1: On a regular basis.

Arthur Turner: We might have just a little discussion before we break up about how you're proposing to involve members of the organization in working with you on these things.

Student 3: I, for example, will be scheduling a meeting later on this week with the assistant to the operations department head. And I will be meeting with her and discussing what her needs are and taking a look at - she's got some sheets of - that's she's done up with present equipment and talking about how - what criteria she sees in there, and I've talked this over with Brian, and the next step from that will be taking her sheets and going over and visiting with the fellow who does the - their data processing. But I have to get to him quickly because his wife is pregnant and going in for Caesarian, and he has to stay home with his 18-month-old son who has medical problems. It's just - I couldn't believe it when the guy told us that, but... so we have to hurry the process along. And he told us - what did he say? Two weeks?

Student 2: Um hum.

Arthur Turner: But this - she feels that - you think...

Student 3: She was his star pupil.

Arthur Turner: So she wanted to do this, and...

Student 3: Yeah.

Arthur Turner: She's likely to see you as a source of help in getting done something that is important to her to do, right?

Student 1: Yes.

Arthur Turner: So there isn't much trouble of getting...

Student 1: Yes and he's committed. We had just a very brief sort of just an introductory meeting with him on the same day the data processing head - the same day that we had the meeting with the two principals. And the EDP chief was very, very responsive to coming up with simple software program. He said like the visicalc system on the Apple? We said yes, with these parameters, and so on. And the wheels were already spinning, he was already thinking about a program that would help operations.

Student 2: O.K. And in terms of the coordination of the functional capital budget planning and all of that - long-winded - I'll be engaging in some immediate fact finding with, um, the cable projects director and the marketing and sales person who is trying to come up with ideas on how to utilize cable co-production. Cable co-production will be one of the major inputs into the capital budget and increasing it, and as a result of that, I will be coordinating that along with the special telecommunications unit, to see how they can communicate better, plan better, forecast better for this new cable technology that can be put together in lease-back system. The main problem seems to be a lack of forecasting in my mind, with regard to what can happen within four years with this cable. They're saying, "Well, it's so new we don't know what's going to happen. However, they are situation analyses and also models that can even be put on EDP to help the marketing person come up with what can happen in planning for cable. And in that fact finding, I plan to try and put together a system that they will be comfortable with in the future.

Arthur Turner: Gatsby, that's sort of like, talking - it sounds a little bit like there are several different people that in a way should be working together...

Student 2: Um hum.

Arthur Turner: And you'll be sort of running around between them, getting information - you'll be communicating, you'll be assisting them to coordinate by actually being the coordinator.

Student 2: Right.

Student 1: Yup.

Arthur Turner: And, and one can't help wondering if you'll have some opportunities to bring two or three of them together.

Student 2: That's the objective, yes.

Arthur Turner: From time to time. Rather than just on-on-one as you go through.

Student 2: Yes. For example, the marketing and sales person and the cable projects director must go out on some visits together with clients and work together quite closely, so that they can come up with something successful.

Student 1: Which I think that's going to be a major help in doing number 3, which is really, number 3 really is subsumed by the strategic consideration. We are looking at other, private and public television stations to look at some capital budget strategies that they have used.

Arthur Turner: Are you going to go and look at some of them?

Student 1: To, to meet with cutbacks. And possibly even do a little bit of sub-consulting. There are a couple of consulting firms in the Boston area, Cambridge area, that do nothing but communications strategic planning for firms and clients and we have indication that a couple of those firms might allow us to come and chat with them and use some of their resource materials, which are directed specifically to this type of problem. And more importantly, rather than just come up with a catalog of other systems, is to really help them bridge the short-term horizon, which they're still locked into, but that we hope is going to be one of the major goals of the project, is to at least start them and think about looking at technologies and changes in the business and the marketplace that are coming in two or three years ahead. Because it's always the crisis budget after this point. They've had the budget, they've had a couple of weeks to come up with it, and then they've been locked into it, and to live with it. For that fiscal year and then two or three years down the road, they're saying "Why in the world did we ever buy this particular piece of equipment?" And unless they can get some kind of organizational cohesion, they're never going to overcome that problem of having one small group of people in operations make a few calculations and decisions and then have the CFO accept them, see what can be budgeted, and fund the first line of priority items and then cut part of the second, and the third tier is not budgeted at all. And I think a real benefit of what Gatsby's going to be doing, in terms of bringing some of these people together, is that they're not all going to be strangers when we meet at our final four-hour working session, they're going to have an interaction.

Arthur Turner: And to do this, well, you're going to have to have continued interaction with the top people a little bit too, to get...

Student 1: Yes.

Arthur Turner: O.K. Well, let's, so what's happened in this project so far? It's really kind of interesting to think back. They gave you a thing to do which, after you poked around and listened to a few people, turned out in your opinion to be less than an adequate description, really, of what they needed. Or at least a lot of things had to happen first before they would be able to do that. And, also that you needed both these executives to be your clients and not just one of them, if this thing was going to be really useful. So the meeting we've been talking about

was a meeting that shifted the agenda in what we think is a useful direction, and in a sense made a client out of both of those guys. In fact, in a sense, made a client out of the relationship between the two of them. I mean in some ways, it's the two of them together. And, and that was a real progress. And left you with three rather specific tasks that you're going to be working on for a while individually but with a need to coordinate among yourselves as you do that.

Student 1: Um hum.

Arthur Turner: And some opportunities to involve people in the client organization in the work of those three things, and not just have it be something you do all by yourselves. Then they'll be the business of feeding all that back into a report that looks like it's going to be the kind of report that, in effect, says, "This is what we've been doing And this is what we have been learning. And here are some things that have already been happening on these dimensions and then a discussion among all the people concerned as to what this implies to, you know, what they should be doing next. So the next big event of the project is that meeting in April and to see what can be budgeted, and maybe fund the first line of priority items and cut part of the second and the third tier is not funded at all. And I think a real benefit of what Gatsby's going to be doing, in terms of bringing some of these people together, is that they're not all going to be strangers. When we meet at our final four-hour working session they're going to have good interaction.

Arthur Turner: And to do this, well, you're going to have to have continued interaction with the top people, a little bit too, to...

Student 1: Um hum. Yes.

Arthur Turner: Well, let's, uh, so what happened in this project so far? It's really kind of interesting to think back. They gave you a thing to do, which after you poked around and listened to a few people, turned out in your opinion to be less than an adequate description, really, of what they needed, or at least a lot of things had to happen first before they would be able to do that. And, um, also that you needed both these executives to be your clients and not just one of them if this thing was going to be really useful. So the meeting we've been talking about was the meeting that shifted the agenda in what we think is a useful direction, and, uh, in a sense made a client out of the relationship between the two of them, I mean, in some ways it's the two of them together. And that was a real progress. And left you with three rather specific tasks that you're going to be working on for a while individually, but with a need to coordinate among yourselves as you do that, and some opportunities to involve people in the client organization in the work of those three things, and not have it be something you do all by yourselves. Then they'll be a business of feeding all that back in to - to a report that looks like it's going to be the kind of report that, in effect, says, "This is what we've been doing and this is what we've been learning, and here are some things that have already been happening on these dimensions," and then a discussion among all the people concerned as to what this implies about, you know, what they should be doing next. So the next big event of the project is that meeting in April.

Student 1: Well, I think the interesting thing, just in terms of filling in a little bit of the history: In order to get to these contract goals, we had to weed out an incredible number of disparate organizational signals that we were getting. Every single department person that we talked with

had a different idea of what we specifically should be doing in the organization. Some were very small projects, like time scheduling between the production department and the financial office, coming up with a system for allocating studio time, and so on. And a number of other things that entered - which were already being worked on from within the organization and really had a fairly high probability of being solved internally and really were not the major problems. They looked like they were major organizational problems, but we didn't think that they really were. It was something that, if the individuals who had some responsibility for both could get together and work them out, that they could do it much more effectively than we could attempt.

Student 3: If we were McKinsey, though, we would have done that. I mean we would have done that time scheduling and gone in...

Arthur Turner: Oh, I see. You're thinking this is some examples of being given - of refusing to do some things that you were asked to do.

Student 1: Um hum.

Student 3: Absolutely. Absolutely.

Arthur Turner: And you're thinking about how the fellow last week said "Do them."

Student 3: Do what the client wants.

Arthur Turner: Do what the client wants as a way of earning credibility that...

Student 3: But we don't have the time for that credibility.

Student 1: No. If we'd had a staff of associates that could come in and help them construct some of these scheduling, budget, things, that might have been a help. But at the same time, I think it was realistic that we made an assessment. That this would really be a waste of time for the client. I mean that we could come up with something...

Student 3: But they made the same assessment with the com...

Arthur Turner: With that other one. When he told them they should be counting pink slips.

Student 3: Yeah. And they made that same assessment that their time was limited and our time is limited here, and there's a point at which you arrive where you say, "Do I count the pink slips, or do I do something that they really need? And..."

Student 2: Well it was also pointed out in the group that we have some goals as well in this practicum. That we want to gain some skills and just counting pink slips or doing exactly what the client want would not fulfill our goals either. So it is, we do have license in this situation to - to deviate from what...

Student 1: Exactly. And at the same time we accepted. I mean we accepted the task, which is coming up with this EDP program. Which is really a small, I mean it's a small task of bridging operations in EDP and yet it hasn't been tackled because there is a sort of - there isn't a

smoothness in relations between the two sides of the operation. So at the simplest level, it appeared to us that that was no going to get done unless we actually tried to force some organizational change.

Student 2: Well, I like our goals. (Chuckling.)

Arthur Turner: It's interesting, isn't it, yeah? It's what the client asks for, what the client needs (in the consultant's opinion) which is a big parenthesis sometimes.

Student 1: Um hum.

Arthur Turner: What the consultant wants to get out of it, and out of the sort of the from those three things kind of deriving something that you say this is - satisfies all three of those to some extent, without turning any of them down completely.

Student 2: That's right.

Student 1: Exactly. And to overcome, I think, the client prejudice, which we encountered initially, and that is either the project's going to be too small, to be useless for them, they're just going to do some busy work, and it's something that they could do internally but they have some people coming in from the outside, so why not saddle them with this, and they've got some small counting of the pink slips done. And on the other is that it's going to be such a general broad sweeping, and there are no specific recommendations. It will just be a beautifully typed produced document that's worthless for the organization. They'll all look at it and read it and put it on the shelf and nothing will happen.

Student 3: One has to wonder, you know, I mean they're backing us up against the wall and one has to wonder now why they didn't recognize this coming, or why they sought out a team like us to come in and help them do this. Their positioning of themselves has made me very curious, and this really is going to be a tremendous problem for them. And they've gotten maybe six months lead time now into their first financial crisis. And I just can't figure out why the management doesn't see that coming. Why those signals aren't there for them.

Arthur Turner: You may have, when the chief financial officer said he wanted this project, he may have been ambivalent in the following way: He may have thought, "Here's a nice thing that I can give some business school students to do and it will be kind of good for the course and it won't really bother me too much." But he also may have been thinking if it goes well, it might mean that I and the operations officer and some of these parties it interests will actually begin work on this problem instead of just worrying about it all the time. So you may have ultimately been successful in tapping into that underlying need that was also there, even though it wasn't an easy one to express. Kind of hard to say, "Help us be better managers and coordinate better." It's easier to say, "Do this specific thing." I think he responded to the specific thing in a way that also addresses the other need which I think they were aware of all along, but it wasn't so easy for them to express. So anyway let's hope so. Before we break up, one of the interesting things we haven't been talking about is a little bit about the process of how you guys are working together, and how that played itself out in this meeting in which there was this tension, some differences of opinion about you, among you, about how confronting to be - some tendency for some people

to be more quiet and some to be more talkative, and this division of labor, and I'm just curious how you feel about how the meeting went, in terms of your own kind of teamwork.

Student 2: Well, I think it's a fantastic team.

Others: (Snicker.)

Student 2: I'm going to be carving these two up at some point (laughter.) We're able to hammer out a number of issues, very specific disagreement sometime and still come up with a consensus, which I appreciate. Brian brings a very, very good method of writing things, as with his journalism background, in such a way that it just is very meaningful. Then Judith comes with this "Well I don't know." And synthesizes information so well. And then we kind of work together in talking this whole thing through.

Arthur Turner: What do you do?

Student 2: I bring the two of them together - and keep them on point. (Laughter.) Stop cutting people off. (I'm the chairman.) Yeah, it works out, very well. When we were putting this memo together, we met at 8:00 in the evening, and we - Judith had hurt her hand, in fact she broke her finger that same evening in the Baker Library door, and, uh, we were sitting there, and we finished at 11:30. And we were absolutely exhausted because we had put in some very intense work into this thing. And then the meeting itself, well, we knew that each of us had our favorites, or someone had a favorite of the two guys that were the CFO and the operations manager. And, as I said, Brian started off very well and that set a good tone because we had decided to - I think Judith you said, "If they start getting on us, we know that this is a sexist world. You protect us, Brian. Because you can be the bad guy because you're a man." Wanted to make that very clear. And then the operations manager was very, very busy looking at Judith's legs during the, during of the meeting (laughter), that helps him with too.

Student 1: No, it was a good point because I related very well to the operations manager. And he has been very interested throughout the relationship in stressing the quality of his production facilities and so on. And that's been very important. And he is very skeptical of any support or administrative systems if they are in any way going to hamper his engineering production.

Arthur Turner: Which the two of you feels - the other two feels most *simpatico* with, financial officer.

Student 2: I do.

Student 3: I'm very *simpatico* with the operations guy, but the reason being that I - that he behaves like the underdog. He dresses slovenly.

Arthur Turner: You just naturally identify with that?

Student 3: Well, no, you know, I've worked with those kind of people before. In the museums in the Midwest. And there is a type that becomes an operations manager that heads up a facility. And this guy is the epitome of the type. He comes in and he doesn't have a suit on and his pants legs come up and he's just funny. But it's a whole mode of dressing and behaving.

Arthur Turner: One thing I see a need for, maybe you've already done this, but I don't think you have. I think there's a need for a one-on-one with each of these two people, kind of informally, about sort of what did you think of that meeting, and how do you feel it went, and just a little bit of an opportunity to debrief and maybe, maybe you should talk with the operations people or man and maybe Gatsby should talk with the other fellow. Just kind of , how did it go? Because one of them you already said, "Yeah, I have some things I want to say after."

Student 1: Well, we did.

Arthur Turner: You did that.

Student 1: We did have a little bit of a...

Arthur Turner: I can imagine, though, I can imagine this working better just with one, though.

Student 1: Oh, sure.

Student 3: But the point of the final part of the meeting in the operations manager was that I had been sitting there and Brian started in and I took over the sales job. And it made me - it took the focus off Brian and placed the focus on me as being the bad guy, sort of shoving these ideas down his throat, and Brian took over - the point that - about two minutes into Brian's spiel, he said, "O.K. Enough of the sales talk. I buy." I give up.

Student 2: What can I do to help? That was his question.

Student 3: Yeah.

Arthur Turner: That's nice.

Student 3: So I think that Brian would probably be better dealing with since I'm going to be focusing on the EDP problem.

Arthur Turner: I just think, well, I mean it's easy to do. It's one nice thing of their having a client that's so near is that it's easy just to drop in and have that kind of informal discussion.

Student 1: Well I think that will - and that's helped us a lot because we've done, I think, probably more fieldwork in terms of just hours than most of the other groups have.

Arthur Turner: Yes.

Student 1: Simply because of proximity. We're able to go over and have all-day working sessions, or - or we'd see one person and then move right on to another, and could easily tie that together, or bring them together. It's a little more difficult if a client is at such a distance that you could only schedule a meeting once or twice a month, or...

Arthur Turner: Well, that's good. So we'll have another - we'll get together again in a couple of weeks, and we can have part B of this televised case when we have the big 4-hour meeting.

Student 3: Very good. Hope so. Yes that would be fabulous.

Student 1: Yes, that's what we hope they all come and see.

(everybody talking) Student 3: He wasn't looking at my legs.

Student 1: We would really like to go over to McKinsey, I think. Since we're going to try a McKinsey approach. I mean this is not a real BCG type project because its organization is not strategically enough oriented to survive a Bain or BCG strategic planning session, but a McKinsey thing would be great. I mean it wouldn't have to be the partner in charge. I mean it could be...

Student 2: He might even like it, though.

Student 1: He might enjoy it. He could be an associate or - who, for public relations purposes would enjoy coming over for part of the meeting.

Student 2: That would be good.