

Primex Manufacturing: Culture Informing Strategic Succession Planning

by

Laura Christine Ramage

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Supervisor: Dr. Guy Nasmyth
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Laura Christine Ramage, 2020

COMMITTEE APPROVAL

The members of Laura Christine Ramage's Thesis Committee certify that they have read the thesis titled Primex Manufacturing: Culture Informing Strategic Succession Planning and recommend that it be accepted as fulfilling the thesis requirements for the Degree of Master of Arts in Leadership:

Guy Nasmyth, PhD [signature on file]

Carla Funk, PhD [signature on file]

Final approval and acceptance of this thesis is contingent upon submission of the final copy of the thesis to Royal Roads University. The thesis supervisor confirms to have read this thesis and recommends that it be accepted as fulfilling the thesis requirements:

Guy Nasmyth [signature on file]

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Abstract

Primex Manufacturing's management team was engaged in an exploration of the drivers of their organization's culture and a review of the systems in place that support the culture, informing the inquiry question: How might Primex Manufacturing improve its leadership succession planning through greater awareness of its organizational culture? Research adhered to Royal Roads University's Research Ethics Policy, and followed an engaged, action research methodology, informed by appreciative inquiry and design thinking. Findings were that Primex's existing organizational culture is well established, core values make it a unique organization, knowledge of culture can be harnessed to inform succession planning processes, and that leadership can act today to sustain Primex's culture in the future. Recommendations include Primex continue to hire for organizational values and culture fit, consider, and evaluate existing employees for internal succession, and build a formalized internal leadership development program to support the growth of existing employees for future vacancies.

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Executive Summary

The purpose of this inquiry was to engage representatives from the leadership and management team of Primex to complete a two-part inquiry to explore the key drivers of their organizational culture and review the systems in place that support this culture. Knowledge of their organizational culture will then inform discussion and action regarding how Primex can improve its leadership succession planning through greater awareness of its organizational culture. Primex is a manufacturer of plastic enclosures for the telecommunication industry, HVAC components, and shelving products, located in Langley, British Columbia.

To lead this inquiry, I asked, “How might Primex Manufacturing improve its leadership succession planning through greater awareness of its organizational culture?”

Further to this initial question, I utilized a series of sub-questions informed by an appreciative inquiry-based lens (Stavros, Torres, & Cooperrider, 2018). The sub-questions were:

1. Where is Primex’s culture rooted in formal and documented processes and where is it supported by assumptions?
2. What are the stories of critical and essential strengths and successes Primex employees tell about their organization?
3. How is Primex’s culture considered in succession planning today?
4. What does Primex’s management team feel is the connection between organization’s culture and their ability to execute their leadership succession plan?

To understand Primex’s organizational culture, and the possible impact that succession of members of the Leadership Team could have on it, I referenced seminal work by authors in the

areas of a) identifying and analyzing organizational culture and, b) systematic succession planning. Referencing foundational theories, I have demonstrated a link between organizational leadership and the development, and preservation of organizational culture in organizations like Primex.

This study followed an engaged, action research methodology, informed by appreciative inquiry (AI) (Stavros, Torres, & Cooperrider, 2018) and design thinking (IDEO, 2015). I also drew from the Action Research Engagement (ARE) model (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013) as part of my overarching research methodology. Additionally, I was informed by Schein's (1999) prominent half day cultural assessment workshop framework. Being informed by an appreciative lens, participants were invited to offer stories about Primex's culture which stood out to them as special and unique through an anonymous electronic survey. Participants were then introduced to a high-level summary of the survey findings during our in-person engagement session. During our in-person engagement session, participants were led through a series of Liberating Structure strings, including 1-2-4-All brainstorming, dot-mocracy, 15% solutions, and storyboarding in order to bring forward the ideas and opinions of the participants, and understand how to best take action moving forward (Lipmanowicz & McCandless, 2013).

The inquiry findings were that Primex's existing organizational culture is well established, core values make it a unique organization, knowledge of culture can be harnessed to inform succession planning processes, and that leadership can act today to sustain Primex's culture in the future. Recommendations include Primex continue to hire for organizational values

and culture fit, consider, and evaluate existing employees for internal succession, and build a formalized internal leadership development program to support the growth of existing employees for future vacancies.

Chapter One: Focus and Framing

Primex Manufacturing Ltd. (Primex) has a demonstrated history of developing and achieving bold and challenging strategic plans, and for tackling organizational endeavours head-on. They attribute their past growth and success to their organizational culture and Leadership Team. However, Primex is anticipating the succession of members of the Leadership Team over the next five years, including the President and CEO. While leadership succession is not an uncommon event in business, Primex does not have a succession plan in place. Additionally, there are concerns that succession amongst the Leadership Team may impact Primex's organizational culture, impacting their ability to execute the strategic plans which they have crafted.

I partnered with Primex, which is also my former employer, to complete a two-part inquiry to explore the key drivers of their organizational culture and review the systems in place that support this culture. Knowledge of their organizational culture will then inform discussion and action regarding how Primex can improve its leadership succession planning through greater awareness of its organizational culture.

Inquiry Questions

To lead this inquiry, I asked, "How might Primex Manufacturing improve its leadership succession planning through greater awareness of its organizational culture?"

Further to this initial question, I utilized a series of sub-questions informed by an appreciative inquiry-based lens (Stavros, Torres, & Cooperrider, 2018). The sub-questions were:

1. Where is Primex's culture rooted in formal and documented processes and where is it supported by assumptions?
2. What are the stories of critical and essential strengths and successes Primex employees tell about their organization?
3. How is Primex's culture considered in succession planning today?
4. What does Primex's management team feel is the connection between the organization's culture and their ability to execute their leadership succession plan?

Significance of the Inquiry

The inquiry topic of Primex gaining a deep knowledge of their unique organizational culture to better inform strategic planning, including succession planning, is a leverage point for Primex. Primex prides themselves on having a strong and healthy organizational culture, and credits this culture for many business accomplishments including longer than average lengths of service in their employee group, a diverse and inclusive workplace that employs a demographic representative of the Canadian workforce, specifically employing women, and visible minorities (which is a feat for the industry and location Primex operates in). Consideration of the components that drive and influence Primex's culture will be critical when forming future strategic plans and planning for leadership succession. If these elements are not considered, Primex risks altering, or failing to uphold, their organizational culture. Furthermore, knowledge of elements which influence culture will also allow Primex to invest in and grow these factors in

order to sustain their culture. This inquiry is significant to Primex as the organization has indicated they see their culture as a competitive advantage, and one they wish to protect.

Organizational Context and Systems Analysis

This inquiry into Primex's organizational culture provided Primex a better understanding of their key drivers of culture today, specifically what is shaping the culture and what elements need to remain in place to continue their culture in the future. Secondly, this inquiry offered Primex insight into how to best prepare for the succession of members of the Leadership Team by understanding how these events might impact their culture. By providing this knowledge to Primex they are better equipped to take their Company to the next level of strategic growth, while capturing the essence of what the organizational culture is today and qualifying what makes this organizational culture worth sustaining in the future. Primex's stated values are: Safety – everyone is responsible; Connection – get involved; Collaboration – help each other succeed; Innovation – be bold and responsive; Integrity – be open and accountable (Primex, 2020).

The Cynefin framework (Snowden & Boone, 2007) is a tool for leaders, which offers considerations for how to receive, interpret, and respond to decision making criteria in times of uncertainty – whether the system is simple (*known* solutions for *known* issues), complicated (*unknown* solutions for *known* issues), complex (*unknown* solutions for *unknown* issues), or chaotic (*impossible* to predict issues or solutions). Applying the Cynefin framework to Primex, most of their overall business operations fall within the definition of a complicated system (Snowden & Boone, 2007). However, there are established operational processes that would be

defined as simple, as well emerging operations which I would categorize as complex (Snowden & Boone, 2007). Using this knowledge as a lens through which to view Primex, I better understood how relationships, exchanges of information, and decision-making processes occur internally. Applying the Cynefin framework within the context of this inquiry to assess, understand, and respond to Primex's management problem of being without a succession plan, but with a desire to provide cultural continuity for the organization, I determined I was working within a complicated context (Snowden & Boone, 2007). I evaluated the opportunity for a succession plan as complicated because also there is an *known* component of change or risk, the departure of a senior leader, and there are also *unknown* variables such as who a successor will be (Snowden & Boone, 2007). I see offering Primex insight into their organizational culture and providing them recommendations to capture their culture in their succession plan, provides an opportunity for them to better manage the elements of unpredictability involved in replacing senior leaders within the organization.

As part of my inquiry I assessed the overall context in which Primex operates, informing my approach and recommendations. Primex, located in Langley, British Columbia, is a manufacturer of plastic enclosures for the telecommunication industry, HVAC components, and shelving products. Primex is a non-union work environment which prides itself on being an employer of choice in the local manufacturing marketplace. Primex's Leadership Team is comprised of the President and CEO, and four Vice Presidents who each lead a respective business unit. Primex also has a management team comprised of the Leadership Team, and their direct reports, called *Team 17*. Team 17 meets quarterly to discuss the state of the business, share

updates on respective areas of the business, and complete a professional development activity.

Primex has an existing established five-year strategic plan, which includes an already identified mission, vision, and value statement, as well as documented policies and procedures in place.

Primex operates with several elements that influence the organizational system including geographical spread of business elements, scheduling requirements of a production business which runs 24 hours per day - five days per week, and the nature of the work being completed by the office employees, plant employees, and field employees. Primex's head office is located in Langley, BC; however Primex operates a logistics centre in Pitt Meadows, BC (a 10 minute drive away); Primex's Finance team is located in a separate building across the road from the main office and plant; and Primex's Sales Team is primarily based in home offices strategically located across North America. Primex also runs on a 24/5 schedule, whereby the office team has established core hours, and the plant operates three distinct schedules. The office works a traditional Monday to Friday, 8-4:30 pm schedule. The plant works a day shift, an afternoon shift, and a night shift. There is an overlap between production shifts of 30 minutes each where critical information is shared from one shift to another. The day and afternoon shift employees are on during the same time as the office team; however, the night shift arrives at work, and leaves for the day while the office is closed. The nature of work completed by the office, plant, and field employees is vastly different and there are obvious system boundaries in place that are also physical in nature. There are separate policies which govern safety, which are specific to the plant, and the location of work is separated by heavy, steel, sound-reducing doors. To enter the plant Personal Protective Equipment (PPE – safety boots, hearing and eye protection, and a hi-

vis vest) must be worn. To visit the field employees, a direct effort to travel by car or plane must be made. However, Primex has introduced communication technology, such as video conferencing, to reduce the need for physical travel but still offering the benefits of face to face communication.

Primex has made concerted efforts to ensure that all shifts, and all employees, have the same employment experience. Events which happen during the day (summer BBQ, staff update meetings, potlucks, training, etc.) are duplicated on the afternoon shift and night shift, and the Leadership Team will attend meetings in person with each shift. Primex has placed extensive weight on the importance and value of every employee feeling connected to and engaged with in the business. This is demonstrated by the actions of the Leadership Team, and the interest Primex has in better understanding their own organizational culture.

Overview of Thesis

In Chapter 2, Literature Review, I present a review of literature of in the areas of a) identifying and analyzing organizational culture and, b) systematic succession planning. Within the literature I found guidance with regards to how to assess organizational values and artifacts, and the cultural norms that the existence of both perpetuate. I have also found literature that connects culture to strategic goal attainment, but less literature about how organizational cultural awareness can better inform succession planning. This is an area where I can offer my research and conclusions as a contribution to the greater body of knowledge.

In Chapter 3, Methodology, I explain how this inquiry followed an engaged, action research methodology, informed by appreciative inquiry (AI) (Cooperrider, Whitney & Stavros,

2003) and design thinking (IDEO, 2015), and also drew from the Action Research Engagement (ARE) model (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013). Research methods included a survey informed by the appreciative step of Discover (Stavros & Torres, 2018), and an in-person engagement session, where participants were led through a series of Liberating Structure strings, including 1-2-4-All brainstorming, dot-mocracy, 15% solutions, and storyboarding (Lipmanowicz & McCandless, 2013) following the AI steps of Design (Stavros & Torres, 2018). This chapter will also describe how I analyzed and validated my research.

In Chapter 4, Findings and Conclusions, I present and discuss the four findings derived from the survey and the in-person engagement session data. The findings are presented in a combined fashion as the data from the survey method informed the Liberating Structures methods. Based on the four findings, I arrived at eight conclusions which are presented in a table matching the conclusions to the research question and sub-questions. A discussion of the conclusions then follows. These findings and conclusions were shared with my inquiry participants and validated as complete and correct as part of the engagement process (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013). To conclude this chapter, I discuss the scope of the inquiry, as well as any limitations faced.

In Chapter 5, Inquiry Implications, I synthesize the research findings, conclusions, and suggestions from the literature into four recommendations. At this point, the final phase in the appreciative approach, Deploy (Stavros & Torres, 2018), occurs when I present and discuss my recommendations to my inquiry partner and participants. The recommendations are presented in order of importance and in chronological order.

Chapter Two: Literature Review

To understand Primex's organizational culture, and the possible impact that succession of members of the Leadership Team could have on it, I referenced seminal work by authors in the areas of a) identifying and analyzing organizational culture and, b) systematic succession planning. Through the review of literature on cultural elements and cultural diagnosis, I have been informed of ways to analyze the state of Primex's culture, and the drivers of it. Referencing foundational theories, I have demonstrated a link between organizational leadership and the development, and preservation, of organizational culture in organizations like Primex. Lastly, by familiarizing myself with themes present in organizational culture literature, and with an understanding of succession planning best practices, I have recommended to Primex how they may best understand the implications on their organizational culture when members of the Leadership Team leave the organization, and what supportive practices Primex can put into place today.

Research area number one focuses on identifying and analyzing organizational culture. Several research studies offer a definition of what organizational culture is and how it presents itself through demonstrated beliefs, values, rituals, symbols, and behavioral norms (Schein & Schein, 2016; Jung et al., 2009, Schein, 1999; Schein, 1995; Fletcher & Jones, 1992; Schein, 1986; Barney, 1986). Many studies have argued that there is an undeniable relationship link between an organization's leadership and organizational culture (Bolman & Deal, 2017; Schein & Schein, 2016; Hatch & Schutz, 1997; Hatch, 1993). Krause-Jensen (2011) attributed a large part of an organization's culture to be influenced by espoused values held by senior

management, where Wilkins (1983) credited a shared understanding amongst employees of what is socially acceptable (Wilkins, 1983). Schein and Schein (2016) specified that it is the underlying assumptions of employees that both drive and perpetuate an organization's culture. There are varying positions on whether culture is co-created by all employees in an organization, or if culture exists as an outcome of management style and leadership preference. Although there is no singular answer as to where organizational culture originates, both Schein and Schein (2016) and Wilkins (1983) suggested that identifying and having knowledge of both the obvious and hidden assumptions is a primary step in learning how to influence or preserve culture. Both researchers also noted that it is a complex undertaking to embark on a cultural inquiry, as the most valuable assumptions are the hidden ones (Schein & Schein, 2016; Wilkins, 1983). An example of hidden assumptions are the assumptions employees make, with regards to their work, and the interpretation of common behaviours employees accept from one another (Schein & Schein, 2016). This detailed level of organizational culture is often referred to as the "micro culture" (Schein & Schein, 2016; Schein, 1999; Fletcher & Jones, 1992), which is different than "climate" (Schein & Schein, 2016; Jung et al., 2009; Schein, 1999). The purpose and scope of an organizational culture audit can have many variations including the assessment of employee engagement, organizational strengths and competitive factors, determining the root cause of a change in productivity, or to validate an assumption of uniqueness (Schein & Schein, 2016; Jung et al., 2009; Schein, 1995; Wilkins, 1983). What many researchers do agree upon is that any inquiry into cultural drivers must focus on going beneath the surface and engaging with employees in a meaningful way (Schein & Schein, 2016). Researchers say key focuses of an

organizational audit are on assumptions (Jung et al., 2009; Schein, 1999; Schein, 1995; Wilkins, 1983). A common approach to understand these assumptions is to ask employees to identify what is special or different about their organization, and to give examples of these manifestations (Schein, 1999; Wilkins, 1983). Furthermore, assumptions can be tested by looking at what notions are implied with regards to the work employees conduct, specifically, what is commonly understood without explicit instruction (Wilkins, 1983).

The selection of cultural audit participants is a key consideration when designing a cultural inquiry. Researchers recommend including a broad selection of participants from within the organization, including senior and junior employees, as well as new hires and long service employees (Schein, 1999; Wilkins, 1983). However, the same researchers also make mention to be aware of the motivations of participants, as well as the intention behind the audit itself (Schein, 1995; Wilkins, 1983). In the case of participants, senior leaders in the business may have reasons for an organizational audit to result in a more favourable way for political reasons (Wilkins, 1983). In the case of the researcher conducting the organizational cultural audit, they too may face a conflict of interest in transparently and accurately reporting the findings of their study back to the organization (Schein, 1995). Therefore, it is imperative that in both the case of the participants, and the researcher conducting the organizational cultural audit, there is a shared understanding of the level of transparency with regards to the outcome of the audit (Schein, 1995; Wilkins, 1983). This mutual understanding can be ascertained by open dialogue between all parties before an audit is conducted (Schein, 1995; Wilkins, 1983).

Research area number two focuses on systematic succession planning. Several research studies offer a definition of what succession planning is, and offer suggestions of best practices for designing a succession plan specific to an organization's needs (Atwood, 2007; Al Hour, 2012; Bechet, 2008, Bottomley, 2018; Bottomley, Burgess & Fox, 2014; Groves, 2007; Wolfe, 1996). However, some argued that succession planning is a complex process, and that a generic and non-specific plan will not suffice (Bechet, 2008). Rather, a successful approach to succession planning requires a systematic approach, embedding these practices into how a business operates, creating sustainability within their organization (Bottomley, 2018). Researchers stress that talent management is a superior approach to succession planning and offers a longer view than replacement planning only (Bechet, 2008). Talent management is a vein of succession planning that ensures the continuity of talent internally, thereby reducing the risk to the organization should someone leaving impact a critical process (Al Hour, 2012; Bechet, 2008; Bottomley, 2018). Succession planning can be described by the process undertaken or the intended outcome; however all researchers stated global minimum requirements for success including leadership involvement (Atwood, 2007; Groves, 2007; Wolfe, 1996), taking a simple and up to date approach (Atwood, 2007; Al Hour, 2012; Bechet, 2008), investment in the organization's current employees through planned talent management (Al Hour, 2012, Bottomley et al., 2014, Groves, 2007; Wolfe 1996), and the embedding of succession planning into the organization at a strategic level (Groves, 2007).

Atwood (2007) argued that a key to successful talent management and succession planning is to make it a wholistic and continuous process through leadership involvement. Many

researchers attest that senior leadership buy-in and meaningful participation in a succession planning program is a precursor to attaining strategic embedding of it in an organization (Atwood, 2007; Groves, 2007; Wolfe 1996). Further to this, researchers believe that senior leadership holds great responsibility whether a succession planning initiative will be successful, or not. Consistent commitment to the purpose on a long-term basis, and a positive outlook for the future are two variables that contribute to a strong climate for organizational succession planning (Atwood, 2007; Wolfe 1996). Specifically, Wolfe (1996) attributed senior leadership's philosophy, actions, and attitudes toward the creation of an organization's "culture" and "climate" toward succession planning. Groves (2007) credited an organization's Human Resources Department with often being the champion of succession and talent management activities, but that this siloed approach is often ineffective. Furthermore, Groves (2007) stated that senior leadership must support succession planning efforts by being directly engaged in the development of employees and seeing succession planning and talent management as strategic priorities, fostering the culture and climate required for effective succession planning (Wolfe, 1996). Wolfe (1996) offered a "climate control assessment" (p. 81) to gauge an organization's climate and ability to create future leaders. However, Al Hour (2012) cautioned that succession planning is not always embraced, stating that the knowledge transfer process can be cumbersome and can adversely affect the job security of the current incumbent going forward. This reluctance can be challenging to overcome; however senior leadership must reinforce the importance of crafting a succession plan and focus on the benefits having a plan in place offers everyone concerned (Al Hour, 2012).

In addition to reducing barriers to effective succession planning at the leadership level, researchers of talent management and succession planning offer best practices for a succession planning framework. Most agree that best practices include employee involvement, senior leadership involvement, and a clear connection to the strategic plan (Atwood, 2007; Wolfe, 1996). However, complexity of the plan and program are also critical success factors. Atwood (2007) argued that a simple and straight forward succession planning program is best, as over-complexifying leads to failure to follow through on plans or to keep the plan updated. Wolfe (1996) credited remaining adaptable and open to unforeseen circumstances as key framework requirements. Bechet (2008) defined the process of succession planning as a strategic and systematic effort, which can be followed like a formula: first forecast the volume of succession in your workplace and understand the impact this will have on the business, and then directly respond by crafting corresponding recruitment and employee training and development plans to match. However, Groves (2007) offered a more loosely framed recommendation stating that identifying and developing an organization's high potential employees should be an ongoing process. Groves (2007) also cautioned that leadership development and succession planning should be done in tandem, not as separate initiatives. Although no researcher suggests their approach to succession management is the only way, the resounding summary is that the best programs are purposeful, linked to strategy, are proactive rather than reactive, and involve existing employees in development opportunities through purposeful talent management.

Effective talent management must be planned for, strategic, and follow a standard process for identifying incoming organizational talent and skill (Atwood, 2007; Wolfe, 1996). Bottomley

(2018) and Bechet (2008) credited the impending mass retirement of the baby boomer generation for the popularization and awareness around present-day succession planning approaches. Bottomley (2018) coined the term *sustainable leadership* as “implementing processes and systems that support the culture even after a specific leader has left” (p. 3). Narrowing in on cultural implications of succession, Bottomley (2018) cautioned that when an influential leader leaves an organization, organizational culture can be directly impacted if the organization has not taken succession measurements. Bottomley, Burgess, and Fox (2014) stated that incoming leaders are often not equipped to be immediately effective, and leadership development plays a key role in setting new leaders up for success. Researchers suggest that internal knowledge transfer and training, paired with leadership and managerial development are part of what creates a successful succession plan (Atwood, 2007; Bottomley 2018; Wolfe, 1996). Bottomley et al. (2014) differentiated that training gives skills, whereas leadership development and talent management initiatives promote employee growth. Wolfe (1996) stated that succession planning involves equipping high potential individuals with the skills and abilities to take on future roles within the organization. Furthermore, for new leaders to inspire those they lead, they must be able to respond to change, manage expectations, and quickly gain trust (Bottomley, et al., 2014). These soft skills are often products of an internal talent management program. Whereas Wolfe (1996) took an individual focus on an employee’s singular development, other researchers (Bottomley, 2010, Bechet 2008) saw a more systematic approach as being key. By building a formal leadership development training program, an organization can vary the types, styles, and approaches of development offered internally within an organization, thus increasing an

employee's exposure to the business, and offering continuous development (Atwood, 2007; Bechet, 2008; Bottomley 2018; Wolfe, 1996).

When designing a succession planning program, there are different perspectives to build from. Atwood (2007) suggested succession should be focused around the roles within an organization that are deemed critical. Atwood (2007) further justified this position by focusing on the object of succession planning which is the reduction of disruption to the business as a result of attrition and suggests that there should be a succession plan in place for every key role within the organization. In contrast, Wolfe (1996) suggested talent management strategies should be built around extraordinary individuals who senior leadership see as valuable and have a promising future within the organization. A different strategy is suggested by Bottomley (2018), stating that an indirect benefit or use of succession planning is an avenue to be purposeful about diversity. By having completed an organizational map of knowledge, skill, and ability, as part of a routine succession planning process, this knowledge can be paired with demographic and biographic information to map diversity strengths and opportunities (Bottomley, 2018). In combination, Bechet (2008) suggested building a staffing model that captures multiple possibilities and options to be considered (p. 245). Regardless of the viewpoint in which systematic succession planning is built, from the perspective of the employee or the role, there is consensus amongst researchers that succession planning will need to become systematic in order to address the impending retirement wave of the baby boomers (Atwood, 2007; Bechet, 2008; Bottomley, 2018). Although the retirement of the baby boomers is a known risk, they are the "largest generation" occupying our workforce (Atwood, 2007). Compounding generational

implications is the trend that newer generations to the workforce tend to leave organizations multiple times within their career (Atwood, 2007).

I have been informed by the literature of influential authors and researchers in the area of cultural analysis and succession planning when I conducted my inquiry. Within the literature I have read I have found many similarities with regards to how to engage employees in the organization to participate in the audit, what areas of work I asked about in order to assess values and artifacts, and the cultural norms that the existence of both perpetuate. I have also found literature that connects culture to strategic goal attainment, but less literature about how organizational cultural awareness can better inform succession planning. As we enter a time of an ageing workforce coined as the “silver tsunami” (Jackson, 2014, p. 1) it is more important than ever to begin to plan for the succession of leaders in our businesses.

Chapter Three: Methodology

This chapter will explain the methodologies this inquiry was guided by, as well as the rationale for each. I will also review the methods used to collect data, the overall study conduct, and scope and limitations put in place when designing this inquiry. The purpose of this inquiry was to learn how Primex might improve its leadership succession planning through greater awareness of its organizational culture. The following sections will elaborate on how the choice of methodology, methods, and conduct complimented my research question.

In this study I followed an engaged, action research methodology, informed by appreciative inquiry (AI) (Bushe, 2012; Cooperrider, Stavros & Torres, 2003; Stavros & Torres, 2018) and design thinking (IDEO, 2015). I also drew from the Action Research Engagement (ARE) model (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013) as part of my overarching research methodology. Additionally, I was informed by Schein's (1999) prominent half-day cultural assessment workshop framework. The methodology I was guided by, and the engagement methods I employed in this inquiry, had a qualitative approach, and collected solely qualitative data. Qualitative data was obtained primarily through second person research (Torbert & Taylor, 2008) whereby I collected data from participants during the Liberating Structures sessions. Liberating Structures are engagement methods which harnessed the knowledge of a group through participatory discussion and activity, whereby knowledge was self-generated by participants (Lipmanowicz & McCandless, 2013).

Action research is a collaborative form of research, whereby the relationship that exists between the stakeholders, researcher(s), and the participants work together to create shared

learning. Specifically, action research focuses how an inquiry is conducted “with” participants, rather than “on” participants (Greenwood & Levin, 2011, p. 1). It is this engagement between participants and the researcher that differentiates action research from other forms of research. More narrowly, action research becomes insider action research when the researcher is part of the organization being studied. As I conducted research within an organization I was recently employed by, I consider it to have been insider action research. To ensure effectiveness of insider inquiry I required: 1) access to information and closeness to the object of research; 2) a pre-understanding of the inquiry focus, developed from an understanding of the topic of inquiry as both an insider as well as a researcher; 3) capability to balance the dual roles held as both a researcher and insider; and 4) ability to navigate the inherent internal politics which can be present when looking objectively within one’s own organization (Coghlan, 2014). In my former role of Director of People and Culture, I was central to organizational development activities and had an intimate understanding of Primex’s organizational culture. Furthermore, by developing and following research protocol with respect to ethical considerations, I crafted a framework for a successful insider action inquiry.

The ARE model determines that effective change leadership requires stakeholder engagement both early on, and throughout the inquiry process (Rowe, et al., 2013). Following the ARE model, I led participants through the *readiness for change cycle*, *transition zone*, and *change action cycle* (Rowe, et al., 2013, p. 20) (see Figure 1). I leveraged ARE facilitation to fostering participant involvement early on through communicating the purpose, process, and intended outcome of the change process as prescribed by Step 1: Focus and Framing (Rowe, et

al., 2013). I involved stakeholders throughout the inquiry through multiple systematic successive engagement methods as prescribed by Step 2: Stakeholder Engaged Inquiry Methods (Rowe, et al., 2013). Additionally, after the appreciative interview survey concluded, I shared preliminary data with my inquiry partner ensuring the engagement methods were effective as prescribed by Step 3: Reflection on Action (Rowe, et al., 2013). During the in-person engagement session I invited participants to reflect on their own responses to the appreciative interview survey, as well as the responses of their peers, and apply this in our in-person session. Once findings and conclusions were generated from the research gathered in the in-person engagement session, they were shared with my inquiry participants and validated as complete and correct as part of the engagement process as prescribed by Step 4: Evaluation of Action and Engage Forward (Rowe, et al., 2013). Also provided in this timeframe was draft recommendations. I received confirmation that no changes were requested to the findings, conclusions, or draft

recommendations. From here, I began the process of transferring the change leadership to the organization through concluding my inquiry, and presenting the organization with my findings, conclusions, and recommendations as prescribed by Step 5: Recontextualize and Reconstruct for Organizational Change (Rowe, et al., 2013).

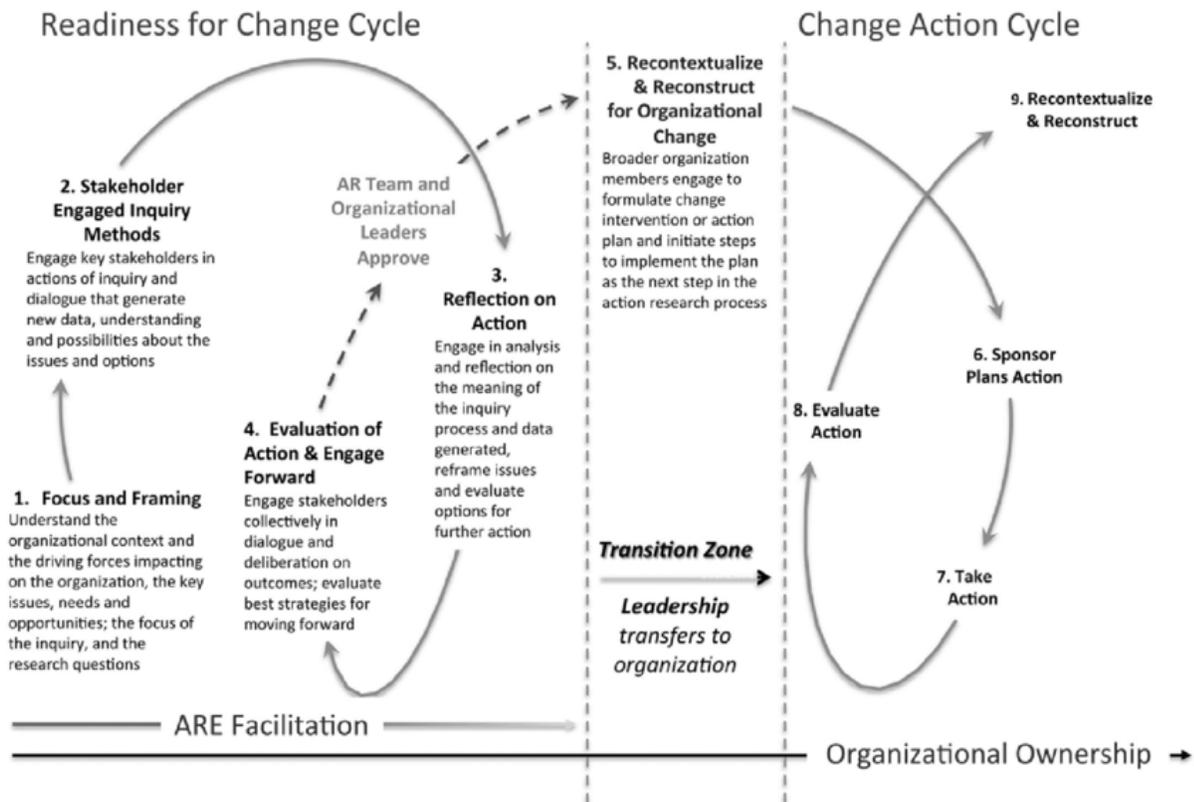


Figure 1 - Action Research Engagement: Creating the Foundations for Organizational Change - Scientific Figure on ResearchGate. Available from: https://www.researchgate.net/figure/The-action-research-engagement-model-Modified-version-of-the-original-organizational_fig1_259932785 [accessed 18 Feb, 2020]

I chose to be informed by principals of Appreciative Inquiry because AI seeks to understand positive and “life-giving forces” within in a system (Watkins & Mohr, 2001). AI calls for the sharing of positive stories, an emphasis on an improved future state, the creation of a focused vision for the future, and intentionality on planning, acting, and reflecting upon a vision for the future (Bushe, 2012; Fry, 2014). Stavros, Torres and Cooperrider (2018) presented a five-step model to generate discussion around possibility and strength called the Appreciative Inquiry 5-D Cycle (see Figure 2). The five steps in the cycle are Define, Discover, Dream, Design, and Deploy (Stavros, Torres & Cooperrider 2018).

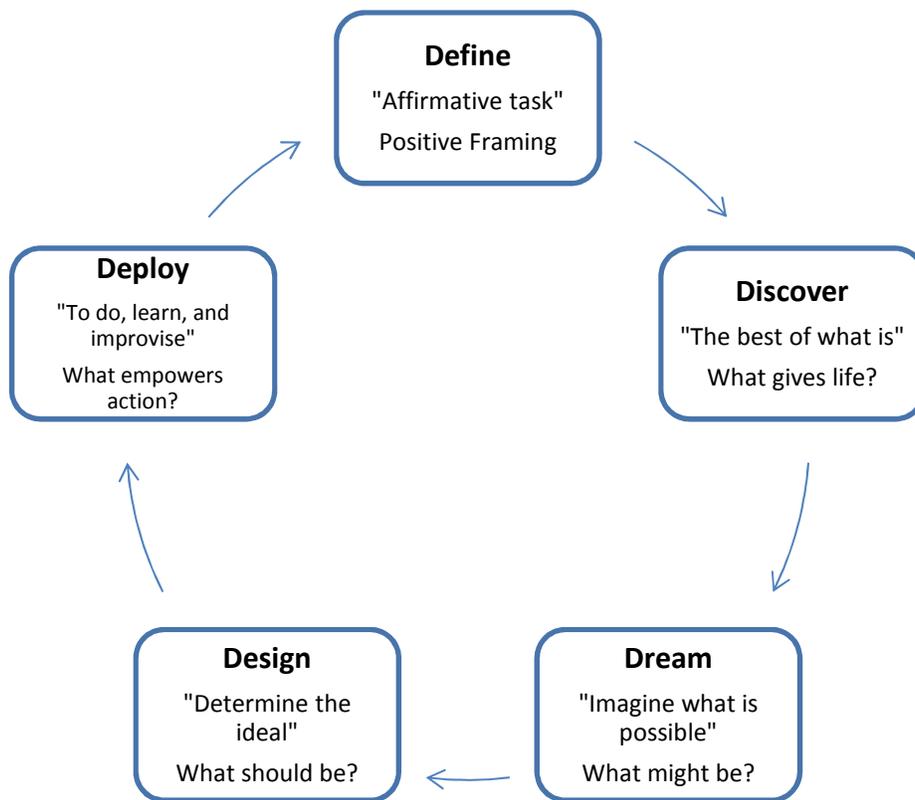


Figure 2 - Appreciative Inquiry Cycle (Stavros, J. M., Torres, C., & Cooperrider, D. L., 2018).

Survey Methodology

A survey method was chosen for the number of process and design benefits it offered both the participants, and the researcher. From the participant perspective, a survey offered the participants flexibility with regards to the date and time of day they chose to participate as both the participant invitation email, and the research information letter, instructed participants to access and complete the survey at a time of their choosing within a one-week window. In addition, the participant invitation email (Appendix A) and the research information letter (Appendix B) provided the participants the survey questions in advance. This allowed for the participants to take time to consider the questions and prepare to respond to the survey in advance of completing the live survey. I felt this benefit of time to consider the questions, and choice of when to complete the survey, would lead to thoughtful and genuine responses from participants as well as a higher participation rate. Additionally, the use of an electronic survey allowed for participation and input from employees who were not able to attend the in-person engagement session but still wished to contribute to the inquiry. Although electronic interviews lose the human interaction element which traditional in-person appreciative interviews offer, including probing, this method allowed me to effectively mitigate power-over concerns within the participant group. Potentially there would be participants within the same department, senior and junior to one another, participating and it could potentially limit or change a participant's response given the power-over dynamic. Furthermore, the use of an electronic survey allowed me to obtain verbatim statements from participants, capturing their sentiments word for word,

thus reducing interpretation errors by an interviewer. I was then able to reference these verbatim statements throughout the writing of this document.

In-Person Engagement Session Methodology

Design thinking principles (IDEO, 2015), specifically Liberating Structures (Lipmanowicz & McCandless, 2013), were chosen as the method for the in-person data collection sessions for multiple reasons. I was able to gather both the singular and collective knowledge of the participant group by *stringing* together four different Liberating Structures into a four-structure string. This specific four-structure string leveraged both individual brainstorming as well as group discussion and ideation (Lipmanowicz & McCandless, 2013). Additionally, the use of Liberating Structures fostered collaborative communication and interaction between the participants based on the nature of how the structures were facilitated (Lipmanowicz & McCandless, 2013). There was opportunity for individuals to record their thoughts and ideas alone, as well as discuss how to best act on these ideas in small groups. The groups were intentionally made to ensure there were people from different departments and levels in the organization, as well as to ensure that no direct reports were in any groups together. This created a cross-functional perspective within the discussions, as each participant offered different experiences and insights with regards to working at Primex. Furthermore, it was important that as the researcher I did not lead, influence, or contribute to any discussions – the design thinking behind the use of Liberating Structures and the specific design of the string ensured this: Liberating Structures place the focus on a question or topic, offering a process to facilitate discussion; however all content is derived directly from participants. It was important that as the

researcher I did not lead, influencer; or contribute to any discussions. This was an important design element as I did not want my former role as Director of People and Culture for Primex to influence, or contribute to, any content within the discussions. Additionally, the use of this Liberating Structures string leads the participant group through every step of the change process including inspiration and ideation through the brainstorming structure, and implementation considerations through 15% solutions and storyboarding structures (IDEO, 2015).

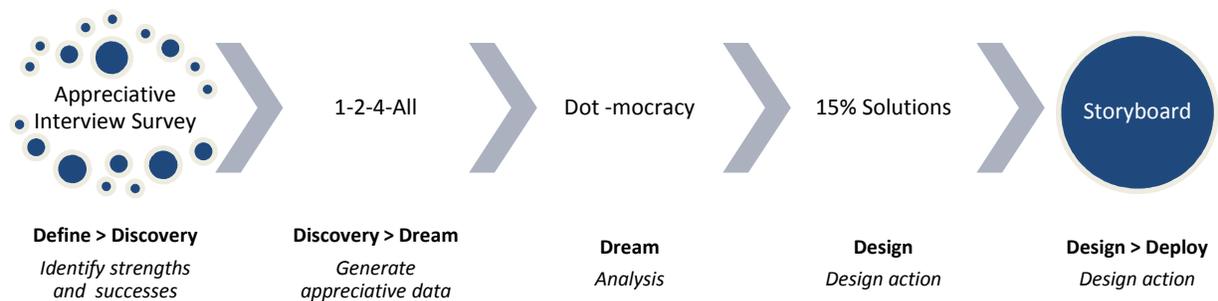


Figure 3 - Appreciative Inquiry Informed Liberating Structures String

Survey Method

The Liberating Structures (LS) string started with an Appreciative Interview, which is informed by the AI step of Discovery (Stavros, Torres & Cooperrider, 2018). This step is intended to build momentum (Lipmanowicz & McCandless, 2013) while sharing personally reflective experiences of their successes and in areas where they have seen memorable positive parts of the organization in action. Specific questions for the interviews can be found in Appendix G.

The Appreciative questioning was conducted electronically via an anonymous survey in advance of our in-person engagement session. The survey was hosted on Survey Planet, an electronic survey platform hosted in the United States. The survey could be accessed anonymously via a hyperlink which was included in the participant invitation (Appendix A) and research information letter (Appendix B).

Engagement Session Methods

The string started out with Appreciative Interviews, conducted via survey. The second structure in the string was a form of 1-2-4- All and Brainstorming which is informed by the next AI step of Dream (Stavros, Torres & Cooperrider, 2018). This step was intended to generate a high volume of quality ideas built off a combination of the responses from the appreciative survey and the five brainstorming questions presented in the session (Lipmanowicz & McCandless, 2013). In this step, I asked participants to follow a 1-2-4-all framework by first individually brainstorming responses to the questions posed to them, then partnering up in groups of two, and then later, four, to share their responses and continue to generate further ideas while writing all the additional ideas down on post-it notes. Lastly, all the post-it notes generated were posted on flip chart paper, one flip chart per question. A list of brainstorming questions can be found in Appendix F.

The third structure in the string was Dot-mocracy, whereby participants narrowed down the suggested ideas brought forward and identified the ones agreed upon as core and most prevalent. Dot-mocracy involved participants voting for their favourite ideas by placing dot shaped stickers on the Post-it notes with the idea they most liked. Once all the dots had been

placed, the Post-it notes with the most dots on them indicated that they were the group's top choices.

The fourth structure in the string was 15% Solutions (Lipmanowicz & McCandless, 2013) which was informed by AI's fourth step of Design (Stavros, Torres & Cooperrider, 2018). This step was intended to engage the employees of Primex in planning for the future. Leveraging the vision discovered in the first three structures, I had asked the participants to propose manageable and practical actions they could take to build and sustain Primex's culture, whether those actions related to succession planning or not. Additionally, I asked participants to consider actions they could take to enhance the creation and implementation of a succession planning program in their respective areas. This step connected the supportive policies, procedures, and organizational elements to the stories brought forward, exploring the relationship between the organization's values and artifacts and what organizational assumptions may be present (Schein, 1999). We also identified how the current practices can be improved, or better supported / documented (Schein, 1999).

The fifth structure in the string was Storyboarding (Lipmanowicz & McCandless, 2013) which was informed by AI's fifth step of Deploy (Stavros, Torres & Cooperrider, 2018). This step was intended to take participants' thoughts and discussions in the 15% solutions structure and conceptualize what steps they would need to take to enact their ideas. In the Storyboarding session I had the participants work in groups to sketch the steps their 15% Solution ideas would require. The Facilitation Guide is attached for the in-person engagement session and can be found in Appendix E.

Project Participants

The participants chosen for this inquiry were members of Primex's Leadership Team and their direct reports who oversee frontline operations and are considered part of Primex's Management Team. The Leadership Team is known as the *5 Team*, as it is comprised of five members: President and CEO, Chief Financial Officer, Sr. Vice President, Sales, Marketing and Engineering, Vice President of Manufacturing, and Vice President of Supply Chain. The President and CEO was not an inquiry participant as he is my organizational partner. Primex then has a second level of management employees who are the direct report of the 5 Team and have leadership and functional management responsibilities. The combination of the 5 Team and their management level direct reports is known as *Team 17*. Therefore, after excluding my organizational partner, I invited 16 participants which equals 10.66% of Primex's employees and provided representation for 100% of Primex's departments, offering representation from a broad perspective who also have varying lengths of service (Schein, 1999; Wilkins, 1983).

I chose the Leadership Team as participants based on wanting representation from every functional area, including the perspective of tenured employees who have visibility of Primex outside of their own department. I chose the direct reports (but managers of others) of the Leadership Team, based on wanting to harness the perspective and tacit knowledge of front-line employees, and bring insight to the discussions from beyond who would typically be asked for input in strategic decision making. I have limited the invites to this group only because Team 17 has an ongoing working relationship and there is trust amongst this group. Additionally, the group is used to working together and having cross-level interaction and discussion as part of

Primex's culture, and organizational past practice is that the management team meets quarterly, in its entirety, to discuss the business. Finally, this group was chosen as they would be the individuals within the organization who bring the most exposure and experience to the concepts of organizational culture and succession planning, and would be the group who are ultimately responsible for actioning the recommendations generated through this inquiry.

The survey method is appropriate for any sized participant group, and works especially well for Primex who have potential participants who work on one of the off shifts (afternoon or night shift) and may be unable to attend the in-person engagement session, but would still like to contribute to the inquiry. Due to the engagement sessions taking part in the middle of December, I was aware that it would be likely that a few potential participants would be unable to attend the in-person engagement session due to work or personal travel commitments that would conflict with the session dates. However, the Liberating Structures string also had flexibility with the number of participants and could run effectively with as a little as four participants.

My inquiry team consisted of myself, and a member of my MA-L cohort who is external to my organization and is also an HR professional. The inquiry team member confidentiality agreement can be found in Appendix D. When it came to interpretation of the data, I acknowledged that as an action researcher within my former organization I had specialised insider knowledge. Furthermore, as an HR professional I also bring subject matter expertise and pre-existing knowledge of Primex's organizational culture. Both perspectives enhanced my inquiry abilities, but also brought forward the potential for researcher bias. To mitigate this bias, I relied upon my inquiry team member to offer additional perspectives to the data collected, other

than my own. Once I had completed an initial review and summary of the data, I shared this with my inquiry team member for her observations and feedback of what findings, conclusions, and recommendations I had prepared.

Study Conduct

Participants were invited by email, (Appendix A) which included the information letter (Appendix B). Those who respond in favour of participating in the inquiry were then asked to return their signed consent form (Appendix C) as their RSVP to the engagement session. Due to the 24-hour schedule of Primex's business, a mid-day engagement session worked best in order to see both day and afternoon shift employees. For anyone who wanted to participate and was unavailable on the day of the session or chose not to attend but still wanted to confidentially provide information, they were able to complete only the appreciative questioning survey. There were eleven participants who completed the survey (n=11) and there were eight participants who attended the in-person engagement session (n=8). The survey asked four open-ended short answer questions. The questions solicited employees to share personal stories or experiences which speak to the best of Primex's culture. The survey questions, and a summary of top responses, can be found in Appendix G. There was no time limit with regards to how long the participants could spend completing the survey once they had begun; however, from the date of the research participant invitation letter, they had one week to complete the survey.

The data collected through the electronic survey was then coded by participant, with each anonymous response being assigned a participant number (P1 through P11). After reviewing, coding, theming, and summarizing the survey data, I presented a summary of these ideas and

themes in a de-identified format to those who attended the following in-person engagement session. The presentation of this content kicked off our in-person engagement session and set the intention for our time together. These personal stories and experiences were the narrative which made up the aesthetic heart of Primex's organizational culture and embody the totality of what we were trying to qualitatively identify in our engagement session. The introduction of these stories refreshed the group on the experiences each participant had shared, which also acted as a primer for our session. By debriefing the survey results in person, we built momentum and began the process of our engagement session.

Next, I numbered each participant in attendance at the engagement session from one to eight, and asked that every piece of research content they generated during the session be labelled with their participant number – this included post-it notes of ideas from the individual and group brainstorming activities in 1-2-4-All and the final lists and flip chart paper used to document the 15% solutions and storyboard presentations. After completion of the two and one-half hour (2.5 hour) engagement session I thanked all participants and advised them of the next steps: after the session I transcribed the data, compiled it in a spreadsheet, grouped into themes, and would then share the summarized data as findings with the research participant group to ensure that they were complete and correct.

I presented a summary of the four findings derived from the survey and the in-person engagement session data in the form of an Excel spreadsheet the participant group as well as my organizational partner. Sharing the findings with my inquiry participants was part of the engagement process to ensure that the participants see their contributions reflected in the final

findings and are provided an opportunity to correct any errors or misinterpretations as agreement with finding is critical (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013). The participants confirmed the accuracy of the findings and did not amend or add to the findings.

Based on the confirmed four findings, and the literature I reviewed with regards to organizational culture drivers and succession planning considerations, I arrived at seven conclusions which respond to the inquiry's guiding sub-questions which were:

1. Where is Primex's culture rooted in formal and documented processes and where is it supported by assumptions?
2. What are the stories of critical and essential strengths and successes Primex employees tell about their organization?
3. How is Primex's culture considered in succession planning today?
4. What does Primex management team feel is the connection between the organization's culture and their ability to execute their leadership succession plan?

I then synthesized the research findings, conclusions, and suggestions from the literature into four recommendations. Before finalizing these recommendations, I met with Primex's Human Resources Manager. The purpose of this meeting was to seek her feedback and ensure that the recommendations addressed Primex's main concern with regards to leadership succession planning. This was a key step as Primex's Human Resources Manager would be the lead in the implementation of these recommendations, in concert with other inquiry participants. In this meeting we focussed our discussion on how to best mobilize the recommendations, and

understand what would empower inquiry participants to take action, satisfying part of the Deploy step in the AI informed inquiry model (Stavros, Torres & Cooperrider, 2018).

Data Analysis and Validity

To demonstrate validity within my inquiry, I followed a predetermined and regimented process. The data collected through the electronic survey was copied and pasted from the survey tool into an Excel spreadsheet with the following column headings: *participant number*, *verbatim response to question*, and *themes identified by researcher*. Data from the 1-2-4-All Brainstorming and Dot-mocracy, 15% Solutions and Storyboard responses followed a similar process; however, I manually transcribed the data for each into Excel. For the brainstorming activity I also noted on the spreadsheet the frequency of unique ideas and how many dots each idea received in votes. In total the 8 participants generated 171 post-it notes of ideas which represented 90 unique ideas in response to the five brainstorming questions (Appendix F).

By formatting the data this way, I followed the verbatim principal by capturing the exact words used by the participants (Stringer, 2007). Additionally, by capturing the verbatim responses of participants I would be able to reduce possible researcher bias, interpretation errors, and be able to include direct and paraphrased quotes from participants in the study, increasing credibility and confirmability (Stringer, 2007). I organized the data so each data generating question had its own tab; through this I became more easily familiar with the empirical data I had collected. From there, the responses were coded by participant, with each anonymous response being assigned a participant number. Participant numbers were assigned in order of submission, with the first survey respondent receiving number one (P1), and the final survey respondent

receiving number eleven (P11). During the in-person engagement session participants were each assigned a participant number privately (P1-P8).

To code the data from both the survey and the in-person engagement session, I first looked for repetition of key words in context (KWIC) (Ryan & Bernard, 2003). Words that came up frequently were highlighted and assigned merit within the data. Using the sort and filter tools in Excel I was able to sort the key words and theme them by prevalence and context. The themes I identified were then summarized in the *themes identified by researcher* column which I then later sorted and counted the responses by. A benefit of using Excel was that I was able to easily group key responses with key words. My analysis process was informed by Hesse-Biber and Leavy's (2011) specification and reduction process by looking for patterns in my data, as well as Saldana's (2016, p. 14) process of categorizing data based on themes and frequency and asserting theories from there.

Once I had prepared the data, I collaborated with my inquiry team. I presented emerging themes I had identified, shared my preliminary interpretations, and sought their observations. The involvement of my inquiry team at the data analysis stage increases the validity and reliability of the inquiry. By working through my initial findings with my team, rather than alone, I was more aware of judgements and assumptions I made when reviewing my data (Ryan & Bernard, 2003). I asked that my inquiry team member challenge my perceptions and judgements, forcing me to identify, articulate, and defend my findings resulting in a refined position informing my conclusions and recommendations (Ryan & Bernard, 2003). Additionally,

the use of multiple coding techniques and data sources are elements that increase the validity of my inquiry.

Once the review and refinement process with my inquiry team was completed, I shared the preliminary findings back to the participant group to ensure transparency and accuracy. The involvement of participants to review and respond to preliminary findings is also an activity which is seen to increase validity (Lincoln & Guba, 1985, as cited in Ryan & Bernard, 2003).

It is noteworthy to mention that, as a part of the Liberating Structures string, the participant group mirrored coding activities. Specifically, they themed data when grouping the post-it notes, and enacted elements of pattern-coding and focused-coding (Nelems, 2019, p.1) when using dot-mocracy. As part of my own data exploration process (Hesse-Biber & Leavy, 2011), I considered both the data generated at the individual level (post-it notes) to the data generated as a group (dot-mocracy, 15% solutions, and storyboarding). I was alert to the possibility that material data put forward by an individual could not surface at the group level (Saldana, 2009). However, this did not occur. I also compared the themes that emerged from the raw data, to the themes that the group prioritized and put forward during the Liberating Structures activities and noted that there was continuity of key ideas.

Ethical Implication

As a former employee of Primex, and now researcher, I have no formal power over any of the participants. However, I acknowledge that in my role of researcher there may have been residual power-over dynamics or perceived power-over from my time as an employee and my existing relationships within the organization. In order to ensure this potential ethical issue was

mitigated, I was purposeful in engagement design, specifically: making it clear in the study invitation letters that participation was voluntary, and building in a simple opt-out process so people may decline to participate without tension; utilizing Liberating Structures as a data collection method to allow participants to self-generate their content in a group setting, reducing my direct involvement with the collection of data at a one-on-one level (Lipmanowicz & McCandless, 2013); as well as using an Appreciative Inquiry informed approach to focus dialogue in a manner that may be perceived as less controversial (Cooperrider, Whitney, & Stavros, 2003).

Further to my own possible power-over dynamic, I recognized that there may be power-over dynamics within my participant groups. Therefore, the Appreciate Interviews were conducted through a confidential survey. This was intended to prevent people with power-over relationships in the same room hearing each other's personal reflections. During the other Liberating Structures strings, I was intentional in my engagement method design to ensure that no direct reports work together within any of the structures by intentionally grouping participants in cross-departmental groups. These instructions and intentions were stated in the invitation and information letters. In addition, due to the President and CEO's power-over relationship with all participants he was not present during the engagement methods. Additionally, when my organizational partner, Primex's President and CEO, was presented with initial findings the data was anonymized.

With respect to the Tri-Council principles (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, & Social Sciences and

Humanities Research Council of Canada, 2014) of respect for persons; concern for welfare; or justice, I saw no areas of concern and can confirm participants' rights were upheld throughout the inquiry process. The invitation letter (Appendix A) outlined the purpose of the study and invited participants informed and voluntary participation in the study. It also stated that they were free to withdraw from the study at any time without prejudice, but that due to the collaborative nature of group discussions and the use of Liberating Structures my ability to remove the contribution to date was limited. The information letter reiterated the withdrawal process but also disclosed risks (slight) and benefits of participation (many), and stated that I had no conflict of interest, explained the purpose of the study including what to expect during the engagement sessions, as well as how their data would be kept confidential and ultimately used and shared. The consent form (Appendix C) confirms that participants read the information letter and that their participation was informed and voluntary.

Outputs

As an outcome of my inquiry, I will provide Primex with a formal debrief meeting and this written report. Prior to concluding my inquiry and finalizing my recommendations I will meet with key stakeholder of Primex to ensure the draft recommendations are accurate and possible. The discussion of the recommendations from a lens of utilization begins to satisfy the final step of the Deploy step in the AI informed inquiry model (Stavros, Torres & Cooperrider, 2018). The step of Deploy will be fully satisfied once I transition the knowledge to them in a "make-it- happen meeting" (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013). In this meeting I will review this report and discuss the leadership implications for organizational

change with the intention for them to begin the implementation of the recommendations as they see fit. Specifically, this meeting will:

1. Offer Primex foundational knowledge of their organizational culture;
2. Provide a recap of how leadership team fosters this culture – assumptions and systems in play;
3. Identify cultural drivers and implications so culture becomes part of the future decision making and planning framework;
4. Describe how this knowledge can inform strategic succession planning and other critical processes;
5. Discuss how knowledge of culture and system can contribute to organizational resilience, long term.
6. Present action-oriented recommendations in order of chronology and importance

A written report was chosen as the research output to offer the organization a reference document for future use. A debrief meeting was selected in order to foster clear and transparent communication, as well as provide an opportunity for discussion on any areas of query, concern, or further interest.

Contribution and Application

Within my inquiry, I sought to offer Primex the ability to understand their organizational culture and use that knowledge to better inform their succession planning. To complete this inquiry I utilized first-person, second-person, and third-person research (Torbert & Taylor, 2008). An example of first-person research was my use of an inquiry journal; I was mindful to

capture my subjective reflections (Torbert & Taylor, 2008) both in-action, as well as on-action (Schon, 1983), throughout my inquiry. I constructed second-person research (Torbert & Taylor, 2008) through my engagement methods, facilitating dialogue and manifesting tacit knowledge within my participant group using Liberating Structures. As an organization, the desire to better understand its own culture is not unique to Primex; other organizations have sought to better understand their organizational culture, and many researchers have developed tools to aid in this process. Therefore, my inquiry was also informed by third-person research (Torbert & Taylor, 2008) from leaders in the field of understanding and leveraging organizational culture, as demonstrated in my literature review. Additionally, I will contribute to the greater body of knowledge by sharing this thesis which looks at the application of organizational cultural awareness to the succession planning process –an application I have found very little specifically written about.

Chapter Four: Inquiry Project Findings and Conclusions

This chapter will introduce the findings of the inquiry and identify key themes which became apparent after analyzing the data produced through the engagement sessions. The findings then informed a series of conclusions with regards to the inquiry question: “How might Primex Manufacturing improve its leadership succession planning through greater awareness of its organizational culture?” Further to this initial question, the conclusions will also address a series of guiding sub-questions which were:

1. Where is Primex’s culture rooted in formal and documented processes and where is it supported by assumptions?
2. What are the stories of critical and essential strengths and successes Primex employees tell about their organization?
3. How is Primex’s culture considered in succession planning today?
4. What does Primex management team feel is the connection between the organization’s culture and their ability to execute their leadership succession plan?

The inquiry findings and outcomes for Primex have been considered and recommendations for each are made in Chapter Five.

Study Findings

The following section will provide an analysis of the data collected from the participants and has been grouped into findings. Each finding is supported with direct and paraphrased quotes from the participants, gathered through both the survey and in-person engagement session

methods. The findings offer a narrative of the key themes which were apparent in the analysis of the data.

Finding 1: Primex's existing organizational culture is well established. This finding was apparent based on the volume of examples participants were able to identify where Primex's culture is formally supported and established by documented processes and procedures. Additionally, most examples were provided multiple times by different participants demonstrating commonality of ideas. Specific themes included:

Communication: Formally, information is intentionally communicated within the organization to reach a varied audience, and the method of communication is tailored to meet the needs of the receiving group (P1, P3, P6, P8). Specific examples include the use of communication boards for those without computer access (P6), email for those who work remotely, all staff meetings to deliver critical news to everyone at the same time, and in-person team meetings where two-way communication is encouraged (P1, P3, P6, P8). Informally, Primex's President and CEO habitually walks around the office and manufacturing plant to personally engage with each employee (P1, P2, P3, P6). This in-person dialogue fosters an immediate two-way information exchange as Primex's President and CEO is known to be forthright and will answer any question he is asked about the business with honesty and transparency (P4). Additionally, his genuine interest in how each of his employees is connecting with their work opens a myriad of conversation topics in which sometimes small groups gather to partake (P1, P2, P3, P6).

Recognition: Formally, Primex fosters a sense of ownership and team through linking performance to compensation in the form of the profit-sharing program, *Coaching for Success* performance management program, length of service award bonus program, and the *Club 365* attendance award bonus program (P1, P3, P6, P8). These programs place a formal emphasis on how everyone contributes to the overall success of the company and reinforces the company's team promise of "first time, on time, every time" (Primex, 2020). Informally, recognition and celebration of successes centres around social gatherings over food or branded *swag* (P1, P2, P4, P5, P6, P7, P8). It is common that when an organizational achievement has occurred, such as a new *days without a lost time accident* record is set, a sales record is broken, or an individual is celebrating a personal milestone such as a marriage, the birth of a child, or a promotion, that the company comes together to hold a pot-luck lunch, a morning of chai tea and desserts, gifted snacks set out in the lunchroom/ at the coffee machine, or another grassroots organized celebration (P1, P2, P4, P5, P6, P7, P8). Alternatively, Primex surprises employees with the gift of a branded item (P2, P3, P4, P6, P8). Past gifts have included commemorative coins for Team 17 and award recipients of Club 365, and branded clothing items including jackets, vests, windbreakers, blankets, mugs, post-it note holders, and journals (P2, P3, P4, P6, P8). These gifts are visual indicators of being part of a team, and all contributing toward and achieving the same goal.

Values Driven: Formally, Primex outwardly communicates the organization's values and team promise as they can be found on the company website, displayed on the walls in the office, boardrooms, plant, and warehouses (P1, P2, P4, P6, P7). In addition, Primex internally circulates

an Employee Handbook and Culture Book which focus on the alignment between company performance, values, and culture (P1, P2, P3, P6, P7, P8). Informally, there is a strong current of family values and sense of team within the organization. These values manifest as an organizational belief and understanding in work-life balance, employee health and wellness, and flexibility and support around employee-family commitments (P2, P6, P7).

Team: Formally, Primex places a large weight on organizational and cultural fit when hiring new members to the team, and often the interview process includes a third party assessment for fit, informal team meet and greet, and a formal team interview focused on assessing fit and synergy (P2, P3, P6). However, the focus on team fit does not end with the offer letter, but rather continues forward in the onboarding process that has a focus on supporting the new hire to build internal relationships quickly and settling in with the team efficiently (P6). Informally, a team lunch is always scheduled for the first week so that the new team member can get to know their new department in a more relaxed and social setting (P1, P5, P7, P8). Additionally, external social events are peppered into the calendar to ensure adequate time for getting to know each other and sharing an experience outside of the workplace; events have included outings to sporting events, getting involved in local park clean up, and taking part in physical activities such as sports teams and the Sun Run (P1, P4, P5, P6, P8).

Finding 2: Primex is a values-centric organization. Primex's values are: Safety – everyone is responsible; Connection – get involved; Collaboration – help each other succeed; Innovation – be bold and responsive; Integrity – be open and accountable (Primex, 2020).

Although these value statements are familiar to all who work at Primex, participants felt it was

the combination of these values in concert with one another, and how they manifest in the workplace is what makes Primex such a unique organization. Each of Primex's values was brought to the forefront by participants referencing each value and noting the synergies between each.

Collaboration: Collaboration was the most referenced value, with 54% of participants connecting Primex's uniqueness to how employees collaborate with one another (P1, P3, P6, P8, P10, P11). Specific examples included stories about the feeling of team, and the sense of genuine care and consideration for one another, and how people care about each other and how they are doing (P10). A related theme was how everyone is treated with mutual respect, regardless of role or department in the organization (P5, P7, P9).

Safety: Although Safety is the value which is listed first in the Primex values statement (Primex, 2020), it came second in response frequency with 45% of participants connecting safety to how Primex differentiates itself from other organizations. Safety is often the first topic reported on in meetings, has a dedicated committee to uphold best practices and continued improvement, and it is evident that safety is at the core of Primex's approach to business (P2, P3, P5). Primex's safety program was credited to be foundational to Primex's success (P11), paramount to all employees (P3), and is a core competency of the organization (P4). Primex's standing record for days without a lost time accident is 285 days, achieved in 2008 (Primex, 2020).

Connection: Participants identified that Primex celebrates diversity in both formal and informal practices, as inclusivity is at Primex's core (P11). In addition to celebrating diversity,

transparency in communication was also a theme that was presented with regards to connection (P9, P10). Involvement, discussion, and awareness are fostered through programs including the Primex Culture Book (P10) and the Employee Engagement Survey (P3). In addition, Primex encourages employees to have fun by getting involved and participating in events, programs, and activities on and off site (P11).

Innovation: Creativity and innovation were stated to be two of Primex's most unique values (P8). By leveraging the spirit of continuous improvement, teams troubleshoot challenges in original ways, spurring new thinking and innovative solutions (P8). Additionally, Primex excels in the ability to creatively problem solve and to collaborate with different departments and people to achieve the best outcome (P1). This value is also made a reality by the management team's openness to new ideas and encouragement of approaching problems creatively (P2).

Integrity: The way Primex enacts integrity is demonstrated in a combination of some other themes seen in the values: transparency, inclusivity, and respect for one another and the ideas and value each person brings (P9). Furthermore, the foundation of trust built upon integrity shows up in how Primex approaches challenges, listening, adopting new technologies, and employing a willingness to change (P6).

Finding 3: Knowledge of Primex's culture can be harnessed to inform and enhance succession planning processes. Participants identified existing processes that reflect Primex's organizational culture that could be present in a succession planning program. Already established resources include the employee engagement survey which highlights the strengths and opportunities of the organization's culture (P3). Primex's senior leadership demonstrates

transparency by communicating that business decisions are guided by the organization's values (P4). Organizational culture and values are considered when hiring new employees and using team interviews to ensure an organizational fit (P1, P3, P4, P8) as well as the use of pre-employment testing (P2, P4, P6). Primex's new hire onboarding process offers an opportunity to set new hires up for success and indoctrinate them into the organization (P1). The Coaching for Success Program combines performance history, demonstration of values, and personal goals to help identify people who could be considered for succession opportunities (P3, P4, P6).

Finding 4: There is opportunity for Primex's Leadership team to act today to reinforce Primex's culture for the future. Participants recognized that there are behaviours of Primex's leadership team that regularly impress the organization's values and culture into the business and upon employees (P1, P2, P4, P7, P8). Primex's leadership is consistent in their communication with employees about how personal performance and individual values alignment is important (P3, P5, P8). Primex can foster opportunities for meaningful social interaction, solidifying a sense of team and collaboration throughout the organization (P2, P4, P7). Human Resources and management can provide employees with professional, emotional, and leadership development and programming, providing the employees of today with skills needed for tomorrow (P1, P2, P8). Primex as a whole can do more to document the successes of the organization's current culture in initiatives and activities such as ongoing publishing of the annual culture book (P5), continued reporting out of the engagement survey results (P3), and leveraging the Coaching for Success program to develop employees in-house (P3, P4, P5).

Study Conclusions

This inquiry was conducted to answer the research question: “How might Primex Manufacturing improve its leadership succession planning through greater awareness of its organizational culture?” The following conclusions will respond to the research sub-questions, as illustrated in the following table.

Table 1 - *Study Conclusions by Inquiry Sub-question*

Inquiry Sub-question	Study Conclusion
1. Where is Primex’s culture rooted in formal and documented processes and where is it supported by assumptions?	Conclusion 1: Primex’s Leadership champions the organization’s culture and values
	Conclusion 2: There is alignment between Primex’s espoused culture and values, and its documented organizational practices
2. What are the stories of critical and essential strengths and successes Primex employees tell about their organization?	Conclusion 3: Employees experience Primex at its best when connecting and collaborating with others in the organization.
	Conclusion 4: Employee’s connect deeply with Primex’s culture and values
3. How is Primex’s culture considered in succession planning today?	Conclusion 5: Cultural fit is considered in external recruitment
	Conclusion 6: Primex lacks a formalized employee professional and leadership development program
4. What does Primex’s management team feel is the connection between the organization’s culture and their ability to execute their leadership succession plan?	Conclusion 7: Primex’s culture of continuous improvement reinforces the concepts of professional and leadership development

Conclusions relating to Sub-question 1: Where is Primex’s culture rooted in formal and documented processes and where is it supported by assumptions? Two conclusions address this question. The first conclusion is that Primex’s Leadership champions the organization’s culture and values. The second conclusion is that there is alignment between Primex’s espoused culture and values, and its organizational practices.

Conclusion 1: Primex’s Leadership champions the organization’s culture and values.

As presented earlier in Chapter 4, Primex’s culture is well established, both formally and supported by assumed behaviours. Where there are no formally documented expectations with regards to the demonstration and application of Primex’s culture and values, employee glean from the actions of management what is acceptable (P1, P2). As discussed in Chapter 2, an organization’s culture is influenced by espoused values held by senior management (Krause-Jensen, 2011). For Primex, research participants identified several examples where Primex’s Leadership Team leads by example in specific areas. In these areas of cultural display, such as how information is communicated, recognition is given, teamwork is fostered, and decisions are made, the actions of the Leadership Team set the tone for acceptability and create the social contract. It is through the actions of the Leadership Team that employees are signaled what is socially acceptable. It is also through programs that the Leadership Team has put in place, such as Coaching for Success (P2, P3, P4) and Profit Sharing (P8), that reinforce the importance of shared values. The Coaching for Success Program asks employees and managers to document specific examples where the employees have demonstrated Primex’s values in how they complete their work (Primex, 2020). Further to this, historically, and dependant on Primex’s

financial performance, the Leadership Team has set aside a pool of funds to be allocated to employees in the form of a profit-sharing bonus. The profit-sharing bonus is paid out using a multiplier factor which is based on employee ratings from the Coaching for Success program. This connection further demonstrates the link between the values which the Leadership Team hold, and the formal and documented processes that reinforce to the employees these ideals. It is one thing for senior leaders to set expectations, it is another for leaders to champion them – a visible example is Primex’s President and CEO who is known for his daily walks around the office and the plan to individually check in with every single employee (P1, P2, P3, P6). At Primex, Leadership empowers employees to attain values alignment through two-way communication between employees and management. Mechanisms such as the annual employee engagement survey provide for employees to provide anonymous feedback to Primex’s Leadership team, as well as ask questions under the guise of the survey. Additional supportive structures in place include purposeful focus on values through committees. Primex has an established safety and wellness committee, continuous improvement team, and dedicated strategic and functional leadership teams in the form of Team 5 and Team 17, respectively. These practices and programs developed and supported by members of the Leadership Team led me to conclude that it is their involvement and advocacy which perpetuates Primex’s culture and values.

Conclusion 2: There is alignment between Primex’s espoused culture and values, and its documented organizational practices. As introduced in Chapter 2, Literature Review, a common approach to understand what employees see as an organization’s culture is to ask them

what they identify as special or different about their organization, and to provide detailed examples of these manifestations (Schein, 1999; Wilkins, 1983). As discussed earlier in Chapter 4, each of Primex's five organizational values were brought forward by employees as both espoused and established programs which make Primex a special and unique place to work. This affirmed that employees experience alignment between Primex's advertised values and culture reflected informal and common activities, as well as espoused values through formal and documented procedures. Also discussed in Chapter 2 was the notion that the assumptions employees hold about an organization can be tested by looking at what perceptions are implied with regards to the work employees conduct, specifically, what is commonly understood without explicit instruction (Wilkins, 1983). Inquiry participants identified four themes of Primex's culture: team, values driven, communication, and recognition. Furthermore, participants identified an equal number of cultural indicators with regards to both documented and informal practices which support and exemplify the four themes. This common understanding of what are the organizational norms and beliefs led me to conclude that whether formal policy dictates it or not, Primex's employees are aware of Primex's culture and values, and actively uphold them without prompting.

Conclusions relating to Sub-question 2: What are the stories of critical and essential strengths and successes Primex employees tell about their organization? Two conclusions address this question. The first conclusion is that employees experience Primex at its best when connecting and collaborating with others in the organization. The second conclusion is that Employees connect deeply with Primex's culture and values.

Conclusion 3: Employees experience Primex at its best when connecting and collaborating with others in the organization. When asked for stories of critical and essential strengths and successes, participants primarily referenced examples of when they experienced meaningful collaboration with their peers and felt connected to others in the organization. Moreover, collaboration was the most referenced value in both the Appreciative Inquiry informed (Cooperrider, Whitney & Stavros, 2003) employee survey as well as the in-person engagement session, with 54% of participants associating Primex's uniqueness to how employees collaborate with one another (P1, P3, P6, P8, P10, P11). As supported by Chapter 2, Literature Review, and in line with the appreciate inquiry informed methodology, discovering how employees describe Primex at its best was a key element of this inquiry (Cooperrider, Whitney & Stavros, 2003). The prevalence of collaboration and connection in responses, as well as the merit of the stories and examples provided led me to conclude that it is the interpersonal interactions and experiences that employees have with one another that make their employment experience with Primex special and unique. Further to this, it is these experiences which shape and foster the culture theme of *team* and are further supported by the culture theme of *communication*.

Conclusion 4: Employee's connect deeply with Primex's culture and values. As introduced in Chapter 2, Literature Review, an employee's ability to both know and identify their organization's culture is a key step in influencing or preserving it (Schein, 2016; Wilkins, 1983). As concluded earlier in this chapter, employees are aware of the socially accepted behaviours at Primex and demonstrate this assumed behaviour voluntarily. Although scholars offer no singular

answer to where organizational culture originates, it has been established that an employee's connection to culture is a core part of cultural continuity (Schein, 2016). Furthermore, if an organization wishes continuity of an element of their business, such as culture, a successful approach is to embed these practices into how a business operates (Bottomley, 2018). Currently, most employees demonstrate assumed cultural behaviour without prompting; speak of a connection to Primex's culture; and reliably demonstrate the espoused and assumed values. Therefore, Primex's employees' deep connection to existing culture and values offers a very promising base for future succession planning which considers culture as a factor to preserve.

Conclusions relating to Sub-question 3: How is Primex's culture considered in succession planning today? Two conclusions address this question. The first conclusion is that cultural fit is considered in external recruitment. The second conclusion is that Primex lacks a formalized employee professional and leadership development program.

Conclusion 5: Cultural fit is considered in external recruitment. Primex has a robust recruitment and selection program which includes a multi-step process involving multi-step interviews, which often includes a team interview, in addition to pre-employment testing for new hire strengths, interests, attentional and interpersonal elements (P1, P3, P4, P6, P8). In addition to a thorough screening of potential new hires, Primex offers all new employees a standardized onboarding program (P6) which introduces all formal and documented processes including cultural initiatives such as the Primex Culture Book (P1, P6, P7, P8). The hiring of new talent into an organization is necessary, for immediate replacement hires as well as strategic key hires. However, as presented in Chapter 2, Literature Review, taking a talent management perspective

to recruitment, including a longer view than replacement planning only, better prepares an organization for future succession management strategies (Bechet, 2008). Further to considering cultural fit in hires, when an employee leaves Primex voluntarily an exit interview is conducted to learn how the organization can improve, and specific questions relating to culture are asked (P1). In addition, when an employee is terminated from the organization Primex leverages their continuous improvement mindset to be intentionally reflective with regards to what elements were not a fit with the former employee and what learning could be brought forward in to the replacement recruitment (P3, P6).

Conclusion 6: Primex lacks a formalized employee professional and leadership development program. Although Primex has an established external recruitment program that considers cultural fit and organizational potential, they do not have a standardized internal leadership development program (P2). While existing employees are offered development, a documented, module or skills-based program does not exist (P2). As discussed in Chapter 2, Literature Review, there are a number of approaches to equipping an organization with a next generation of leaders: taking a qualitative approach by custom building development plans around high-potential employees (Wolfe, 1996), or taking a standardized approach to succession planning based on organizational need for diversity, specific knowledge, skill, and ability requirements, or demographic and biographic needs (Bottomley, 2018). At this point, Primex has not conducted an organizational analysis, such as a 9-box ranking assessment of existing employees to determine organizational competencies and gaps, or high potential employees who are suitable for further development (P2).

Conclusion relating to Sub-question 4: What does Primex’s management team feel is the connection between the organization’s culture and their ability to execute their leadership succession plan? One conclusion addresses this question. The conclusion is that Primex’s culture of continuous improvement reinforces the concepts of professional and leadership development.

Conclusion 7: Primex’s culture of continuous improvement reinforces the concepts of professional and leadership development. Primex’s values support their ongoing approach to being responsive to the needs of their business and of their employees, through their continuous improvement mindset (P3). A continuous improvement mindset harnesses the concepts of regular evaluation, identifying opportunities for improvement, and taking planned action toward a goal. For Primex, continuous improvement is an organizational attitude that all departments and employees already embrace, and can be leveraged in many creative ways, including how Primex approaches the development of their employees (P3). Primex already provides employees with development opportunities or educational support; however, it is mostly on an ad-hoc basis, and as a response to a performance gap or an employee request (P2, P3). Applied to how Primex evaluates and considers both the future needs of employee talent and the current human resources in the organization, a continuous improvement mindset reinforces Groves (2007) suggestion that identifying and developing an organization’s high potential employees should be an ongoing process. As introduced in Chapter 2, Literature Review, investment in an organization’s current employees through planned talent management is required in order to realize an effective succession planning program (Al Hour, 2012, Bottomley et al., 2014, Groves,

2007; Wolfe 1996). In other words, an organization needs to be purposeful in providing the right training to the right employees at the right time.

Scope and Limitations of the Inquiry

For the purpose of this inquiry, I have defined the boundaries of who I included in the engagement methods to Team 17 only. This group was chosen as I view them as a representative sample of the entire organization's culture. Additionally, as the leaders of people, the management team has the most influence on Primex's organizational culture and is responsible for the oversight of the execution of Primex's strategic plan. I defined the focus of the inquiry as identifying and analyzing the drivers of organizational culture and determining how Primex having knowledge of their culture can support their strategic planning, including succession planning. This inquiry did not focus on the success of Primex's strategic plan or seek to make any recommendations with regards to how Primex functions operationally.

The engagement portion of the research was conducted in December. This time of year (nearing high vacation season) proved to be a challenging time to recruit participants. 16 members were invited to participate in both the survey and the in-person engagement session, however only eleven participated in the survey and eight participated in the in-person engagement session. Although the number of participants was less than I had intended, the execution of the research methods was not impacted.

Chapter Five: Inquiry Implications

This chapter will describe the study recommendations for Primex based on the findings and conclusions presented in Chapter 4. Each recommendation has been discussed with key stakeholders at Primex to determine the order of priority, as well as the actionability of each. As a result of these conversations the recommendations are presented in order of importance and chronological roll-out. Details of how Primex will move each recommendation forward is also provided, including possible limitations, barriers, and resources required. The recommendations respond to the inquiry question: “How might Primex Manufacturing improve its leadership succession planning through greater awareness of its organizational culture?” Further to this initial question, the recommendations also leverage the insight provided by guiding sub-questions which were:

1. Where is Primex’s culture rooted in formal and documented processes and where is it supported by assumptions?
2. What are the stories of critical and essential strengths and successes Primex employees tell about their organization?
3. How is Primex’s culture considered in succession planning today?
4. What does Primex management team feel is the connection between the organization’s culture and their ability to execute their leadership succession plan?

Implications for Primex, as well as for future iterations of related research, have been considered and will be discussed.

Study Recommendations

In consideration of the findings and conclusions discussed in Chapter 4, I have established four recommendations. I discussed these recommendations with my organizational partner and key stakeholders to ensure there was a connection between the recommendations and their overall concern of how to protect their organizational culture through times of leadership transition. Further to this, I aimed to ensure that my organizational partner and key stakeholders felt a connection to the recommendations as well as a sense of ability, possibility, and ownership when it came to implementation of the recommendations in the future.

The following recommendations are a result of the engagement process which was informed by research, literature, and an engaged, action research methodology, informed by appreciative inquiry (AI) (Stavros, Torres & Cooperrider 2018; Cooperrider, Whitney & Stavros, 2003) design thinking (IDEO, 2015), and the Action Research Engagement (ARE) model (Rowe, Graf, Agger-Gupta, Piggot-Irvine, & Harris, 2013):

1. Create a knowledge transfer program for current leaders to share their cultural knowledge/ values-based leadership now.
2. Consider and evaluate all existing employees for suitability for internal succession.
3. Continue to hire for organizational values and culture fit.
4. Build a formalized and documented internal leadership development program.

Table 2 will show the conclusions introduced in Chapter 4 with their corresponding recommendations.

Table 2 - *Study Recommendations by Study Conclusion*

Study Conclusion	Recommendations
Conclusion 1: Primex’s Leadership champions the organization’s culture and values	Recommendation 1: Create a knowledge transfer program for current leaders to share their cultural knowledge/ values-based leadership style now
Conclusion 2: There is alignment between Primex’s espoused culture and values, and its documented organizational practices	
Conclusion 3: Employees experience Primex at its best when connecting and collaborating with others in the organization.	Recommendation 2: Consider and evaluate all existing employees for suitability for internal succession
Conclusion 4: Employee’s connect deeply with Primex’s culture and values	
Conclusion 5: Cultural fit is considered in external recruitment	Recommendation 3: Continue to hire for organizational values and culture fit
Conclusion 6: Primex lacks a formalized employee professional and leadership development program	Recommendation 4: Build a formalized and documented internal leadership development program
Conclusion 7: Primex’s culture of continuous improvement reinforces the concepts of professional and leadership development	

Recommendation 1: Create a knowledge transfer program for current leaders to share their cultural knowledge/ values-based leadership style now. This recommendation is presented first as it responds to the urgency my organizational partner feels with regards to being proactive by preparing for the succession of leadership at Primex. Managing the timeline of

leaders departing Primex is a challenge because anyone at anytime could choose to leave the organization, and currently there is no formalized framework to document job-based knowledge for the organization to retain and use to train and onboard a successor. Helm-Stevens (2010) defines the purpose of a knowledge transfer program as a two-step process to first capture an individual's knowledge, so that it may then be transferred, benefitting the entire organization. Crafting a knowledge transfer program requires the least amount of program development lead time as it can start in a rudimentary form and would be an improvement on the status quo as there is no existing process. In the Deploy stage of this inquiry (Stavros, Torres & Cooperrider, 2018) I will discuss with Primex how they wish to get started with this recommendation and suggest that part of this conversation involves prioritizing areas of knowledge to begin to document. As the program is established, enhancements can be made. Additionally, all leaders and holders of key roles within Primex can begin an individual knowledge transfer plan immediately as the documentation work is done independently and there are no organizational or resource-based barriers to start.

A successful knowledge transfer program requires information to be captured and shared through various methods and formats, in order to be diversified yet effectively reach all audiences (Wagner, 2009). I recommend Primex start with written documentation for future reference, as well as real-time in person (face to face) knowledge transfer. Primex already has established job documentation in the form of job descriptions which speak to the responsibilities of a role; however, these resources do not capture the espoused cultural and values-based elements of how the current leaders execute their role. This is the gap that a cultural and values

focused knowledge transfer plan would address. By existing leaders documenting how their values and organizational culture show up in the way they conduct their role within the organization there is an improved opportunity for their successor to follow a similar approach. In-person knowledge transfer can be fostered through a mentoring-like program. As discussed in Chapter 2, several succession planning best practices, including mentoring, were discussed. Groves (2007) defined mentoring as a both formal and informal relationship based on developmental advising between a senior and junior employee, and suggested that having a mentor is an element that greatly increases the chances of an employee being ready for a promotion, or succession opportunity, when the time comes. A mentoring program would compliment Primex's existing performance management program, Coaching for Success. As employees share their personal and professional goals within the Coaching for Success program, this can be leveraged to document the developmental progress a mentoring relationship provides. Furthermore, a mentoring program offers both short- and long-term benefits; mentoring builds leadership abilities in current employees preparing them to take on future challenges while at the same time providing support for current day tasks (Shults, 2011).

Additionally, inquiry participants suggested the creation of legacy programs established by current leaders to be carried forward after their departure from the organization (Endres & Alexander, 2006). Through iterations of an appreciative informed perspective (Cooperrider, Whitney & Stavros, 2008) Primex can identify specific habits or behaviours of leaders which have been determined as key and influential to the organization and adopt these practices organization-wide. Examples provided were the pre-shift walk that Bob Smart, Primex's

President and CEO, does on a regular basis (P1, P2, P3, P6), or how Heinz Avendano, Primex's VP of Manufacturing, always starts his meetings with a mention of organizational performance with regards to occupational health, safety, and wellness (P3, P4).

Recommendation 2: Consider and evaluate all existing employees for suitability for internal succession. As discussed in Chapter 4, Primex's existing recruitment practices have consistently provided for an employee base who are aligned with the organization's values and feel a strong affinity toward the organizational culture. Primex's current employee pool offers a rich supply from which to select future leaders, providing Primex a strong base to begin an internal succession planning program. Through application of a "systems thinking approach" to cultural continuity and succession planning management, and by considering both the people and the "people systems" at play, Primex can proactively look for leadership potential within the organization (Senge, 2006; Senge 1992). This recommendation requires an immediate shift in thinking, and implementation over a short period of time to experience long term benefit to the organization. Specific tactics suggested by inquiry participants included offering leadership experiences to all team members with the intention of building capacity within all levels in the organization, while also identifying possible high potential leaders. Further to opportunity-based activities, Primex could also institute a process to evaluate leadership potential within the employee on an ongoing basis. Also discussed in Chapter 4, current practices are that only key hires are put through externally-managed testing (Prevue, TAIS, etc.), and this is typically only done at hire. Other programs such as Talent Insights could be considered for their focus on employee strengths, interest, and how they can be leveraged to support company culture (Talent

Insights, 2020). For long service employees, or for employees who were not tested upon hire, there exists an opportunity to assess and consider these individuals for leadership opportunities as well. As noted in Chapter 4, Primex could also further leverage the organization's continuous improvement mindset to train and develop today's leaders for tomorrow and become a learning organization (Senge, 2006; Senge 1992).

Recommendation 3: Continue to hire for organizational values and culture fit. As identified in Chapter 4, Primex already considers cultural fit of an incoming hire within the recruitment process. This is an important strength which Primex does well; however, the practice is not consistently applied. In order to better leverage this existing process, Primex should implement team interviews across all roles and functions. This recommendation can be implemented immediately and would require a standardization of the recruitment practice, and practical training for managers on how to enhance their selection process by incorporating meaningful input from their teams.

As discussed in Recommendation One, Primex has existing role descriptions that outline job responsibilities but contain no mention of leadership-related key performance indicators (KPIs), or organizational culture requirements. This is an area where there is opportunity for this inquiry to inform an enhanced practice. The leadership themes and organizational values established through this inquiry should be documented as requirements in role descriptions. In addition, hiring criteria that considers organizational culture and fit, as well as leadership related key performance indicators (KPIs), should be written in as requirements in job advertisements. These two action items would take time to develop and implement but could be done with

internal resources and completed in the short term. To further support the selection process, interview questions and supporting guides should be tailored to ask specific questions to address these elements. Furthermore, the addition of “intellectual curiosity” and those who are “motivated by learning and experimentation” (Senge, 1992) are suggested phrases to be added in both role descriptions and job advertisements from a people-system support perspective. Also suggested by participants is that Primex’s recruitment, selection, and onboarding practices feature existing culture and performance programs such as the Culture Book and Coaching for Success.

Recommendation 4: Build a formalized and documented internal leadership development program. The final recommendation represents a long-term initiative for Primex to grow leaders internally, and with the right values who will sustain the organizational culture Primex employees are so proud of and connected to. As referenced in Recommendation 3, Primex is already bringing people into the business who are culturally aligned with the values and ideals of the company. By providing all employees the opportunity to develop and grow their leadership skills and competencies in the areas of business acumen, people leadership, and function-specific knowledge development, a pool of high potential future successors will be created. This approach will shift Primex’s current *act of replacing* leaders to a *process of developing* leaders as a function within the business (Groves, 2007). This change in how succession is viewed and managed within Primex will leverage sustainable leadership development best practices to grow future leaders in house rather than bring them in from an external source (Collins & Jerry, 2011). This recommendation requires significant investment in

time and resources to craft and implement; however, by designing the program to be module based, the program can be developed one focus at a time. A module-based design also allows for Primex to develop both department-specific modules, as well as generalized modules, dependant on the target audience. The engagement of a specialized consultant with expertise in training design would be an additional resource Primex may wish to consider. By adopting a continual improvement mindset to organizational training design, this process would remain iterative, collaborative, and ever-growing supporting the concept of a learning organization (Senge, 2006; Senge 1992). Primex has already established “management fundamentals” and “interviewing 101” training modules which can be leveraged and serve as a foundation for future training program design.

Organizational Implications

As discussed in Chapter 3, within the Study Conduct section, I involved both my organizational partner, Primex’s President and CEO, as well as my study participants throughout the inquiry process at multiple and differing steps. The participation and engagement of key stakeholders supported my ability to confirm and finalize the findings of the inquiry, and the conclusions that informed initial draft recommendations and ultimately the final recommendations presented within this thesis. As part of the fifth step in the Action Research Engagement Model (ARE), Recontextualize and Reconstruct for Organizational Change (Rowe, et al., 2013), I met with Primex’s Human Resources Manager to review the draft recommendations which had been reviewed and approved by my organizational partner and the study participants in the fourth step of the ARE, Evaluation of Action and Engage Forward. In

the meeting with Primex's Human Resources Manager we discussed the draft recommendations with the intention of understanding any implications of their implementation. Using the perspective of how to best implement the recommendations we determined their sequencing and priority, which informed further discussion with regards to what resources would be required. This was an important step in the engagement process so that I could understand what change would be required by Primex's leaders to act on the recommendations. This insight further allowed me to finalize my recommendations with implementation suggestions that address possible barriers or resource considerations.

In this meeting we identified the constraints of time, both for those involved in crafting and executing the initial recommendations but also for those who would be managing the programs in perpetuity. Communication would also be a key factor in the successful implementation, as participation of both outgoing leaders as well as current employees would be required and succession planning can be a daunting subject to broach – it can make senior employees feel like they are being replaced before they are ready to leave, and it can leave hopeful successors feeling uncertain about how the organization views their potential. We also identified and discussed the systemic impacts of introducing change to an already established formal performance management program, Coaching for Success. As well it was shared with me that Primex is also on the verge of introducing Success Factors, another performance management and employee review program. We determined that regardless of what program was being used to foster dialogue around employee performance and potential, the important element that succession planning requires is the fact that the conversations are happening and are being

documented. I see the change of performance management programs as a possible leverage point to introduce other tactics suggested by participants such as building a data base of employee information and the introduction of a “nine box method” for employee evaluation at the same time.

In order to optimize implementation, dedicated resources may be required to reduce the amount of lead time development of the recommended programs may take. Furthermore, change management strategy to address the people side of change would be required. I suggested the change management strategy of ADKAR (Haite & Creasey, 2012). The ADKAR framework would address concerns and considerations around how to communicate the change, garner buy-in from the management team, create ability around the use of new technology and the tools used by Primex, and to have these processes become part of the organizational fabric of Primex.

ADKAR (Haite & Creasey, 2012) is an acronym standing for:

1. **A**wareness of why change is required
2. **D**esire to change based on the understanding of the benefit
3. **K**nowledge of how to change
4. **A**bility to demonstrate the new required state
5. **R**einforcement to ensure the change is sustainable

Referencing a “leader’s framework for decision making” with regards to approaching implementation, the contextual variables discussed make for a complicated system (Snowden & Boone, 2007) suggesting that there are some variables that are known, as discussed above, but there may also be some unknown variables. These unknown variables include external influences

in Primex's evolving talent management program. These include the availability of talent for hire in the marketplace, specifically around cultural fit as this requirement cannot be forced or created, as well as Primex's internal recruitment capabilities. In addition, there would be increased financial costs to the recruitment program should a third-party tool such as Talent Insights (Talent Insights, 2020) be brought on board as a selection tool that assesses candidate motivators which can provide insight for initiatives around long-term onboarding, introduction of leadership development training, and enhanced on the job training.

Should Primex choose not to implement the suggested recommendations, as discussed with stakeholders, succession of leaders within the business is inevitable. The implementation of these recommendations would not prevent or slow leadership succession at Primex, however it would better prepare Primex for the loss of the knowledge and cultural presence these leaders hold. As addressed above, a key concern of Primex is that leaders will leave before a full succession and transition plan is put in place. Therefore, recommendations are presented in order of impact, ease of execution, and lead time. It is not a matter of if leaders will leave, it is a question of when, and how resilient will Primex and its organizational culture be through those transitions.

This thesis offers Primex, and other organizations facing leadership succession who desire cultural continuity and a sustainable values system, insight on how to first assess the drivers of culture, then plan how to imbed the people-driven elements of culture into organizational processes, and the recruitment and/or development of future leaders of the organization.

Implications for Future Inquiry

As touched on in Chapter 2, Literature Review, society is facing a wave of retirements from not only businesses, but from government, educational bodies, and communities of practice which will have far reaching effects (Eoyang, 2008; Jackson, 2014). The generational differences of those exiting the workplaces, and those entering the workplaces, have created a melting pot of organizational cultures and values once dominated by Baby Boomers (Seaton & Boyd, 2007). For organizations like Primex, there is harmony in the current state, and they wish to maintain that. However, as organizations leverage appreciative perspectives to determine the contextual elements which are “life giving” they may wish to put in place parameters to capture these elements and sustain them going forward. Succession planning addresses part of the people side of change, but there are other components within an organization’s system which an appreciative lens could help identify action oriented and engaged research methods to understand how an organization wishes to maintain them.

Thesis Summary

The intention of this inquiry was to understand how Primex’s knowledge of its organizational culture might inform the creation of an enhanced succession planning program. Through qualitative research, including an appreciative informed survey (Stavros, Torres, & Cooperrider, 2018), and a design thinking (IDEO, 2018) and liberating structures (Lipmanowicz & McCandless, 2013) in-person engagement session, four key findings were identified. The findings were that Primex's existing organizational culture is well established, core values make

it a unique organization, knowledge of culture can be harnessed to inform succession planning processes, and that leadership can act today to sustain Primex's culture in the future.

Referencing literature from influential authors, I was able to arrive at seven conclusions. I concluded that Primex's Leadership champions the organization's culture and values; there is alignment between Primex's espoused culture and values, and its documented organizational practices; employees experience Primex at its best when connecting and collaborating with others in the organization; employees connect deeply with Primex's culture and values; cultural fit is considered in external recruitment; Primex lacks a formalized employee professional and leadership development program; and that Primex's culture of continuous improvement reinforces the concepts of professional and leadership development.

Through study of literature and with participation from Primex I was able to put forward four recommendations to support Primex's desire to ready a program to both hire and develop those who may be the future of leadership for the organization. Recommendations are that Primex create a knowledge transfer program for current leaders to share their cultural knowledge/values-based leadership style now; continue to hire for organizational values and culture fit; consider and evaluate existing employees for internal succession; and build a formalized internal leadership development program to support the growth of existing employees for future vacancies.

As a former employee of Primex, I had the fortune to work with Primex's leadership team and understand first-hand the importance of organizational culture to the success of the business. Other organizations may wish to better understand their culture, and drivers of it. This

knowledge might benefit the organization in the development of not only succession planning programs but many other Operations or Human Resources focused strategies. There continues to be more inquiry into the areas of cultural resilience (Bottomely, 2018), and I endeavour to add to this growing body of knowledge through this thesis. This is an area I see the harmony between my professional background in Human Resources Management and my educational aspirations in leadership and organizational development, and I intend to pursue further education and aspire to continue inquiring into the connection between organizational culture and business performance, and the systems that can be put in place to sustain organizational culture through material changes to a business.

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Appendix A – Email Invitation Letter

E-MAIL INVITATION

Primex Cultural Analysis and Leadership Planning Project

Dear NAME,

I would like to invite you to be part of a research project that I am conducting. This project is part of the requirement for my master's degree in Leadership, at Royal Roads University. This project has been approved by Bob Smart, Primex's President & CEO, and I have been given permission to contact potential participants for this purpose.

The purpose of my research is to understand the organizational culture of Primex, and to work with the management team to determine how the knowledge of our organizational culture can better inform Primex's succession planning process.

You have been chosen as a prospective participant because you are a member of the Primex's "Team 17" Management team.

The research phase of my project will consist of one electronic survey, and one onsite workshop which is estimated to last 2.5 hours. The electronic survey will be conducted in advance of the workshop and will be confidential and anonymous. Should you wish to participate in this project but are unable to attend the workshop, you are still invited to contribute your thoughts through the electronic survey.

In the workshop I will use a series of discussion tools called liberating structures to facilitate discussion. The workshop will be held in the main boardroom from 12:30pm – 3pm on December 17, 2019.

The attached document contains further information about the study conduct and will enable you to make a fully informed decision on whether you wish to participate. Please review this information before responding.

Please note that you are not required to participate in this research project. Additionally, I realize that due to our former collegial relationship, you may feel compelled to participate in this research project. If you do not wish to participate, simply do not reply to this request. As your participation in this inquiry is completely voluntary, your decision to not participate will not affect our relationship or your employment status with Primex in any way.

If you do choose to participate, you are free to withdraw at any time without prejudice. If you choose to withdraw once the Liberating Structure 1-2-4-All event has begun, your spoken

comments made prior to leaving have impacted the group's conversation and were witnessed by the others in the group and will therefore remain as part of the anonymous data set from the inquiry. Your decision to withdraw from the interview or group method, either before or during the method, will be kept completely confidential.

If you would like to participate in my research project, please reply to this email at [email address]

Sincerely,
Christine Ramage

Appendix B – Research Information Letter

RESEARCH INFORMATION LETTER

Primex Cultural Analysis and Leadership Planning Project

My name is Christine Ramage and this research project is part of the requirement for a Master of Arts in Leadership at Royal Roads University. My credentials with Royal Roads University can be established by contacting Dr. Catherine Etmanski, Director, School of Leadership Studies: [email address] or [phone number]

Purpose of the study and sponsoring organization

The purpose of my research is to understand the organizational culture of Primex, and to work with the management team to determine how the knowledge of Primex's organizational culture can better inform Primex's succession planning processes. You have been chosen as a prospective participant because you are a member of the Primex's Management team (Team 17).

Your participation and how information will be collected

This phase of my research project will consist of one anonymous and confidential electronic survey and one in-person workshop and is estimated to last 2.5 hours over an afternoon. Please note that the survey will be conducted through Survey Planet which is a US platform and for that reason I must inform you that data is open to seizure, under the Patriot Act, though that happening is extremely rare.

In the workshop I will use a series of discussion tools called liberating structures to facilitate discussion. During these sessions, as a proactive measure, I will have you work with the other members of Team 17, however I will intentionally partner you with others outside of your department do reduce or mitigate any conflict of interest or power dynamics which may or may not exist. The workshops will be held in the main boardroom from 12:30pm – 3pm on month, day.

The anticipated questions for the first session will be based on the broader questions of:
How might Primex Manufacturing improve its leadership succession planning through greater awareness of its organizational culture?

I will ask participants to complete the electronic survey in advance of the session for two reasons: 1) that you have the opportunity to reflect on the questions and provide thoughtful and thorough responses, and 2) so that you can provide responses that we can debrief and discuss as a group without them being directly attributed to any one specific person. This is intended to create an option for people to provide input to the study if they are unable to do so in person during the workshop.

The survey will ask:

Please share a story about a time you personally experienced Primex at its best, when you were genuinely excited to be here? Who was there, what happened? What did you learn about the company?

What do you see as the core values of Primex, which make this organization unique?

How does Primex support these core values?

What are the top three things you would like to see happen to improve the cultural effectiveness of the organization?

When we are together as a group, utilizing a variety of techniques, I will ask questions regarding the connection between Primex at its best from an organizational culture perspective and the actions we can take to support Primex from a culture and values perspective, and a succession planning perspective:

Where have we done a great job representing our culture in formal and documented processes?

Where is our culture supported by informal, undocumented, or common practices only?

What are examples of Primex's demonstrated (espoused) values that are present or could be more present?

How Primex could better feature its culture in the future?

How can knowledge of Primex's culture be harnessed to inform and enhance succession planning processes?

What actions can you take action to build and sustain Primex's culture?

What actions can you take to enhance the creation and implementation of a succession planning program in your respective area?

Benefits and risks to participation

This research study into the organizational culture of Primex aims provide us a better understanding the key drivers of your culture today, specifically what is shaping the culture and what elements need to remain in place in order to continue the culture in the future.

Secondly, this research study will offer us insight into how to best prepare for the succession of members of the leadership team and understand how these events might impact the culture.

Knowing this will better equip us to take your association to the next level of strategic growth, while capturing the essence of what your organization is today and qualifying what makes your organizational culture worth sustaining.

The only risk of participation in this study, beyond the minimal risks inherent in your line of work, is the risk of raised expectations as there is possibility that any recommendations, we generate through this process may not happen. This statement of risks and benefits seeks to enable you to assess whether benefits outweigh the risks and determine whether you wish to participate in this study.

Inquiry team

In addition to myself, I will be working with an inquiry team to lead this research project. My inquiry team consists of Shauna Yohemas, a fellow Royal Roads MA- Leadership student. Additionally, Bob Smart, Primex's President & CEO, is my partner within the Primex organization.

Real or Perceived Conflict of Interest

There is no real or perceived conflict of interest in your participation in this study, nor my own. I disclose this information here so that you can make a fully informed decision on whether to participate in this study.

Confidentiality, security of data, and retention period

I will work to protect your privacy throughout this study. All information I collect will be maintained in confidence with hard copies (e.g., consent forms) stored in a locked filing cabinet in office. Electronic data (such as transcripts or audio files) will be stored on a password protected computer in my office. Information will be recorded in hand-written format and, where appropriate, summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand. All documentation will be kept strictly confidential. I will retain the raw data for 12 months after collection to serve only as back up to my final report during its defence. After that, all raw data will be deleted or shredded, depending on format. Due to the nature of the use of a group method, it is not possible to keep the identities of participants anonymous from the researcher, facilitator, or other participants. However, I will ask other participants to respect the confidential nature of the research by not sharing names or identifying comments outside of the group.

Sharing results

In addition to submitting my final report to Royal Roads University in partial fulfillment for a Master of Art in Leadership, I will also be sharing my research findings with Bob Smart, Primex's President & CEO. All findings will then inform the creation of a published document, in the form of a thesis. Upon request, I will provide you with a copy of this document as well.

Procedure for withdrawing from the study

You may withdraw at any time. However, the data collection will take part in a group setting. If you choose to withdraw once the Liberating Structure 1-2-4-All event has begun, your spoken comments made prior to leaving have impacted the group's conversation and were witnessed by the others in the group and will therefore remain as part of the anonymous data set from the inquiry. Your decision to withdraw from the interview or group method, either before or during the method, will be kept completely confidential. This means that although you will be permitted to withdraw your participation at any time, your contribution to the data may have influenced the responses of others who will remain involved in the study.

You are not required to participate in this research project. By replying directly to the e-mail request for participation you indicate that you have read and understand the information above and give your free and informed consent to participate in this project.

Please keep a copy of this information letter for your records.

Appendix C – Research Consent Form

RESEARCH CONSENT FORM

Primex Cultural Analysis and Leadership Planning Project

By signing this form, you agree that you have read the information letter for this study. Your signature states that you are giving your voluntary and informed consent to participate in this project and have data I contribute used in the final report and any other knowledge outputs.

I consent to my responses to the electronic survey to be shared and discussed within the participant group provided that my identity is not disclosed, and my responses are treated as anonymous.

I consent to thoughts and ideas expressed by me through the Liberating Structure be included in this study, provided that my identity is not disclosed

I consent to the material I have contributed to and/or generated [e.g., flipchart notes, post it notes, and interview notes] thorough my participation in the Liberating Structure research sessions be used in this study

I commit to respect the confidential nature of the Liberating Structure by not sharing identifying information about the other participants

Name: (Please Print): _____

Signed: _____

Date: _____

Appendix D – Inquiry Team Member Agreement

INQUIRY TEAM MEMBER LETTER OF AGREEMENT

In partial fulfillment of the requirement for a Master of Arts in Leadership Degree at Royal Roads University, Christine Ramage will be conducting an inquiry study at Primex Manufacturing to understand how might Primex build awareness of its organizational culture to improve future collaborative and strategic decision making, including systematically planning for leadership succession. The Student's credentials with Royal Roads University can be established by calling Dr. Catherine Etmanski, Director, School of Leadership, at [phone number] or email [email address]

Inquiry Team Member Role Description

As a volunteer Inquiry Team Member assisting the Student with this project, your role may include one or more of the following: providing advice on the relevance and wording of questions and letters of invitation, supporting the logistics of the data-gathering methods, including observing, assisting, or facilitating an interview or focus group, taking notes, transcribing, reviewing analysis of data, and/or reviewing associated knowledge products to assist the Student and Primex's change process. During this activity, you may be privy to confidential inquiry data.

Confidentiality of Inquiry Data

In compliance with the Royal Roads University Research Ethics Policy, under which this inquiry project is being conducted, all personal identifiers and any other confidential information generated or accessed by the inquiry team advisor will only be used in the performance of the functions of this project, and must not be disclosed to anyone other than persons authorized to receive it, both during the inquiry period and beyond it. Recorded information in all formats is covered by this agreement. Personal identifiers include participant names, contact information, personally identifying turns of phrase or comments, and any other personally identifying information.

Bridging Student's Potential or Actual Ethical Conflict

In situations where potential participants in a work setting report directly to the Student, you, as a neutral third party with no supervisory relationship with either the Student or potential participants, may be asked to work closely with the Student to bridge this potential or actual conflict of interest in this study. Such requests may include asking the Inquiry Team Advisor to: send out the letter of invitation to potential participants, receive letters/emails of interest in participation from potential participants, independently make a selection of received participant requests based on criteria you and the Student will have worked out previously, formalize the logistics for the data-gathering method, including contacting the participants about the time and location of the interview or focus group, conduct the interviews (usually 3-5 maximum) or focus group (usually no more than one) with the selected participants (without the Student's presence

or knowledge of which participants were chosen) using the protocol and questions worked out previously with the Student, and producing written transcripts of the interviews or focus groups with all personal identifiers removed before the transcripts are brought back to the Student for the data analysis phase of the study.

This strategy means that potential participants with a direct reporting relationship will be assured they can confidentially turn down the participation request from their supervisor (the Student), as this process conceals from the Student which potential participants chose not to participate or simply were not selected by you, the third party, because they were out of the selection criteria range (they might have been a participant request coming after the number of participants sought, for example, interview request number 6 when only 5 participants are sought, or focus group request number 10 when up to 9 participants would be selected for a focus group). Inquiry Team members asked to take on such 3rd party duties in this study will be under the direction of the Student and will be fully briefed by the Student as to how this process will work, including specific expectations, and the methods to be employed in conducting the elements of the inquiry with the Student's direct reports, and will be given every support possible by the Student, except where such support would reveal the identities of the actual participants.

Personal information will be collected, recorded, corrected, accessed, altered, used, disclosed, retained, secured, and destroyed as directed by the Student, under direction of the Royal Roads Academic Supervisor.

Inquiry Team Members who are uncertain whether any information they may wish to share about the project they are working on is personal or confidential will verify this with Christine Ramage, the Student.

Statement of Informed Consent:

I have read and understand this agreement.

Name (Please Print)

Signature

Date

Appendix E – Group Method Facilitation Guide

FACILITATION GUIDE FOR ENGAGEMENT SESSION - WORKSHOP PROCESS

Two weeks prior to the engagement session I had asked participants to complete an electronic survey. The survey asked:

- Please share a story about a time you personally experienced Primex at its best, when you were genuinely excited to be here? Who was there, what happened? What did you learn about the company?
- What do you see as the core values of Primex, which make this organization unique?
- How does Primex support these core values?
- What are the top three things you would like to see happen to improve the cultural effectiveness of the organization?

A summary of these stories will be brought forward into the room in the form of general themes and ideas, to inspire and support further discussion of the day. No participant - identifying elements will be disclosed.

When we are together as a group, I will start with the brainstorming structure.

In a large room with flipcharts, markers, post it notes, stickers, overhead projector, and scratch paper available, I will begin the session by setting the intention for the half day workshop. I will define the purpose of why we are together which is to understand our culture so we can systematically plan for leadership succession. Then I will ask participants to create space for ideas, safety, and growth by participating fully while together, and keeping confidentiality of any story or idea shared while together as a group.

1-2-4- All Brainstorming and Dotmocracy (80 minutes)

I will explain the 1-2-4-all brainstorming intention:

“You can generate better ideas and more of them faster than ever before. You can tap the know-how and imagination that is distributed widely in places not known in advance. Open, generative conversation unfolds. Ideas and solutions are sifted in rapid fashion. Most importantly, participants own the ideas, so follow-up and implementation are simplified. No buy-in strategies needed! Simple and elegant!” (Lipmanowicz & McCandless, 2013).

I will ask participants to respond to questions regarding the connection between Primex at its best from an organizational culture perspective (referencing their lived experiences and stories shared), and the actions we take to support Primex from a culture and values perspective.

I will run five seven-minute rounds, asking participants to respond to the following questions:

1. Where have we done a great job representing our culture in formal and documented processes?
2. Where is our culture supported by informal, undocumented, or common practices only?
3. What are examples of Primex's demonstrated (espoused) values that are present or could be more present?
4. How Primex could better feature its culture in the future?
5. How can knowledge of Primex's culture be harnessed to inform and enhance succession planning processes?

Set Up Process

I will have the current question on the overhead projector so everyone can see it

I will also have a flip chart paper on the wall with each of the questions written on it so once the post-it-note ideas have been generated they can go on a single flip chart paper for use in the next structure.

I will provide participants colour coded post it notes for each question.

- Question one – manila;
- Question two – pink;
- Question three – blue;
- Question four – green;
- Question five – yellow.

Timed Brainstorming Process (40 minutes)

- I will ask participants to get into partners
- I will ask participants to consider the question on the screen and individually write their responses on the post it notes (4 minutes)
- I will then ask participants to turn to their partner and discuss their ideas and to generate any additional ideas that surface while they are debriefing (4 minutes)
- I will ask participants to place their post it notes on the flip chart with the corresponding question written on it.
- I will then ask the group to form new partners and I will guide them through the next question in the same manner.
- We will repeat this process three more times until all five questions have been responded to.

Theming Process (25 minutes total - 10 minutes to theme, 15 minutes to report out)

We will now that we have 5 flip charts populated with post it notes responses

- I will place the participants into 5 groups (pre-determined to be multidisciplinary and to not have any direct reports within the same group).
- Each group will be given the instruction to:
 - review the post it notes on their flip chart
 - physically cluster the post it notes into like groupings on the paper by moving the post it notes around based on their interpretation of emerging themes.
 - Ensure all post it notes can still be seen, and that the grouping is obvious.
 - Groups can use a flip chart marker to give their groupings a ‘heading’ or to draw a circle around the clusters to differentiate them.
- I will have each group “report out” on
 - the themes they have identified on their flip charts
 - explain how they have grouped the post it notes
 - not to summarize prevalence or frequency of ideas.

Dot-mocracy (15 minutes)

In this step, dot-mocracy is being used as a tool to generate excitement and familiarity with the ideas put forth by the group and to satisfy the group report out step of 1-2-4-all.

- Each participant will be given 15 stickers
- participants will be invited to use 3 dots per “topic” / flip chart to “vote” for the idea they feel the strongest about, with regards to the 5 questions asked during the brainstorming session.
- They can use their dots however they like, 1 dot on 3 ideas, or 3 dots all on one.
- This process will allow every participant to see the themes within the group’s responses emerge.
- I will conduct a verbal debrief

I will then call a 5-minute break, and I will photograph all the flip charts with dots and post it notes on them, roll them up and take them home as reference data.

15% Solutions (40 minutes)

I will explain 15% solutions intention:

15% Solutions is a Liberating Structure which invites participants to discover and focus on what each person has the freedom and resources to do now. For example, most people have about 15 percent control over their work situations. The other 85 percent rests in the broader context, shaped by the general structures, systems, events, and culture in which they operate. However, we are often consumed by, and focus on, the 85 percent which is out of our control (Lipmanowicz & McCandless, 2013).

15% Solutions Set Up

Have flip charts, markers, scratch paper and post it notes available

15% Solutions Instructions

I will invite the participants to:

- reflect on the contents of their appreciate interviews, brainstorming activities, and group discussions
- I will place the participants into 5 groups (pre-determined to be multidisciplinary and to not have any direct reports within the same group).
- I will ask participants to consider the question “What is your 15 percent? Where do you have discretion and freedom to act? What can you do without more resources or authority?” (Lipmanowicz & McCandless, 2013).
 - propose actions they can take action to build and sustain Primex’s culture.
 - propose actions they can take to enhance the creation and implementation of a succession planning program in their respective areas.
- Individually – list personal 15% Solutions (5 minutes)
- Small groups – participants share their 15% Solutions (5 minutes)
- Same small groups - participants refine and clarify the 15% Solutions within the group by offering helpful questions, feedback, and suggestions (10 minutes)
- Same small group – participants create a group summary of 15% solutions that the member of their group can take (5 minutes)
- I will have each group “report out” (15 minutes)

Storyboarding (30 minutes)

I will explain the storyboard intention:

In cartoon format, map out the next 8-10 steps you or your team can take to build and sustain Primex’s culture, and enhance the creation and implementation of a succession planning program in your respective areas.

Storyboard Set Up

Post it notes, colour markets, legal sized (11 x 14) paper

Storyboard Process

- In groups of 3, have fun and think creatively about the small things you can do (15% solutions).
- Combine ideas, overlap activities, and collaboratively as a group storyboard as many of the 15% solutions you have come up with (15 minutes)
- Group report out (15 minutes)

Session close

I will thank participants

I will recap the activities of the day and the purpose we set out to achieve

I will provide information on my next steps and when they will hear from me next

Appendix F – Brainstorming Volume

Ideas by Brainstorming Question

Brainstorming Question	Count of Ideas	Count of Unique Ideas
1. Where have we done a great job representing our culture in formal and documented processes?	42	17
2. Where is our culture supported by informal, undocumented, or common practices only?	52	22
3. What are examples of Primex’s demonstrated (espoused) values that are present or could be more present?	27	19
4. How Primex could better feature its culture in the future?	29	16
5. How can knowledge of Primex’s culture be harnessed to inform and enhance succession planning processes?	21	16

As can be seen in the table above, a large volume of ideas was generated in the brainstorming round. Additionally, there was also a large volume of duplication in ideas as can be seen by the contrast numbers between the count of total ideas generated and the count of unique ideas.

Appendix G - Summary of Survey Findings

Summary of Survey Findings

Survey Questions	Top Response Category
1. Please share a story about a time you personally experienced Primex at its best, when you were genuinely excited to be here? Who was there, what happened? What did you learn about the company?	<ul style="list-style-type: none"> · Primex demonstrating care and concern for us on a personal level · Opportunity for personal growth and development · Taking pride and joy in our work · Primex demonstrating a focus on employee health and safety · Collaborating well with others in the organization
2. What do you see as the core values of Primex, which make this organization unique?	<ul style="list-style-type: none"> · How employees collaborate with one another · How Safety is always the focus · How diversity is celebrated · How decision making is communicated transparently · How we treat one another with respect · How we take an innovative approach in all we do
3. How does Primex support these core values?	<ul style="list-style-type: none"> · Management leads through example of living our values · Programs like Coaching for Success and Profit Sharing reinforce the importance of our values · Two-way communication between employees and management (engagement survey) · Purposeful focus on values through committees (Safety, social, continuous improvement, Team 5, Team 17)
4. What are the top three things you	<ul style="list-style-type: none"> · Increased all staff events purposely designed

would like to see happen to improve the cultural effectiveness of the organization?

- to foster networking and a team culture
- Increased focus on year-round employee development for all employees (emotional intelligence, cross training)
 - Increased celebration of successes (key milestone events for the company, departmental, or individual)
 - Increased transparency and frequency of communication regarding company performance, goals, and objectives
-