



## **DBL 710 Doctoral Critique**

How purpose matters in supporting frontline leaders and mitigating bias in the workplace

**Chris Barlow**



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## **Certificate of Authorship**

My name is Chris Barlow, and I am the author of this Doctoral Critique. I have written every word in this document, conducted the literature review, and developed every figure or table, model or otherwise, as presented in this document unless otherwise expressly credited. I developed the research concept, framework, and questions and personally completed every interview.



Christopher M Barlow

26th May 2023

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26th May 2023

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## Critique Overview

This Doctor of Business Leadership journey is principally for leadership practitioners to improve themselves as leaders and, most likely, as people too. Our Doctoral leadership journey started with four coursework units that developed our knowledge and skill in leadership theory and practice, research case analysis, ethics and leadership issues through strategy. Among those four units, a central focus on our journey was linked to progress in our personal contingent leadership paradigm (PCLP), which we use as students to map our learning and progression as a leader. Given that this Doctoral journey and this Doctoral critique are so focused on us as students, I will write this document in the first person and will seek to give colour and context to the important influences on me as a person and leader, things that are often not related to Business books or charts or management models. Life events shaped me as much as anything I have read or learned along the way.

Many Gurus have influenced me and guided me on this journey, none more so than; Peter Senge, Peter Drucker, John P Kotter, Michael Porter, W. Edwards Deming, Frederick Taylor, John Katzenback, Meredith Belbin, Ray Mclean, Robert Greenleaf, Bill George, Abraham Maslow, Frederick Herzberg, Carl Rogers, B.F Skinner, Kathy Charmaz, and Robert Yin.

The most important Gurus that have influenced and guided me are those on the frontline, any service operations touch point with its customers.

Thank you so much.

## Introduction to the Author

My name is Chris, and I am, to my core, a hopeless romantic.

Being a hopeless romantic gives me the conviction and strength to believe anything is possible, and that helps me see future places or states where things can be better. As a person, a human, this perspective is amazing; in the work I do in a business improvement sense, it can be frustrating when people cannot see what I can see, and part of my learning journey is to be better at painting the picture of that future place and being better at leading and enabling others on the journey to that place. In a work sense, it is a great honour to help guide others to that to be place.

## Never growing up

To be good at business improvement, imagining what that *to be* place looks like is important in being able to metaphorically see the forest for the trees, to know what matters and what is a distraction — imagining and visualising matters in this context. In a dynamic and busy work environment, alert to market conditions and positions along with strategic considerations all happening amidst the grind of business as usual; it takes some imagination and a detachment from bias and the baggage we often carry to be able to see a way to a better place, a to be place.

In a childish sense, dreaming and imagining are incredibly powerful, and I try every day to carry that sense into all I do and infect everyone I work with. I love the book, *Where the Wild Things Are* (Sendak, 1963), where Max, a young boy, imagines a world where he sails off to in his dreams. Much is possible if I can dream and if we can dream together.



**Figure - A1** - Max dreaming. Image courtesy - *Where the Wild things are* (Sendak, 1963)

For me, being inquisitive and curious is underpinned by an innate wish to never grow up. In my work, I investigate things from a business improvement perspective. Being childish helps me to remain unencumbered by baggage and to stay open-minded to the possibilities. Being childish provides a unique perspective and makes collaboration a privilege with others who exist in a like-minded way. I investigate without bias where I can consider all the options and possibilities.

## **Music**

Music has played a formative role in my life, and I am an 80s child in the sense that I was a teenager in the 1980s, and the time I started listening to music, more specifically, was the late 70s to early 80s. Musical references, wherever poignant and relevant, may be interwoven into this document because those moments meant something to me in those moments and have helped shape the person I am today and will help shape the person I will be tomorrow, the one that is slightly better, yet still never growing up. I, as a person, am also the leader amidst other roles, and the leader would not be the leader without first being the person. The person guides the leader in my world, not the other way around.

And in music, many moments exist, yet one of the most poignant is from a song I love partly because it has not one, but two of the greatest electric guitar solos of all time, in my humble opinion (IMHO), and the song is by Pink Floyd from The Wall album and is called Comfortably Numb. This song may mean different things to different people, yet to me, it is about dreaming. Similar to Max in the book, dreaming means a lot to me; after all, I am an Aquarian, and we are dreamers. The lyrics listed below point to a dream where a child caught a fleeting glimpse, then the child is grown, and the dream is gone.

*When I was a child, I caught a fleeting glimpse, out of the corner of my eye. I turned to look, but it was gone; I cannot put my finger on it now; the child is grown, the dream is gone - I have become comfortably numb (Gilmour & Waters, 1979)*

These words push me every day to not lose sight of or let go of my dreams. One of my dreams is to never grow up, so I can keep on dreaming dreams and helping people based on what I see and hope to help others see a to-be place where things can be better. I fight not to settle, not to accept a lower standard, and not to be comfortably numb.

## **Curiosity**

An intrinsic part of me is dedicated to curiosity. Coupled with being a hopeless romantic is a dangerous combination for the curious; it can get me into trouble with those less curious, those who cannot seem to imagine a better way, those who seem only focused on business as usual (BAU) or what I refer to some times as bulldust as usual. I have a job ahead of me, trying to help those people and finding better ways of helping others.

This exquisite learning journey, this labour of love, this inquisitively driven epic exploration is my work, all my work, although influenced by many incredible collaborators along the way who have guided the path. Thank you all.

## **Abstract**

The notion of synergy is a fleeting and rarely viewed or experienced thing. Synergy exists in a single team as a performance multiplier where the team's output is greater than the sum of its parts. The role of a leader in this pursuit is important in either enabling or disabling such synergy. The ability of the team to share the load and accountability for results may help the leader let go of leading long enough to enable others to step forward and, in part, provide leadership within the group and beyond. The opportunity presented, then, is the rapid development of leaders within a group plus the performance multiplier in the team.

Leadership is innate in all of us in some way, shape or form. Some would like us to think and even condition us to believe it is the domain of those born with a right or brought up through the right schools or those in positions of power. It is not. We can all lead in our own domain and support others in their pursuit of the same. Moreover, as power shifts to those who deserve it, in the mythological meritocracy, those even less fortunate have more of a chance to be celebrated and rewarded for their performance and capabilities based on merit. Factors such as sex, race, religion, sexual orientation or simply not being a mate of the chosen, fade as levers of bias in a merit-based system underpinned by a clear focus aligned to purpose.

This critique will attempt to examine and illustrate how we all have that innate ability to lead in the right context, with the right support, capability and understanding of our role within a team. Organisational purpose guides and provides for this puzzle to come together clearly. This is a two-sided proposition, though, a role for the aspiring leader and a role for the decision-makers themselves. The leaders and organisations which miss the vast talent pool while choosing to drink only from the cup of bias, rethink your approach and see the rewards of much greater choice. Show your people that they matter, and you may be rewarded with inspired performances from the many, who may finally see their opportunity based on merit and the strength of their performances.

The benefits are simple and powerful. Pick from a broader talent pool, and you may have better leaders, and you will show everyone that fairness matters, which may be inspiring for all the people who often miss out unfairly. Imagine the positive spin on that message; no need to spin it because real behaviours drive fairness, and along the way, you may just be creating a culture of excellence and performance reward. This might even be an organisational competitive advantage in attracting like-minded smart, and hardworking folks.

A requiem for Leadership may sound dramatic, yet in many ways, Leadership in the traditional command and conquer, Great Man, *follow me* sense, has never been more ineffective in harnessing the collective energies of people in many workplaces today.

We have always had leaders because people need to be led. What if they don't need to be led? What if the role of a leader is not about leading anymore? No need to show who is boss because being boss is less important than achieving our purpose for being. If we are clearer about our purpose, organisationally, team-wise, and personally, why can't everyone lead within that context? Further, suppose a team leader's brief is clearer and aligned with that purpose. In that case, they are more naturally set up to succeed in harnessing the energies of their teams, focusing their teams and playing their role in removing barriers to their team's success and enabling them to deliver the purpose. If everyone is clearer about their role, everyone's job is easier.

The clarity of purpose as a key lever that guides leaders and teams in adding value is a central component of this critique. This is not about ego or seeking the spotlight; it's about effective leadership through focus, enabling, coaching, supporting, and listening. It involves removing bureaucratic barriers, rewarding based on merit, and ultimately stepping aside to allow individuals and teams to excel. And when those folks you have helped and coached achieve great things, be happy for what they have achieved because they did the work. We, as mentors, helped them get there, which is an essential part of our job, along with creating value for our masters because we all have masters. Numerous masters and mentors helped guide me along the way, and to pay forward that guidance to others is a true joy and an ultimate satisfaction and, in my case, still to this day, the single most rewarding thing I have and can do in a work context.

Purpose is a foundational factor in differentiating a truly merit-based reward system from the norm. One is demystifying the aura of leaders and strategy and vision by having a clear and sensible reason for being that all folks can understand. This helps everyone work towards or, at best, help develop the vision and strategy. If we see, we believe, and if we have helped shape them, we are more likely to be driven to achieve them. A collective sense of vision, purpose and focus can help support the journey and possibly bring others along as leaders within their domain and the more we are clear on our purpose, the more we can be self-led, focused and effective. The requiem for a Leadership revolution is already well underway, and a new day is dawning.

## Glossary

**Agile:** Being agile is a way of working. Agile is very customer-focused and collaborative. It has been described as a Culture, not a process (M. Sahota, 2012)

**Agile manifesto:** In February 2001, representatives from different types of programming and software development styles met to solve several problems as they saw them within the IT industry. They developed the Manifesto for Agile Software Development, which included four agile values and 12 agile principles (Highsmith, 2001).

**Agile organisationally:** Where agile principles and values are embedded at an organisational level, not merely at a team level.

**Agile principles:** The 12 Agile principles are customer centric. They focus on people and team collaboration as defined in the manifesto (Agile Manifesto.org, 2001b).

**Agile values:** Agile values are a core part of the Agile Manifesto, and the four values are;

1. Individuals and interactions over processes and tools
2. Working software over comprehensive documentation
3. Customer collaboration over contract negotiation
4. Responding to change over following a plan

(Agile Manifesto.org, 2001a)

**Agreed behaviours:** Represent the rules of engagement a team agrees to, which the team uses as a guide to self-management and mutual accountability.

**BAU:** Business as usual. A term used to describe the maintenance state of a business operation.

**Collaboration:** The art of teamwork (Butler & Waldroop, 2004; Katzenbach et al., 2012).

**DIFOT:** A logistic industry metric to measure the quality of service to customers. DIFOT stands for - delivered in full on time

**DLT:** Dahlsens Leadership Team

**Diversity:** In the team context, this refers to a diversity of skills as well as perspectives, yet also in any other way that a team member identifies themselves that will help give the team the broadest perspective of solving problems.

Organisationally, how a person identifies has a stronger implication in diversity

**Empathy:** In a workplace or team sense to the Author, this is always about walking in another's shoes, understanding the feelings of others and being mindful of those feelings in interactions.

**Empowerment:** The delicate balance of building confidence in team members to the point where they step forward and lead. Good leaders do not abdicate responsibility at this point; they support and lead their empowered team members to the point where that follower can lead in that specific area of expertise (Katzenbach & Smith, 1993b).

**Engagement:** A key measure in the status of the relationship between an organisation and its employees.

**Frontline Leader:** Running an operation directly connected to the business's customers. This is different from Frontline heroes who have thankfully come to prominence during the COVID pandemic and are identified as medical, Police, Fire and ambulance service legends. Apologies for any exclusion here.

**Good Manager:** The idea of the Good Manager, a term coined by Geoff Dahlsen based on a long-term wish he felt to help Frontline Managers following on from myriad conversations with his Managers, myself, and others.

**HPT:** High Performing Team as defined by Katzenbach and Smith (Katzenbach & Smith, 1993a, 1993b).

**Inclusiveness:** The Diversity Council of Australia defines inclusion as;

*Inclusion occurs when a diversity of people (e.g. of different ages, cultural backgrounds, and genders) feel valued and respected, have access to opportunities and resources, and can contribute their perspectives and talents to improve their organisation.*

*It is only through inclusion that organisations can make the most out of diversity.*

*(Diversity Council of Australia, 2019).*

**Manager Advisory Group (MAG):** The Manager Advisory Group (MAG) evolved out of the Good Manager evolution of thinking and was conceived by me as a way for Geoff being able to get closer to a representative group of Managers. And for them, as a group, to feel they

had a voice with our group CEO. The driving force in feeling like the MAG was a valid and helpful mechanism came directly from Frontline Managers.

**Mutual accountability:** In an HPT sense, mutual accountability is the mechanism teams use to manage themselves against the team's agreed behaviours or rules.

**Nimbleness:** At a team level, this refers to the ability to adapt quickly to changes that may affect an agreed output to a customer. At an organisational level, this refers to the ability to make strategic adjustments to mitigate the effect of distal, market or competitor impacts (Kanter, 2011; Porter, 2001).

**NPS:** is as nett promoter score. It uses a standardised survey to determine customer experience.

**PCLP:** Personal Contingent Leadership Paradigm frames an ongoing individual journey in adaptive leadership in consideration of appropriate leadership styles to suit varied contexts and situations in the review of personal gaps; will provide necessary guidance (Australian Graduate School of Leadership, 2018)

**R&D:** Research and Development

**Self-Management:** Is a principle of high performing teams where mutual accountability between team members to a set of agreed behaviours and a clear perspective of team roles and the purpose of the team provide the opportunity for the team to self-manage (Katzenbach & Smith, 1993b; Moultrie, 2013).

**SME:** Subject matter expert

**Trojan Horse:** A term aligned with Helen of Troy's approach to hiding her troops in a giant wheeled horse to gain access to the City of Troy by stealth. In this context, it was used to bring about software development solutions to improve service while keeping quiet on the notion that Dahlsens had service improvement needs.

**TBA:** To be advised

**UAT:** User acceptance testing

**Voice of Customer (VOC):** The voice of the customer is a discipline defining the key requirements that a customer expects to see in the product being produced.

# **Chapter 1**

## **Overview of the Research Context**

### **1.1 Context**

To express the feeling and emotion of my journey immersed within the context of my learning within this Doctor of Business Leadership program, its four coursework units and the shaping of this critique piece of work helped enlighten me, helped challenge me and helped shape an improved version of myself as a leader, a mentor and a human.

My name is Chris Barlow, and I am the author of this critique. I am currently the Continuous Improvement Manager for the JC Dahlsen group of Companies, the largest independent and privately owned building supplies distributor to trade in Australia. Dahlsens is a fifth-generation, family-owned business with over 2500 employees, and it has been in operation for more than 145 years. I have been in this role since April 2016. <https://www.dahlsens.com.au/>.

### **1.2 Formative years**

My professional career began at McDonald's at the age of 16. Then the opportunity arose to enter the renowned McDonald's Management Development program. This program was meticulously designed to transform young adults into capable Managers, entrusted with the responsibility of leading teams of up to 150 individuals and overseeing multimillion-dollar businesses, all at a remarkably young age.

We were so raw in so many ways, yet we were able to function as an integral cog in a production system (Heineke & Davis, 2007; McDonald Consulting Group, 2018; McDonalds Corporation, 2020) that worked despite our inexperience, lack of interpersonal and essential life skills. Ray Kroc called it the Speedee Service System.

McDonald's training honed us into Managers of young individuals, working diligently on a shift basis, where we all had primary and secondary responsibilities. Our job was to ensure the smooth functioning of the entire shift. We managed people, harnessed the energies of many or failed dismally trying. A high-volume McDonald's shift operation was a place where you often witnessed the good, the bad and sometimes the ugly of customer service,

and those live-action experiences helped us form views about what worked and what didn't in terms of harnessing the energies and the focus of a team in order to deliver consistently good customer service. Those experiences honed and calibrated us; every shift, we learned how to be better prepared and how to adjust when required under pressure. Adjusting was often required not because plans were not good but due to unforeseen circumstances that arose during the shift, even with the best preparation.

Preparation meant that everyone knew what their primary and secondary roles were. This provided a clear overview of all of the expectations for that shift. Primary roles could involve tasks such as preparing French fries or managing the grill, while secondary roles may have been to cover a break at a specific time, help in the dining room or replenish supplies for specific areas. We all knew our roles based on the station assignment sheet for that shift, which transitioned from the previous shift and then to the next shift. The more we worked as a team, the better our shift ran. And we cared about our shift running well; as a team, it was fun if it did and a headache when it didn't. In the moment, the decisions from the Managers often made the difference in whether we sped through a fun shift or endured a hard shift. Before becoming a Manager, I studied those good Managers and learned from them. The good Managers had heads on a swivel, stayed calm and helped keep everyone focused on their job. Profoundly and clearly, our purpose was to provide every customer with a great service experience encompassing many things, from the cleanliness of our site, toilets and dining room, to the freshness and quality of our food and the service experience itself. Our purpose was clear, very clear. What I took for granted in McDonald's then, that all organisations operate in this focused way, profoundly affected me to my core and has been a central tenet of my work to this day. This Doctoral journey was inspired by that experience and fuelled a burning desire to understand why many other organisations don't seem to have a purpose anywhere near as clear or as obsessive as what I knew from McDonald's. I see the effect of unclear purpose and, by extension, ambiguous focus points in the businesses I work with, including Dahlsens.

Unexpected situations only underline the importance of preparation and everyone's understanding of their roles. Throughout my professional life, ever since the McDonald's days, planning inclusive of contingency thinking, being adaptable and utilising the strengths of my teams, including their leadership, guidance and insights, have been essential to the shared successes we have enjoyed.

Organisationally, all decisions, even those at the highest level, were always sense-checked against that obsessive customer-focused purpose that seemed normal until I went out and learned of that disconnect in many other organisations. McDonald's Australia today has 970 restaurants and over 100,000 staff, having built from its first in 1971, and they serve over 2 million customers every single day in this country alone. (*McDonalds Australia - Our Story*, n.d.)

### **1.3 Early learnings – Problem-solving**

As an up-and-coming Manager of people, learning to think on my feet was an important skill. Being organised for my shift mattered as well. My team's knowledge of what we expected of them was also a crucial help. Furthermore, understanding why a problem occurred was also a useful skill I learned by leading people. This analytical approach, known as root cause analysis, was as relevant then as it is today.

McDonald's systems' thinking and analysis of the root cause of issues started pointedly from our customers backwards. If their experience was impacted, we worked hard to understand why? As a Lean Six Sigma Black belt today, the practice of investigative tools such as the five why's, a technique (Mateos, 2021; Rybkowski & Glenn, 2008; Serrat, 2017) innate in practice, yet it was also in McDonald's training of its Managers as was its very connection to our purpose of customer excellence. Diagnosing an issue affecting customer excellence through root cause analysis made sense because of our connection to the purpose. It was natural for us to solve service issues, and with each shift completed, we were able to calibrate our ability to run consistently good shifts where our customers got a great experience because we were getting better with each shift we ran and learned a little each time on how to be better. This was continuous improvement in action, and when it was good, it was very good.

Throughout my nearly 20-year tenure at McDonald's in various roles, I had the opportunity to delve into project work, initially as an additional responsibility alongside my operational duties. I liked the projects. Where operational business, as usual, was about maintaining, I had demonstrated skill in fixing things. Even in operational roles, I had earned a reputation for fixing broken operations and had been sent numerous times to these broken operations and fixed them. What seemed to resonate with my masters was that these operations typically maintained performance once I had moved on from them to fix the next problem.

The expectation in the late 1980s was that the operation would drop in performance after an intervention; mine often didn't and only did when an incumbent undid the excellent work the whole team had done to achieve that performance lift. Undoubtedly, the success was attributed to the collective efforts of the team to transform our approach to certain tasks with an unwavering focus on customer excellence.

I enjoyed fixing problems more than business as usual (BAU) – maintaining operational work; plus, I had a skill for identifying problems and then figuring out what was not working and why it was not working, and then I knew how to fix those problems in a sustainable way, beyond shift related issues; systemically there were often bigger issues to deal with overarchingly. At that moment, my new work path was conceived, although it took time to get there fully. Fixing the problems necessitated solutions that often involved modifying the business process, structure, and strategy. This required, at the very least, a re-evaluation of focus and role expectations. At times the changes focused on the existing business process, which was not broken itself, yet let down in some way. Fix the reasons behind why the process was failing, and the operational consistency could resume. These learnings were my first exposure to root cause analysis.

Root cause analysis was a term learned very early on, and the problem-solving technique was a central tenet of tweaking the famed McDonald's production system. Diagnosis of a root cause became a core skill underpinning my work to this very day; in fact, it has been my competitive advantage tool in helping organisations solve their problems.

My first leadership learning - That I was good at problem-solving and helping straighten up business operations was the first key learning which has stayed with me for my lifetime. Inherent in problem-solving, for me, is understanding pain points as represented by those people doing the jobs where pain exists; those people are the key to understanding a problem before moving any further into diagnosing patterns, the scale or breadth. It astonishes me that so many people try to solve problems without speaking with the people experiencing the pain which causes problems. In these cases, folks are typically looking to solve what they think is a problem rather than an actual problem. Root cause analysis requires looking beyond symptoms to the underlying problem.

Operational roles were where I had made my reputation, albeit mostly via the change required to produce the needed adjustments to turn a failing operation into a successful one.

A lack of teamwork was often the underlying yet more complex problem. I sought roles where projects were at least a component as opposed to strictly operational positions and which involved analysing problems, identifying process inefficiencies, and addressing execution inconsistencies that required change to deliver a step improvement.

### **1.3.1 Introduction to People and Change**

Early learning for me about BAU and change through projects was fascinating. However, it was the overlay of people into the fixing component, now called change management, that was truly mind-blowing for me. I had learned much from leading people, realising what I liked and disliked about my leaders. Over time and with many mistakes along the way, I did learn that people wanted to be involved and contribute. People in teams relished being part of something, and with change projects, the results were clearly evident and tangible; thus easier to paint a picture of what we needed to do as a team.

My second leadership learning - The McDonald's production system taught us the significance of roles and the importance of everyone fulfilling their role, which was classically as strong as its weakest link.

Engaging and involving people in the work we do, is the second key learning that has stayed with me for my lifetime and is inextricably linked to the first, change via problem-solving.

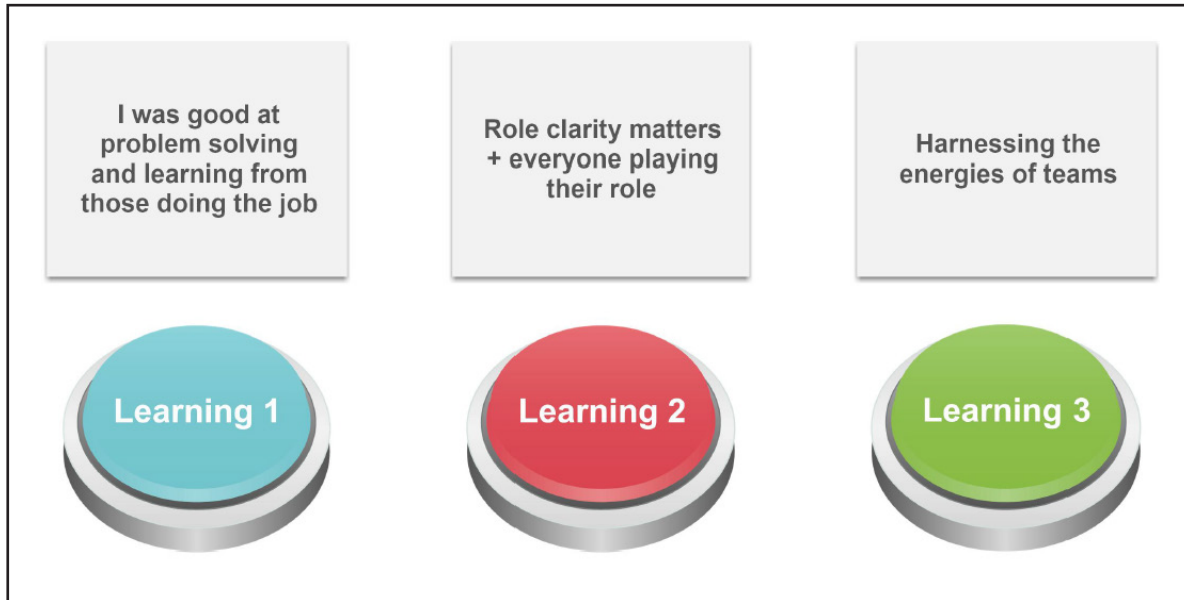
Conversely, I saw plenty of evidence to support the view that people didn't enjoy being told what to do all the time; they shut off and didn't look to get as involved or contribute in the same way. We sometimes lost good people from teams and organisations in this way. Getting more from people and making them happy at the same time seemed a simple recipe, particularly where people in the teams could help identify problems and be part of the solution.

### **1.3.2 Early learning from working with people on projects**

There is a difference between managing people in BAU operations and bringing people together in projects. Working with teams on projects and in operational transformation briefs, moments existed where a clear synergy grew within a team that produced results better than expected and greater than the sum of the parts of the team. Achievements like this fascinated me and created a drive to understand more about that synergy, those intoxicating results beyond expectation or belief.

My third leadership learning - The third key learning has been in harnessing the collective energies of people so they together could achieve greater than expected or normal things. This third key learning underpins the focus of this critique.

**Figure 1.1 - Early Leadership Learning**



### **1.3.3 Leadership learning as it applies today**

The leadership learnings described above in Figure 1.1 is part of the framework underpinning this work in understanding the success and failure factors that affect business success through the collective synergy of teams. I wish to understand how purpose affects success attributes in the delivery of performance; research will explore this further.

## **1.4 Leadership preferences**

I am writing this after studying DBL701 - Business Leadership - Theory and Practice, and having the privilege of being exposed to myriad different leadership styles and models. Despite all of that, my style remained mostly the same – Enabling, albeit with considerably more depth and breadth. As a Leader of people, my job is to enable the teams I lead for those amazing people to flourish. In a service-facing sense, the focus is simple, and the behaviours are simple. Use that Northstar of being customer obsessive to drive all that you do and all that your teams do. Reference it early and often.

## **1.5 Leadership Ethics**

Ethics as a lens for decision-making and actionable behaviours in every moment is and has been a profoundly important consideration throughout my career. I hope it always will be, more so now that I can wholeheartedly stand behind doing right. It is easier to do when you do not fear reprisals or losing a job; financial freedom can help with that. The sting of that realisation only pushes me to do right on behalf of those who do not yet have sufficient financial freedom and are constrained as a result. Is it the role of a Leader to protect and nurture people, to allow them to shine, rather than to oppress them? I am immensely proud of the accountability and sense of custodianship I have felt for as long as I can remember. Setting the right example always matters to me as a human and a leader of others. I hope I do what I do for the right reasons, not to impress those above me. For me, impressing the people I led and worked alongside was and still is more important than those I reported to. That ethos has often gotten me into trouble with those above who needed my acquiescence before my performance capability or the quality of my work. I have always had little time for those people, and even less so now. As one rises higher in an organisation, there is a greater obligation to lead people in the way and to avoid abusing power. Enabling leadership, for me, provides a framework for how to behave in order to support others in their flourishing. The loyalty, engagement and performance of and from those people always ensured results greater than the sum of a team's parts. I will write on Ethics, more formally, later on.

## **1.6 Work Scope**

### **1.6.1 Evolution of work type**

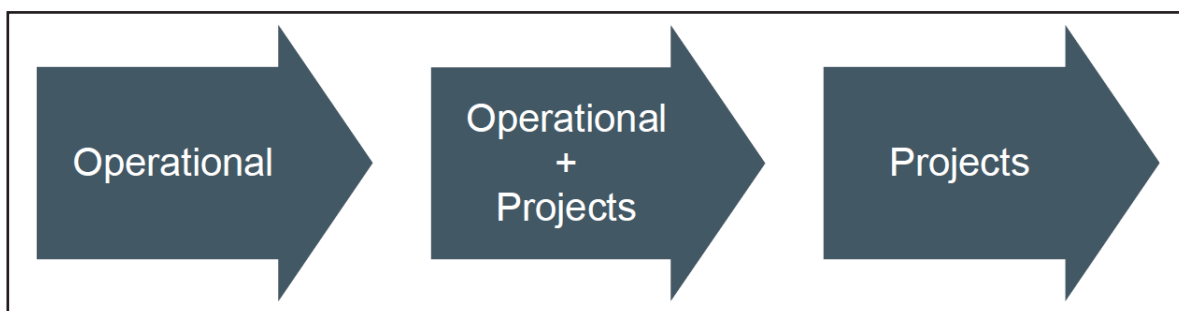
By the mid-1990s, technology was starting to play more of a part in solution development. During that time, the primary components of enterprise resource planning (ERP) software offerings were inventory management and resource planning via scheduling.

Beyond that, into the 2000s, the influence of technology was expanding at an unprecedented rate. The Internet of Things had arrived, and by extension, our lives had changed forever. The 2000s created a lot more project opportunities and formed the formal transition from operational to hybrid to project-only roles.

I came to work in IT Agile environments and felt immediately uniquely aligned with how project teams operated. Domain expertise mattered, and the leaders seemed more helpful and focused on removing barriers. Much of the movement's focus was on individuals engaging and collaborating as a team and where the leader didn't need to shine brightly. I felt comfortable, possibly for the first time, in an organisational context. In teams, I had felt comfortable leading in an engaging and enabling way, yet organisational bureaucracy, red tape and policy at that time often unpicked much of the synergy we as a team had built. Agile changed all that.

When taking the role with Dahlsens, the idea of having more of what seemed like a greenfield opportunity to practice business improvement on a scale of operation that was meaningful and across an operation with complexity in markets was interesting. The role is a full-time employment position, yet I look at it in yearly increments or specific deliverables of a brief.

**Figure 1.2 - Work type shift**



Project work allows me to appropriately utilise my investigative skill set. While I have a passion for operations, I believe I can make a more positive impact and bring about meaningful change by working in a non-operational or project-based role, such as my current role in continuous improvement.

### **1.6.2 Current work type**

My current work type is to influence leaders & teams where no direct reporting line exists. Work type represents a combination of short-term project-based roles inclusive of a specific scope and brief and the occasional longer-term brief with end-to-end investigation requirements leading to a provision of solution in the context of misalignment between strategy (or competitive advantage) and execution. The current brief is an end-to-end longer-term engagement, currently 5+ years into the engagement. The role is continuous

improvement, yet the brief is more definitively business improvement because Dahlsens has more major transformational improvement needs than incremental continuous improvement.

### **1.6.3 Current Organisation Context**

Dahlsens is a more than 145-year-old family-owned building materials supplier with four separate wholly-owned Businesses operating across 4 States with over 1000 employees. Research for this critique will be conducted within the trade Business sector in Victoria and New South Wales.

Dahlsen's brief for this role is to examine their Business units and find the most significant Business improvement opportunities to benefit financially & holistically. Dahlsens now has a fully scoped and developed Change program that focuses specifically on bridging the gap between its strategy and its service promise to customers. That service promise or competitive advantage statement is that Dahlsens will provide substantially better service than competitors. Dahlsens is currently vulnerable because it does not consistently deliver substantially better service than competitors.

Reporting lines are to Geoff Dahlsen, the Chief Executive Officer of JC Dahlsen Group. Geoff is the son of John Dahlsen, the owner of the Business and a former Chairman of Woolworths and ANZ Bank Director.

## **1.7 Bias in the workplace**

Early on in McDonald's, I did not feel any bias other than the clamouring for shifts by casual workers, where performance dictated how many shifts you got the following week. I naively thought that merit and fulfilling your role as part of the team were the only factors in performance measurement and the rewarding of shifts. Later, I learned that various forms of bias tilted the seemingly simple equation I had lived by in McDonald's. It made no sense to me that good-performing people missed out on opportunities for being female - the not-so-subtle bias that females were here to be mothers, and there was no point promoting them on that basis. The more subtle bias that I felt at times was that men held women back for not being tough enough and not being manly enough in their eyes. My early experience in McDonald's, where a high proportion of women were leading the Business

at Store level leadership and beyond, was normal for me, and my best mentors, my most balanced leaders, were often women.

McDonald's was a melting pot of different ethnic groups. The first non-heterosexual people I ever met were in McDonald's; looking back, the Company captured an amazingly diverse and eclectic group of people at a time when organisations were not diverse or eclectic. People came together in that melting pot in a very focused and synergised way because of our customer obsessive purpose that was omnipresent. Performance recognition based on merit was so far ahead of its time; I am very proud to have been a part of such a culture, albeit by accident, as I did not even know how special it was at the time; only after, when it became obvious by comparison with the organisations I subsequently worked for, even to this day.

### **1.8 Purpose - to align people with clarity**

What seemed normal to me at McDonald's was to live a clear customer service obsession in everything we do. At McDonald's, a focus on customer service was ingrained in everyone from the CEO down, and it was always the top priority. Charlie Bell (*Charlie Bell Scholarship*, n.d.; Warner, 2005; Wikipedia contributors, 2022), a person I knew here who emerged from our Australian Operation to head up the Global McDonald's Business as our Global CEO, set that type of example along with every other person I knew who came into any Store, and if that Store needed help, they would take off the suit jacket and help to clear tables, jump on the fry station or help wherever we needed them. That was Leadership as I saw it, and I felt it on the frontline. It was about Actions, not just words.

Nothing, no words, no vision statements, or corporate mumbo jumbo can replace that example set. Some talk of the standard you walk past is the standard you accept, powerful words by Lt General David Morrison (*David Morrison Speech Transcript: The Standard You Walk Past Is the Standard You Accept. – What's Your Message?*, n.d.; RicHayden, n.d.), yet for leaders like Charlie, it was the standard you set via your own actions and not words, that spoke so loudly to many. Leaders often quote great leaders but fail to model the behaviour themselves, as if simply saying the words is enough to make them great leaders. Actions speak louder than words. Charlie's actions made me walk taller, and every time I shared stories like that with others, I saw the same effect. I had numerous examples of leaders like Charlie, who inspired me in similar ways. May you rest in peace, Charlie; you and the example you embodied profoundly touched me and many frontline folks like myself.

It came as a shock to me that other organisations I subsequently worked with did not have that same obsessive customer service focus or ingrained purpose as McDonald's did. And all of these organisations are customer facing service based Businesses.

Purpose specific to focusing teams and organisations seems different to the other three key learnings I had growing as a Manager into a Leader. On the occasions I had been part of or was leading a team to a point where synergy was occurring, things often conspired against that synergy remaining for an extended time or us being able to spread the influence of synergy. What we were doing at a team level was not aligned with the organisation. When people live the synergy, the sense of empowerment, being part of the decision-making, ways we solve business problems; that sense of engagement given freely by people feeling they were part of something good; it is hard, then, to go to environments without it. It has been around 25 years since I first felt the magic of that team dynamic, and I fully expected things would have moved much further forward in that time within general business operations to ensure I and others could feel more of that magic more often.

As I moved entirely to project-based roles, I was exposed to Agile philosophies and agile ways of managing projects alongside customers who helped shape solutions to Business problems via software solution builds. I enjoyed observing SME leadership within the team context – more supportive, selfless and enabling; it all seemed so natural to me to facilitate and work alongside people with a shared clear view of helping their customers in an obsessive way that I was used to. And it made me think that my idealistic wish for more and for better was not just a romantic dream.

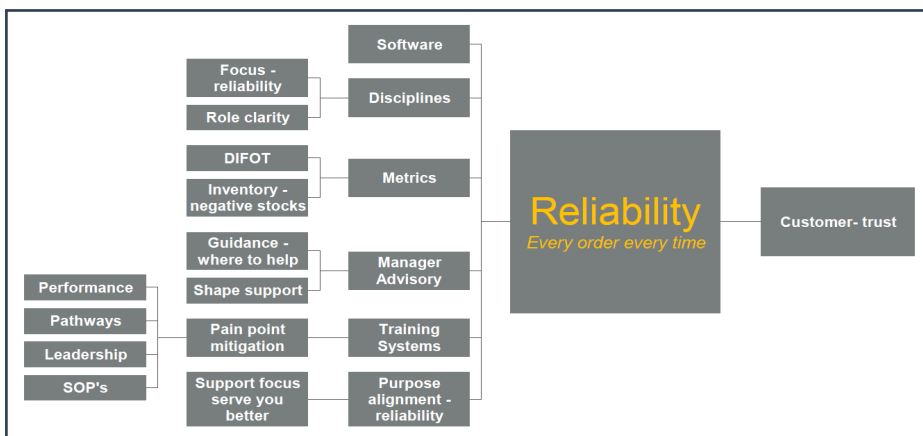
Agile thinking puts the purpose in focus; we are customer obsessed. Agile was like McDonald's; it talked customer obsession all the way through an Organisation, and like McDonald's, it recognised that the purpose must be strongly aligned and lived from top to bottom for it to work in a sustainable way. For all these reasons, I wanted to explore the notion of purpose as a North Star, along with other success factors and attributes, in more detail as part of my Doctoral work.

## 1.9 Strategic Considerations

### 1.9.1 Summary

This section outlines the problem to be solved. My Dahlsens brief started broad to assess business improvement and standardisation opportunities across four separate business units. After conducting an initial investigation, the opportunity in Dahlsens' main business stood out to me due to its scale, current size, and strategic vulnerability. A Service Reliability Program of Work became the blueprint for mitigating strategic vulnerabilities in Dahlsens.

**Figure 1.3 - Service Reliability Blueprint**



### 1.9.2 Strategic vulnerability

Figure 1.4 below represents both sides of the problem facing Dahlsens. The vulnerability exists due to chronic inconsistency in service reliability to customers. For a service-based logistics business, this gap in its core business function represents a serious vulnerability strategically and to its very existence.

**Figure 1.4 - Strategic Vulnerability or Advantage**



### **1.9.3 Strategic advantage**

An agreed program of improvement works is in progress, henceforward referred to as the Service reliability blueprint (SRB). This program operates under the Continuous Improvement function within Dahlsens. The strategic vulnerability faced by Dahlsens is being turned into a strategic competitive advantage, where Dahlsens can take market share or develop new market channels or segments by leveraging the strength of the reliability advantage over competitors. A competitive advantage for Dahlsens exists most strongly where competitors are unable to replicate the actions of Dahlsens in its chosen markets.

### **1.9.4 Dahlsens strategic risk assessment**

With Michael Porter's five forces that shape industry model (Porter, 1997), Dahlsens was risk assessed in its two main functions:

- Trade: Supply of building materials to builders
  - The organisation of jobs and delivery to site
  - Procurement and aggregation of materials from many suppliers
  - Services to help builders estimate quantities required
  - Advice on product fit for the need
- TAF: Truss and Frame prefabrication manufacturing
  - Estimation and detailing of job needs
  - Production and delivery to site
  - Quality guarantee

Figure 1.5 - Porter's five forces

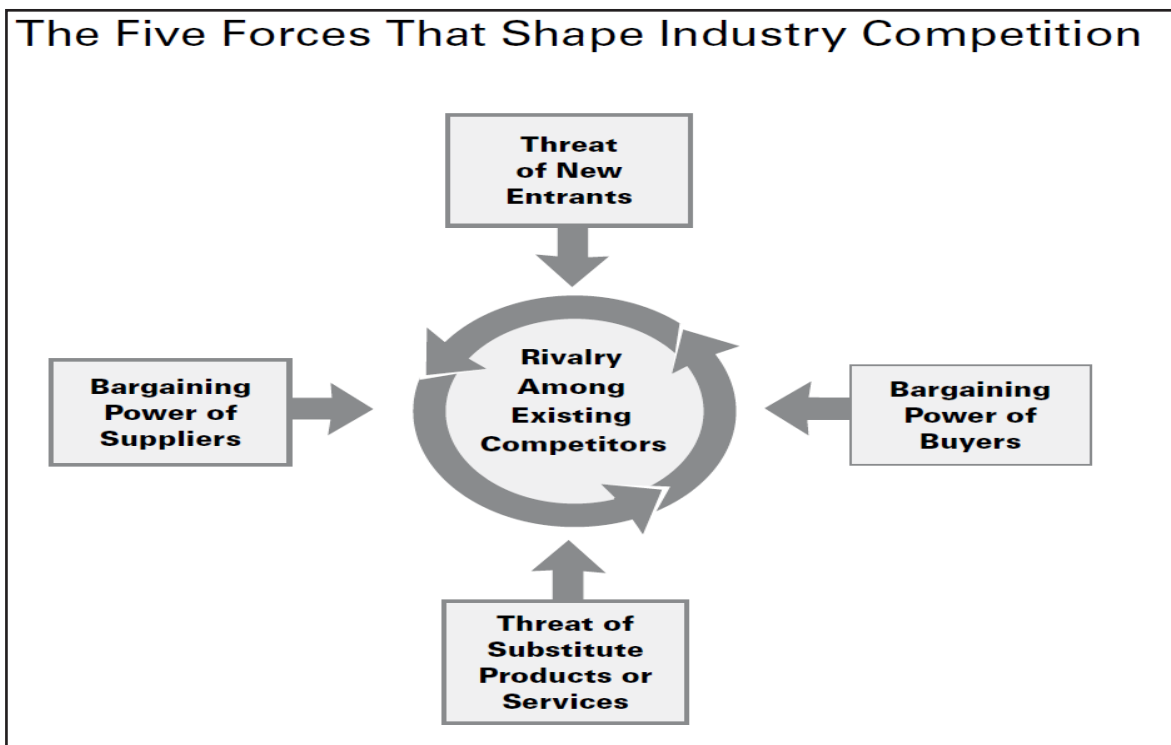


Table reference - (Porter, 1997)

Figure 1.6 - Porters five forces - Dahlsens analysis

| Porter's 5 forces that shape industry | Dahlsens Trade           | Dahlsens TAF | Opportunities                                                                                                 |
|---------------------------------------|--------------------------|--------------|---------------------------------------------------------------------------------------------------------------|
| Rivalry among existing competitors    | threat of better service |              | provide service that competitors cannot replicate. systems and discipline advantage. Communications advantage |
| Threat of new entrants                | Threat of better service | High         | Mitigate by reliable service advantages                                                                       |
| Threat of new products                | Threat of better service | High         | Mitigate by reliable service advantages                                                                       |
| Threat of new services                | Threat of better service | High         | Mitigate by reliable service advantages                                                                       |
| Bargaining power of suppliers         |                          |              | Volume driven from reliability advantages increases Dahlsens bargaining power with suppliers                  |
| Bargaining power of customers         | High due to poor service |              | Mitigate by reliable service advantages                                                                       |

Mitigating Dahlsens service inconsistency and building a reliable service offering was assessed as the best immediate approach to allow for innovation and exploitation of opportunities provided by being a reliable service provider. Geoff Dahlsen put into motion a digital innovation strategy operating alongside the reliability blueprint as a forward-thinking parallel move while the reliability work takes shape. Both strategies will create innovative and disruptive strategic opportunities in time.

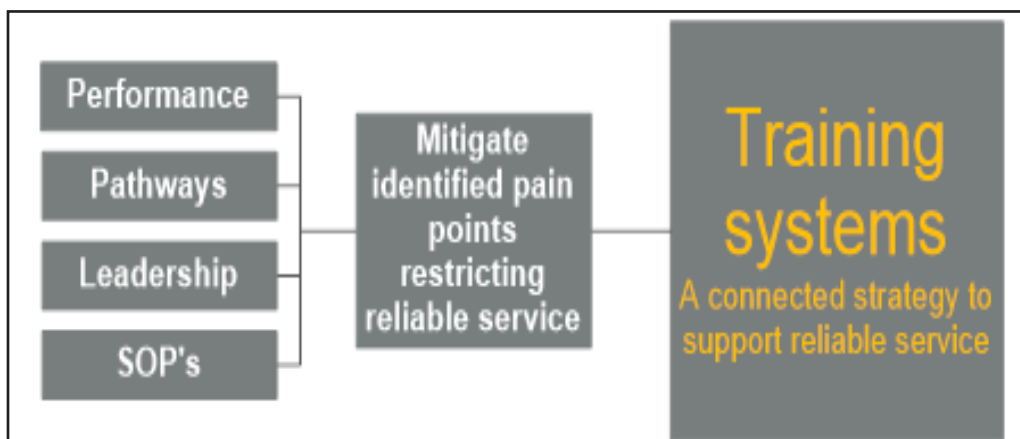
### 1.9.5 Service Reliability Blueprint

The blueprint is the overarching strategic plan to achieve reliable service in Dahlsens by mitigating service vulnerability (in a service-based Business model). Reliable service should be a fundamental pillar in a service Business which is why this vulnerability was identified as the major piece of work within the author's remit within his Business improvement brief in the Continuous Improvement (Ci) department. Work is required to have this service-based purpose embedded into the Business, to connect to tangible behaviours aligned to a service purpose.

### 1.9.6 Training needs

As part of the investigative data gathering period in Dahlsens, many data points are linked to a lack of system, structure or sensible connected strategy in training systems.

**Figure 1.7 - Pain points distilled from many data points**



### 1.10 Personal Contingent Leadership Paradigm (PCLP) – introduction

Part of developing my personal contingent leadership paradigm (PCLP) has seen a leader style alignment process analysis take place. This alignment process helped to identify and validate like-minded leadership styles as an evolutionary check while making assessment and progression adjustments in the shape of the PCLP.

My leadership style and initial PCLP fit in the stakeholder space within the generic leadership classification approach (Fayed, 2017). Alignment exists here due to my aligned values to the stakeholder style in terms of being inclusive, enabling and respectful (AGSL, 2019). More

specific leadership styles feel like high engagement and high collaboration, where teams have a chance of coming together in a dynamic and synergised way.

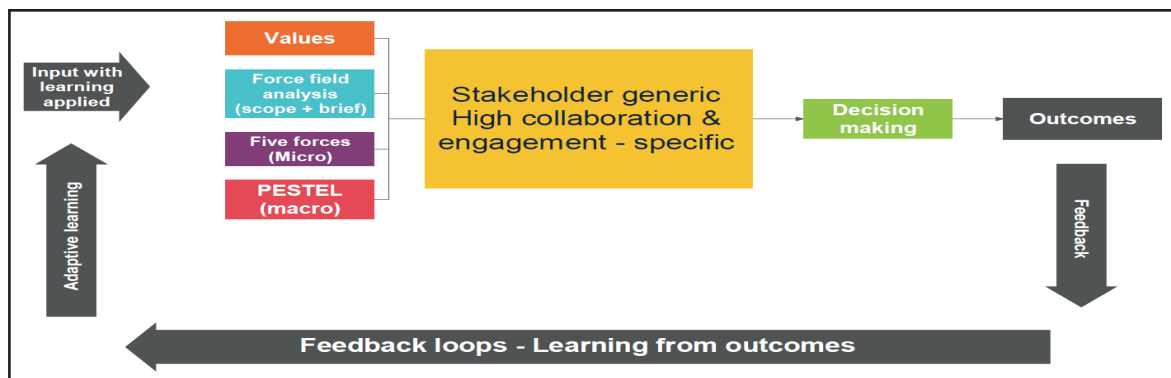
### 1.10.1 Personal Contingent Leadership Paradigm – Pre-Literature Review

The PCLP model below flows from left to right as the inputs (values, relational & commercial guidance, and context-specific to role brief and distal factors) feed to diagnostic to determine the appropriate style and approach. Relational and commercial guidance, with consideration of distal factors, are all contextual inputs and become relevant impediments or controllable elements under the diagnostic microscope. Values are an earlier consideration in aligning before acceptance of a role alongside the brief and scope. Force field analysis, designed by Kurt Lewin (DeJong, 2019; Murdock & Murdock, 2018), will test as the central evaluation mechanism of the diagnostic. A higher frequency of re-evaluation will be tested to validate feedback loops and adjustments required in the approach.

Agile case study learnings feed value driving change and iteration of approach. The learning differences between IT and non-IT frame shifts are required in different environments.

### 1.10.2 PCLP model

Figure 1.8 - Initial PCLP v1.0



### 1.10.3 PCLP explained

A visual model made the most sense to me as a visual person. Additionally, the purpose of the PCLP is to be iterative and aspirational in nature, and I love the continuous improvement iterative flow of this model. There are inputs guiding the approach and feeding information as to the most effective style in each different situation, framed by different roles and briefs

these days, in a project based capacity. Inputs guide the leader approach, yet the favoured approach is highly collaborative and engagement focused in order to bring out the best in teams. Feedback loops represent important calibration and improvement opportunities within a role or brief to be as effective as possible.

#### **1.10.4 PCLP - Encompassing Leadership Styles**

Under the proposed generic leadership approach and classification (Fayed, 2017), the most aligned style is stakeholder, given its alignment with PCLP values. Stakeholder style is prescribed for turbulent environments (AGSL, 2019), yet as a foundational base to work from, the values resonate, and styles are validated by self-assessment via feedback loops. Generic leader approach alignment to Stakeholder style supports an enabling approach with collaboration and engagement central to leader philosophy. While alignment to high-performing teams (HPT) and agile behaviours remain aspirational depending on the context, their values remain firm in practice, whether or not the style is fully deployed. Other highly aligned styles, such as servant and authentic, are also of reference; both styles' values align with generic stakeholder values.

In reality, though, interactions within jobs or pieces of work are sometimes transactional due to time constraints set by the brief and limited by the scope. The ability to create a win-win and to deliver a result is sometimes required (B. M. Bass, 1990; Burns, 1978b; Burns & Berg, 2002). Time working alongside people is needed to build the required trust within a team (Katzenbach & Smith, 1993a, 1993b). Beyond these fundamentals may be where real synergy has a chance; certainly, I had never felt true synergy without fundamental team dynamics in place. Shared behaviour frameworks, mutual accountability, diversity of opinion, and shared leadership are commonalities between HPT and Agile methodologies within the SME domain. Additionally, there is a focus on promoting psychological safety and encouraging true divergent thinking to generate better ideas.

Transformational leadership feels appropriate where the highly collaborative HPT & Agile approach is not supported either at a leadership, team or organisational level. Transformational leadership aligns in terms of its espoused values of building team cohesiveness, sharing company vision, being team-focused and not ego-driven (B. Bass & Avolio, 1994; B. M. Bass, 1990; B. Bass & Riggio, 2006; Bennis, 1990), yet falls short of

the highly collaborative, shared leadership, mutual accountability, diversity loving world of Agile and HPT at an Organisational level (Krush, 2019; M. Sahota, 2012; M. K. Sahota, 2016).

My leadership style is a high engagement and high collaboration style where (versions of) servant leadership in giving and encouraging teams to self-lead is preferred. The environmental and contextual conditions, along with the scope of the brief and the capability of the team, determine the suitability of encouraging teams to self-lead

#### 1.10.5 PCLP - Application implications

Given the already stated stakeholder engagement challenges and the stated research question from DBL702, *“What **success factors** from high-performing teams and Agile case studies, can be applied in an SME family owned business environment?”* opportunity exists to be more effective in this area.

Current PCLP application challenges and implications for Dahlsens’ current context exist:

- In improving influence capability of Geoff Dahlsen and the Board
  - Implication: If not addressed, the *Service Excellence* program of work currently underway could underperform, yet other stakeholders may help here, so this is not imperative. **Failure here may not cause program failure.**
- In influencing change in the organisational structure, policy framework and mindset toward the Branch network to a *supportive* ethos rather than a *compliance-based* mentality. This change will help support a change program, which is very customer-centric.
  - Implication: If not addressed, the *Service Excellence* program of work will not deliver on its objective because the organisational structure changes specified have to happen to enable the program change to deliver. **Failure here will cause program failure.**
- In influencing a shift in mindsets and behaviours toward revised company values. Helping highlight the specific things we can all do to live the values.
  - Implication: **Failure here will not cause program failure, yet success here will accelerate and multiply the effect of program success.**

#### **1.10.6 Further paradigm development and conclusions**

In a broader context, considering all development opportunities beyond just the Dahlsens context, the development opportunities below frame the holistic opportunity.

At this moment, key PCLP development learnings are:

1. PCLP evolution is a constant, and there is much to learn.
2. Consider conducting a values assessment and scoping out the role before engaging with stakeholders to influence them.
3. Disciplined force field analysis is vital to better analysing, understanding and mitigating impacts, stakeholder or otherwise, on projects.
4. Regular and robust re-assessment of force field assumption must be a core part of adaptation and mitigation of impacts.
5. Developing sensible feedback loops is prudent and part of the reassessment process.

This analysis provides an opportunity to be better and do better with several relatively simple adjustments and focus points to implement into practice, which, with the right attention, will bring desired results.

The most significant learning here is learning. The self-reflection part of this process provides the impetus for self-growth and an important message to remember in practice in the heat of the action. The second learning here is discipline. Force field analysis is a useful tool, but it may not have been used with enough breadth of input considerations, rigour, frequency, or focus on stakeholders to achieve the necessary discipline.

Such is the state of my PCLP coming into this DBL710 critique. The two main contributing subjects to the development and evolution of this PCLP were Leadership theory and Case study research, foundational subjects specific to linking to a unique and focused PCLP. Beyond that, ethics was an important additional consideration as well. The literature review as part of this document will serve to evolve and adapt further as I proceed along this journey. In Chapter 3, we will see where that evolution gets to.

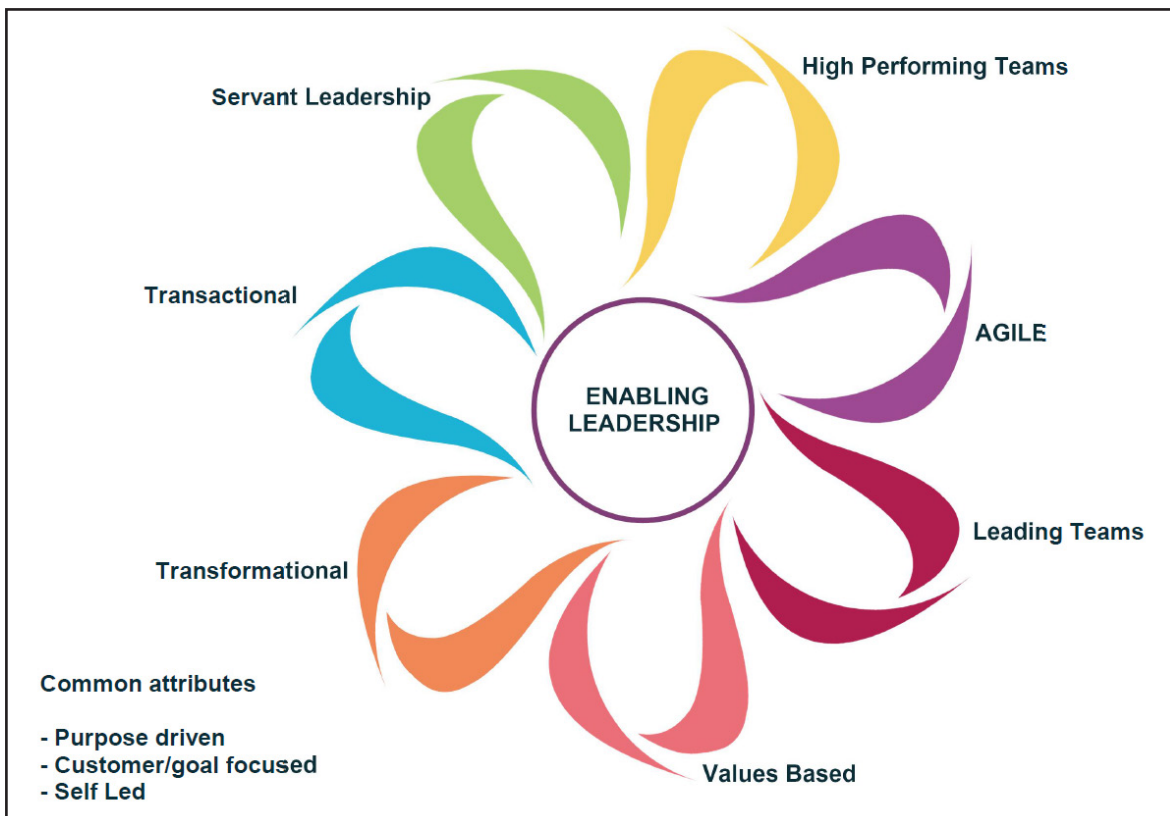
## Chapter 2

### Leadership literature review

#### 2.1 Part 1 – Literature Review Overview

This part provides an overview summary of favoured or aligned leadership styles; the following figure 2.1 represents the styles to which I strongly align, and I have distilled this information through a critical literature review. Whether a leadership style, model or philosophy, they all share the common attributes of being purpose-driven, customer/goal focused, and self-led, supported by Enabling Leadership. Enabling leadership helps set the tone for team synergy and empowers team members to lead within their respective contexts.

**Figure 2.1 - Styles overview - Enabling at the core**



### **2.1.1 Introduction**

My perspective on Leadership is framed by my leanings and the styles that work for me in a practical sense, as well as what enables me to help others, which brings me great satisfaction. I have a range of influences that makes sense in a practical way to my own evolving leadership style. From the early age of 19 or 20, when I led teams of up to 150 people, I made numerous mistakes, and those learnings shaped my evolution as a leader since the early 1980s when the focus was on how to bring out the best in people in order to achieve a clear goal collectively. At McDonald's, our focus was clear – providing exceptional service to customers with hot and fresh products, all served in a clean and safe environment. If we provided great service, everything else would follow; and it did. Franchisees paid vast sums of money to tap into that simple system, and I was fortunate enough to be paid for the privilege of studying and learning within it every day. The clear focus on our customers was tangible and one that we could align staff members to as we all played our roles to achieve something important. To satisfy a customer in a service-based Business is a profound purpose and achievement, and when focused collectively, a team can do it consistently, delivering high performance. The feeling is incredible, achieving in this way while also making great money for our masters. Funnily enough, when customers get great service, they tend to come back more often.

Learning how to engage people in a more meaningful way mattered. The sense of belonging we felt seemed to matter, particularly so when our purpose was so clearly defined. Being part of a collective effort seemed to matter. At times these teams achieved extraordinary results, and often, it seemed effortless and enjoyable. The weight of the workload was carried by many team members playing their roles as part of a team. Everybody knowing their role seemed to matter. People who knew their roles felt a sense of belonging; knowing that they were part of a collective team effort seemed to elevate them and their willingness to take even more responsibility or load in a beautiful way. Leading in this context was a joy, particularly witnessing the effect of growth and confidence on others in the team. In reality, the formula was simple, and we repeated it consistently. The “why” was clear and centred around our customers, which made the “what” easy to understand, and almost intuitive.

Over time it was clear that my role was to create an environment for this magic, for this high collaboration and high engagement team synergy to happen. Leadership became about facilitating, orchestrating, ensuring the purpose and roles were clear, removing barriers and

then getting out of the way to let the team thrive. How to recapture that feeling is what I seek as part of this Doctoral journey.

### **2.1.2 Interests frame the problem to solve**

Blending leadership theory and writing with practical experience is a captivating endeavour. The focus of this literature review is to find common grounds in terms of styles, philosophies, ideals, work approaches and behaviours. My alignment is with high engagement and high collaboration, enabling effective thinking and behaviours in practice, yet underpinned by a clear purpose or *raison d'être*. A why.

In the context of organisations like Dahlsens, which are medium-sized and Family-owned, and operate in markets where customer success depends on their services, the question arises: Does having a clearer purpose create an opening for such organisations?

Furthermore, is a customer-obsessed purpose necessary to align strategy, organisational behaviours and operational focus, or does the purpose itself suffice as a catalyst? Can a customer-obsessed purpose facilitate team synergy, high-performance, and enable Frontline Leaders to flourish? Perhaps these aspects combined can generate the desired magical synergy? Let us find out.

A comprehensive study and broader understanding are required to ensure that the narrow view through experience is valid to my personal contingent leadership paradigm (PCLP). The literature review here will start in a broader sense and attempt to become clearer by distilling, research and analysis.

Additionally, understanding key parts of the history and evolution of Leadership theory may help to understand what may serve me as best practice in the current day. I am particularly interested in the link between theory and practice. Practice often seems to be behind the theory, with a notable exception; Agile. The Agile Manifesto was conceived by practitioners in various software development disciplines to solve problems they were witnessing as the Internet of Things and technology advancements were evolving at unprecedented speeds. These were not leadership theorists, these were practitioners, and the solutions were designed to achieve results. Agile philosophies seem to look at the organisational structure and purpose perspectives in order to support highly collaborative teams. We will delve further into Agile methodology later on.

### **2.1.3 The Synergy of Teams**

My work in project teams over time and the dynamic which sometimes forms within those teams to produce a synergised result greater than the expected sum of the team's parts is fascinating. The notion of a group of people sustainably outperforming expectations is fascinating. High-performing teams (HPT) in various guises and led in different ways are of interest. Agile environments led by servant-style leaders who proactively enable and also share power with subject matter experts (SMEs) are of interest, particularly regarding the potential for teams to outperform others even without the added benefit of synergy.

### **2.1.4 Introduction Summary**

The combination of practical experience and the fascinating opportunity to explore leadership theory, along with my areas of interest, will guide my focus on key areas of interest that align with my preferred leadership styles. Agile and HPT will likely feature prominently, although for synergy, the magical and elusive synergy to occur, an aligned organisational purpose feels like it matters. What Leadership attributes matter most in the pursuit of a sustainable synergy in teams?

## **2.2 Leadership Theory Evolution**

Much has been written by theorists on the differing approaches to taxonomy, whether it be based on "*School of thought*" (Bolden et al., 2003), styles or eras, stages or others; the need to classify in order to compare remains the same (B. M. Bass & Stogdill, 1990c; Yukl et al., 2002b). Numerous theorists have also commented on whether leadership theorists are more enlightened on the subject today, given the flood of writing on Leadership Theory (Bennis et al., 2008; Burns, 1978a; King, 1990).

### **2.2.1 Great Man**

The Great Man theory is attributed to Thomas Carlyle. His book "*On Heroes, Hero-Worship, and the Heroic in History*" evolved from six lectures he delivered on the subject of heroes (Hero in this paper is a reference to a non-gender specific hero or heroine). Carlyle's lectures about Heroes as Poets (Dante & Shakespeare), the Divine (Odin through Scandinavian mythology), a man of letters (Rousseau), as Prophets (Mohammed) and Kings (Cromwell &

Napoleon) (Carlyle, 1841). In his first lecture on Tuesday, 5<sup>th</sup> May 1840, where the topic was Divinity, He described heroes as:

*For, as I take it, Universal History, the History of what man has accomplished in this world, is at the bottom the History of Great Men who have worked here. They were the leaders of men, these great ones; the modellers, patterns, and in a wide sense creators, of whatsoever the general mass of men contrived to do or to attain; all things that we see standing accomplished in the world are properly the outer material result, the practical realisation and embodiment, of Thoughts that dwelt in the Great Men sent into the World; the soul of the whole world's history, it may justly be considered, were the history of these* (Carlyle, 1841)

What Carlyle spoke of here place the deeds of these heroes, these great men, in high esteem. In this context, Carlyle portrays the acts of great men as influential in history and to some degree, he points to the role these heroes played in writing history itself (Carlyle, 1841).

Bernard Bass wrote that *"History was created by the acts of great leaders. Leaders molded the masses. (Despite the examples of Joan of Arc, Elizabeth I, and Catherine the Great, great women were ignored)"* (B. M. Bass & Bass, 2008).

A generally accepted view today is that several key players in history were heroes, leaders and/or trailblazers in their context. Winston Churchill, William Wallace and Joan of Arc were portrayed as great leaders where inspiration was the key. In times when compassion triumphs, Mother Teresa, Gandhi and Mandela are generally accepted as great leaders.

My interest in the Great Men and Women in this context drives the thinking that a single person could lead effectively. The study of followers' expectations will link back to this moment in time to frame just how far we have come in acknowledging the role of followers, more so the contribution to their team, both in leading and following; such is my interest in self-managed teams.

### 2.2.2 Traits

It is a matter of conjecture whether the great heroes mentioned above shared any traits. Great Man theory suggests that these great people or heroes had traits they were born with, which precludes lesser people from being capable of such deeds.

To this day, organisations still evaluate potential leaders and hire against personality trait-based testing mechanisms (16personalities.com, 2019; 123test.com, 2019; DISC, 2019; MBTI, 2019).

In 1948 and again in 1974, Ralph Stogdill comprehensively surveyed almost 300 trait studies to define a list of characteristics, 8 of which were identified as being prevalent in people who became leaders (B. M. Bass & Stogdill, 1990a; Stogdill, 1948, 1974). It was also identified that a person in one situation might fail in a different situation; thus, the ability to optimise traits is situational (B. M. Bass, 1969; Northouse, 2015). Comparing the Stogdill studies among others, Peter Northouse listed those major studies in the table below.

**Figure 2.2 - Studies of Leadership Traits and Characteristics (Northouse, 2015)**

| <b>Stogdill<br/>(1948)</b> | <b>Mann<br/>(1959)</b> | <b>Stogdill<br/>(1974)</b> | <b>Lord,<br/>DeVader,<br/>and<br/>Alliger<br/>(1986)</b> | <b>Kirkpatrick<br/>and<br/>Locke<br/>(1991)</b> | <b>Zaccaro,<br/>Kemp, and<br/>Bader (2004)</b> |
|----------------------------|------------------------|----------------------------|----------------------------------------------------------|-------------------------------------------------|------------------------------------------------|
| Intelligence               | Intelligence           | Achievement                | Intelligence                                             | Drive                                           | Cognitive abilities                            |
| Alertness                  | Masculinity            | Persistence                | Masculinity                                              | Motivation                                      | Extroversion                                   |
| Insight                    | Adjustment             | Insight                    | Dominance                                                | Integrity                                       | Conscientiousness                              |
| Responsibility             | Dominance              | Initiative                 |                                                          | Confidence                                      | Emotional stability                            |
| Initiative                 | Extroversion           | Self-confidence            |                                                          | Cognitive ability                               | Openness                                       |
| Persistence                | Conservatism           | Responsibility             |                                                          | Task knowledge                                  | Agreeableness                                  |
| Self-confidence            |                        | Cooperativeness            |                                                          |                                                 | Motivation                                     |
| Sociability                |                        | Tolerance                  |                                                          |                                                 | Social intelligence                            |
|                            |                        | Influence                  |                                                          |                                                 | Self-monitoring                                |
|                            |                        | Sociability                |                                                          |                                                 | Emotional<br>intelligence                      |
|                            |                        |                            |                                                          |                                                 | Problem solving                                |

SOURCES: Adapted from "The Bases of Social Power," by J. R. P. French, Jr. and B. Raven, 1962, in D. Cartwright (Ed.), *Group Dynamics: Research and Theory* (pp. 259–269), New York: Harper and Row; Zaccaro, Kemp, & Bader (2004).

Comparing the Stogdill studies among others, Peter Northouse found five traits somewhat consistent, and they were intelligence, integrity, self-confidence, sociability and determination (Northouse, 2015). Here are at least five traits, some of which aspiring leaders can attempt to develop in themselves.

### **2.2.3 In Society**

In popular culture, there is some romance attached to societal views of great leaders or heroes in history and their collective contribution to shaping our world, as Carlyle illustrated. While not a robust statistical measure, online survey polls offer a view of general societal opinion on the subject of great leaders and heroes. When examining polls on great leaders separately from those on great heroes, the intersection of these polls reveals that certain figures such as Joan of Arc, US presidents Kennedy, Washington and Lincoln, Napoleon, Julius and Augustus Caesar and Alexander the Great are prominent in both categories. Adolf Hitler highlights great leaders who did not feature as great heroes. Great heroes who did not feature as great leaders were astronauts Yuri Gagarin and Neil Armstrong, activist Rose Parks, and explorers Cook and Lindbergh, while war heroes Boudica and William Wallace appeared alongside scientific contributors Darwin, Newton and Einstein and artists Da Vinci and Michelangelo (Alain, 2012; Bear, 2019; Hackman, 1998; History's heroes, 2019; Jeffers, 2003; Ranker, 2019). Our fascination with how these exceptional individuals achieved their great accomplishments has, to some extent, fueled our desire as managers and leaders to emulate, or at the very least, aspire to, their qualities. Additionally, the notion of aspirational traits and this aspirational desire may have underpinned the role modelling of the archetype 20<sup>th</sup> and 21st-century leader.

### **2.2.4 Psychology and Leadership Theory**

It is only in the last century that psychologists have begun to help us understand human motivation. As leaders of people, there may be value in understanding what motivates and what demotivates the people we work with.

Pivotal in this space was Abraham Maslow's theory of motivation (F. L. Herzberg, 1966; Kessler, 2017; McGregor Douglas, 1960), expressed through a hierarchy of needs pyramid. Maslow identified that humans need to satisfy basic needs first, represented at the bottom of his model's pyramid, before any move up the pyramid could occur. He identified that a move up the pyramid occurred through personal growth (Maslow, 1943, 1954) (Bozarth & Brodley, 1991; Olson, 2013).

Frederick Herzberg built on Maslow's hierarchy of needs through research conducted in workplaces. His outputs, while building on the foundations of Maslow's motivational

hierarchy pyramid, went further to suggest that employees were motivated in multiple ways, categorised under the heading of his two-factor theory as hygiene and motivation factors (Gawel, 1997). Importantly, hygiene factors or extrinsic factors are maintenance-type factors that the absence of; cause dissatisfaction rather than providing satisfaction if they are in place (F. Herzberg, 1959; F. L. Herzberg, 1966). While the concept of an employee not being paid correctly can lead to dissatisfaction, it's important to note that paying them correctly doesn't always guarantee satisfaction (Bassett-Jones & Lloyd, 2005).

In an attempt to understand whether the Herzberg theory is still a relevant indicator today, particularly where extrinsic hygiene factors are concerned, a 2005 study by Bassett-Jones and Lloyd of 3200 respondents to the question "What motivates employees to contribute ideas" was conducted. The results indicated that the extrinsic factor of money did not play a part in motivating employees to contribute ideas (Bassett-Jones & Lloyd, 2005).

Social psychologists French and Raven developed their five bases of power which had implications for leaders and followers in their ability to influence each other's behaviour and responses as part of the relationship between the two parties (French & Raven, 1959).

Psychologist Carl Rogers advanced Maslow's theory by expanding on the notion of self-actualisation as a state a person can attain where our *ideal self* is congruent with our actual or *real self* (Bozarth & Brodley, 1991; Ford, 1991; Rogers, 1961). While approaches to self-actualisation differed between Rogers and Maslow, the cognitive links between behaviour and motivation were similar for Leader and follower interaction in the workplace. This study of self-actualisation, self, love & belonging, esteem and empathy by Maslow and Rogers, among others, was called the *Humanistic school* of psychology.

Maslow's theory of motivation also has its critics, partly due to the subjective nature of the biographical analysis choice by Maslow, a qualitative study of only 18 people he perceived to be self-actualised (McLeod, 2007). Wahba and Bridwell completed a comprehensive literature review of many studies on Maslow's theory and concluded:

The literature review shows that Maslow's Need Hierarchy Theory has received little clear or consistent support from available research findings. Some of Maslow's propositions are totally rejected, while others receive mixed support at best. (Wahba & Bridwell, 1976)

From a different perspective, yet another psychologist, B.F Skinner, linked individual motivation to positive reinforcement due to external stimuli such as Leader behaviour. Skinner's *behavioural* school of psychology had, at its core, operant conditioning theory, which looked at the effect of positive and negative reinforcement on individuals (Skinner, 1938). In a work context, this meant that a Leader could influence followers' behaviour through reinforcement of positive behaviour or punishment of negative behaviours to replicate positive behaviours and mitigate negative behaviours. From a management perspective, this fundamental transaction can form the foundation of the employer-employee relationship – fair pay for fair work. The understanding is that if an employee tells their employer what they need to get the job done, the employer will do their best to provide it.

Some influence of the seminal psychology work seems to exist with motivational type theories, generally (Ayers, 1998; B. M. Bass & Stogdill, 1990b; Burns & Berg, 2002; Butler & Waldroop, 2004; George, 2008; Greenleaf, 2010; House, 1971, 1996; Langer, 2010; Silverthorne, 2010; Tannenbaum & Schmidt, 1973; Yukl, 2002), specifically with the Path-Goal where all of the four leader styles are set up positively so as to consider follower satisfaction (House, 1971; House & Mitchell, 1974). The expectancy theory by Vroom in 1964 suggested that people make conscious choices to optimise pleasure over pain (Van Eerde & Thierry, 1996; Vroom, 1964).

Some influence of seminal psychology works also seems to exist with behavioural styles, particularly capability-focused styles where employee levels of competence in a situation are relevant factors to appropriate leader style in that situation (Delizonna, 2017; Skinner, 2002; Stogdill, 1974; Vroom & Jago, 1978, 2007). The Tannenbaum and Schmidt continuum theory proposes that a leader's required behaviour varies along the continuum relative to the level of competence of an individual employee (Tannenbaum & Schmidt, 1973). Recognition of employee competence in a given situation may be useful in practice. The Hersey Blanchard model is particularly relevant when leading employees with varying levels of capability. The four behaviour types – telling, selling, participating, and delegating – provide a useful framework for leaders to approach different tasks (Hersey & Blanchard, 1970, 1984).

Many studies, writings and theories here point to a link, albeit in different ways, between leaders and followers. Further, leaders can influence followers' behaviour to achieve results.

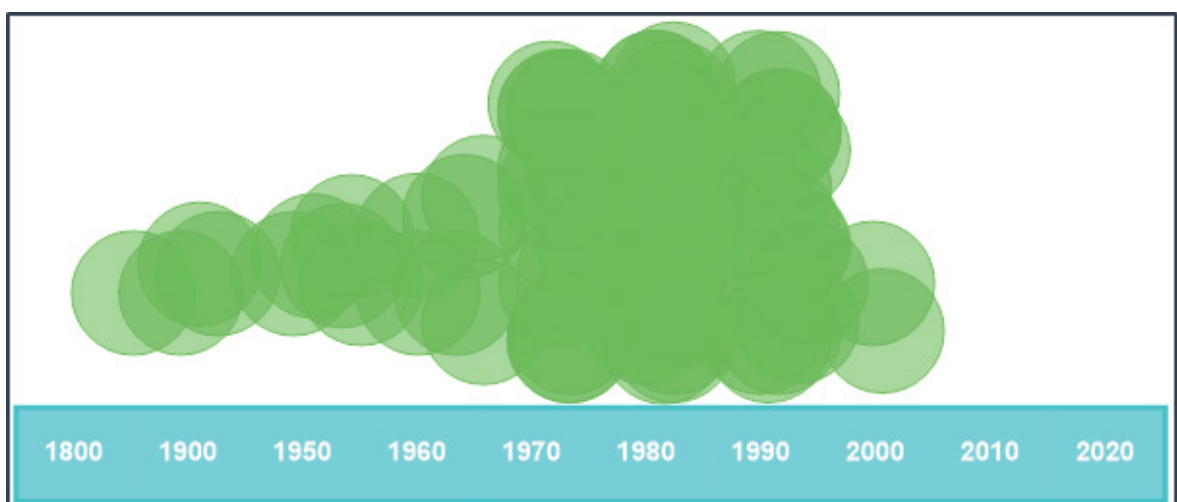
What may have changed this body of work is the expectation of what makes a good leader and the role of a follower. Leaders may not need to have all the answers and an inherent expectation of the followers today is that they expect to be collaborated with, having their expertise valued, and they are respected for what they bring to a team. Contribution matters.

### 2.2.5 Proliferation period

Chronologically, the psychological theories presented earlier cover a broad span from the 1940s to the 1960s, while the period of proliferation spans from the 1970s to the 1980s (see figure 2.3 below). Table 1 illustrates this period of proliferation through the 1970s and 1980s. I am not making a comment on what this means and why this happened, but the point I am making here is that it did happen and that much was written on Leadership during this time, before and since, at a different cadence. Whether or not leadership theory evolved as a result is a question I choose not to answer at this time.

Figure 2.3 below depicts leadership theories as per the DBL 701 module 1 topic 2 *Brief History of Leadership Theory* as a core source of truth with cross-referencing, as shown in the *sources* below the table. The logic of this table is to show the proliferation of theory development and its spread.

**Figure 2.3 - Leadership theory period of proliferation**



Sources (AGSL, 2019; B. M. Bass & Stogdill, 1990c; Bolden et al., 2003; King, 1990; van Vugt & Ronay, 2014).

## 2.2.6 Alignment

Much of this proliferation period is challenging to navigate when reading, due to the sheer volume of material, the complexity of some theories, and limited time available to review them thoroughly enough to fully comprehend. To make sense of all this and with some good advice from Dr Jess Murphy (Drjessmurphy.com, 2017), the idea of creating a model, which ended up comparing leadership theories or styles against specific PCLP values as shown in the PCLP core values vs Leadership styles table below was developed. Alignment ensued on a personal level in like-minded styles.

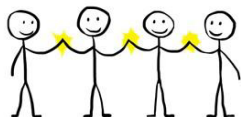
## 2.3 PCLP implications

### 2.3.1 Leadership theories or styles compared to PCLP values

This proposed model cross-references styles against values with a low – high scale subjectively rated through a large volume of leadership theory literature. The correlations sometimes feel weak, yet this analysis is a self-assessment tool for the Author to help with PCLP evolution and development by sifting through many styles to highlight the aligned styles compared to PCLP values.

**Figure 2.4 - PCLP core values vs Leadership styles - Broad classification**

| <u>Proposed model – values to style</u>                 |                           | PCLP core values                 |                                |                          |                                |                           |
|---------------------------------------------------------|---------------------------|----------------------------------|--------------------------------|--------------------------|--------------------------------|---------------------------|
| Core values<br>vs<br>Selected Leadership theories/style |                           | Engagement<br>+<br>inclusiveness | Collaboration<br>+<br>teamwork | Adaptable<br>+<br>nimble | Empowered<br>+<br>self managed | Empathy<br>+<br>diversity |
| A personal model to align PCLP<br>core values to styles | Great Man theories        | Low <sup>17</sup>                | Low                            | Medium                   | Low <sup>17</sup>              | Low                       |
| PCLP – leader style alignment test                      | Trait theories            | Low                              | Low                            | Medium                   | Low                            | Low                       |
|                                                         | Behaviourist theories     | Low                              | Medium                         | Medium                   | Low                            | Low-medium                |
|                                                         | Situational theories      | Low <sup>15</sup>                | Medium <sup>16</sup>           | Medium                   | Medium <sup>16</sup>           | Medium                    |
|                                                         | Contingency theories      | Medium                           | Medium <sup>14</sup>           | Medium                   | Medium <sup>15</sup>           | Medium                    |
|                                                         | Transactional theories    | Low-high <sup>12</sup>           | Medium <sup>13</sup>           | High                     | Medium <sup>12</sup>           | Medium                    |
|                                                         | Transformational theories | Medium <sup>1</sup>              | High <sup>2</sup>              | Medium                   | Medium <sup>13</sup>           | Medium <sup>2</sup>       |
|                                                         | Authentic Style           | High <sup>9</sup>                | Medium <sup>9</sup>            | Medium <sup>11</sup>     | Medium <sup>10</sup>           | High                      |
|                                                         | Servant style             | High <sup>7</sup>                | Medium <sup>7</sup>            | Medium                   | Medium <sup>8</sup>            | High <sup>7,8</sup>       |
|                                                         | Agile style               | High <sup>6</sup>                | High <sup>5</sup>              | High <sup>6</sup>        | High <sup>6</sup>              | High <sup>6</sup>         |
|                                                         | Team style (HPT)          | High <sup>3</sup>                | High <sup>4</sup>              | High                     | High <sup>3</sup>              | High                      |



References to table ranking: (Yukl et al., 2002a)<sup>1</sup>, (Lowe et al., 2018)<sup>2</sup>, (Katzenbach & Smith, 1993b)<sup>3</sup>, (Katzenbach et al., 2012)<sup>4</sup>, (Kegan et al., 2014)<sup>5</sup>, (Agile Manifesto.org, 2001a)<sup>6</sup>, (Greenleaf, 2010)<sup>7</sup>, (Greenleaf et al., 2002)<sup>8</sup>, (Silverthorne, 2010)<sup>9</sup>, (George, 2008)<sup>10</sup>, (Avolio & Gardner, 2005)<sup>11</sup>, (Burns & Berg, 2002)<sup>12</sup>, (Burns, 1978b)<sup>13</sup>, (Fiedler, 1964)<sup>14</sup>, (Vroom & Jago, 2007)<sup>15</sup>, (House & Mitchell, 1974)<sup>16</sup> (Drucker et al., 1997)<sup>17</sup>.

In the PCLP core values vs Leadership styles Figure 2.4, the highest rating leadership styles were the high-performing team and agile values centred with a high contribution from the servant and authentic styles. Transformational leadership embodies many of these like-minded values and is part of the mix.

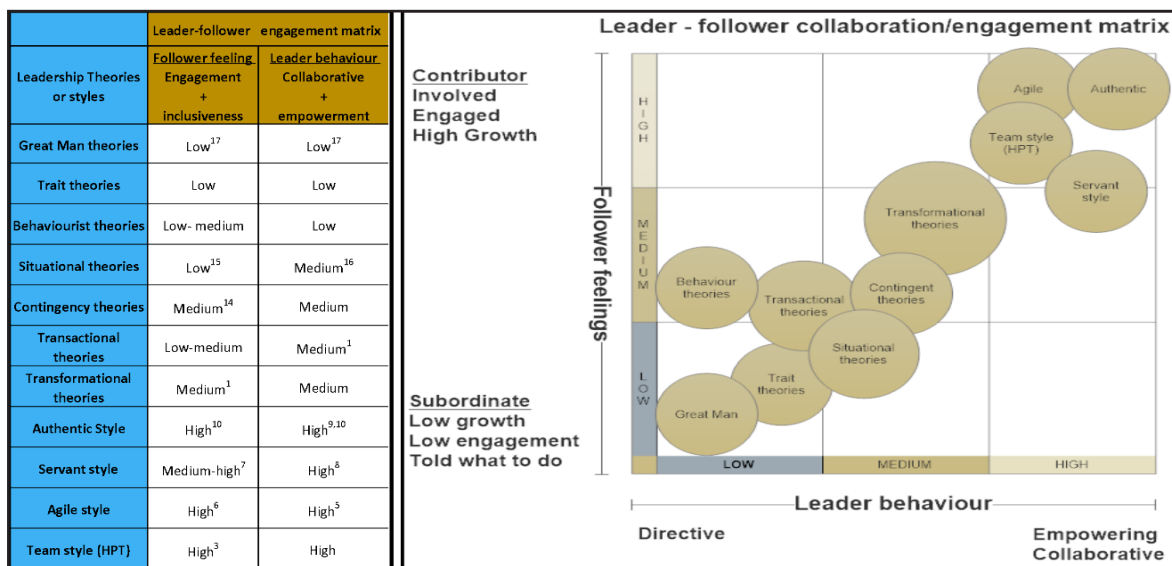
Other theories of interest in the literature review, diving more deeply, start with Douglas McGregor's behavioural theory X & theory Y, which put forward that Managers followed two types of assumptions about people. Manager X believes people dislike work, while Manager Y believes that people enjoy their work (Gannon & Boguszak, 2014; Kessler, 2017; McGregor Douglas, 1960; Mohamed & Nor, 2013). McGregor's theory describes two different mindsets and approaches to managing people. A pessimist may say that this theory carries an almost Pygmalion or self-fulfilling prophecy-like quality to it (Eden, 2011; Rosenthal & Jacobson, 1968).

Fred Fiedler, yet another psychologist, developed his contingency model, which suggested that a leader's behaviours and styles experienced over time could be more difficult to change than to try and place a specific leader in a situation or context that suited their style (Fiedler, 1964). Fiedler's model is interesting in the sense that it focuses on contingent variables rather than the *born with inherent traits* belief of Carlyle and his great men theory or the trait-based theories that followed Carlyle's theory.

### **2.3.2 Leader-follower collaboration/engagement matrix**

In Figure 2.5 the section to the left cross-references leader styles against two scales on a low – high rating, subjectively rated through a large volume of literature on leadership theory. This table to the left grades the same leadership theories or styles as depicted in Figure 2.4, but this time using a scale that evaluates follower's feelings (subordinated - involved) and leader behaviour (directive - empowering). At times, the correlations here may feel weak. However, it is important to note that this analysis serves as a self-assessment tool designed to assist with the evolution and development of PCLP. The visual representation of the leader-follower engagement matrix is shown to the right.

**Figure 2.5 - Leader/follower collaboration/engagement matrix**



References to table ranking: (Yukl et al., 2002a)<sup>1</sup>, (Katzenbach & Smith, 1993b)<sup>3</sup>, (Kegan et al., 2014)<sup>5</sup>, (Agile Manifesto.org, 2001a)<sup>6</sup>, (Greenleaf, 2010)<sup>7</sup>, (Greenleaf et al., 2002)<sup>8</sup>, (Silverthorne, 2010)<sup>9</sup>, (George, 2008)<sup>10</sup>, (Fiedler, 1964)<sup>14</sup>, (Vroom & Jago, 2007)<sup>15</sup>, (House & Mitchell, 1974)<sup>16</sup> (Drucker et al., 1997)<sup>17</sup>.

Gary Yukl fairly criticised 2-factor models such as this one by suggesting that while some value may be attained, they tend to oversimplify complex interplay and can lead to typecasting (Yukl, 1999). Given the context and time constraints this paper is subject to, this limited insight will have to suffice in its context, providing leadership style guidance for the Author and PCLP development. The process teased out like-minded styles and highlighted styles less suited to my Leadership approach. This serves as a valuable learning for me as a leader.

## 2.4 Part 2 – Teams

In the context of leadership literature, teams receive relatively little attention, and followers even less. Team members are the individuals whom leaders lead, and the author's interest in team dynamics was sparked by early experiences with teams. This interest has persisted, and team dynamics remain a phenomenon that the author considers worthy of exploration.

The pure notion of a high-functioning team delivering superior performance results is tantalising. Doing so while building more engaged team members, who became better in the short term and better along the journey, is fascinating.

Delivering superior performance while also developing and nurturing teams who can self-manage, without the micromanaging influence of a middle manager or leader as such, is an even greater goal.

### 2.4.1 High Performing Teams

Longstanding and forward-thinking writer on team dynamics and High Performing Teams, Jon Katzenbach, along with Douglas Smith, wrote the seminal book on teams, *The Wisdom of Teams* (Katzenbach & Smith, 1993c). Whilst the authors did not coin the term HPT, they did define it in some detail.

*The essence of a team is common commitment. Without it, groups perform as individuals; with it, they become a powerful unit of collective performance.*  
(Katzenbach & Smith, 1993a)

Katzenbach and Smith spoke with hundreds of people on more than 50 teams across 30 Companies, looking at what differentiated team performance levels. Some key attributes that they defined were:

*A team is a small number of people with complementary skills who are committed to a common purpose, set of performance goals, and approach for which they hold themselves mutually accountable*(Katzenbach & Smith, 1993a).

The research approach they took made sense to me, and while my research is constrained to one Company across 20+ teams and their Frontline Managers, my logic in looking at the attributes which make teams successful was influenced by Katzenbach and Smith.

I hold a keen interest in the synergy of teams, and my work has, at times, provided evidence of the performance increase that a well-synergised team can achieve and deliver. Moreover, this can be sustained over time while simultaneously building capability within the team.

Meredith Belbin argued that roles for team members within a team unit need to be based on the inherent capabilities of the individual; indeed, to play to each person's strengths rather than the role being fixed (Belbin, 2010). The role designations Belbin created were 9 in total and were grouped as action oriented, thinking oriented or people oriented (Belbin, 2020; EPM.com, 2016; Moultrie, 2013). Belbin's work on specific roles may align well with the roles played in sporting teams, which increasingly tend to align with the capabilities of participants. Flexibility in playing multiple roles in a sporting context has been evolving over time. Earvin *Magic Johnson*, acknowledged as a top 2-5 all-time player in the National Basketball Association (NBA) in the United States(Bailey, 2019; ESPN, 2016), may have been a pioneer in the basketball forward playing the point

guard position. However, in today's National Basketball Association (NBA), the game is evolving towards a more positionless style of play (McMahan, 2018; O'Connor, 2019; Reifer, 2020). As sporting organisations seek any and every advantage, a player's ability to slot into different roles helps provide versatility. At the time, Magic Johnson shattered multiple paradigms in the NBA, and that served to provide a competitive advantage, in part for a tremendous run of success where his team, the Los Angeles Lakers, won 5 NBA championships over an 8 season period.

Belbin suggests that in the past, factors used to assess capability within jobs resulted in people being categorised based on parameters unrelated to their actual capabilities within the role. Such categorisations were often biased by social standing, race, gender, and other factors (Belbin, 1981, 2010). The nine roles, as Belbin outlines, do not require nine people per se, team members may take up more than one role. Belbin suggests that all nine roles must be present within the team for it to become high-performing (Belbin, 2020).

#### **2.4.2 Leading Teams**

In the case study below, which pertains to the Leading team and a sporting context, the values of teamwork have proven to be integral to the success of recent AFL history.

##### **2.4.2.1 Case Study – Leading Teams**

The idea of High Performance Teams (HPT) has been around for a long time (Katzenbach & Smith, 1993a, 1993b), and the current day **Leading Teams** Company (Leading Teams, 2019) is a high-profile example of HPT principles being applied in improving team performance. Their work with the South Australian National Football League (SANFL), a State based sub tier to the Australian Football League (AFL); team Central Districts & AFL teams Hawthorn, Sydney, Geelong and the Western Bulldogs particularly shines.

SANFL team Central Districts had never won a premiership and had not even played a final in 2 decades. After working with Ray McLean, the founder of **Leading Teams**; they soon changed that. From 2000 they played in 12 consecutive Grand Finals, winning 9; all without personnel changes (CDFC.com.au, 2019;

SANFL, 2019). (Barlow, 2017). In the AFL, Hawthorn, Sydney, Geelong and most stunningly recently with the Bulldogs; over the last 12 years (until 2017), won 10 premierships and 5 Grand Final appearances. That is 15 out of 24 possible GF slots (AFL.com.au, 2019).

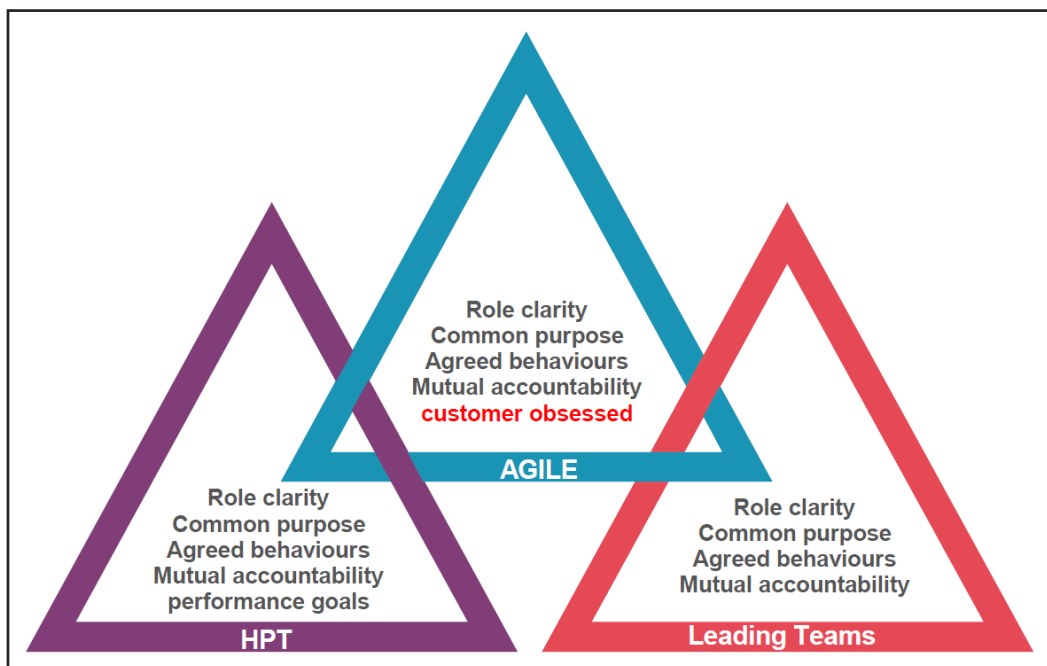
(Barlow, 2017)

Leading Teams has been widely credited by these successful Clubs for playing a key role in building the culture, sense of role clarity, mutual accountability and agreed behaviours (Landsberger, 2019; McCormack, 2012; McLean, 2012; McNicol, 2013; Willoughby, 2018) that is part of the leading teams model (McLean, 2006, 2010). High Performing Teams, in this context at least, have flourished.

## 2.5 Summary - HPT

After critically analysing 56 case studies of Agile teams and High Performing teams, with an interest in finding attributes for success or failure, the attributes in Figure 2.6 below represent the distilled findings of that empirical research. The inductive iterative critical analysis sought to firstly seek out attributes for success or failure; list them and iterate further. These attributes are the foundation of my research to come.

**Figure 2.6 - Team success attributes - case study analysis**



The case studies identified poor customer engagement, ambiguous or unclear purpose, and a lack of established teamwork processes as the primary barriers or causes of failure. Agilists seem to have addressed team behaviour through what is commonly referred to as an inception protocol or session. During this session, the team comes together and collaboratively works through their rules of engagement. During the inception protocol or session, the team establishes a set of agreed-upon behaviours, ground rules for mutual accountability, and primary and supportive roles, and addresses any other issues that need to be resolved before the project commences (Madsen, 2020; PMI.org, 2020; Poonawala, 2014; Rasmusson, 2010; The Agile Warrior, 2010).

## **2.6 The role of employees**

In their book “*Managing the Millennials*”, Chip Espinoza & Mick Ukleja shed light on the challenges faced in understanding and leading these employees:

*Unlike any other generation before them, Millennials are the first generation that can access information without an authority figure. They are wizards with technology, visionaries with high expectations; armed with the knowledge or the know-how to access it, they proclaim themselves as ready. At the core of the Millennial phenomenon is that they do not have the same need or know-how to build relationships with their managers or authority figures. (Espinoza & Ukleja, 2016)*

### **2.6.1 Engagement**

Leadership theory seems to have evolved far beyond Great Man and Hierarchical styles. During the period of proliferation, before and since, many evolved styles or philosophies have emerged, surpassing the prominence of the Great Man theory. Theorists often engage in extensive discussions about these theories. However, as a practitioner with experience

spanning four decades, encompassing various levels of organisational hierarchy, from the shop floor to the boardroom and back, I have not witnessed a substantial evolution in the workplaces I have been fortunate to be a part of. These environments suffer from detrimental gaps between strategy and evolution, which pose a significant challenge to organisations.

My experience, in a limited context, is that too many current-day workplaces feel somewhat overly governed by Hierarchical Leaders. These environments still retain bureaucratic and hierarchical organisational support structures and mechanisms that are yet to be broken down. These barriers include performance & reward frameworks, overly compliance-based policy frameworks and bureaucracy; all of the things which stifle empowerment and engagement through genuine collaboration.

This Doctoral program has been a revelation in unexpected ways. The work is intellectually stimulating, yet it is the self-reflection that is helping to challenge and provide new ideas. Some of these ideas are derived from the myriad leadership readings, both prescribed and beyond. Some ideas are generated through discussions along the way, combined with real-world experience. All of these ideas relate to identifying learning styles and addressing gaps in practical application in order to achieve real results with real people.

Modern-day leaders, such as Sir Richard Branson, a large employer of people, comments often, on the importance of motivation and taking the risk to invest in one's workplace. According to Branson, creating a work environment where employees are trained, treated well, and meaningfully engaged can help to retain employees. While Branson's insights may not be peer-reviewed, his experience as the owner of Virgin Group, which employs over 69000 people in 35 countries, underscores his interest in ensuring that his employees are well-engaged. (Branson, 2019b). Some relevant quotes from Sir Richard Branson on how he treats his people:

*Train people well enough so they can leave, treat them well enough, so they don't want to (Branson, 2019a).*

*Clients do not come first. Employees come first. If you take care of your employees, they will take care of the clients (Branson, 2019a).*

### 2.6.2 Engagement Surveys

Much has been written about the unprecedented scale & rate of change creating the turbulence that exists today in markets worldwide (Kotter & Schlesinger, 2008); (De Smet et al., 2018) as we wake up to a new dawn that will never look the same (Savage, 2010). Indeed, it is very different from the long-range Strategic Planning days of the 1960s & 1970s (Mintzberg, 1994) to the emerging global markets of the eighties and nineties (Drucker et al., 1997; Porter, 1996) and to the noughties where it has all been turned on its head by the digital revolution which has seen Fortune 500 mainstays disappearing at an unprecedented rate. In 2017, only 60 companies remained on the Fortune 500 list from 1955. Current projections suggest that only half of today's Fortune 500 companies will still exist in 10 years (Anthony et al., 2016).

Today, globalisation and the digital economy have disrupted and changed the way we interact in work environments (Ghemawat & Altman, 2019; Porter, 2001; Porter & Rivkin, 2012). Furthermore, globalisation may be contributing to changing the expectations of a workforce that does not respond to being led. This workforce seems to have a new set of expectations of a workplace, including how long they stay in a job and the flexibility of that job (Alton, 2019; Zendesk, 2019), how that workplace supports the way its people coexist & interact, and alignment of the employer and employee values and social conscience of the Organisation (Delizonna, 2017; Kanter, 2011; Maak & Pless, 2006).

Regarding appropriate organisational leadership styles in the modern day, Peter Senge, the father of the term *learning organisation* (P. M. Senge, 1997; P. M. Senge, 1991), had some thoughts in 1997:

Almost everyone agrees that the command-and-control corporate model will not carry us into the twenty-first century. In a world of increasing interdependence and rapid change, it is no longer possible to figure it out from the top. (Drucker et al., 1997)

Even today, where more engagement, empowerment, and self-management in teams are cues to employee motivation (Gallup, 2017; Oehler & Adair, 2018), employee engagement worldwide is still stunningly low. According to Gallup, which has been surveying employee engagement for over 35 years, engagement rates globally sit around the 15% level. Gallup also reported that the makeup of that 15% engagement figure shows the US market came in at around 34%, and Western Europe reported only 10% (Gallup, 2017, 2018).

In 2018, Aon published a report based on a survey conducted from 2016 -2017. The survey encompassed over 8 million employees in 1000 Companies in over 60 different industries. The Aon survey found that engagement levels had increased slightly worldwide, primarily due to growth in Africa and parts of Asia. Furthermore, AON reported that engagement levels are at an all-time high as of 2018 (Oehler & Adair, 2018).

Considering the significant impact of the leader-follower relationship, it becomes evident that acknowledging employees' emotions to enhance performance has gained importance in *behavioural psychology*. The dynamics between leader and follower relationship can elicit positive or negative responses in employees, affecting their behaviour and output in the short and long term. It is intriguing to explore how leaders' actions influence their followers, although it seems that we are still in the process of understanding this effect and optimising follower performance accordingly. From a *Humanistic school* of Psychology perspective, it appears that many Leaders today do not even understand motivation beyond using coercive measures. In Practice, there is a considerable gap between Leadership theories that advocate a shift far from command and control leadership styles for decades. So much of the writing on leadership theory is about the leader. I have an interest in models that prioritise high engagement and high collaboration, both at the team level and in the collective synergy of teams in High performing and Agile environments. In these models, the role of team members is just as important as the role of the leader, who should actively encourage team members to play a bigger role – to contribute and collaborate in an engaged way. Perhaps the willingness of followers to play a role is just as important, and over time, followers may desire greater autonomy and less direction. Engagement and turnover may play a part in Organisations treating this dynamic seriously.

## **2.7 Part 3 – The world of Agile**

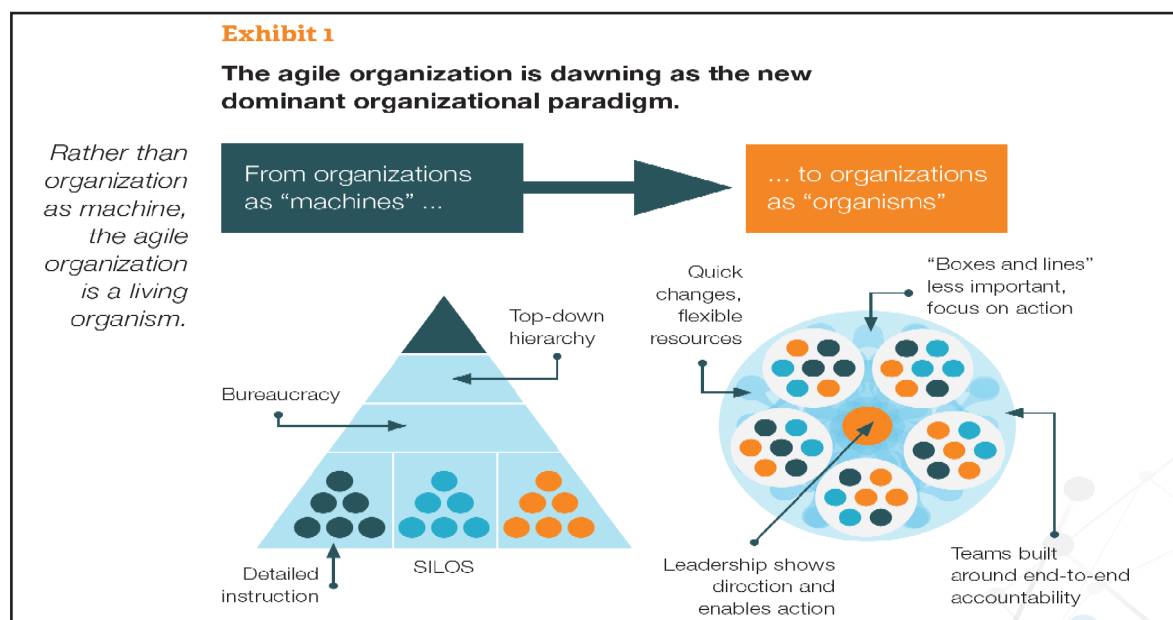
### **2.7.1 Agile**

Highlighted PCLP challenges with engaging stakeholders exist principally with internal stakeholders where aspired engaging leadership styles, and organisational structure, policy frameworks and organisational leadership style do not align. Numerous Agile reports, articles and surveys point clearly to similar misalignment organisationally in support of emerging agile teams (Aghina et al., 2017; Collabnet VersionOne, 2019; De Smet et al., 2018; Garton & Noble, 2017; Siroky, 2019).

The [www.stateofagile.com](http://www.stateofagile.com) comprehensive yearly survey within agile organisations across a broad demographic, role type, location, organisation size and industry type listed organisational culture issues as the main impediment to organisations adopting agile values, specifically where culture is at odds with agile values (Collabnet Versionone, 2002). A recent McKinsey Report underlines the message about cultural gaps being an issue. It said that leadership and culture were the key barriers, and the number one issue (more than doubling the next) was “transforming the culture and ways of working” (De Smet et al., 2018).

McKinsey & Company has invested in building agile offerings for the market, and their network of global experts in this space has been actively articulating the organisation’s vision in supporting agile transformations (Aghina et al., 2017; Comella-dorda et al., 2016; De Smet et al., 2018; McKinsey & Company, 2017; Stephanie.Cadieux, 2018). Similarly, Price Waterhouse Coopers (PWC) (Keen, 2018; PWC, 2019) and Deloitte (Muir, 2019) have been building offerings in the agile space. If these advisory players are investing, we know that they see an opportunity in this space.

**Figure 2.7 - The Agile Organisation**



Featured in *The Five Trademarks of Agile Organisations* - McKinsey and Company. Source (Aghina et al., 2017)

The Agile Organisation Figure 2.7 above illustrates a distinctive organisational structure, emphasising the necessary differences for organisational success under this model. The organisation, resembling organisms, adopts a nimbler structure where teams are

accountable end-to-end. The focus is on the action rather than a rigid structure & bureaucratic constraints. This enables leadership to be closer to the action, rather than distant and detached.

### **2.7.2 Manifesto for Agile Software Development**

From my working context and experience, this review of leadership theory, from a relevant perspective to applied leadership practice, may represent a shift in the way teams interact and how leaders serve those teams, both pre-and post-agile era. However, it's important to note that this categorisation would be an oversimplification of a much more complex dynamic.

The Agile Manifesto was created in 2001 by 17 experts from within different software development disciplines; adopted 12 agile principles and 4 agile values. The manifesto outlined a set of guiding principles and disciplines rather than a methodology. The group met to solve issues they were facing in their respective fields, partly due to the emergence of the web and with what they described as *documentation-driven, heavyweight software development processes (Agile Manifesto.org, 2001a)*.

One primary consideration noted in the manifesto was:

*In order to succeed in the new economy, to move aggressively into the era of e-business, e-commerce, and the web, companies have to rid themselves of their Dilbert manifestations of make-work and arcane policies (Agile Manifesto.org, 2001a)*

The formulation of the agile manifesto has successfully created a movement and much success (De Smet et al., 2018; Kanter, 2011; Rigby et al., 2018).

### **2.7.3 Agile Values**

The values embody many aspects that align with agile principles, delivering fast and efficient solutions with a focus on customers and people. With a clear focus on rapid development and deployment with what is called a minimum viable product (MVP), a competitive advantage can be gained.

**Individuals and interactions** over processes and tools  
**Working software** over comprehensive documentation  
**Customer collaboration** over contract negotiation  
**Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

(Agile Manifesto.org, 2001a)

#### 2.7.4 Agile principles

The values present the sentiment and pragmatic focus shift that the movement sought to address. As far as the principles, principle 1 holds the most significance for me because it aligns with my customer-obsessed perspective. However, I recognise that other principles also emphasise the importance of the customer.

**Figure 2.8 - The 12 Agile Principles**



I won't go into detail on any of the principles other than principle 1 below.

## Agile principle 1

*Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.*

Agile, in practice, is known for its nimbleness, achieved by breaking work into smaller chunks and actively involving the customer throughout the process. Agile enables faster releases of a minimum viable product (MVP) to the customer. This allows them to gain advantages from its utilisation. The lengthy development cycles, characterised by detailed requirements and waterfall planning, often resulted in the final deliverable falling short of customer expectations. Agile methodology addresses these issues through its focus on small, iterative increments and continuous customer involvement, calibration and collaboration. Agile development is often divided into time-boxed development cycles called sprints, which typically range from 1 and 4 weeks. Agile daily stand-up or scrum rituals promote robust collaboration and communication to facilitate constant pivoting and iteration. These meetings serve as update sessions, but their primary focus is to identify and address pressure points or obstacles in the workflow, code or any factors that may impact the deliverable.

Common themes in practical things which help execute the above:

- UAT: This links with the customer's feedback to ensure that the deliverables meet their expectations.
- Sprint length: Short, bite-sized chunks
- Deliver continuously and early as stated

## Chapter 3

# Evolution of the personal contingent leadership paradigm

### 3.1 Early Leadership challenges

Through self-reflection in DBL701 & DBL702, it has been identified that there are gaps in stakeholder engagement within the current context of Dahlsens. Additionally, leadership challenges also exist in a general context, particularly in project-based work. Firstly, there is a need for a better alignment of roles with PCLP values. Secondly, there is a limitation in the ability of roles to effectively influence stakeholders due to brief or scope constraints. These challenges should be considered before engaging stakeholders. Upon reflection, it is evident that aligning business purpose has been particularly challenging, especially when our Group CEO and his emerging leadership group have not explicitly connected strategy with actions that would shift mindsets and behaviours throughout the organisation. Furthermore, there was a missed opportunity to engage the broader Business, including our employees, in the process of establishing that purpose alignment and addressing associated needs and revised values.

#### 3.1.1 Learnings

Values are inherent, and those that resonate with me on a daily basis are the ones that are right and just. My decision-making process is underpinned by a strong deontological ethical framework, which ensures that I act selflessly and lead on behalf of others, representing the service-based organisations I work with while maintaining a customer-obsessed approach. It is crucial that this aspect of my leadership philosophy is more explicitly represented in my PCLP evolution.

Additionally, the success factors that have been identified for research appear to have relevance to my PCLP, and, therefore, should be incorporated into it. At this point, it is unclear which ones are the most prominent. However, I plan to incorporate a general acknowledgement of these factors into my PCLP evolution.

### 3.1.2 The Emergence of Enabling

As I continue to study and practice leadership, I find myself increasingly drawn to leadership styles that prioritise enabling others to flourish. I am driven by the profound sense of fulfilment I experience every time a person I have helped a little starts to shine. Enabling is what I do, and there are elements of it in servant leadership, HPT, and Agile leader behaviours. This needs to and will be represented more clearly in my PCLP evolution.

### 3.2 PCLP evolution - V1.0 vs v2.0

Figure 3.1 - PCLP V1.0

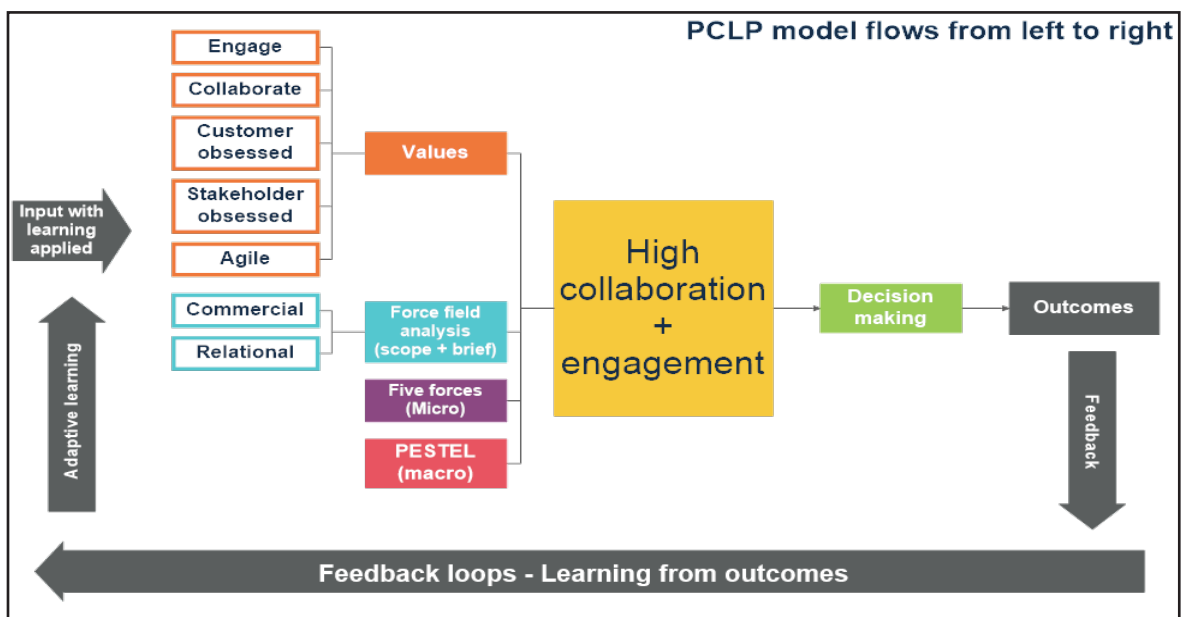
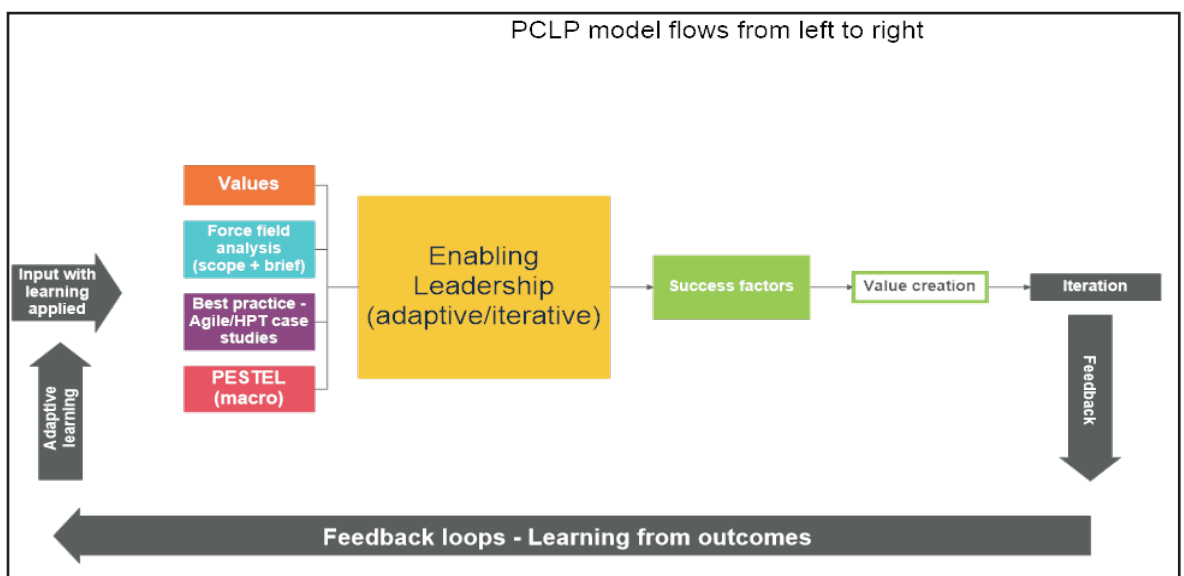


Figure 3.2 - PCLP version 2.0 evolution



Iteration includes:

- Enabling Leadership - replaces high engagement/high collaboration as a more suitable encompassing
- Success factors included - detail TBA following research findings
- Five forces are dropped out yet are included as part of the force field analysis discipline
- Values - inherent - do not need to be explicitly listed

### **3.3 Ethical considerations**

Beyond the essential learnings from a literature review, alignment with like-minded styles and linking to a research methodology that suits the Author's iterative investigative style of work, ethical considerations must be taken into account as part of the input values to the PCLP.

#### **3.3.1 Kantian Deontological Ethics**

German philosopher Immanuel Kant developed a philosophical or ethical framework called deontology, derived from the Greek word "Deon," which means duty (Alexander & Moore, 2021; *Deontology*, n.d.; The Editors of Encyclopedia Britannica, 2022). In this framework, Kant formulated Categorical Imperatives as moral commands that must be universally followed, independent of personal interest or desires (Kohl, 2015; Paton, 1971). According to Kant, our actions should be guided by the principle of treating as we would want to be treated, considering all individuals are subject to the same law.

As a person and leader, I strive to consistently exhibit a sense of duty towards others. Particularly as a leader, I find that servant and enabling behaviours align with this sense of duty, devoid of any self-interest or tolerance for such conduct from others. An unwavering focus on customer satisfaction aids in identifying and addressing individual or organisational obstacles to service. By staying true and dedicated to the purpose of my role, I can operate selflessly, knowing that the enabling type behaviours will contribute to the success of my objectives and, consequently, my overall mission.

### **3.4 Strategic Arena**

#### **3.4.1 Introduction**

Dahlsens primarily works with residential builders, although we have some multi-residential developments such as retirement villages. However, commercial or semi-commercial projects are constructed using different methods that we do not currently supply or choose to engage in. Commercial builders predominantly rely on prefabricated concrete and steel, which are not part of Dahlsens's current strategy or capabilities.

#### **3.4.2 Customer**

Dahlsens customer is not the end home consumer, our customer is the builder, and Dahlsens currently have contractual partnerships with Simmonds, Metricon and many other small, medium and large-scale residential builders.

### **3.5 Core arena**

Dahlsens have one strategic arena network made up of two core components fulfilling the same end-user demand for residential houses. A residential house in Southern Australia is typically built with prefabricated roof trusses and wall frames (TAF). Dahlsens makes these, and the manufacturing division of Dahlsens makes wall frames and roof trusses along with flooring systems. TAF is one strategic arena in which Dahlsens competes, making it the sole focal point of detailed analysis in this paper.

The second arena encompasses building materials, which play a vital role in completing the overall package referred to by Dahlsens as a comprehensive *whole-of-house* offering. These two arenas are distinct due to the commercial partnerships Dahlsens maintains with numerous builders. It is noteworthy that many of these builders evaluate and price the two components separately, effectively putting each job out to tender whenever they embark on a new construction project. While the customer remains the same, the construction project of a single house build is often divided into separate components. At times, Dahlsens supplies the frame and truss components without providing the remaining materials, and vice versa, to varying extents within the building materials sector.

### **3.5.1 Vertical integration**

Dahlsens does not engage in vertical integration beyond the supply chain for manufacturing wall frames and roof trusses. Prior to commencing construction, several factors need to be taken into account, including engineering, surveying, town planning, draftspersons, architects and project management capabilities. Additionally, customer-facing services such as banking and insurance should also be considered. It is important to note that these services are not integrated within Dahlsens.

### **3.5.2 Core supply system**

In the table, Dahlsens core supply system – manufacturing, below, Dahlsens's core supply system is the wall frame and roof truss operation (TAF).

While there are several rival or substitute supply systems available, the timber TAF market is currently the most competitive due to the significant cost differential between timber TAF and other alternatives.

### **3.5.3 Rival supply systems**

Direct rival supply systems in the industry employ similar manufacturing processes for wall frames and roof trusses, albeit through different methods and approaches. Currently, rival supply systems in steel or prefabricated wall systems are not competitively priced for builders to save sufficient time to make these solutions viable. Currently, the competitor competition is most fierce in the TAF supply space.

The acid test for a builder deciding to switch to different building systems is whether the net cost for a component for a job is cheaper (given the same quality standards) and/or quicker due to resource constraints. A prime example of the resource issue is the growing popularity and market position of wall-cladding products, which are replacing traditional brickwork. Brick houses have long been regarded as of higher quality, as the story of the three little pigs attests, leading cladding to be seen as a less durable option. In many geographic markets, there is a shortage of skilled bricklayers, prompting builders to adjust their design strategies and favour cladding. Additionally, builders typically employ their own carpenters who can handle the installation of cladding, unlike bricklayers, who are usually subcontracted and pose challenges in terms of timing control.

### 3.5.4 Complimentary supply systems

Complimentary supply systems exist to supply builders with their services directly. These include carpentry, bricklaying, plumbing and electrical services. Others supply directly to builders yet source their materials through a supplier like Dahlsens. These complimentary supply systems encompass painting, fencing, landscaping, tiling, and roofing services.

Other complimentary supply systems also exist, and some of their channels are through the Dahlsens' building materials supply arena, as Dahlsens are procurement coordinators for numerous components of the construction project.

Banking and insurance serve as stand-alone complimentary supply systems for the end-user customer. Additionally, other services, such as conveyancing, legal, and architectural design, are also available.

Dahlsens have a supply and install package for the kitchens, blinds and A/C, which operates as an additional complimentary supply system.

**Table 3.1 - Dahlsens core supply system – manufacturing**

|                  | Core supply system           | Rival & substitute supply system | Rival & substitute supply system                                 | Rival & substitute supply system                               | complimentary supply system            | complimentary supply system                             | complimentary supply system | complimentary supply system | complimentary supply system |
|------------------|------------------------------|----------------------------------|------------------------------------------------------------------|----------------------------------------------------------------|----------------------------------------|---------------------------------------------------------|-----------------------------|-----------------------------|-----------------------------|
| Core chain title | timber                       | steel                            | prefabricated                                                    | brick block wall frames                                        | Engineering                            | trades (plasterers, painters, bricklayers, plumbers)    | Banking/insurance           | architectural               | conveyancing                |
| origination      | Production                   | Production                       | Production                                                       |                                                                | expertise                              |                                                         |                             | expertise                   | expertise                   |
| transformation   | wall frames and roof trusses | wall frames and roof trusses     | complete wall system - roof trusses separate (part rival system) | Bricked solid wall - roof trusses separate (part rival system) | Required for sign off of a home design | Each trade provides part of the job goods and expertise | Loan and insurance products | home design services        | protection of investment    |
| Market level     | Wholesale network            | Wholesale network                | Wholesale and part retail network                                | Wholesale and part retail network                              | retail                                 | wholesale or retail                                     | retail                      | retail                      | retail                      |

### 3.5.5 Core supply system - Value adds

Dahlsens customers are builders, and the value added to each can be nuanced at times. However, there are several oft-discussed points of commonality expressed as the *voice of the customer* (VOC).

1. Quality – The need for on-site rectification (if there is an issue) is a costly exercise for Dahlsens. Moreover, it not only delays builders and their people but is the number one concern for customers.
2. Consistency – Consistent quality on point 1 will drive more business
3. Trust – Delivering on points 1 and 2 will earn customers' trust and encourage them to give more of their business. Additionally, customers become less price-sensitive when they perceive good quality and service.
4. Price – if customers are let down on points 1 and 2, they will focus more on price because trust has been lost.

Note: While delivering on things that should be expected (quality and consistency of product and service), the level of inconsistency of TAF products throughout the market (including Dahlsens) highlights the importance of service and quality as crucial factors for sustainable market share in the short to medium term. When Dahlsens have consistency and quality in their operation, price is taken out of the equation, and Dahlsens create a short-term competitive advantage based on quality and service. This advantage has a potential weakness, as competitors can replicate it, especially if they are motivated by a desire to gain market share.

### 3.5.6 Strategic arena – Manufacturing

The manufacturing or truss & frame (TAF) arena is highly competitive, with numerous players adopting a simple strategy of driving volume through the lowest cost. However, Dahlsens positions itself differently by offering a more holistic approach where they provide a whole-of-house offer that appeals to many builders for various reasons, including:

- A commercial agreement is in place (Simmonds/Metricon and others)
- Builder finds it easier to manage projects because Dahlsens provides assistance in project managing timelines. Self-organisation is a crucial factor for many builders
- Long-term trust is established between Dahlsens and their clients.

- Quality of specifications – Dahlsens prioritises the quality of specifications, building to a higher standard which may incur higher costs.
- Pricing consistency is maintained regardless of production lead time demand.

A key component in manufacturing is keeping the wheels turning, and this is what drives many smaller manufacturers. Their prices are low during production downturns, while they are high when they are busy. This position is not ideal for many builders but is perfect for price shoppers, which Dahlsens does not covet as long-term customers and partners.

Dahlsens collaborates with its customers to plan production needs well in advance. This is made possible through the council approval timeline process. This workflow enables customers to plan their start dates and associated trade resource needs well in advance in multiple regions across Victoria and New South Wales.

### 3.6 Key Emerging Leadership Issues - Strategic

Five key issues have been listed below without being categorised as crystalised, fuzzy or positioned. While operational performance is not explicitly portrayed as the strategy itself, the absence of adequate operational performance within the Dahlsens arena industry can lead to a lack of trust, which, in turn, can impact the overall strategy. According to Michael Porter, operational effectiveness refers to improving the execution of existing activities, while strategic positioning involves undertaking distinct actions to achieve a unique purpose (Porter, 2012).

1. Service standards - Dahlsens' TAF operation underperforms on key VOC metrics in the area of service. This issue represents a major vulnerability if a competitor beats Dahlsens to better consistency of service. NPS survey results point to poor - delivered in full - on time (DIFOT) performance.  
**Issue type:** This is a **positioned** issue. Stakeholder engagement/management plans are in place linked to a robust solution workflow to track and monitor DIFOT metrics. This ensures that the Business constantly maintains visibility into the service level being delivered. Metrics are the first step, followed by intervention on a needs basis – led by DIFOT reporting.
2. Quality inconsistency - Dahlsens TAF operation underperforms on key VOC metrics in the area of quality. This issue represents a major vulnerability if a competitor

outperforms Dahlsens in terms of delivering consistent quality products. NPS survey results indicate quality issues, which are reflected in the measurement of rectification costs.

**Issue type:** This is a **crystallised** issue but was previously classified as fuzzy. Investigation and root cause analysis has helped understand the issue to a point where an interim solution has been agreed upon.

3. Research and development (R&D) – If Dahlsens fails to comprehend or invest in this area, it could potentially evolve into an emerging issue. Jamie Dahlsen, former GM of Dahlsens, has been assigned the responsibility to assess the landscape in this area.

**Issue type:** This is currently a **fuzzy** issue. Further understanding is required before deciding on a strategy.

4. Communication between manufacturing and trade – This is a perceived issue that has generated significant concerns within the Business, although its scale has not been quantified yet. Feedback obtained from NPS surveys has highlighted this issue among certain customers.

**Issue type:** This is currently a **fuzzy** issue. Further understanding is required before deciding on a strategy.

5. Slow to invest in technology – This issue is closely related to the R&D matter, specifically focused on technological capability. There will be some overlap with R&D at a future time.

### 3.6.1 Issue Prioritisation

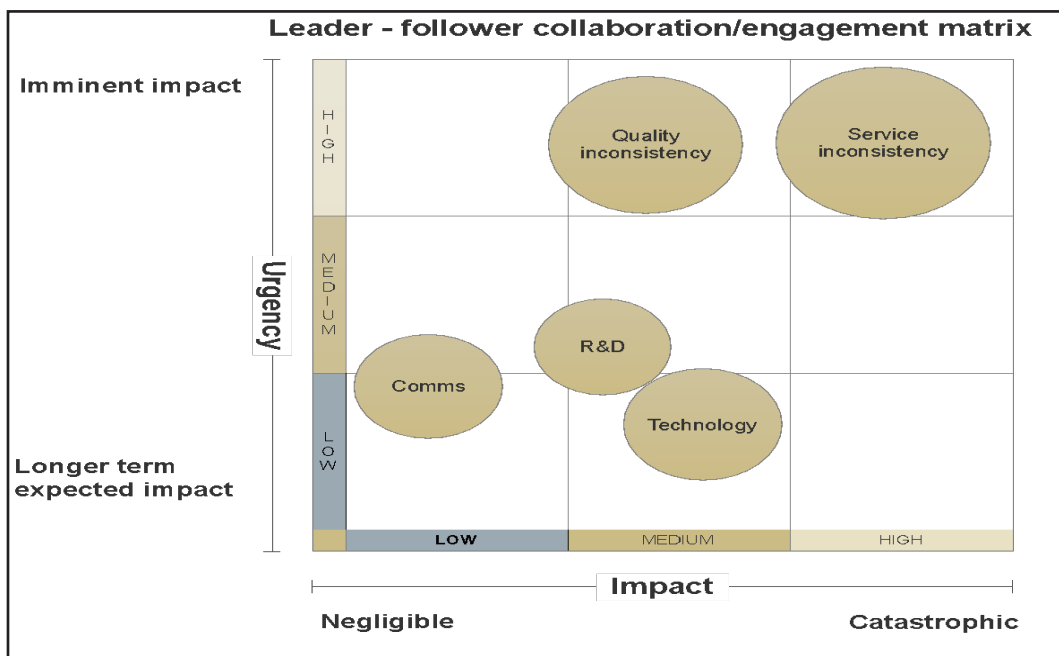
The issue prioritisation matrix below illustrates the prioritisation process by considering both urgency and impact. Urgency refers to the level of urgency in terms of how much an issue will impact the business, while the impact relates to the scale of impact on the Business.

The weighting is designed to accentuate the variation between priority levels at 1, 3, 5 and 9. This prioritisation process involved interviews with the leadership team at Dahlsens, as well as several key stakeholders in the manufacturing division. A survey was conducted among sixteen key individuals.

This prioritisation process is ongoing and iterative as the Business learns from each issue. It can adjust ranking, associated resource allocation, and focus. The Dahlsens Leadership team convenes to discuss this issue resolution and prioritisation process.

**Table 3.2 - Issue Prioritisation Matrix**

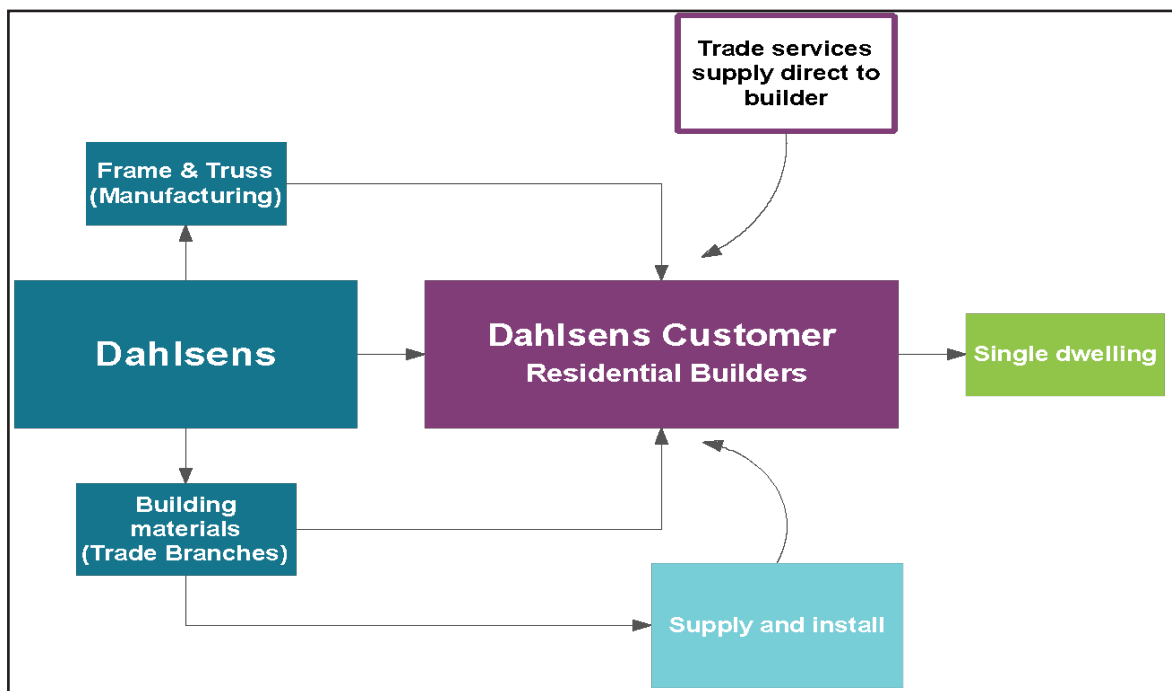
|                                  |             | 1, 3, 5, 9 | 1, 3, 5, 9 |        |
|----------------------------------|-------------|------------|------------|--------|
| Issue                            | issue type  | Impact     | urgency    | Totals |
| Service inconsistency            | crystalised | 9          | 9          | 18     |
| Quality inconsistency            | crystalised | 5          | 9          | 14     |
| Lack of R&D                      | fuzzy       | 3          | 3          | 6      |
| communications between divisions | Fuzzy       | 1          | 3          | 4      |
| Slow to invest in technology     | fuzzy       | 3          | 1          | 4      |



### 3.6.2 Strategic Arena Network

The components owned by Dahlsens in this arena consist of two parts that contribute to the overall market offer, which is the primary focus of this paper. Although building materials form the second arena; they are not extensively discussed here. However, their significance within the strategic network structure of Dahlsens is crucial, especially in relation to expanding demand, segmentation opportunities, and scenario planning.

**Figure 3.3 - Dahlsens strategic Arena network – High level**



### **3.7 Future Strategic Arena Scenarios**

Four future strategic scenarios are illustrated below in Table 3.3. These scenarios have been developed using the model described in the DBL704 module 2 (Ramzi Fayed, 2019), with adaptations by Schoenmaker (Schoenmaker, 2002).

#### **3.7.1 Defining future scenarios**

The five issues flagged in the key emerging issues section earlier in this paper are now presented as factors to consider for future strategy scenarios. While some of these factors (some far too operational) may seem too operational, they are crucial in the current Business scenario for establishing stronger foundations and enabling more aggressive strategic initiatives.

**Table 3.3 - Future scenario planning**

|                                  | <b>Future strategy scenario planning</b> |                                              |                                                                             |                                                     |
|----------------------------------|------------------------------------------|----------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------|
|                                  | <b>Scenario 1<br/>Best/Best</b>          | <b>Scenario 2<br/>Best/Worst</b>             | <b>Scenario 3<br/>Worst/Best</b>                                            | <b>Scenario 4<br/>Worst/Worst</b>                   |
| <b>Demand side</b>               | <b>dominant position</b>                 | <b>dominant</b>                              | <b>loss of market share</b>                                                 | <b>unrecoverable loss of market share</b>           |
| <b>Supply side</b>               | <b>matched capability</b>                | <b>capability issues</b>                     | <b>capable</b>                                                              | <b>incapable</b>                                    |
|                                  |                                          |                                              |                                                                             |                                                     |
| <b>Service</b>                   | <b>best in class</b>                     | <b>serviceable</b>                           | <b>could be a cause for demand drop off</b>                                 | <b>Unrecoverable</b>                                |
| <b>Quality</b>                   | <b>best in class</b>                     | <b>improvement opportunity</b>               | <b>Less sensitive as supply side is best</b>                                | <b>Unrecoverable</b>                                |
| <b>R&amp;D</b>                   | <b>best practice</b>                     | <b>not sensitive</b>                         | <b>Competitors could be leading with improved system, method or process</b> | <b>behind competitors on R&amp;D</b>                |
| <b>Technology</b>                | <b>best practice</b>                     | <b>not sensitive</b>                         | <b>Competitors could be leading with improved technology</b>                | <b>behind competitors on technology</b>             |
| <b>Communications</b>            | <b>Could be a gap</b>                    | <b>Supply side capability - not a factor</b> | <b>less sensitive</b>                                                       | <b>Unrecoverable</b>                                |
| <b>Raw material availability</b> | <b>steady supply</b>                     | <b>possible supply inconsistency</b>         | <b>not a factor</b>                                                         | <b>Is supply the reason driving loss in demand?</b> |
| <b>Likely to succeed</b>         | <b>Likely to succeed</b>                 | <b>Uncertain</b>                             | <b>Uncertain</b>                                                            |                                                     |
| <b>Likely to fail</b>            |                                          | <b>Uncertain</b>                             | <b>Uncertain</b>                                                            | <b>Likely to fail</b>                               |

Scenario planning assessments in this table were conducted by Chris Barlow.

### 3.7.2 Scenario Issues – top priorities for each scenario

Of the four scenarios, the top priority issues from each are listed below for consideration on how to manage them via the Personal Contingent Leadership Paradigm (PCLP). Some scenarios require making several assumptions to predict the most likely issue. It is essential to have robust contingencies in place to effectively manage scenarios as they unfold:

- Emphasise robust planning when constructing scenarios.
- Form a focused team to analyse and make adjustments or agree on further investigation
- Incorporate force field analysis as part of the investigation process.
- Engage with the Influence mapping process
- Utilise likely outcome scenarios to prioritise and learn from best and worst cases

For the sake of the exercise, however, scenario 1 Best/Best frames the path required to achieve the best outcome. Conversely, Scenario four highlights the possible flaws that could lead to the worst-case scenario. Addressing these potential issues and implementing mitigation strategies as part of a probable outcome may be beneficial.

1. Scenario 1 (Best-demand/Best-supply): In the best and best scenario, the prevailing gaps in service and quality are more likely to be addressed due to plans in place. Currently, **communication** looms as a complex problem to solve and could impose limitations on expanding the overall range of services in this scenario.
2. Scenario 2 (Best-demand/Worst-supply): **Quality** looms as the most likely issue when the supply side is at its worst. Quality is directly linked to production throughput consistency, as well as the production of a high-quality finished product.
3. Scenario 3 (Worst – demand/Best – supply): Communication, quality and raw material availability are not factors where the supply side is at its best. In the case of worst demand, the pressure points are most likely to arise from competitors gaining advantages through **R&D or technology**. Service could potentially be a factor, but for demand to significantly decline, the service would have to be considerably worse than its current state. However, such a scenario is unlikely.
4. Scenario 4 (Worst-demand/Worst-supply): Choose any scenario from this category. Any of the five issues could have contributed to a Worst/Worst scenario if the impact is catastrophic enough, although raw material supply issues affect all similar competitors. Considering the current inconsistency in Dahlsens's service, quality or communications, it is unlikely that issues will lead to a catastrophic outcome. Instead, the root cause can lie in either **R&D, technology or raw material supply**, any of which could have a devastating impact on Dahlsens in this field.

### 3.8 Issue Prioritisation and Resolution

With a leadership style that emphasises high collaboration and engagement, the PCLP improvement initiative has a specific focus on stakeholder engagement. The diagnostic process aims to assess the most suitable leadership style for various situations, including addressing the top four priority issues from each of the four future scenarios. It is now time to put the current iterated PCLP to the test.

**Table 3.4 - Highest priority issues from future strategy scenarios – prioritised**

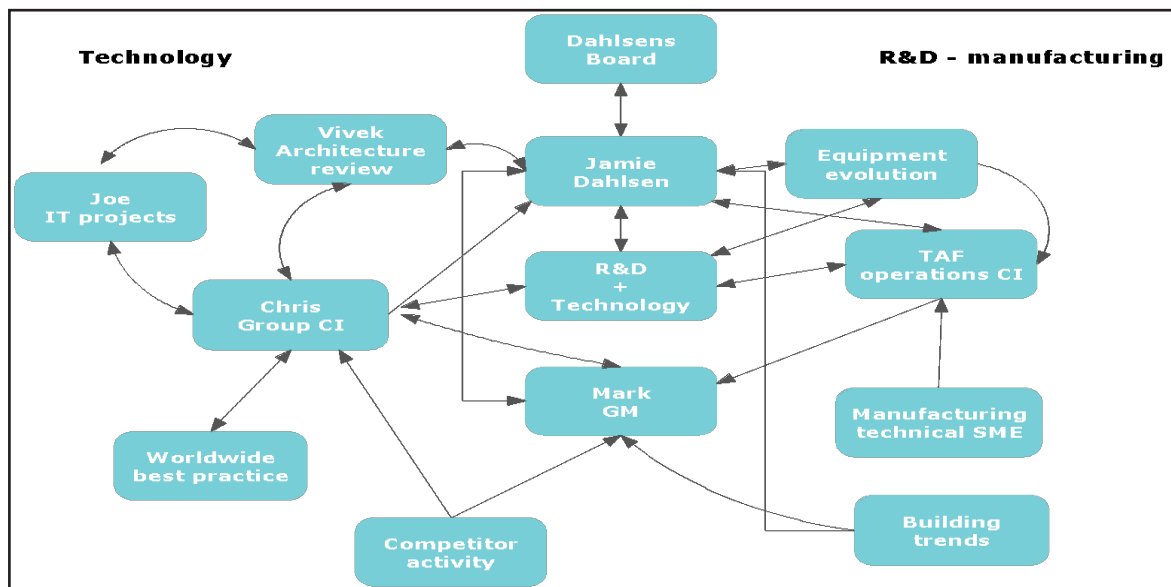
|                     |            |        |        | 1, 3, 5, 9 | 1, 3, 5, 9 |        |
|---------------------|------------|--------|--------|------------|------------|--------|
| Issue               | scenario   | Demand | Supply | Impact     | urgency    | Totals |
| R&D + technology    | Scenario 3 | Worst  | Best   | 9          | 9          | 18     |
| Raw material supply | Scenario 4 | Worst  | Worst  | 9          | 5          | 14     |
| Quality             | Scenario 2 | Best   | Worst  | 3          | 3          | 6      |
| Communications      | Scenario 1 | Best   | Best   | 1          | 3          | 4      |

Table 3.4 above, the highest priority issues from the four future scenarios are listed. To the right, the four issues have been further prioritised using impact/urgency values to assess the priorities within the priorities across the four scenarios. Among the presented scenarios, scenario 1 is the least concerning, whereas scenario 2 is considered a lower priority compared to scenarios 3 and 4 due to its potential ramifications being relatively less significant. Scenario 3 poses the biggest strategic risk to the Business, primarily due to the possibility of competitors gaining a stronger position in R&D or technology. This risk is further heightened by Dahlsens not taking the lead in these areas. Raw material supply issues resonate for the whole industry, and Dahlsens, with its comprehensive *whole-of-house* offer, is relatively more protected compared to most TAF manufacturers.

### 3.9 PCLP capability in dealing with issues

Issue 1 - **R&D + Technology** (Worst – demand/Best – supply): R&D and technology endeavours of the company are headed by the newly appointed General Manager of Dahlsens, Jamie Dahlsen. Dahlsens have realised the strategic vulnerability posed by not investing quality resource in this area. Jamie has been in this role for the past three months.

**Figure 3.4 - Influence map of R&D + technology issues**



The two issues are mapped together in Figure 3.4 above because Dahlsens have strategically grouped them together based on the significant overlap observed in multiple areas, as well as the anticipated synergy resulting from their integration.

Solution: The focus points of PCLP, pertaining to stakeholder management and engagement, have already been effectively demonstrated in influencing the Group CEO, Geoff Dahlsen, regarding the strategic significance of the technology space. Geoff Dahlsen has not only appointed Jamie to his role and has also appointed a new Board member specifically skilled in IT systems and architecture. This strategic appointment is expected to play a key role in driving technology advancement and investment within the company.

### 3.9.1 Influencing stakeholders

Through a more detailed and in-depth influence mapping, as well as force field analysis, along with the PCLP diagnostic, the discipline of re-evaluation will continuously iterate and realign itself. Agile thinking requires iterative thinking and nimbleness in making adjustments. ***PCLP is capable of effectively managing this issue without requiring amendment consideration.***

Issue 2 – **Raw material supply** (Worst – demand/Worst – supply): No influence map here. In the worst/worst case scenario, all possible issues appeared nearly irrecoverable. In practice, if raw material supply were the highest priority issue in this scenario, a significant portion of Dahlsens’ competitive market would be affected even more severely than Dahlsens itself, given Dahlsens buying power.

Solution: Influencing Dahlsens’ General Manager and Merchandise Manager through leadership team (DLT) meetings is a sufficient forum for developing an appropriate mitigation strategy. The DLT oversees the process of prioritising strategic issues and has visibility of all such matters. ***PCLP can handle the management of this issue without requiring any amendments to be considered.***

Influence in R&D and technology helps to mitigate risk, as solutions in this space may extend beyond the use of pine framing timbers.

Issue 3 – **Quality** (Best – demand/Worst – supply): No influence map here. In this scenario, a focus on quality mitigates the issue, which, in the context of the four top priorities, has a much lower priority than the first two. Resource allocation and investment need to be considered accordingly.

Solution: My change program includes a provision that has already been signed off to incorporate quality metrics for rectification work, as well as service measures with DIFOT. ***PCLP can effectively manage this issue without requiring any amendments.***

Issue 4 – **Communications** (Best – demand/Best – supply): No influence map here. In this scenario, communications loom as the most complicated issue to be dealt with. While the priority is low due to the minimal risk to the Business, effective communication can contribute to driving growth in the whole-of-house offer by extending future strategy demand into rival or complementary supply systems. This area presents numerous

opportunities, but our current focus is to ensure the smooth functioning of our core business operations.

Solution: My Continuous improvement change program incorporates various technology-related solutions, as well as people and process solutions, to significantly enhance this area.

***PCLP can handle the management of this issue without requiring any amendments to be considered.***

### **3.10 Strategic Conclusions**

Service and quality-related issues are a significant component of key strategic scenario planning and ultimately hinder Dahlsens' ability to make strategic moves. Dahlsens' options are limited to mitigating its service-related risks, which is the simplest option to transform a strategic vulnerability into a competitive advantage, at least until emulated by others.

## Chapter 4

### Overview of research questions/methodology

#### 4.1 Research context – the convergence of work and study

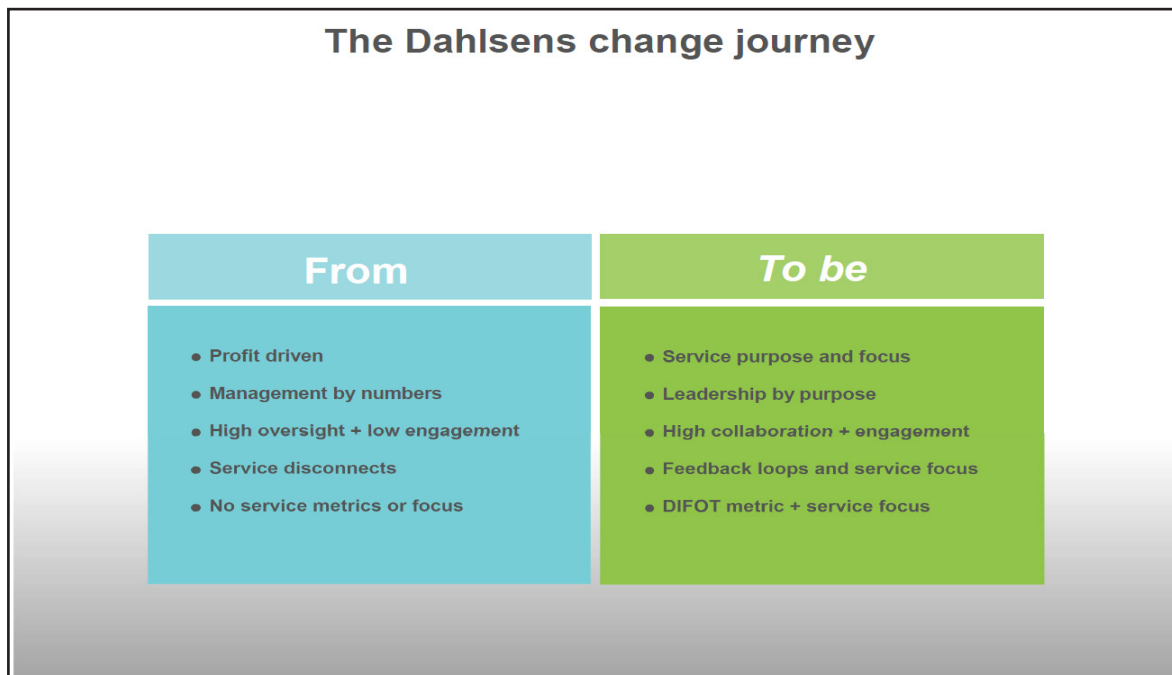
My research study and work as a Continuous Improvement (Ci) lead have led me to believe that this research could potentially initiate a cultural change shift in Dahlsens, guided by its Managers, if the research validates the key success factors being tested. It is crucial for Dahlsens to listen to and acknowledge the needs and opinions of its people. Dahlsens is a business with a rich historical background, spanning an impressive five generations as a family-owned company. However, it is operating with outdated practices, particularly in its hierarchical approach to leading Operational teams and its reliance on lagging P&L indicators as primary drivers, along with an emphasis on the telephone. The telephone is included as a key metric due to customers using it to contact Dahlsens in the event of delivery issues with their delivered customer orders. Operational leaders are well aware of this dynamic, yet they have resisted my attempts to help them explore alternative ways to operate via listening to the cacophony from their Frontline teams. Unfortunately, they have chosen to silence those voices instead of attentively listening and offering assistance. The prevailing mindset seems to be that the P&L rules and the bosses know best about how we should do things here. Although it is challenging to witness, this situation does offer a rich research landscape for investigation.

The expansive investigative scope of my Ci role has allowed me to delve into the Business and pinpoint the strategic vulnerability facing Dahlsens as a customer-facing service-based Business. It has become evident that there is a lack of sufficient emphasis and established metrics to gauge its customer service performance.

As a Business, Dahlsens, to some extent, embraced the concept of becoming more customer-centric and aimed to shift organisationally from being a high governance oversight focused Business with high levels of management by numbers to a place, a *to be* place where behaviours are more consistently and strongly focused on its customers and the reliable service Dahlsens claim or wish to stand for. Geoff Dahlsen has demonstrated a strong desire to support this program, possibly without fully grasping the extent of

the change or appreciating the pressure and focus placed on operational leadership and support structures. In hindsight, I believe that Geoff underestimated the effort required to bring to life the initiative he sponsored through my Ci program, and he didn't anticipate the level of guidance needed from him to lead us to that to be place. Additionally, I must take accountability for not effectively conveying the vision of that to be future state or, more specifically, the work required to reach that point for Geoff and others.

**Figure 4.1 - Dahlsens change Journey**



To illustrate, Figure 4.1 above shows the shift in focus through a defined purpose connected to customer service. Behavioural support transitions from profit-driven to purposeful service focus, which Frontline Managers require assistance with.

## 4.2 Interview process and critical questions

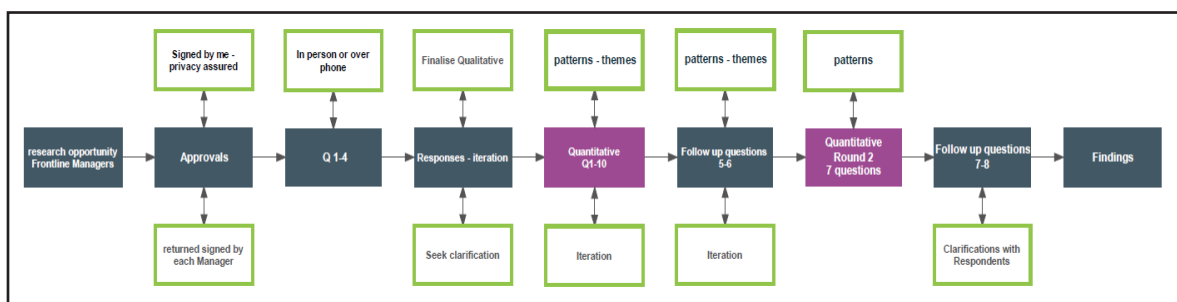
The interview process was conducted with Frontline Managers within Dahlsen’s operational framework. Interviews have not been recorded, whether by phone, in person, or via video link. There are two reasons that could compromise the quality of insights gained from Managers. One is related to the commercial sensitivity surrounding Dahlsen’s mode of operations. The details of Dahlsen’s operational strengths or competitive market advantages cannot be disclosed.

During the COVID lockdown in Victoria, several interviews had to be conducted partially, through video conference or phone call, depending on the preference of the interviewee. Due to the demanding schedule of a Dahlsens Manager, a brief phone call with follow-up questions has proven to be an optimal way for gaining additional information and insights from the interviewees.

Secondly, the interview process challenges Dahlsens leadership and the bosses of all interviewees. Therefore, if interviews were to be recorded the quality of insights would be substantially impeded. The iterative interview process facilitated multiple additional conversations and has been thoroughly documented throughout the journey.

I, as the interviewer, will take comprehensive notes and log them for reference as required by examiners. Figure 4.2 below outlines the end-to-end interview process.

**Figure 4.2 - Interview Process**



### 4.3 Research methodology – Method in selected methodology

Business improvement inherently involves an iterative discipline. It entails observing, learning, seeking to understand, and, if necessary, changing perspective. This discipline is constant and involves a disciplined approach to learning the root causes of problems. Going beyond the identification of a simple problem, this iterative problem-solving approach aims to understand more. Is the problem systemic, affecting multiple users, shifts, or the entire site? All of this is considered before assessing whether the problem extends to multiple sites and to what extent.

While reading Kathy Charmaz's work on constructivist grounded theory, I noticed that the disciplines she explains seem to align somewhat with my own investigative approach.

With the discovery of grounded theory, Glaser and Strauss emphasised that;

*Most writing on sociological methods has been concerned with how accurate facts can be obtained and how theory can thereby be more rigorously tested. In this book, we address ourselves to the equally important enterprise of how the discovery of theory from data – systematically obtained and analysed in social research – can be furthered.*

*(Glaser & Strauss, 1967).*

Glaser and Strauss comment on the prevailing dominance and perceived superiority of verification through quantitative methods compared to generation through qualitative methods (Glaser & Strauss, 1967). Their groundbreaking exploration of grounded theory expanded researchers' potential to enhance the validity of qualitative methods (De Bruijn & Steenhuis, 2006; Eisenhardt, 1989; Healy & Perry, 1969).

Importantly, in chapter 2 of their book, *The Discovery of Grounded Theories for Qualitative Research*, Glaser and Strauss clarify distinctions in their use of comparative analysis to generate theories to make sense of the subject under study. A key distinction they emphasise is that;

*Comparative analysis is a general method, just as are the experimental and statistical methods (all use the logic of comparison). Furthermore, comparative analysis can, like those other methods, be used for social units of any size (Glaser & Strauss, 1967).*

This distinction appears to lend credibility to the method's quality when compared to quantitative methods at the time. In this Dahlsens based research, the inclusion of quantitative inquiry to the qualitative data enhanced its quality, from my perspective as the researcher in this case.

Kathy Charmaz further describes the grounded theory as "*inductive, emergent, open-ended, and qualitative*" (Charmaz, 2017). Charmaz states that these qualities, when compared with constructivist grounded theory (CGT), are aligned. She goes on to say that CGT is more than that;

*CGT integrates developments in qualitative inquiry over the past 60 years and, moreover, treats data and theorizing about these data as constructed, not discovered. Thus I introduce how CGT rejects the positivist epistemology of earlier versions and builds on the pragmatist heritage of Strauss (1959, 1961, 1993) (Charmaz, 2017).*

When considering where to begin case study research, Kathleen Eisenhardt outlines what she refers to as a roadmap for executing this type of research (Eisenhardt, 1989).

Robert Yin suggests that case study research is an appropriate method in situations where;

- a. *How* or *why* questions are apparent
- b. Control over behavioural events is low
- c. The study is current rather than historical

(Yin, 2018)

I have an interest in Robert Yin's case study methodology, although the research method to be used here is constructivist grounded theory. In this research, there will be no formal hypothesis statement. However, I recognise the value of hypothesis-based research and testing in the appropriate context.

In grounded theory, the discipline of making sense of the data is crucial in both the analysis and collection phases. It aids in the development of further questions based on the preliminary interpretation of the data based on its categorisation, grouping, cutting up or coding (Chametzky, 2016; Charmaz, 2017; Glaser & Strauss, 1967).

Glaser and Strauss assert that comparative grouping needs are dependent on the relevance of the study's categories for comparison development (Glaser & Strauss, 1967).

#### **4.3.1 Paradigms**

In terms of paradigms, Lincoln and Guba articulate the belief system effectively;

*Now certain sets of such basic or metaphysical beliefs are sometimes constituted into a system of ideas that "either give us some judgement about the nature of reality, or a reason why we must be content with knowing something less than the nature of reality, along with a method for taking hold of whatever can be known" (Reese, 1980, p352). We shall call such a systematic set of beliefs, together with their accompanying methods, a paradigm (Lincoln & Guba, 1985).*

This *systematic set of beliefs, together with their accompanying methods* (Lincoln & Guba, 1985), represents a fundamental belief system that can be further broken down into Ontology and Epistemology and the methodology.

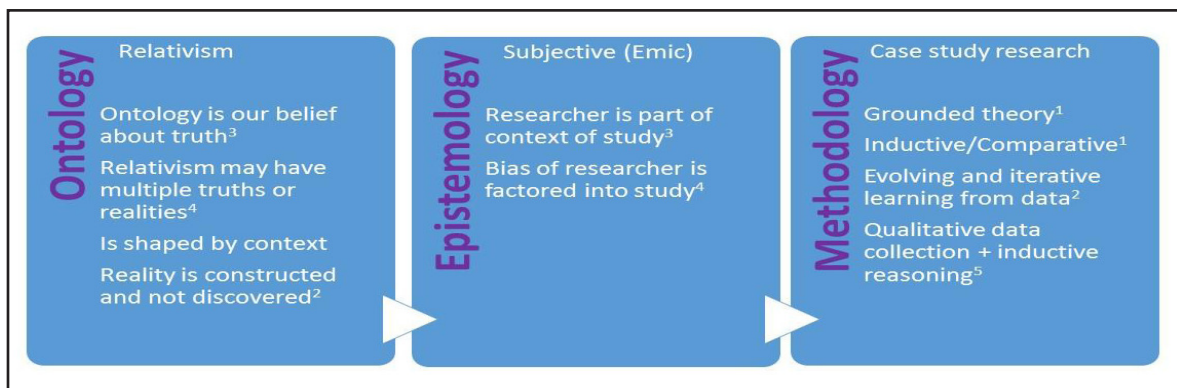
Healy and Perry describe this in a very concise and clear manner;

*Briefly, ontology is the "reality" that researchers investigate, epistemology is the relationship between that reality and the researcher, and the methodology is the technique used by the researcher to investigate that reality. (Healy & Perry, 2000).*

#### **4.3.2 Research Paradigm - Constructivist grounded theory**

Constructivist grounded theory aligns well with this context due to its fundamental similarities to the author's Business improvement logic and approach. The business improvement methodology entails exploring human behaviour within systems, where interactions and behaviours lack quantitative measures. This absence of measurable data may account for the inconsistency in interactions, behaviours, or overall sense of focus. Moreover, adopting an inductive approach with an empirical focus on capturing qualitative data, as advocated by the constructivist grounded theory paradigm, can provide valuable insights (Charmaz, 2017).

**Figure 4.3 - Research Paradigm**



(Charmaz, 2017)<sup>1</sup>, (Yin, 2018)<sup>2</sup>, (Healy & Perry, 1969)<sup>3</sup>, (Guba & Lincoln, 1994)<sup>4</sup>, (Eisenhardt, 1989)<sup>5</sup>

### 4.3.3 Research Scope

The current research scope does not include;

- Business sizes larger than Small to Medium-sized Enterprises
- Non-family-owned Businesses
- Other industry types
- Other work types, such as project-based teams

## 4.4 Research question and parameters

What **success factors** from high-performing teams and Agile success stories can be applied in an SME family-owned business environment?

Based on the literature review, which conducted a case study analysis of 56 unique cases, the following seven vital success factors were identified. The analysis revealed a predominance of agile case studies, accounting for over two-thirds of the cases. These agile cases were instrumental in shaping the success and failure factors at an organisational level, which are critical for understanding these seven success factors. It is evident that a lack of organisational vision and support often leads to failure in many cases, as they fail to facilitate the necessary cultural change.

A key opportunity identified as part of my Continuous improvement work is a misalignment between support functions and Operational Field Managers & teams. A key success factor identified is obsessive customer service and misalignment from a purpose perspective. The

research will seek to understand whether there is an aligned purpose and customer service misalignment through interviews, which are two critical success factors missing in Dahlsens. Whether the other five success factors can be proven or disproven via research in the absence of these two foundational and influential factors remains to be seen. Numerous case studies have highlighted organisational misalignment as a critical factor contributing to the failure point in Agile projects and transformations. Additionally, many case studies have emphasised the lack of customer obsession as another significant failure point in Agile projects and transformations. When examining failures of high-performing teams, case studies also indicate misalignment and a lack of clear purpose as fail points in HPT projects.

**Figure 4.4 - Success factors - To be researched**



Each of these factors is part of the research parameters to be tested within the chosen group of respondents, to determine whether these success factors can be applied in an SME non-IT business environment.

The research context is specifically focused on a Family-owned Small to medium enterprise (SME) and in a Business-as-usual (BAU) operational environment of Dahlsens Trade Building materials aggregation operation. The interview subjects consist of Managers responsible for Dahlsens trade operations, each leading teams ranging from 12 to 60 members.

## 4.5 Research as a beacon for change

The proposed research interview process is designed to provide the impetus to changing Dahlsens' current state (as depicted in the orange boxes below). The current state is characterised by low organisational enabling and low employee engagement. The aim is to shift towards green boxes, where increased organisational enabling and employees taking a leap of faith can potentially validate or disprove the seven success factors identified in the case study analysis.

**Table 4.1 - From State and To State**

| <b>Employee engagement v Organisational enabling Matrix</b> |        |                                        |                                   |                                         |
|-------------------------------------------------------------|--------|----------------------------------------|-----------------------------------|-----------------------------------------|
| Engagement                                                  | HIGH   | People driving organisational enabling | Organisation getting on board     | Sustainable high functioning            |
|                                                             | MEDIUM | People taking the leap of faith        | Faith by all parties              | People getting on board                 |
|                                                             | LOW    | Death spiral                           | Organisation wanting to be better | Enabled structure waiting for believers |
|                                                             |        | LOW                                    | MEDIUM                            | HIGH                                    |
|                                                             |        | Organisational enabling                |                                   |                                         |

## **Chapter 5**

### **Case research analysis and reflections**

#### **5.1 Research logic**

Some of the themes I wanted to explore in this doctoral work already interested me before I started working for Dahlsens. The learnings, disciplines, and strong sense of purpose instilled in me at McDonald's resonated with my own moral compass. It was imperative to prioritise customer care and maintain an unwavering commitment to that fundamental objective. This purpose was unambiguous and significant, offering guidance for our decision-making process at all times. Within this framework, teams and leaders thrived as their roles were well-defined, and the daily decision-making process was transparent and simple. I yearned for that synergy in other workplaces, and in Dahlsens, it was evident to me the profound absence of it and the consequential effects. While many individuals in Dahlsens merely perceived issues as isolated problems, I discerned the interconnected underlying causes of those issues, linked to the absence of certain elements that had fostered cohesion and prosperity in other Businesses. The attributes I hoped to test through research in Dahlsens and in this doctoral work seemed interconnected, particularly in terms of purpose and focus. Without a clear purpose, we were adrift in a sea of ambiguity, or worse, each going their own separate way. In the absence of a defined purpose and direction, individuals set their own course. And that may be scarier because misdirection, or worse, self-interest, can very quickly become a cacophony of clamouring interests and voices.

As a Company to work with, Dahlsens emerged as a suitable research subject because of the willingness of Geoff Dahlsen, our Group CEO and the person I reported directly to. If it weren't for Geoff's sponsoring of this research, it would never have been possible, and I am immensely grateful for the opportunity to assist Dahlsens in this context while conducting meaningful research.

Dahlsens was also a suitable research candidate organisationally because of its longstanding position in the industry, its role as a service-based business, and the potential opportunity arising from its apparent disconnect, both operationally and organisationally, from its

customers. Certainly, it was expected by Support Office that frontline operational teams would be highly customer-focused; and they were. However, the pain points I observed in my Continuous improvement role at Dahlsens, as I deep-dived into their operations, indicated some missing elements, some of which resonated with my previous experiences. These elements were related to the level of support for customer service and the priorities of the management.

While working as the Group Continuous Improvement Manager, I discovered how perfectly Dahlsens aligned with my research interest in the factors affecting the ability of team leaders to lead effectively. Additionally, I gained insights into the leader's capacity to foster synergy within teams and the impact of purpose alignment, especially in a service-based business prioritising customer satisfaction decision-making and strategy formulation. Through my research, I also became aware of the significant influence that success factors have on Frontline Managers and their teams when they lack a clear purpose or customer service focus.

During my tenure at the Dahlsens Group of Companies, I was given the opportunity to actively engage with and gain an in-depth understanding of the different operations. I was entrusted with the task of identifying pain points and applying logical reasoning to assess the interdependencies within the Dahlsens system, which oversaw the seamless flow of goods from numerous suppliers to building sites. The numerous products required at various stages of the building process, when needed, had to be obtained quickly by builders who were not known for their advanced organisational planning. It is an intriguing challenge to connect multiple moving parts using manual tools and archaic software systems. Meanwhile, Dahlsens was transitioning from being a fifth-generation retailer that catered to anyone, only to be overshadowed by Bunnings and their giant green box. Recognising their limitations in the retail sector, Dahlsens made a strategic decision to fully concentrate on the trade sector and their familiar customer base, despite lacking the necessary infrastructure to support them effectively. Outdated software systems and a retail-oriented mindset have hindered the transition towards thinking as a service-based logistics supplier necessitating improved organisation of rolling inventory, better fleets to facilitate site delivery, and a higher concentration of skilled logistics personnel to oversee operations rather than relying on product experts for retail customers.

**Figure 5.1 - Business type shift** - Author evaluation of Dahlsens business type shift



### 5.1.1 Strategic vulnerability

Based on my initial investigation, the division of greatest concern was Dahlsens, as it constituted the largest portion, accounting for 58% of the total Business (At the time). Additionally, it faced significant service frailties, and the disconnect between frontline and Support functions was exceptionally profound, necessitating attention for effective change.

Dahlsens was the only division with such risk, and it also experienced the most turmoil due to its transition from a retail-focused model to a trade-based one.

I joined the Business as it was transitioning to a fully trade-focused operating model. However, I have observed that the mindset has remained anchored in past retail behaviours, supported by outdated structures. While Dahlsens frontline operational teams have adapted quickly, the support structure has taken several years to retool and still lags in providing adequate support for frontline teams and Managers.

In my deep dive work alongside frontline teams and their Managers, I was able to feel significant pain in a lean operation, under trained, under-resourced and absent from any metrics measuring the quality of our service; delivered in full, on time (DIFOT) is a standard logistics quality metric. From a business improvement perspective, having a baseline to measure improvement is important as a starting point, to drive focus and prioritisation around exceptions. In Dahlsens, I felt that DIFOT would help immeasurably to shift the

focus to the service of the bosses of Frontline Teams and also potentially of the whole support structure.

I am privileged to have been given the time and opportunity, the time invested by Dahlsens, to have these insights over a multi-year period to guide and shape this Doctoral research. For Dahlsens, of course, their investment was in improving their Business operations. Piecing together the threads of myriad insights and observations over time shaped the problems we faced. Further investigation helped determine whether a particular issue was an isolated pain point or something more systemic in nature.

### **5.1.2 Pain points**

The investment in providing me with sufficient time to comprehend the pain points and business problems encountered by Dahlsens was a remarkable decision by Geoff Dahlsen, our group CEO and my direct report. It showed patience, curiosity and commitment to improvement. Bravo to him! In order to gain insights, I adopted a strategy of visiting each site, sometimes on multiple occasions, to fully grasp the dynamics of their operations. This involved observing their performance under various conditions, including high-pressure situations, while consistently maintaining a positive and supportive attitude towards our amazing frontline personnel. The initial brief was loose because Dahlsens had not previously had a Continuous Improvement or Business Improvement function, so Geoff Dahlsen and Jamie Dahlsen (Dahlsen's General Manager at the time) were confident in letting me proceed and gather insights into the operation. They were pleased by the insights, learnings and opportunities that emerged, which presented a pathway to enhance operations and service.

The Dahlsens frontline teams are exceptionally dedicated to their customers and extraordinarily committed to their role. However, they often fall short not due to their efforts, but rather because we need to provide better support for our frontline teams. This includes equipping them with better tools, offering enhanced support and focus, and providing better training and resources.

Systemically, some of our pain points were rooted in resourcing and training quality. From Dahlsen's operational perspective, serving customers was considered a frontline job, but it appeared that this mindset was not consistently shared at higher levels. Frontline teams

often seemed overwhelmed and constantly busy, yet their effectiveness was not always apparent.

In working with the bosses of frontline leaders, conversation after conversation centred around my attempts to introduce considerations for reviewing workload prioritisation and the importance of allocating more time to customer service for Operations Management and the Regional Managers— the direct reporting line of Frontline Managers. The Bosses.

Those hierarchically above the Frontline level were measured by P&Ls, and thus, their focus remained on P&Ls. However, since there was/is no DIFOT measurement, they were not inclined to prioritise it at that time. Recognising the significance of service quality metrics, I identified DIFOT reporting as a crucial aspect to address the misalignment and provide momentum to support functions in enhancing Dahlsens customer service.

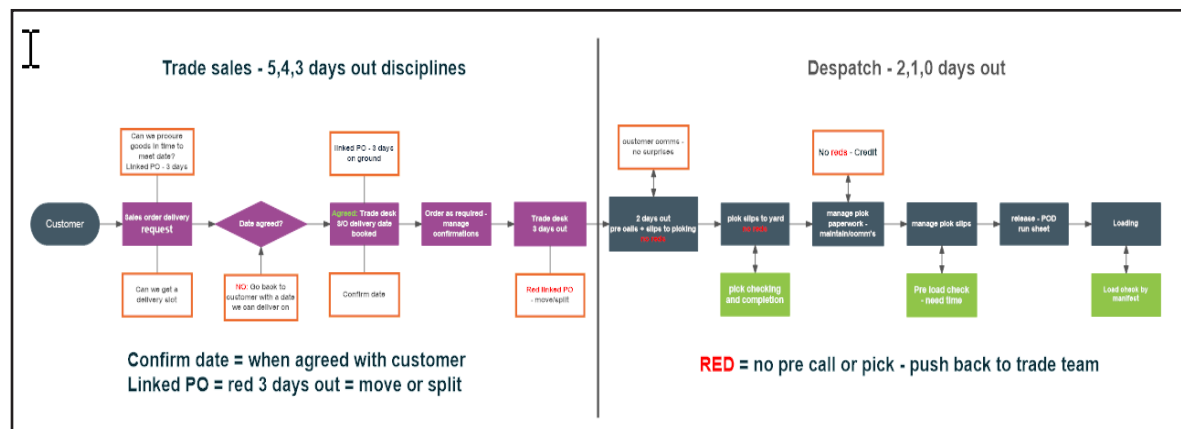
Ultimately, for those who are solely focused on lagging indicators, such as profit and loss statements (P&Ls) in a linear manner, they may eventually realise that by shifting their focus to improving the consistency of the service, sales will naturally follow. These sales will then flow through their valuable P&Ls in a sustainable and replicable manner. With my previous experience as a business General Manager, Operations Manager, and Regional Manager outside of Dahlsens, albeit in different sectors, I have firsthand knowledge of the roles I aimed to bring about change in. I have a clear understanding of the requirements of these roles, especially in customer-facing environments.

Research questions are initially derived from the identified pain points and serve as a valuable addition to the ongoing program of work. Frontline Managers are primarily chosen as research subjects due to their pressing need for assistance. By providing them with the necessary support, they can significantly enhance the delivery, integrity, flexibility, order, and timing (DIFOT) to their customers. As a former Frontline Manager myself, I am deeply committed to the success of this group of individuals who also serve as the pre-eminent representatives of a service organisation.

On the Frontline, teams and leaders face challenges in gaining visibility into the flow of customer orders, specifically sales orders (SO). The lack of visibility resulted in various issues within the business. Sales orders often consist of multiple items sourced from different suppliers, all of which need to be consolidated before being shipped. One notable example of a discipline requiring leadership coaching and support is the process

of agreeing on a delivery date with a builder. Before the items are loaded onto the truck, it is crucial to determine if we can meet the agreed-upon delivery date or if we need to notify the builder in advance about a potential delay. Improving our discipline in reaching a consensus on a delivery date, considering all the factors that could affect our ability to meet it, was a significant factor that demanded leadership, reinforcement, coaching and support. This example, along with others, sheds light on the importance of having a supportive structure, clear purpose, and focused approach. It felt like addressing this purpose disconnect would serve as a root cause solution, leading to the line of inquiry for our research. By examining what seemed like a disconnect in purpose, I realised its impact on a daily basis. The process map below illustrates the key points in the workflow where the delivery date agreement is established and communicated to the despatch operations.

**Figure 5.2 - Sales order workflow**



### 5.1.3 Program solution pieces

The investigative work was validated, and an agreed program of work was set in motion.

The program was primarily designed to enhance the quality of service for Dahlsens customers and address Dahlsens service vulnerabilities, a major strategic risk and blindspot. Geoff Dahlsen, our Group CEO and my direct report, committed to establishing supportive structures, roles and functions to bolster the multi-pronged program I had developed and that he had sponsored.

## Dahlsens service improvement program of works

- Software tools have been scoped and built to enhance the visibility of the sales order flow. Stages 1 and 2 have already been released. The core ERP (Enterprise Resource Planning) module is named E-despatch.
- The proof of delivery (POD) software has been integrated with E-despatch and is currently in use across 127 vehicles, both owned and contracted.
- DIFOT reporting, which measures the quality of service, is currently under development. Testing is scheduled for February 2023, with the release date to be announced.
- The Manager Advisory Group, established in mid-2021, consists of appointed advocates who meet with Geoff Dahlsen on a monthly basis. This group serves as an essential feedback loop and provides Geoff with perspectives from the Manager ranks.
- Operational support - Frontline Managers - WIP
- Organisational support initiatives, such as Frontline Managers, Purpose alignment, and customer obsessive (Strategy and decision-making Ethos embedding) are works in process (WIP)
- The Good Manager program is currently being scoped with the aim of providing Frontline managers with better tools and enhancing their capability in leading their teams

### 5.1.4 The Good Manager

The concept of the Good Manager, a term coined by Geoff Dahlsen, stemmed from his long-standing desire to assist Frontline Managers. This aspiration was born out of myriad conversations with Managers over time, with myself, and with others. It served as the driving force for my extensive exploration of Frontline operations, as Dahlsens Frontline Managers were the individuals we aimed to support and enable to become effective and well-supported. Subsequently, I elaborated on these would be Good Managers, outlining the specific challenges and limitations they faced in performing their roles. As our understanding grew regarding how and where we could offer assistance, the term “Good Manager” emerged as a description of the plan to aid them.

### **5.1.5 Manager Advisory Group**

The Manager Advisory Group (MAG) evolved out of the “Good Manager” evolution of thinking and was conceptualised by me as a means for Geoff to establish closer ties with a representative group of Managers. Its purpose was to provide these managers with a collective voice in discussions with our group CEO. The impetus behind the creation of the MAG as a valuable and supportive mechanism stemmed directly from feedback from the Frontline Managers. They had been experiencing a sense of inability to express concerns or share ideas through the usual operational Channels. On numerous occasions, I witnessed the Operations Manager dismissing ideas or thoughts raised in Regional Manager’s meetings. As a result, the group of managers would often withdraw and refrain from suggesting anything further.

My observations in this context were that our Managers have consistently served as the main source of inspiration and my primary collaborators in understanding the pain points operationally, that have necessitated the implementation of Dahlsens’ service issue mitigation program. Their valuable insights have played a pivotal role in shaping the program. Dahlsens Managers have actively shaped the work at every step, and I am grateful for their openness in allowing me into their world. Their thoughtful and honest sharing, especially considering the consistent treatment they receive from their superiors at Dahlsens, is truly appreciated. Acknowledging the challenge at hand, it is a difficult position for Geoff Dahlsen to be in, especially considering my prior knowledge of the fundamental service support disconnect and the systemic suppression of critical thinking. I advocated for the establishment of the Manager Advisory Group precisely because I recognised the service disconnect at Dahlsens and the significant limitations faced by its Frontline Managers in expressing their ideas for improvement. I feel privileged and proud to be a part of it, fulfilling my role in supporting and coordinating sessions, as well as providing investigative support whenever requested. Additionally, the bosses were largely disconnected from the core principles of customer service, making them ill-equipped to dismiss ideas from Frontline leaders regarding improvements in service-related activities, workflow, and processes.

### 5.1.6 Divergent thinking

Over time, as mandated by Geoff Dahlsen, I have focused on exploring ways to develop additional avenues and forums that foster divergent and critical thinking within Dahlsens. Geoff has gone to great lengths to revise Dahlsens values, incorporating explicit language that promotes the diversity of thought, all encompassed under the inclusive notion of “Everyone contributes.”



With that agreed mandate, I approached the topic of promoting critical thought and divergent thinking as something positive and admirable for two reasons. Firstly, our Frontline Managers played a crucial role in shaping the program of work we had initiated. I had the privilege of being a custodian on behalf of our frontline leaders. They were sensible professionals who understood the need for different and improved approaches in order to lead their teams to better results. I had witnessed their professionalism, sensible ideas, and their aspiration to constantly improve, so they and their teams could take pride in the service they provided every day instead of frequently falling short. They deserved to be listened to.

Secondly, the sense of engagement I had built through the high level of collaboration with Frontline Managers was important. However, I did not observe the same level of engagement in the way operational bosses interacted with Frontline Managers. Moreover, their energy was drained by the constant need to chase their own tails, primarily due to the lack of support from their superiors and via the constant stream of distractions and initiatives forced on the frontline teams. They desired improvement and recognised that it could only be achieved with the involvement and assistance of others, including myself. However, they relied on their superiors, who are their line Managers, to take the lead. In this context, a quote from Dahlsens General Manager Mark Cooper frequently comes to mind as relevant here; *What is important to my boss is important to me.*

In practice, the current system tends to hinder rather than empower Frontline Managers to share their ideas. The focus is on the boss's priorities, neglecting the importance to others, especially the Frontline Managers themselves. Consequently, most operational issues are relayed by the Frontline Managers, while their disengaged (specific to service) bosses fail to fulfil fundamental core operational duties such as focusing on or supporting customer service. This implies that the boss's desires take precedence over everything else, and unfortunately, this is the actual practice at Dahlsens. To foster a more supportive environment for frontline leaders, who are the subject matter experts in frontline operations, it may be beneficial to consider adopting a service-oriented mindset from upper management. Perhaps we can even rephrase the statement and shift the emphasis towards actively seeking the guidance and insights of Frontline leaders, demonstrating a genuine desire to support them.

*What is important to my people is important to me.*

From a servant or enabling perspective, the shift in the statement has a very different ring to it. By demonstrating to subordinates that they are valued, it creates a distinct atmosphere that can potentially redirect the emphasis towards exceptional customer service. Through setting a powerful leadership example, the revised statement carries a distinct tone that sets it apart. When considering the act of empowering frontline subject matter experts to share insights and offer guidance, it brings a unique sense of collegial professionalism to the table. I have personally witnessed the remarkable advantages that arise from demonstrating and receiving respect, as well as nurturing a shared curiosity while collaborating with Dahlsens Frontline leaders. Their unwavering commitment and support have exceeded my expectations by leaps and bounds. The work we have collectively shaped will undoubtedly endure, thanks to the combined efforts and leaps of faith between us.

It would be truly uplifting to witness the expansion of that collaborative kinship spread across the entire organisation. With my considerable experience working alongside them, I have observed this similar operating style together with Frontline SMEs. However, within the layers of Dahlsens' organisational structure, there exist individuals who lack respect for Frontline leaders and show no curiosity to learn from them. Their preoccupation with P&Ls and dictatorial tendencies represent a missed opportunity thus far.

Nonetheless, the Manager Advisory Group, in collaboration with Geoff Dahlsen, holds the potential to make significant progress in addressing this issue. In continuous improvement, I have the capacity to contribute significantly. However, it is crucial for the bosses to recognise and to embrace the mantra that what matters to their Frontline subordinates, those service SMEs, holds importance for them as well.

## 5.2 Research - mixed methods overview

A series of qualitative and quantitative questions were asked to Dahlsens Frontline Managers. I took this approach to provide greater context, both through the measurable context of the quantitative question data and the qualitative responses.

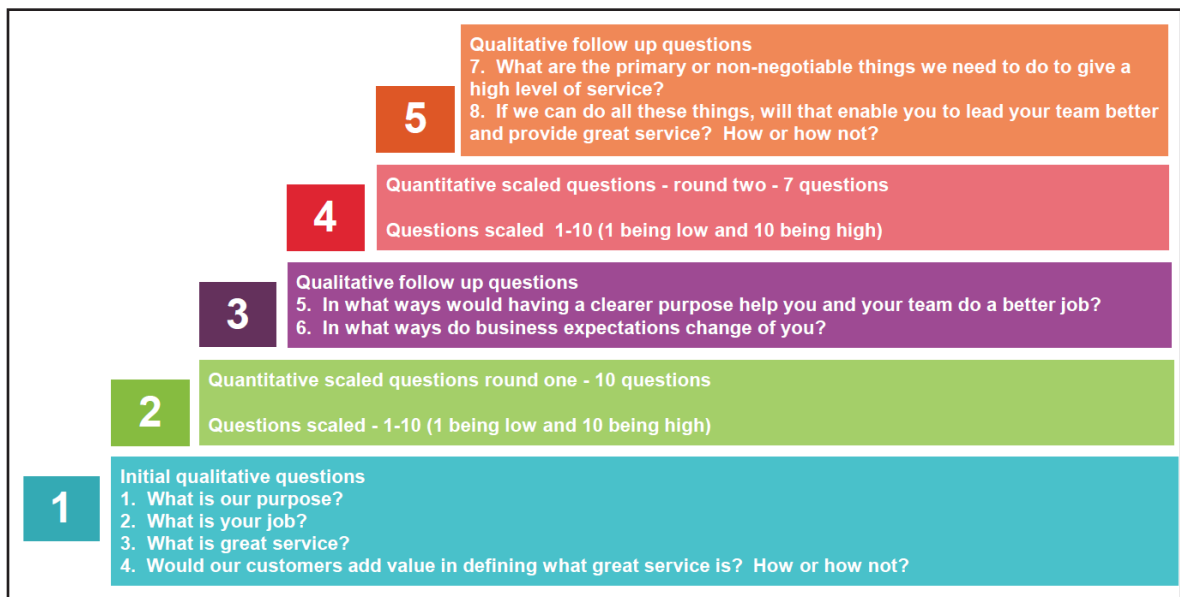
The questions were presented over the course of two to four sessions with 20 different Frontline Managers at Dahlsens. This research took place during the COVID lockdowns over an 18-month period. Throughout this time, there were instances where Managers left or joined Dahlsens. Although Aaron, one manager, chose not to participate, he is still listed because I had already assigned an M number to him. The “list” presented in Table 5.1 is confidential, as promised to each Manager in the confidentiality agreement I signed. This agreement ensures their protection from reprisals within Dahlsens and encourages them to speak freely. Additionally, each Manager has signed the same confidentiality agreement, giving me permission to use their responses. Names can be provided for examination evaluation purposes; if required, yet confidentiality must protect these respondents.

|     | Person       | Code | Signed confidentiality | scaled questions | Booked | Round 1  | Round 2  |                                   |
|-----|--------------|------|------------------------|------------------|--------|----------|----------|-----------------------------------|
| M1  |              | M1   | Yes                    | Trade            |        | complete | complete |                                   |
| M2  |              | M2   | Yes                    | Trade            |        | complete | complete |                                   |
| M3  |              | M3   | Yes                    | Trade            |        | complete | complete |                                   |
| M4  |              | M4   | Yes                    | Trade            |        | complete | complete |                                   |
| M5  |              | M5   | Yes                    | Trade            |        | complete | complete |                                   |
| M6  |              | M6   | Yes                    | Trade            |        | complete | complete |                                   |
| M7  |              | M7   | Yes                    | Trade            |        | complete | complete |                                   |
| M8  |              | M8   | Yes                    | Trade            |        | complete | complete |                                   |
| M9  |              | M9   | Yes                    | Trade            |        | complete | complete |                                   |
| M10 |              | M10  | Yes                    | Trade            |        | complete | complete |                                   |
| M11 |              | M11  | Yes                    | Trade            |        | complete | complete |                                   |
| M12 |              | M12  | Yes                    | Trade            |        | complete | complete |                                   |
| M13 |              | M13  | Yes                    | Trade            |        | complete | complete |                                   |
| M14 |              | M14  | Yes                    | Trade            |        | complete | complete |                                   |
| M15 |              | M15  | Yes                    | Trade            |        | complete | complete |                                   |
| M16 | Dale Russell | M16  |                        | Trade            |        | N/A      | N/A      | Left the Business - no interviews |
| M17 |              | M17  | Yes                    | Trade            |        | complete | complete |                                   |
| M18 | Aaron Pontt  | M18  |                        | Trade            |        |          |          | not participating                 |
| M19 |              | M19  | yes                    | Trade            |        | complete | complete |                                   |
| M20 |              | M20  | Yes                    | Trade            |        | complete | complete |                                   |
| M21 |              | M21  | yes                    | Trade            |        | complete | complete |                                   |
| M22 |              | M22  | yes                    | Trade            |        | complete | complete | Left Dahlsens after round 2       |
|     |              |      |                        |                  |        | 20       | 20       |                                   |

### 5.3 Qualitative Interview Questions

The research flow figure depicted below illustrates the sequential progression of various interview types, moving from the bottom up, beginning with the initial four qualitative questions. The remaining components underwent a transformative evolution driven by the iterative process, fueled by the exceptional responses received from the initial four questions.

**Figure 5.3 - Research flow**



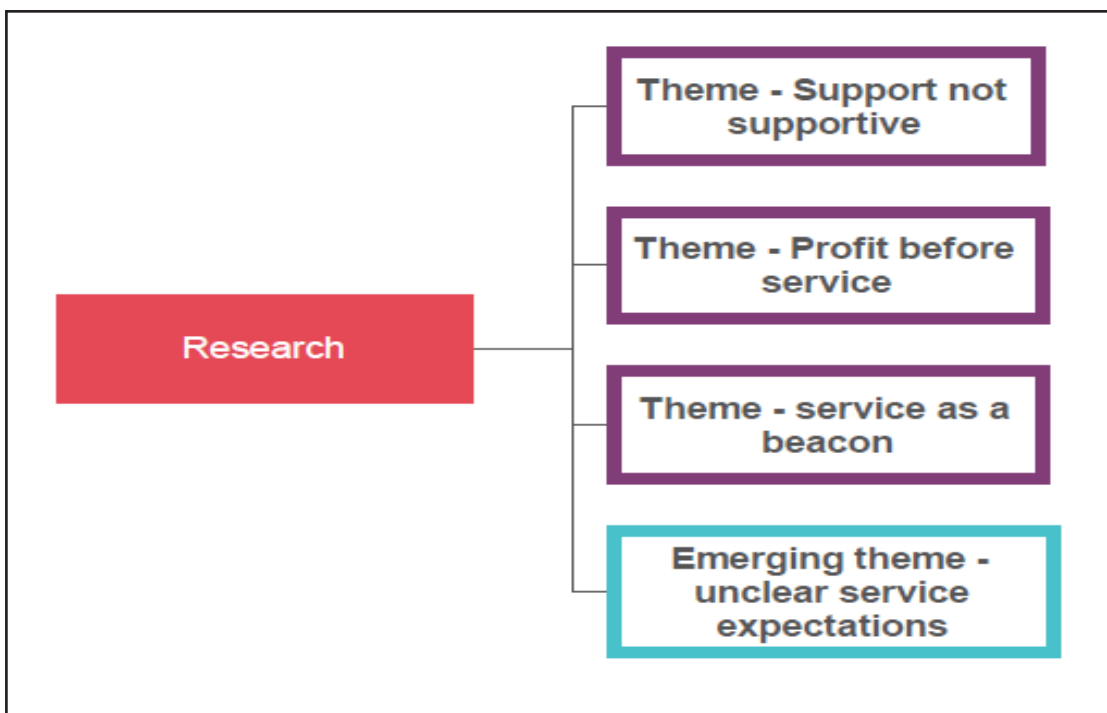
## 5.4 Research Executive Summary

The research is highly detailed in nature, encompassing extensive information. However, the qualitative responses are crucial in capturing the true sentiments of Frontline Managers. It is essential to preserve these responses as they reflect their heartfelt expressions.

This research executive summary aims to streamline and condense the responses to various questions into key themes, facilitating a more straightforward and coherent understanding of the journey that unfolds.

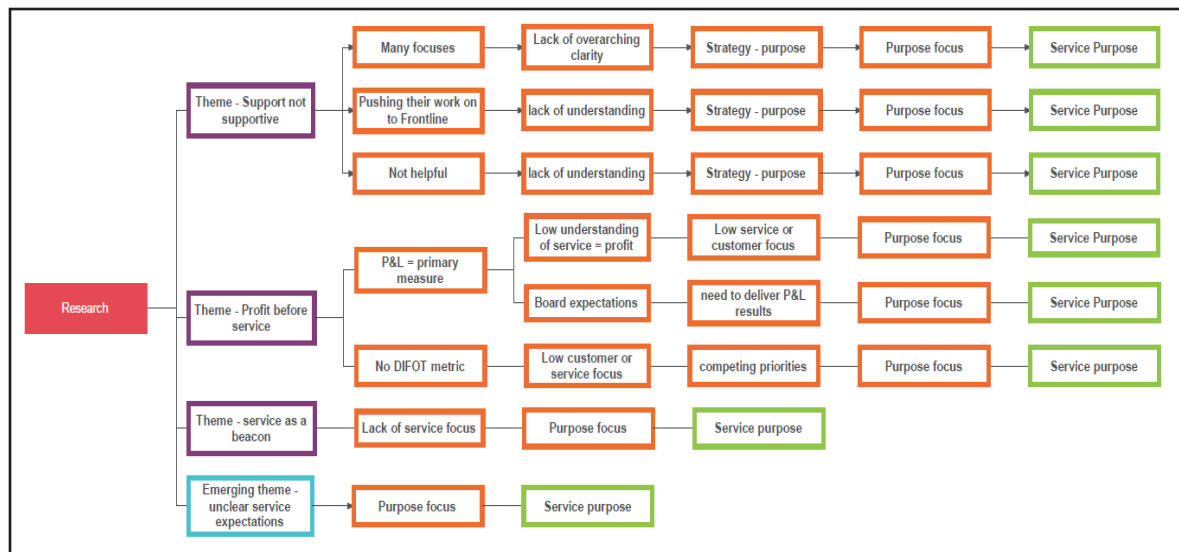
From the first four questions, certain themes have emerged, as shown in the figure below.

**Figure 5.4 - Research Themes Summary**



The themes (in purple) that surfaced from the initial set of qualitative interviews gained even more prominence as the subsequent qualitative and quantitative questions narrowed their focus. Among them, three distinct themes emerged, while one theme (Unclear service expectations) did not expand further. However, it appeared to be connected to the other three themes in terms of root causes. The presence of unclear service expectations could be viewed as a contributing factor leading to the emergence of the other three themes as prominent factors.

**Figure 5.5 - Root cause analysis - themes**



Whilst all roads lead to Rome here, it is unsurprising to discover that the lack of purpose has a significant impact. Furthermore, in a service-based business, the absence of a customer-obsessed purpose holds even greater importance.

## 5.5 Research

### 5.5.1 Qualitative interviews - Q1-4

As shown in the question list in the previous section, the first four questions constitute the initial interview. Two subsequent questions were included as follow-up questions iterated from the results of the previous, followed by another two qualitative questions. Additionally, two sets of quantitative interview questions were conducted concurrently with the qualitative ones.

In NVIVO, all of these questions are listed under interview 1 because it makes more sense for analysis to group the questions together by respondents, allowing for the carving up of themes and coding purposes. The ability to carve up themes and, for coding purposes, layering the questions together by respondents made more sense for the analysis. I have separated them by the question, which breaks up each set of interview sets and shows the iterative chronology of the process. In some interviews, multiple attempts were required due to the nature of an operational Business. There were times when Frontline Managers had to abandon the interview to address pressing issues in their operation, as per their priorities. On every occasion, I supported the need for each Manager to prioritise service issues over the interviews. We rescheduled and continued without compromising the

quality of the information gathering process. Several follow-up conversations took place, during which relevant comments were added to the interview file under the corresponding question being reexamined.

I wanted to emphasise the remarkable responses, as there is a great deal to be learned from studying the responses in their pure form, the multitude of insights and knowledge gained from Frontline Managers, with whom I had previously collaborated successfully in developing tools to support them and their teams, was invaluable. Throughout a two-year period leading up to this interview phase, we established a strong level of trust. Consequently, I conducted the interview in a direct manner, consistent with our prior interactions. I hoped that my inquisitiveness and genuine interest in their responses would be sufficient to elicit sincere and unfiltered feedback. For the most part, that is exactly what I received and even more, than I had anticipated.

## 5.6 Qualitative Question 1

### What is our purpose?

This question was intentionally framed as the first one because there seemed to be a disconnect of purpose in Dahlsens between Frontline and Support structures. Purpose alignment was one of the attributes or identified success factors that the literature review led me to. I began with the intention of prompting Frontline Manager respondents to consider factors that impact their operational control beyond pure operational disciplines, thereby aligning with the purpose of immediate engagement.

The question simply seeks their view without any preamble that could potentially taint their view on the matter at hand. I believed that prioritising this question first would enhance its purity and potentially elicit more meaningful responses.

The unfiltered responses from Frontline Managers are listed directly below.

### Question - What is our purpose?

- ★ *Our purpose is to serve our community, but we need to make money, so profit is top of the list.*
- ★ *To provide a service to customers, service provides for repeat business which will bring the profits.*

- ★ *Make a profit and be sustainable.*
- ★ *To make money for Dahlsens and keep my team employed.*
- ★ *Supplies to the builder, it should be straightforward, but folks do different things which don't fit. We dabble in lots of stuff which doesn't work because we do it half-assed. This stuff doesn't line up with our service needs to customers.*
- ★ *Service is critical, but we need to make a profit. Service provides for profit.*
- ★ *To make money for Dahlsens and to also serve customers.*
- ★ *Keep builders happy, go above and beyond on service.*
- ★ *Supply materials to our customers.*
- ★ *We need to hit our budget and make money to keep our jobs.*
- ★ *To make a profit for Dahlsens. I need to hit my budgets, we are constantly talking about P&Ls, and what to improve but not really how to improve it (Eg - margin and freight recovery) I have been doing this long enough to know what I need to do and I can work the angles to manage the expectations on P&Ls but my way. My way is through consistent service; if our customers come back, the rest will be ok.*
- ★ *Service our customer base, and materials. That is my purpose and that of my team; it's not the same as support office; they do not help me do DIFOT.*
- ★ *To serve the industry. Dahlsens is a family oriented business, and we need to tap into that a lot more. We need to have clear comms between us and our customers. We need to be smarter in how we stop over-committing. Delivering times are critical, and we need to be better at it. Slots would be good.*
- ★ *We make margin, buying and selling goods. We need to manage costs and hit a budget.*
- ★ *Is to buy and sell product, do it in as uncomplicated way as possible, to get a 10/10 customer experience.*
- ★ *To help our customers, to be different, to provide service.*
- ★ *Our purpose is about profit.*
- ★ *my purpose is to lead and grow a team that can be successful, sustainably. From a Business, it's about profit and being part of our community.*
- ★ *To put money in big John's pocket.*
- ★ *To serve builders and make sure their jobs run smoother.*

### 5.6.1 Observations

#### Question - What is our purpose?

Purpose within Dahlsens may seem ambiguous.

Theme - Profit before service - A notable theme that emerged from this first question was the alignment towards profit as Dahlsens' purpose, as indicated by both quantitative responses and the qualitative feedback from Frontline Managers, highlighting a focus on profit rather than service. Follow-up questions can either build upon or challenge this emerging theme, aiming to further explore or potentially refute the notion of profit as the primary purpose within Dahlsens.

In the qualitative comments provided by Frontline Managers, a cluster of responses emphasised the significance of P&Ls (Profit and Loss statements) and budgets as key targets to be achieved, seemingly driven by directives from their superiors. This is something to explore further. Within the realm of "what's important to my boss is important to me," Frontline Managers expressed a sense that their assigned purpose revolved to some extent around profit. This perception was reinforced by the skewed quantitative responses to Q2 and Q3, where profit appeared to hold more significance than service in terms of purpose. Additionally, the comments below are excerpts from the comprehensive list of qualitative responses to the question - What is our purpose? These excerpts more explicitly indicate that profit is perceived as a job requirement on the frontline. The responses here represent 9/20 or 45% of respondents.

- ★ *We make margin, buying and selling goods. We need to manage costs and hit a budget.*
- ★ *To make profit for Dahlsens. I need to hit my budgets, we are constantly talking about P&Ls*
- ★ *We need to hit our budget and make money to keep our jobs.*
- ★ *Make a profit and be sustainable.*
- ★ *To make money for Dahlsens and keep my team employed.*
- ★ *Our purpose is to serve our community, but we need to make money, so profit is top of the list.*
- ★ *To put money in big John's pocket. (John Dahlsen is the owner of Dahlsens)*
- ★ *Our purpose is about profit.*
- ★ *Service is critical, but we need to make profit. Service provides for profit.*

Theme - Service as a beacon - Another prominent theme that emerged was the connection between delivering excellent service and achieving the required profit. Some Managers mentioned their approach of providing exceptional service to customers while also fulfilling the demands of their superiors to generate profit, by focusing on service to achieve both goals. In interviews, this theme emerged too infrequently but powerfully as a potential opportunity for future alignment, integrated within other questions. Those striving to prioritise service also highlight instances of unsupportive behaviour from the Support office when it comes to frontline efforts in delivering excellent service and ensuring DIFOT to customers. The managers who provided the responses below were all seasoned Frontline Managers who, in their own words, possess the expertise to navigate the system in a way that delivers P&L results to the bosses while maintaining a strong focus on service. These managers knew how to handle the distractions from Support Office to mitigate any effect on their ability to lead their teams toward providing customer service. This group represented 4/20 or 20% of respondents.

- ★ *Service is critical, but we need to make profit. Service provides for profit.*
- ★ *Service our customer base, materials. That is my purpose and that of my team; it's not the same as support office; they do not help me do DIFOT.*
- ★ *I have been doing this long enough to know what I need to do and I can work the angles to manage the expectations on P&Ls but my way. My way is through consistent service; if our customers come back, the rest will be ok.*
- ★ *To provide a service to customers, service provides for repeat business which will bring the profits.*

Emerging theme - Support Office not supportive - Another theme appeared to be simmering just beneath the surface among frontline Managers. The following two comments highlight counterproductive actions by the support office, hindering the Frontline teams' efforts to enhance customer service. These two comments frame a possible theme specific to opposing sides with different espoused purposes. These two comments also directly align with the "service as a beacon" group, which acknowledged the impact of Support office distractions. However, their commitment to prioritising service enabled them to remain undistracted. Frontline Managers are instructed that their primary responsibility is to prioritise service. However, those very same Frontline Managers pointed to profit being Dahlsens purpose considerably more so than service in the quantitative questions 2 and 3. The pointed comments below may develop further into another theme.

- ★ *Service our customer base, materials. That is my purpose and that of my team; it's not the same as support office; they do not help me do DIFOT.*
- ★ *Supplies to builder, it should be straightforward, but folks do different things which don't fit. We dabble in lots of stuff which doesn't work because we do it half-assed. This stuff doesn't line up with our service needs to customers.*

Note: The reference to folks engaging in different activities is specifically directed towards the Support Office's attempts to provide assistance that, unfortunately, falls short of being helpful. Further exploration of this emerging theme will be discussed in greater detail during the subsequent interviews.

### 5.6.2 Insights

#### Question - What is our purpose?

The responses highlighting profit being ranked higher purpose-wise than service, were interesting, particularly for a service-based business like Dahlsens, which has been dedicated to serving customers for over five generations. I was taken aback by the magnitude of responses to the question on purpose, as well as the quantitative questions 2 and 3 that explored the dichotomy between purpose as service or profit. What surprised me was the explicit manner in which frontline managers highlighted profit as a hindrance to service – a sentiment I had sensed in earlier discussions, but I did not anticipate it to be so prominently emphasised or directly associated with being a barrier to service.

The qualitative responses were raw and revealed a deep sense of frustration, indicating a significant constraint on the ability of frontline leaders to fulfil their responsibilities. Many frontline managers expressed their emotions while addressing this question. A considerable number of frontline managers appeared deflated and defeated when considering the impact of profit obligations on their capacity to deliver satisfactory service, which ironically affected their P&L outcomes. To be honest, I had an awareness of some of these sentiments, but I had not directly questioned frontline managers in the same manner as this research question did. The emotions expressed in the responses, which shaped the emerging theme, indicate the need for follow-up questions to delve deeper into this fundamental disconnect.

This question elicited unexpected emotions, and as the first question, it established the tone for the subsequent questions. It has significantly influenced and shaped the trajectory of my investigation, which, from the beginning, aimed to provide support and assistance in potentially alleviating some of their frustrations. At the very least, they swiftly recognised that my approach was objective, driven by genuine curiosity, and characterised by respect and attentive listening. This seemed to strike a chord with them, leading to a rapid and open sharing of their thoughts and experiences. I was overwhelmingly surprised by the level of emotional attachment that Dahlsens Frontline Managers exhibited towards purpose.

## 5.7 Qualitative question 2

### What is your job?

This question was positioned as the second one with the intention of offering an easier question for Managers who might have found the first question to be overwhelming. The objective was to redirect their attention towards their primary role and gain an understanding of how they perceive the scope of their responsibilities. This question was aimed at helping them ease into the interview process by discussing a topic they are well-versed in, allowing them to feel more comfortable and confident as experts in their field. This question also sought to explore whether there were secondary or less emphasised responsibilities that managers considered as integral to their job. I had a suspicion that due to their bosses' lack of emphasis on service, managers might have their focus diverted from core service-related duties to some extent. This question was set to explore these underlying questions.

Question - What is your job? - The complete responses are provided below

- ★ My job is to coordinate my team and customers and deliveries, stock, profit and safety. Profit is important and we are here to make money.
- ★ stock, dispatch, inventory, ordering and sales.
- ★ Is to manage and train my team and make the Branch the Branch profitable.
- ★ Lead the team, communications is a big thing within the team, they need updates on how we are tracking. I try and do that comms update in two sessions, this is how this links into what you do. Making a profit is crucial and how that connects to their job.

- ★ We are under resourced and end up being inefficient because we are too lean. Cartage is affected because we are inefficient. More resource would help here. I try and keep the reps in line, but they make promises the operation cannot keep. I try and hold this operation and team together, but the biggest thing which hurts us is not enough people trained properly.
- ★ everything, hold the team together, keep them focused and realign them when they are off track.
- ★ help my team try and serve customers.
- ★ lead my team in the right direction, to drive sales. Look after my team like family, empower the team, trust them and give them the support.
- ★ supply materials to our customer.
- ★ My job is to make money for Dahlsens. My job is to shield my team from things support office want us to do. We need my team to serve customers and nothing else. To help my team be better.
- ★ To hold it all together, keep my team from blowing a fuse and manage all the external expectations.
- ★ leadership, relationship with customers and leading the team. Developing the team, processes etc, to give DIFOT
- ★ Manage what people do and be clear about our expectations.
- ★ Fulfilling orders, enough stock. Check materials, lead time for stock, we just need to check we have all items for you. Pricing points are break down areas from a support perspective.
- ★ My job is to ensure we have a competent and cooperative selling and operations team.
- ★ My job is to be counsellor, yardie, office team, gardener, account manager, stock champion, accountant and manager.
- ★ To hold this thing together. Really, to serve our customers, we try our best but it's tough. I am not engaged with decisions other people make for me. The term, just a manager is used a lot with Managers. The business does not engage me as part of deciding what it is going to do. Why is that? Do I have nothing to offer? I am not involved in setting up customer pricing, and Merch make many decisions for us which I am then responsible for whether I like it or not. I end up with the inventory if it doesn't move.

- ★ My job is to be entrusted by the family to make money for them. Service is a step along the way and linked with profit and to do it the right way with happy people etc.
- ★ make sure the team does their job to make sure the customer gets their job done.  
Be honest with customers and don't overpromise

### 5.7.1 Observations

#### What is your job?

I was not surprised with the results here, with a broad mix of tasks and responsibilities listed. I was pleasantly surprised to discover that a significant portion of their attention is devoted to core customer service, primarily achieved through an emphasis on keeping their team aligned with their roles and a heightened focus on DIFOT. Shielding their team from the support office ranked in 5th place, while profit considerations came in 6th. Notably, both of these potential service distractors ranked lower than the team, customers, and DIFOT in terms of importance. Profit ranked at half or even less compared to manage team/focus team and DIFOT - general. So whilst Frontline Managers ranked profit as a high priority in terms of Dahlsens' purpose, it ranked in the middle of the table when Managers assessed their own job roles.

The scores presented in the table below are the result of analysing and collating the comprehensive responses provided by the managers. The comments were carefully interpreted and consolidated to generate these scores.

**Table 5.2 - Manager responses - Job**

| <b>Q. What is my job? - tasks listed</b> | <b>Tally</b> |
|------------------------------------------|--------------|
| Manage team/focus team                   | 16           |
| DIFOT - General                          | 14           |
| Support customers                        | 13           |
| Support team                             | 12           |
| Shield team from support office          | 8            |
| profit                                   | 7            |
| organise deliveries                      | 5            |
| stock                                    | 4            |
| inventory                                | 4            |
| ordering                                 | 4            |
| sales                                    | 3            |
| safety                                   | 2            |
| resourcing/training                      | 2            |

### 5.7.2 Insights

#### What is your job?

Emerging theme - Support Office not supportive - There were additional responses that highlighted the connection between the Support office and various distractions or a lack of support.

Pragmatically, Dahlsens Frontline Managers demonstrate their ability to prioritise core service delivery by managing and focusing their teams towards tasks related to DIFOT.

- ★ The business does not engage me as part of deciding what it is going to do. Why is that? Do I have nothing to offer?
- ★ I am not involved in setting up customer pricing, and Merch make many decisions for us which I am then responsible for whether I like it or not.
- ★ To hold it all together, and manage all the external expectations.
- ★ My job is to shield my team from things support office want us to do.
- ★ Note - “External expectations” - Support Office expectations (subsequently clarified by respondent via follow up)

### 5.8 Qualitative question 3

#### What is great service?

This question serves as a fundamental baseline to determine the Frontline Manager’s perspective on what constitutes a benchmark for excellence. Within this question, I prompted managers to consider whether they are able to achieve exceptional service, the frequency of such achievements, and the factors that hinder their ability to achieve them more frequently. It encompassed multiple sub-questions aimed at understanding their experiences and identifying the constraints they face in delivering great service. It’s a door-opening question and holds significant value as a part of a qualitative interview set. By being an open-ended question, it prompts further discussion and serves as an ideal springboard for the adopted iterative constructivist grounded theory approach. I had hoped this question would prompt Managers to speak of the gap between where they would like to be and where they are; that space in between represents an upside opportunity for Dahlsens from a Business perspective, making it an important aspect of this research since

Geoff Dahlsen had agreed to sponsor my Doctoral research as long as we, Dahlsens could use the findings to support Dahlsens in their journey towards improvement and progress.

Question - What is great service? - The complete responses are provided below.

- ★ Great service is the ultimate to our customer, to have us as a supplier of choice. Service is about comms to customers, our DIFOT. We should never be scared to ask the question to our customer about service.
- ★ We are not clear about what breathtaking service actually is.
- ★ NPS surveys aren't always highlighting our service issues, they are a guided thing.
- ★ Service is disconnected from making money, we talk about breathtaking service, but all our focus is on making money, P&Ls, margin and costs.
- ★ To get an order out right, every time and the customer comes back. A returning customer.
- ★ Is to have all the product we need to help our customers out as best we can.
- ★ It means a lot, be on top of your game so we can stay ahead of the competition; word gets around pretty quick when we aren't on top of our game, and customers change suppliers.
- ★ stuff on site when they need it; what they expect us to send.
- ★ Customers come back and then buy more from us and all at a better margin. Less price shoppers.
- ★ Provide a service level that makes money for Dahlsens.
- ★ put a smile on customers face, and do the unexpected.
- ★ supply materials to our customers.
- ★ We want to do it but don't know what it takes. This is coming (note: Focus on service added as part of follow up interview) which is going to be great, then it is replaced by something else. We just hold on tight and try our best.
- ★ **customer comes back**.
- ★ Getting DIFOT for customers, also stock on hand.
- ★ Where we - text orders, process and send out next day, always.
- ★ The best service we can give to customers, with everyone working for our customer, not their own agenda (Note: reference to Support Office and their agendas not focused on service - part of follow up interview). Aren't we all supposed to be

doing this for our customer? Surely if we can give better service, we will make more money, so everyone wins.

- ★ These are words yet not clear enough in detail of what it means. What does this look like? It's about DIFOT and quote return dates. Agree on the non negotiables and live them collectively. Do we have the right staffing or skill set levels?
- ★ Should be easy to do business, easy for our customers. Enough staff and vehicles and tablets and tools to get the job done. It's too hard.
- ★ I know what I think service is - price, product, availability, destination shopping.
- ★ customer comes back.
- ★ It means that when I don't hear anything, that's good news, it's going above and beyond. We shouldn't have to tell people how to act, we show them and train them and then trust them.
- ★ Is getting it right, first time. If you can't, then think outside the square to figure it out.

### 5.8.1 Observations

#### What is great service?

In the simplest and most pragmatic way, one answer sums the measurement of great service - *Customer comes back.*

I was pleasantly surprised by the level of optimism expressed by the respondents regarding their perception of what great service entails. Despite the challenges, pain points, and occasional failures observed within their operations, it was truly inspiring to witness their unwavering optimism and shared vision of what exemplary service should be like.

Responses were also overwhelmingly pragmatic in nature, with respondents focusing on what they can control, such as their teams, and the tools and equipment at their disposal to better serve their customers.

Theme - Service as a beacon - The impact of purpose misalignment flows through responses here, highlighting the disconnect at a service level. Several comments emphasise the importance of prioritising service excellence as a means to achieve profits, rather than solely focusing on profits without considering the quality of service provided. The responses here represent 4/20 or 20% of the respondents.

- ★ Should be easy to do business, easy for our customers. Enough staff and vehicles and tablets and tools to get the job done. It's too hard. (note: profit focus forces underresourcing, less equipment (vehicles) than is needed to do the job right)
- ★ Surely if we can give better service, we will make more money, so everyone wins.
- ★ Customers come back and then buy more from us.
- ★ Service is disconnected from making money, we talk about breathtaking service, but all our focus is on making money, P&Ls, margin and costs.

Emerging minor theme - Unclear expectations - service. The four responses below indicate that these individuals have a lack of clarity regarding the expectations placed upon them in terms of delivering great service. Frontline Managers are expected to deliver exceptional service, as it has been clearly outlined that the purpose revolves around profit.

- ★ We are not clear about what breathtaking service actually is.
- ★ We want to do it but don't know what it takes.
- ★ These are words yet not clear enough in detail of what it means.
- ★ I know what I think service is.

### 5.8.2 Insights

#### What is great service?

The comments presented here suggest that purpose misalignment is a contributing factor, which was more prominent than I initially anticipated. However, it is noteworthy that frontline Managers expressed their optimism and framed their perspectives around a vision of what could be, presenting a “to be” state that they aspire to achieve. After all, it is understandable that they may not have a different frame of reference, except for a few individuals who have experienced a support system with a stronger focus on service outside of Dahlsens.

It would be intriguing to delve further into the optimism expressed by Frontline Managers to explore the possibilities of where they envision their service levels could reach. Understanding their perspective on the potential for delivering even better service than they currently can would provide valuable insights. Iteration may help evolve this line of inquiry.

I had anticipated a stronger presence of pessimism and a sense of defeat in the responses to this question. Maintaining objectivity throughout this process is a constant challenge, especially considering my previous immersion in the Dahlsens work environment for a period of two years before embarking on this Doctoral journey. I must allow the data and information and the responses from respondents to shape the iteration of this research.

## **5.9 Qualitative Question 4**

Would our customers add value in defining how we should serve them? How or how not?

Dahlsens have not sought meaningful input or guidance from customers on how we could be a better supplier or Business partner. The relationship between Dahlsens and its customers appears to be quite one-sided, with the customers often dictating the terms. This imbalance is largely due to Dahlsens' inability to consistently deliver on its service promises to these customers.

Dahlsens does conduct NPS surveys periodically, but it appears that the list of customers to survey has been carefully selected or manipulated to present favourable results, rather than genuinely seeking opportunities for improvement. Managers in each Branch along with their bosses pick the customers for each NPS survey. Following the highlighting of this approach, Dahlsens has committed to a different selection process for the next NPS survey. Whether this change is driven by a desire to address criticism or a genuine effort to identify improvement opportunities is yet to be determined. Sceptics hold their own perspectives, and unless Dahlsens demonstrates a sincere commitment to improving their service at all levels, the underlying principles behind manipulating the selection process are unlikely to change. Unless Operational leadership genuinely embraces the notion that substandard service can serve as an incredible gift and opportunity to strive for improvement, meaningful change is unlikely to occur. Currently, there is a prevailing tendency to sweep things under the rug and doctor the selection process for NPS surveys and other interventions, making it easier to avoid confronting and addressing underlying issues. In my job, I have failed to positively influence Operational leadership in Dahlsens. Frontline leaders and all their team members are patently aware of the gaps in being good at customer service. After all, it is the Frontline Managers who experience the daily challenges firsthand. They also encounter the same customers in their regional towns, whether it be at the supermarket, netball training, or other social settings. These encounters serve as constant reminders

that Dahlsens may have disappointed them on that particular day. The practice of sweeping things under the rug and manipulating data appears to be more prevalent at higher levels within the organisation, rather than embracing the opportunity to address the issues and strive for improvement.

Despite utilising a curated list, the NPS results have consistently been poor to average at best and the actions taken to address these results have focused more on mitigating immediate concerns rather than delving into the root cause of these complex problems.

Question - Would our customers add value in defining how we should serve them? How or how not? - The complete responses are provided below.

- ★ Our customers would add value to figuring out what breathtaking service meant to them. Major customers via S/O, yet Branch customers from Branches. Reps have a part to play in all of this service gap issue.
- ★ Yes, they would provide some great guidance; they know what we get right and wrong. They may also have some ideas we have not thought of but would tell us if we asked them.
- ★ I reckon customers would help, the NPS will help.
- ★ For sure, they know what's going on and where we fall down. They may even have ideas about how we can do other things better than just service.
- ★ Yes, they know what we can do better; the reps may be helpful here also
- ★ Yes, they know we stuff up; they feel it more than anyone. They will tell us we don't call them when we need to change a delivery early enough and that our pricing files are a mess
- ★ Yes, they know where we let them down
- ★ 60% no, volume builders no, they expect over and above. The other 40%, they can help
- ★ Some would. Others don't know how they might help us. But we know what we need to do, we need to serve our customers and we know we are not good at that, not as good as we should be.
- ★ They might help support office understand where they are not being serviced which might help us
- ★ Yes, particularly in how to improve pricing files, our quote communications to them. Just ask them

- ★ Possibly, good builders yet not always good business people
- ★ I would add on questions specific to DIFOT.
- ★ Yes, for sure. Our customers would point to us being more consistent with service, we don't get it right enough.
- ★ We know enough now what our customers want from us.
- ★ We need to speak to customers on what they want from us better
- ★ Absolutely, our customers know where we mess up and we don't know enough about them or the things that they struggle with in their business
- ★ Yes. They know how we impact their business, our communication with them is often too late and we hurt them sometimes. We seem to only care about losing their sales rather than looking after them because they are our partners. We need each other but can't we do it for the right reasons?
- ★ Yes, customers know us and our operation best. They don't understand why it's so hard for us to get it right for them though so they won't have all the answers.
- ★ what do I get out of it, customer benefits. Be careful in their motivation, it might be all about what they can get out of it, but yes, they do know us well and know where we let them down.

### 5.9.1 Observations

Would our customers add value in defining how we should serve them? How or how not?

Customers can help us provide them better service - Absolutely, Frontline Managers enthusiastically embraced the idea that customers play a pivotal role in shaping our service for the better, responding with a resounding “yes.” Multiple responses emphasised the valuable insight customers possess regarding areas where we may have fallen short, which presents an exceptional opportunity for a business striving for improvement. If Dahlsens exhibits a strong commitment to growth, leveraging this knowledge could have a profound impact on fostering greater trust and strengthening relationships with customers. The potential is truly remarkable. However, it is important to acknowledge that Dahlsens, as a business, has been recognised by its customers for delivering less than perfect service and has not displayed a genuine commitment to meaningful improvement thus far, aside from the ongoing Continuous improvement program that offers tools without addressing the necessary mindset and behavioural changes required for substantial progress.

Managers appear to view the concept of engaging customers in the process of enhancing our service as a positive and beneficial idea. Managers, having limited success in highlighting service gaps, acknowledge the vital role customers can play in driving change in this area. It is commendable to witness the fearlessness of Managers in acknowledging the truth about Dahlsens and their own shortcomings in meeting expected standards. Despite this, they maintain a positive outlook towards the idea of customers highlighting their concerns and issues. Their admirable integrity and inspiring actions evoke a wishful hope that their courage could influence their superiors and those further up the hierarchy.

### 5.9.2 Insights

Would our customers add value in defining how we should serve them? How or how not?

Managers seem to feel positive about their customers being part of helping improve Dahlsens' service to them. That position can be leveraged within Dahlsens to move towards a more professional and balanced relationship with customers, centered around service quality.

Emerging theme - Support not supportive - Additionally, the undercurrent of the support office disconnect came through in some of the comments, although not prominently emphasised.

- ★ Yes, particularly in how to improve pricing files, our quote communications to them. Just ask them. (pricing files are supplied from a support office function)
- ★ They might help support office understand where they are not being serviced which might help us
- ★ They will tell us we don't call them when we need to change a delivery early enough and that our pricing files are a mess

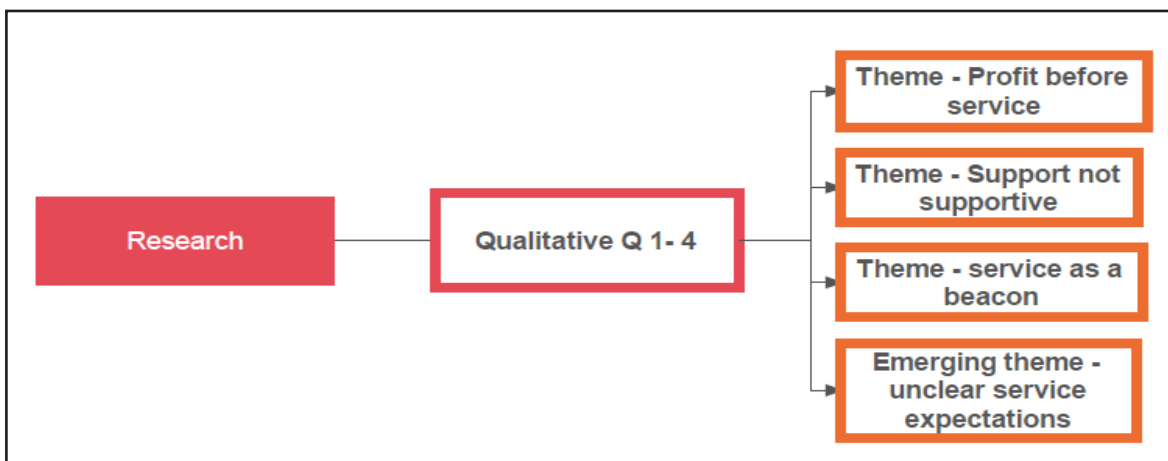
## Recap of the first round of interviews

The first four questions helped shape the quantitative interview questions, particularly in assessing the supportiveness of support office, the focus on purpose, and the Frontline Managers' current capabilities in effectively performing their roles and delivering excellent service.

### 5.10 Emerging themes

The three themes coming through from the first four questions are listed below in the table - themes emerging.

**Figure 5.6 - Themes emerging**



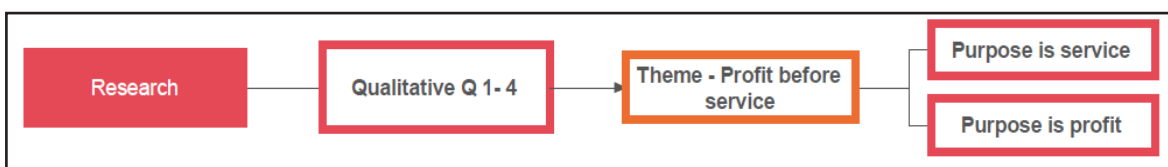
### 5.11 Iteration and further probing via quantitative questions

#### 5.11.1 Theme - Profit before service

Questions designed to probe the purpose are very specific here

- Q2 - To what extent is our purpose about great service?
- Q3 - To what extent is our purpose about profit?

**Figure 5.7 - Theme - Profit before Service**

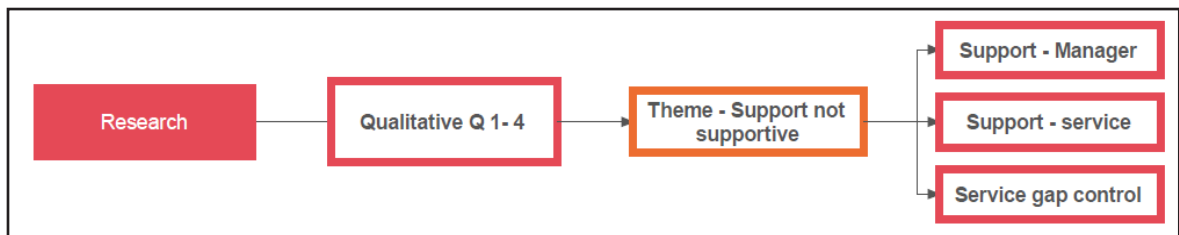


### 5.11.2 Theme - Support not supportive

Q9 probes specific to the support of Frontline Managers and Q10 specific to helping deliver great service. Q5 points to the distractions generated by the Support office.

- Q9 - How well does the Support office help make your job easier?
- Q10 - How well does the Support office help you deliver great service?
- Q5 - For any service gap, how much of that is in your control?

**Figure 5.8 - Support not Supportive**

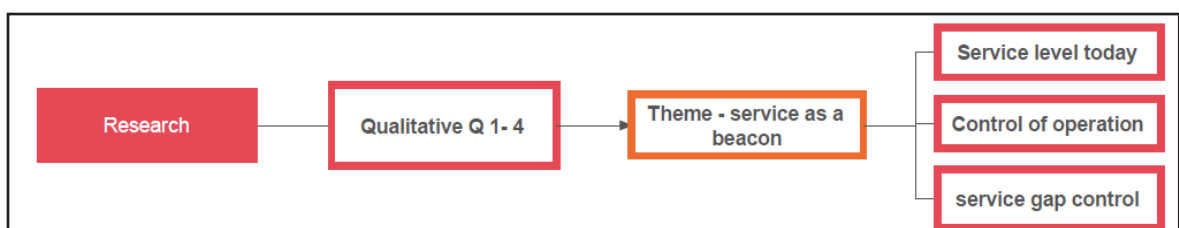


### 5.11.3 Theme - Service as a beacon

Service focused questions (1 & 4) below are designed to directly assess the level of control that each respondent, as a Frontline Manager, feels they have. Additionally, we have included a follow-up question that inquires about our current ability to provide great service immediately. Q5 probes further into the link between service gaps and the distractions spoken of relating to the Support Office.

- Q1 - To what extent are you in control of the Business you run?
- Q4 - How are you able to deliver great service today?
- Q5 - For any service gap, how much of that is in your control?

**Figure 5.9 - Service as a Beacon**



#### 5.11.4 Emerging Theme - unclear service expectations

None of the quantitative questions probe directly into this emerging theme, nor do the follow-up qualitative questions.

### Quantitative Questions

**Table 5.3 - Scaled Quantitative Question Responses - Round 1**

| Scaled Quantitative questions                                         | 1=low: 10=high |
|-----------------------------------------------------------------------|----------------|
| Q1. To what extent are you in control of the Business you run?        | 6.05           |
| Q2. To what extent is our purpose about great service?                | 5.75           |
| Q3. To what extent is our purpose about profit?                       | 8.2            |
| Q4. How well are you able to deliver great service today?             | 5.7            |
| Q5. For any service gap, how much of that is in your control?         | 34.25%         |
| Q6. How engaged do you feel as a leader in Dahlsens?                  | 5.85           |
| Q7. How empowered do you feel?                                        | 5.65           |
| Q8. How well do you know your job?                                    | 8.4            |
| Q9. How well does the Support office help make your job easier?       | 3.15           |
| Q10. How well does the Support office help you deliver great service? | 3.10           |

### 5.12 Insights from scaled quantitative data

Much of the insights from the scaled quantitative data will be represented in an interwoven way with the qualitative outputs, observations and insights as those themes emerge.

#### 5.12.1 Theme - Purpose is profit over service

This theme emerged via the initial qualitative questions and the responses show a clear result on Dahlsens purpose - profit over service.

- Q2 - To what extent is our purpose about great service - **5.75**
- Q3 - To what extent is our purpose about profit - **8.21**

Numerous Managers commented that even though they were aware of Dahlsens' focus on profit as its purpose, their response emphasised on service since they believed that providing excellent service would ultimately lead to profit. Even though the results leaned towards profit, the true outcome would have been even more skewed in that direction.

### **5.12.2 Theme - Support not supportive**

The Support office's assistance in making Manager jobs easier (Q9 - **3.26**) and their contribution to delivering great service (Q10 - **3.22**) received the lowest scores. This theme, which emerged through the qualitative interview process, now seems further validated via these strong responses. Both these answers represent, by far, the lowest scoring in the quantitative question list and correlate with numerous statements by respondents in various qualitative questions. Additionally, The extent to which Managers felt they were in control of service gaps, rated very low at **34.25%**. This implies that for service-related issues, two-thirds of them were beyond the control of Frontline Managers. The interviews highlighted multiple instances where distractions from the Support Office were cited as a contributing factor.

### **5.12.3 Theme - Service as a beacon**

The fact that Frontline Managers feel only 60% in control of the operations they run underlines the service issues within Dahlsens and emphasises the need for support for both Managers and frontline teams. Q4 ranked even lower, indicating that Managers feel they are able to deliver great service only slightly over half of the time. Similarly, Q5 highlights that the majority of the gaps are beyond the control of Frontline Managers and their teams.

- Q1 - To what extent are you in control of the Business you run - **6.05**
- Q4 - How well are you able to deliver great service today - **5.75**
- Q5 - For any service gap, how much of that is in your control - **34.25**

### 5.13 Qualitative question 5

In what ways would having a clearer purpose help you and your team do a better job?

Follow-up questions - iterated from the first four questions

This question arose from the insights gained from the first four questions, which revealed a potential misalignment in purpose. It also raised the possibility of a developing disconnect with the Support office, warranting further exploration.

The purpose of this question is to explore potential possibilities. Many responses reflected an optimistic outlook, and this question aims to leverage that sentiment, fostering further optimism and curiosity to see where it leads. Frontline Managers, who often face discouragement from their superiors, have expressed appreciation for the curiosity and respect I have shown towards seeking their insights and guidance. They seem to find enjoyment in being valued and respected in this process. In response, they expressed their desire to leverage that trust, and this question provides an opportunity for them to further build upon that foundation of trust.

No specific mention is made regarding the type of purpose, which could encompass various aspects such as profit or the legacy of a fifth-generation family-owned business. It opens up the possibility for different interpretations and considerations of what that purpose might entail.

Question - In what ways would having a clearer purpose help you and your team do a better job? - The complete responses are provided below.

- ★ At this moment we are 50/50 on consistency of service. Taking them to the footy should be a thank you and not a bribe. Marketing lever this by suggesting customers we need to build business with and invite them to the footy.
- ★ It would be good so those imposing dumb things onto us had a better idea how to provide us service. Don't make our job harder, why do that?
- ★ I am pretty clear on what I need to do with my team, I wish the office were as clear about our priorities
- ★ I reckon I am pretty clear about our purpose within the four walls of this Business. It would be helpful if support office had a clearer purpose linked to our service rather than profit

- ★ We are shackled by resource more than anything else, so if that purpose is about service then we should get more resource to help deliver that service
- ★ It would help line us up with service and why all the things we do matter
- ★ We know what we need to do, it might help with distractions
- ★ Yes and no, need to see it to believe it. The purpose will need to be explained clearly, we will need to help in painting that picture
- ★ I just need to work more hours when others put things on us, that's what happens when I get distractions, so yes, having a clearer purpose will help because others may not distract me so much. I know what I need to do, supply materials to our customers, but distractions stop me and my team being able to do that. So if others were clearer about how to help us, maybe it might help me
- ★ It would help with support office not throwing things at us which don't make sense or help us do better service. We cant manage to serve our customers as it is and then you have these folks asking us to do things they want, so frustrating
- ★ We would be working together. We don't do that now, we are trying to keep it together and give customers adequate service but we fail on that every day. Then we have others asking us to do things that take us away from DIFOT
- ★ Will show support office how they help us. We know what we need to do, if we could get help rather than hinderance doing it, that would be great
- ★ Its up to all of us to do this. I treat this like its my own Business and that's how I operate
- ★ It would allow us to focus on what is important. It would also show others what they need to focus on, rather than what they do focus on which takes us away from service I hope it would mean that we could focus on our customers more, getting that right is always a struggle
- ★ Having a clearer purpose might show others where we need their help
- ★ If the business was clearer about what it asks of us, things change all the time and its open slather on us from the office. Some of these things are not helping us to serve our customers, in fact, they limit our chances of serving our customers properly each day
- ★ Yes, if the Business being clearer about what it asks of us. It might be nice if it was more about what our expectations are of them supporting us, how they could do that better

- ★ A clear purpose might help others see what we need to do, this DIFOT stuff should help show how much pressure we are under and maybe that will help others support us better
- ★ It would be helpful if credit office particularly understood more about what our job is, its to serve customers not do their bidding all the time and they expect us to drop everything. Our customers should come first but they don't in the eyes of head office wanting something from us.
- ★ not sure about purpose, we know what we need to do but others don't seem to get it and that puts pressure on us taking care of our customers

### **5.13.1 Observations**

Question - In what ways would having a clearer purpose help you and your team do a better job?

The responses received here are incredibly impactful. These responses strongly indicate a significant alignment with purpose, particularly emphasising the importance of service – repeatedly and emphatically. In nearly every comment, except for one, the pointed observations suggest that having a purpose aligned with service would greatly assist Frontline Managers and their teams in providing better service. That's 19/20 or 95% of the respondents. Furthermore, it is suggested that a purpose aligned with service would also facilitate the Support Office in providing better support, or at least, minimise any hindrances or distractions that could impact the frontline staff.

### **5.13.2 Insights**

In what ways would having a clearer purpose help you and your team do a better job?

An emerging perspective suggests that in a service-oriented business, a purpose centred around service holds greater significance compared to an aligned purpose that is not primarily service-based.

Frontline Managers strongly support a service-based aligned purpose, as it not only provides them with guidance but also assists in effectively guiding support staff.

## 5.14 Qualitative question 6

In what ways do business expectations of you change?

Follow-up questions - iterated from the first four questions

This question relates to the persistent sentiment expressed by Frontline Managers over time, where they feel constantly redirected or misdirected onto what they describe as the latest *shiny new thing*. The themes emerging from the first four questions point to purpose before profit and support office distractions. This question delves deeper into the line of inquiry regarding changing expectations, aiming to explore and understand this aspect more thoroughly.

Dahlsens is a Business that has experienced remarkable growth within a short period, necessitating significant structural, directional, positional and strategic transformations. Recognising the importance of enhancing fundamental aspects such as customer service, Dahlsens, under the leadership of Geoff Dahlsen, is determined to excel. In line with this objective, I was appointed to a newly minted role of Continuous Improvement for the group of Businesses. In due course, additional roles and transitions occurred, and as the program of work I devised was set in motion, a digital transformation function emerged. Furthermore, national positions surfaced in various areas including IT, People and Culture, procurement, merchandise, property, and finance. A Project Management Office function (PMO) was established, and a national executive leadership team was formed.

Before the implementation of this new structure, Dahlsens lacked a coordinated direction and strategic framework. Projects were undertaken without proper discipline or structure, and there was a lack of rigour in their execution. Consequently, numerous enthusiastic individuals were vying for attention, eager to have their ideas realised. Frontline Managers have expressed concerns about being distracted and have noted a lack of support from support office, among other issues. This dissatisfaction largely stems from the absence of meaningful consultation with Frontline Leaders and their teams, which include functional SMEs in the specific areas where changes are being sought. Unfortunately, these functional experts are rarely consulted as an integral part of the change process. Consequently, a continuous flow of support personnel has attempted to impose their ideas on frontline teams, only to encounter failure because these ideas often fail to address the actual challenges faced by the frontline. Simply emailing a brief and hoping for the best does not

constitute effective change management. Branches are always expecting the next shiny new thing to be thrust upon them, distracting them from the core business of customer service. Frontline folks just shake their heads and carry on.

As part of my role in Continuous Improvement (CI), I have actively worked towards influencing the approach of support personnel. Additionally, I have lobbied for and supported the implementation of a PMO at Dahlsens in order to introduce a greater level of discipline and prioritisation to potential projects. Furthermore, I have collaborated with support office folks who possess potentially great ideas, facilitating their evaluation at the concept stage with the assistance of Frontline SMEs before progressing any further. Additionally, operational SMEs are actively included in the design, testing and implementation of ideas. Regrettably, this practice is not widely implemented beyond the collaborative work I have been engaged in with Frontline SMEs.

The newly formed PMO uses a customer service lens/DIFOT lens to evaluate potential projects and applies more disciplined prioritisation techniques to concentrate efforts effectively.

Question - In what ways do business expectations of you change? - The complete responses are provided below.

- ★ How do I get to 90% DIFOT? Review the barriers to that? Free myself up, is important because I need to be able to review what we need and the barriers. Backorders are a killer, inventory is a key input here.
- ★ Why do we keep having to do reporting on stuff in the system, sales forecasting, which is already in the system? P&L reports, why do we have to go into so much detail on things which seem pretty obvious. War and peace. There are obvious please explain items. the P&L is an area where we are shackled. Too much focus on the P&L rather than freight recovery or margin, things we can do something about immediately.
- ★ New roles/tasks - Inventory is an area we need more focus. Freight is not an area of control
- ★ Not so much, I know what I need to do. I think others might feel that because they are conflicted, where I am focused on service first and everything else second. Managers get distracted from support office stuff, I often ignore it if its not going to help us

- ★ From the people that matter, they don't really change. Operationally, we have a say in a lot of things that affect us; from others, they will push what they need.
- ★ A lot of the HR stuff that comes through, we have to sign for everything it seems, like we are school kids
- ★ not so much an issue as not having enough trained resource
- ★ ongoing but usually not from operations. I am not sure whether Bryan and co are even aware of a lot of the stuff. They often get surprised at finding out from one of us. That's not good
- ★ different things all the time that take us away from serving customers properly, we never get to do that properly
- ★ The merch support email is great
- ★ expectations are clear from our RM yet so much stuff comes that they don't know about, those distractions don't help me do my job better, they help someone else do their job. Shouldn't their job in support office be to help me serve customers?
- ★ We get lots of things thrown at us from support office without me or other Managers having any input. They never help us do our job better, they take us away from doing our job, its just frustrating and dumb. And you wonder why we dont rate support office
- ★ always changing and many of them are not our priorities, service, they are other folks needs
- ★ Lots of stuff where support office folks don't understand what we do, the pressures on us and they don't help take that pressure away or give us better ways to do things etc
- ★ Too early for me
- ★ The things we get asked to do, often they don't help us do our job, we cant. With so many competing priorities, its hard to imagine us all working toward getting service right
- ★ The expectations of the Business change all over the place, we are buried at times from all the additional non core work we are asked to do. Refer back to Daryl hardidge and the customer journey
- ★ Where do I start on changing expectations. Support us serving customer and not worrying about your own job; **do whats right for the customer and we will all be ok**
- ★ not from my RM but different things come from other places that don't often help us do our job better

- ★ communication from Support office is a big thing, its not always the buyers, they do a great job. Credit Office don't communicate well. IT is under so much pressure, comms are terrible
- ★ I filter stuff out and much goes in the bin. Take the Christmas party video example, I don't do that crap. Support Office issues are more about what they don't do rather than what they do do. We don't have the collaboration like we used to have.
- ★ Different things asked of us all the time, its up to us to make sure these don't get in the way of service. They do sometimes though

#### 5.14.1 Observations

In what ways do business expectations of you change?

Theme (now a theme) - Support Office distractions/lack of support

Lots of commentaries here highlight the impact of support office on Frontline Managers, expressing concerns about their lack of assistance and how it detracts from their ability to prioritise customer service. The responses here echoed the emerging theme about support office distractions/lack of support. This has now become a prevailing theme rather than just an emerging theme. Here are the specific responses:

- ★ **Different things asked of us all the time**, its up to us to make sure these don't get in the way of service. They do sometimes though
- ★ Support Office issues are **more about what they don't do** rather than what they do do. We don't have the collaboration like we used to have.
- ★ I filter stuff out and **much goes in the bin**
- ★ Credit Office don't communicate well. IT is under so much pressure, comms are terrible
- ★ Where do I start on changing expectations. Support us serving customer and not worrying about **your own job; do whats right for the customer and we will all be ok**
- ★ The **expectations of the Business change all over the place**, we are buried at times from all the additional non core work we are asked to do
- ★ The things we get asked to do, often they don't help us do our job
- ★ We get **lots of things thrown at us from support office** without me or other Managers having any input. They **never help us do our job better**, they **take us**

away from doing our job, its just frustrating and dumb. And you wonder why we dont rate support office

- ★ With so many competing priorities, its hard to imagine us all working toward getting service right
- ★ expectations are clear from our RM yet so much stuff comes that they don't know about
- ★ ongoing but usually not from operations
- ★ From the people that matter, they don't really change
- ★ where I am focused on service first and everything else second. Managers get distracted from support office stuff, I often ignore it if its not going to help us

#### Theme - Service as a beacon

The theme of service as a beacon continued to gain momentum and expand further. Out of the respondents, 5/20 or 25%, expressed their views specifically and optimistically about the opportunity of putting service first. Those specific responses are listed below:

- ★ Different things asked of us all the time, **its up to us to make sure these don't get in the way of service**
- ★ Support us **serving customer** and not worrying about your own job; **do whats right for the customer and we will all be ok**
- ★ How do I get to **90% DIFOT**? **Review the barriers to that?** Free myself up, is important because I need to be able to review what we need and the barriers
- ★ Not so much, I know what I need to do. I think others might feel that because they are conflicted, **where I am focused on service first and everything else second**
- ★ Shouldn't their job in support office be to **help me serve customers?**

Amongst the angst here, there is optimism looking at what might be possible with fewer distractions and more support in the right ways to help Frontline teams provide better service. These solutions constitute an integral part of the next steps. However, it may be beneficial to begin by assisting less experienced colleagues in the areas where certain managers have managed to shield themselves and their teams from distractions. This approach can be pursued if it is not feasible to completely eliminate or adequately mitigate the source of the problem, which is the distractions from the support office that do not contribute to improving customer service for frontline teams.

### 5.14.2 Insights

#### In what ways do business expectations of you change?

This question has served to confirm that non-core matters strongly distract our Frontline Managers from their core responsibilities, such as customer service.

Additionally, a number of comments highlighted that the Regional Manager (RM), serving as their immediate boss, was explicitly not part of the problem being described here concerning the support office. When referring to “bosses,” I am specifically addressing the levels above the RM, those individuals who make decisions regarding priorities and where the focus is directed. The existing respect demonstrated by Frontline Managers towards RMs provide a solid foundation to build upon. It is crucial to shift the focus of RMs towards prioritising service and leveraging their potential as a more influential support mechanism. By placing service ahead of profit in a meaningful manner, RMs can become a powerful tool to support the organisation’s overall objectives.

### 5.15 Quantitative Questions - round 2

These questions offer a mixed-method quantitative perspective complementing the qualitative follow-up questions 5-8, enabling an exploration of the same themes or emerging themes.

Q11 and Q12 give a baseline for Q13 and Q14. The survey results indicate that a clearer purpose would be beneficial, as 13 out of 20 respondents agreed with this notion. The average rating of **6.6** (out of 10) further illustrates the extent to which they felt they need for a clearer purpose. The results of Q13, where all 20 Managers agreed, along with a rating of **8.61** on the extent to which they felt a service-focused purpose would aid their job, are significant and strongly aligned with the qualitative responses. These numbers undeniably underscore the importance of such a purpose for Frontline Managers.

**Table 5.4 - Scaled Quantitative Question responses - Round 2**

|                                                                                            |          |
|--------------------------------------------------------------------------------------------|----------|
| R2 - Q11 - Would having a clearer purpose help you do your job? Y/N                        | 13 of 20 |
| R2 - Q12 - To what extent - scaled (1-10)                                                  | 6.6      |
| R2 - Q13 - If our purpose was service-based - would that help you do your job Y/N          | 20 of 20 |
| R2 - Q14 - To what extent - scaled (1-10)                                                  | 8.61     |
| If you did have that aligned service focused purpose - to what extent would that help you; |          |
| R2 - Q15 - Focus your team? scaled (1-10)                                                  | 7.3      |
| R2 - Q16 - Make your role clearer? scaled (1-10)                                           | 8.9      |
| R2 - Q17 - Your team be able to deliver better service? scaled (1-10)                      | 7.4      |

The further probing questions, Q15-17, highlighted that Frontline Managers expressed a strong belief (as indicated in Q16) that a service-focused purpose would have the greatest impact on their ability to perform their job effectively. They believed that by adopting such a purpose, not only would it benefit their individual performance, but it would also positively influence their teams. Collectively, as a team, they would be empowered to deliver improved service.

### 5.16 Qualitative question 7

What are the primary or non-negotiable things we need to do to give a high level of service?

This question builds upon the previous one probing further into business expectations derived from the emerging themes identified in the first four questions. This question was designed to positively channel the focus of Frontline Managers towards identifying what actions both Dahlsens as an organisation and the managers themselves need to take in order to enhance customer service. It served as a tool not only for the research but also to establish a roadmap for Dahlsens' future improvements. The intention behind this was to serve as a call to action, fostering engagement rather than being critical in nature. Taking into account that many of the earlier responses focused on what Frontline Managers needed from others, this question explicitly placed some responsibility on them by asking: "What are you going to do about your service issues?" It aimed to encourage them to consider their role in addressing and raising awareness about the problems they encounter, such as service inconsistencies and the pressure faced by their teams. After all, your primary accountability lies in delivering exceptional customer service. Until any changes occur, it remains your responsibility to strive towards delivering the best service possible. The

purpose of this question is to help crystalise iterative improvement opportunities, providing frontline Managers with a sense of hope and a foundation to build upon. Additionally, when Frontline Managers drive the agenda, it can instil belief in their capabilities among higher-level managers and stakeholders.

Question - What are the primary or non-negotiable things we need to do to give a high level of service? - responses in full below

- ★ Why do we keep having to do reporting on stuff in the system, sales forecasting, which is already in the system? P&L reports, why do we have to go into so much detail on things which seem pretty obvious. War and peace. There are obvious please explain items. The P&L is an area where we are shackled. Too much focus on the P&L rather than freight recovery or margin, things we can do something about immediately. New roles/tasks - inventory is an area we need more focus and help. Freight is not controlled well.
- ★ Ask them first, attitude toward customers, we run very tight on people, focus on service first, calling customers, pre delivery calls, check off trucks every time. merchandise sending us new things, processes or stuff that don't help us give better service. Ask them to spend more time in Branch to understand us better or maybe speak to us before they do something. its more about aligning our focus. Get support office working with us, not thinking they are always right. Speak to us more
- ★ right tools and people in the right position. Keying is crucial. Get rid of support office
- ★ Support office understanding and being aligned with our service purpose. Its ultimately about profit but we only get to that through service. Service, keying, getting stuff, communicating and delivering it right. people making decisions for us when we should be part of that decision, particularly when we would add so much to the decision and it might even work rather than fail as they often do because they don't talk to us
- ★ staff, resourcing, training is needed, despatch - sheer volume and checking, calls, all about the fundamentals. We need to align reps with what we need, not just what the customer needs because sometimes we give worse service because reps overpromise. Focus on the basics and get them right.
- ★ order keying, get it right, get the delivery date right. its about keying orders right, we need better training to trade desk people. We struggle to keep people on the

trade desk. We need something to bring people through. Ordering of product is an issue because the left hand doesn't know what the right hand is doing. Stock is an issue. Take away the distractions and things that don't help us deliver service

- ★ DIFOT - we need to do our basics properly - we never have enough staff and I never get to manage or lead my team because I am pulled down into the mess all the time.  
Its hard to get more staff
- ★ I would love to see product specialists in Branches. More of a Managers catch up, vid call catchups more often.
- ★ We need to get better support from suppliers on timing of product. Drop us - Laminex is an example. We need everyone who is supposed to support us; bloody support us which means helping us do our job better, not to do their job better
- ★ We need people, the right amount and type. Train them right etc. Need the system, pricing needs to work. Account management - setting up, contracts and pricing. CRM - leads and info - if Rep leaves, there are no notes on anything. Setting up new products. Sending marketing emails which are wrong to customers. BBQ emails with Manager names. No time to manage negative stocks New accounts, pricing issues. Tier pricing is great for margin management, yet for new customers, no help - need to align with other Branch customers price level to start - seems to hard. Need a dedicated team to do stocktakes over the course of the year. we dont see invoices anymore, only send when not receipted - cannot batch until receipted. variances on PO vs whats charged from suppliers are not being flagged. AP paying invoices way over PO value. Vehicle inspections - micro managing. dhalsens are legends - credibility gap at the moment. Just cause youwant something, doesnt mean you get it. dahlsens are legends. Area Manager - more about DIFOT and service and our operations. Coops - customers are not that demanding - shows he is out of touch - that doesnt resonate with Managers
- ★ Comms, with customer and suppliers need to be better. Get DIFOT right
- ★ DIFOT - DIFOT and DIFOT
- ★ DIFOT, service, service and service. We need better comms with customers on shifts in orders. We need to be more realistic with expectations on timing of orders.
- ★ My job is not managing the Branch enough to give the service that we should be giving, I spend too much time managing expectations of support office. My team rely on me, its hard to protect them from all the things that distract us from support

office. POS, cant see any of the pricing and its cumbersome, EFTPOS. Heaps of time taken up by Support Office - stock issues.

- ★ DIFOT - pricing structure that is supported and easy to use, its not currently. We never have enough resource in reserve to get through our daily functions, inventory, restocking, reports. We are ok at our job yet we are not great. We underinvest, we dont know how much more business we could get if we invested adequately. When was the last time we were proactive in asking for more Business, we are just coping with what we do. What is our retention rate, we burn people out. Centralise takeoffs. Stephen from buildexact, speak to Vivek. Inventory and stock management is an issue in general. OHS is all reactive from audits perspicitive, yet not proactive. Need budgets and better planning here.
- ★ end to end. From quote to pricing levels, order and quote confirmations. Then procurement and not overcommitting. We need to take away anything that is not aliged to helping us serve customers better. Anything else is secondary to that and we do a lot of secondary things
- ★ Focus on service, really focus on service. be able to map out what it is, consistent serrvice level across all Branches. We have inconsistency across Branches. Reliable staff and vehicles. Nobody speaks to me about what type of vehicles I need, what capability, flat bed with a small crane etc. We need more fit for purpose vehicles and equipment.
- ★ We sell shit, and if we don't, we don't have a job. We need more help with service, we are always not having enough time to do service. service, comms, getting it right so our customer comes back, that's where we know if we do a good job and it feels like we spend more time on new customers than looking after the ones we have, that shits me. just get head office folks working for us, helping us do our jobs easier, that would be a massive help. If they are more focused on that then they are not bring us stupid ideas making demands of us for things that don't help us and where they didn't talk to us about whether their brilliant idea was any good in the first place. They think they know better and maybe they do in negotiations with suppliers but they dont when it comes to our customers, yet they still think they know better.
- ★ DIFOT, communication with suppliers and customers, no over promising. It is ok to say no, its actually good service to be clear and up front if a request cannot be achieved. The priority must be service, anything that isnt about customer service, or keeping our people safe, why do we do it??

### 5.16.1 Observations

#### What are the primary or non-negotiable things we need to do to give a high level of service?

Similar to the table presented in the “What is your job” section, a table outlining the specific needs identified by Frontline Managers is presented here. Interestingly, the list below also highlights what Frontline Managers desire less of, with “less distractions from Support Office” ranking as the second highest indicator according to their ratings. When considering the desire for more support from the Support Office, the combined score would be just 1 point below the leading themes of service and DIFOT. This analysis involves examining the complete responses provided by Managers and interpreting and collating their comments into the table presented below.

The predominant theme that emerged was service. Many practical comments revolved around service and DIFOT across various aspects, such as communication, planning, keying, checking, stock organisation, customer orders, pricing, and managing reps, etc. All of these elements contribute to providing quality service. Specifically, Managers highlighted their need for more service support from the Support Office (8), fewer distractions from Support Office (10), more resources and/or improved training, particularly in keying (6), improved pricing (8), and improved tools of trade (5). The tools of trade encompassed discussions on WIFI, vehicles (including utes and trucks), laptops, phones, and trailers, among other things. One Manager aptly expressed the need for fit for purpose tools of trade.

**Table 5.5 - What do we need?**

| <b>What do we need</b>                 |    |
|----------------------------------------|----|
| More Service/DIFOT                     | 19 |
| Fewer distractions from support office | 10 |
| More resources and training            | 9  |
| More support from Support office       | 8  |
| Improved Pricing                       | 8  |
| Improved order keying                  | 6  |
| Improved tools of trade                | 5  |

Service and DIFOT emerged as the dominant and overarching themes throughout the responses. The majority of comments consistently revolved around various aspects of service. The comments provided by the Managers were direct and unambiguous, highlighting the significance of service in their perspective.

The wave of comments relating to service and DIFOT are:

- ★ The priority must be service, anything that isnt about customer service, or keeping our people safe, why do we do it??
- ★ DIFOT, communication with suppliers and customers, no over promising
- ★ Focus on service, really focus on service.
- ★ POS, delivery manifests, get out quicker, truck checking, labelling, better credit approvals, people exhausted, EFTPOS (note: all service related tasks listed)
- ★ end to end. From quote to pricing levels, order and quote confirmations.
- ★ DIFOT - pricing structure that is supported and easy to use, its not currently.
- ★ DIFOT, service, service and service.
- ★ DIFOT - DIFOT and DIFOT
- ★ Get DIFOT right
- ★ Area Manager - more about DIFOT and service and our operations.
- ★ DIFOT - we need to do our basics properly - we never have enough staff and I never get to manage or lead my team because I am pulled down into the mess all the time.

Another evident theme that emerged was the impact of Support office on frontline teams. Some comments were positive in asking for more help and support.

- ★ just get head office folks working for us, helping us do our jobs easier, that would be a massive help.
- ★ We need more help with service, we are always not having enough time to do service.
- ★ We need more fit for purpose vehicles and equipment.
- ★ Ask them to spend more time in Branch to understand us better or maybe speak to us before they do something. its more about aligning our focus.
- ★ Support office understanding and being aligned with our service purpose. Its ultimately about profit but we only get to that through service.
- ★ people making decisions for us when we should be part of that decision, particularly when we would add so much to the decision and it might even work rather than fail as they often do because they don't talk to us

Other Support Office related comments were less optimistic and which further reinforced the desire for fewer distractions from the Support Office in order to provide better service;

- ★ My job is not managing the Branch enough to give the service that we should be giving, I spend too much time managing expectations of support office.
- ★ They think they know better and maybe they do in negotiations with suppliers but they dont when it comes to our customers, yet they still think they know better.
- ★ If they are more focused on that then they are not bring us stupid ideas making demands of us for things that don't help us and where they didn't talk to us about whether their brilliant idea was any good in the first place.
- ★ We need to take away anything that is not aliged to helping us serve customers better.
- ★ My team rely on me, its hard to protect them from all the things that distract us from support office.
- ★ Heaps of time taken up by Support Office - stock issues.
- ★ Coops - customers are not that demanding - shows he is out of touch - that doesnt resonate with Managers
- ★ We need everyone who is supposed to support us; bloody support us which means helping us do our job better, not to do their job better
- ★ The P&L is an area where we are shackled.
- ★ Get support office working with us, not thinking they are always right. Speak to us more
- ★ Get rid of support office

The comments provided here are explicit and self-explanatory, clearly conveying their intended meaning.

### 5.16.2 Insights

What are the primary or non-negotiable things we need to do to give a high level of service?

Managers feel that Support Office could be more supportive. Continuing the pattern observed throughout these questions, Frontline Managers have directly expressed their need for increased support from individuals in the Support Office to effectively carry out their responsibilities. Simultaneously, they have emphasised the importance of minimising distractions caused by Support Office personnel, which divert their attention from their primary duties. Notably, Frontline Managers have consistently provided practical guidance on specific actions that others can undertake to assist them, highlighting the significance of seemingly straightforward measures. It is possible that this guidance, this prescription of actions that Dahlsens can take to enhance support for their frontline people, serves as a straightforward roadmap for success. It provides insights into how to assist frontline teams effectively, particularly for the bosses, provided they are willing to listen and embrace collaboration in a way that may not have been their strong suit in the past. Frontline Managers, at the very least, maintain hope and have exhibited remarkable dedication, faith and courage in expressing their views. Based on my experience, it is highly unlikely that they would express themselves in a manner they have during these interviews, especially in a setting like a regional meeting where I have witnessed Operational leaders dismiss suggestions and ideas put forth by these very same Frontline Managers. However, it is plausible that this forum provides them with an avenue to have a voice.

In my capacity as a CI role, I facilitated a meeting involving Geoff Dahlsen, the leadership team of the southern region (DLT), and two senior National members from Geoff's team. The objective of the meeting was to deliberate on the concept of adopting a service-based purpose as a valuable guiding principle for decision-making, strategy, and behaviours at all organisational levels. The group overwhelmingly reached a consensus on embracing a service-based purpose and expressed their commitment to integrating this purpose into the Business. However, it is worth noting that the implementation of this initiative is still in progress, and its impact on frontline teams and Managers is yet to be realised. The reality is that Geoff has not utilised a service based purpose to guide decision making in any meaningful way in the intervening 4 years since we convened and agreed to it.

### 5.17 Qualitative question 8

If we can do all these things, will that enable you to lead your team better and provide great service? How or how not?

This question explores the “what-if” scenario within the context of Dahlsens. Frontline Managers have expressed scepticism regarding their ability to receive the necessary assistance. However, this question offers them the opportunity to take accountability of their domains. By actively contributing as Managers, they can generate tangible improvements that will provide the help they seek. At that moment, the onus is on them to excel and leverage their existing gifts and tools to consistently deliver great service. In my role, I often encounter a common criticism or deflection when trying to illustrate the situation to bosses, suggesting that Managers are merely expressing complaints. As I observe the dynamic, I witness Frontline subject matter experts who are actively experiencing and engaging with their teams on a daily basis. As experts in their respective fields, they should undoubtedly have the right to present their improvement ideas to their superiors.

This question has been designed to ensure a balanced perspective that reassures bosses about the accountability of Frontline Managers in delivering service. Managers gladly embrace their accountability and also welcome the assumed accountability from above. It is truly astounding to witness the contradiction where Frontline Managers are lauded as subject matter experts, only to be undermined, silenced, or overruled from above when they seek to provide their expertise, especially in situations where their guidance may have financial implications on the P&L statements. My leadership style, focused on enabling others, pragmatically embraces seeking guidance as a fundamental starting point of improvement. In an advisory role, at times, it is difficult to witness the unnecessary machinations in the relationship between Frontline Managers, their bosses, and especially their bosses’ bosses. Many Frontline Managers at Dahlsens offer simple and wise counsel: If we prioritise delivering excellent service, the positive impact on the P&L results will naturally follow. Thank you for your insight.

Question - If we can do all these things, will that enable you to lead your team better and provide great service? How or how not? - The complete responses are provided below.

- ★ It does but we need to have a meaningful input into restructuring a Managers day. Development, re-aligning their people. I believe that this is more possible now than when we first talked. Its real. What will help us is in getting time back to lead our teams - we need to get rid of the superflous stuff taking up our time. Maybe we need help with a re-prioritisation of tasks - training. We also need help eliminating all the stuff we shouldnt need to do. If we had more time to work with our team, we could build their capability better.
- ★ Yes, massively, this advisory thing is great
- ★ Absolutely. It will help because we will have real input into things that slow us down all the time. If we are involved sooner, it will make the fixes and help much, much more useful
- ★ I wish, we could dominate and have more customers than we need.
- ★ We will feel empowered to give our views on what we can do better. It gives us hope that our perspective matters. Maybe if we can feel that these things help us; if this purpose thing helps others understand our struggles better and then they help us in real ways, then yes, I am a believer, Until then, its hard to imagine, but this manager group says a lot. It says that we are respected and our opinion matters. If it really, really did; we wouldnt have to have this thing supported by you and Geoff to do it
- ★ It seems a long way off considering how far away we are from being consistently good at service. But yes, if we can focus on service more, we will give better service
- ★ If we could really focus on service, we would give great service, not this knee jerk stuff we do running around when a customer complains. Why don't we do it right?
- ★ Yes, of course we would be better, focus works but so do distractions, we have too many of those
- ★ Understanding might help, our support people don't get it and our bosses have a different agenda to us. Why, they should be supporting us to go better service rather than smashing us when we don't
- ★ Yes, of course we would be better, but it's a big if to get there
- ★ Yes, if only
- ★ As already said, focus on customers and service and the rest will come. Profit comes from getting it right with customers and why is service only our responsibility? Support office should care about helping us do better for our customers

- ★ Give us enough people, well trained to do the job, we are forever understaffed. Then we might have a chance to give more consistent customer experience
- ★ I don't see support office changing, they just don't seem to care about what we need, its always their agenda, not about our customers
- ★ Yes, for sure, I can see the light at the end of the tunnel and for once its not a train coming the other way
- ★ Any help is good help
- ★ Maybe, if we can get serious about service through this alignment, then maybe
- ★ It would help for sure, because support people would be doing things to help where we need them to help. I will believe it when I see it though.
- ★ maybe - I am sceptical that support office will ever listen to us, but this advisory thing with us managers might help
- ★ Yes, support rather than distractions would be good

#### **5.17.1 Observations**

Sensible, pragmatic and helpful guidance again here from Frontline leaders. Yet, there is a sense of scepticism in the comments

#### **5.17.2 Insights**

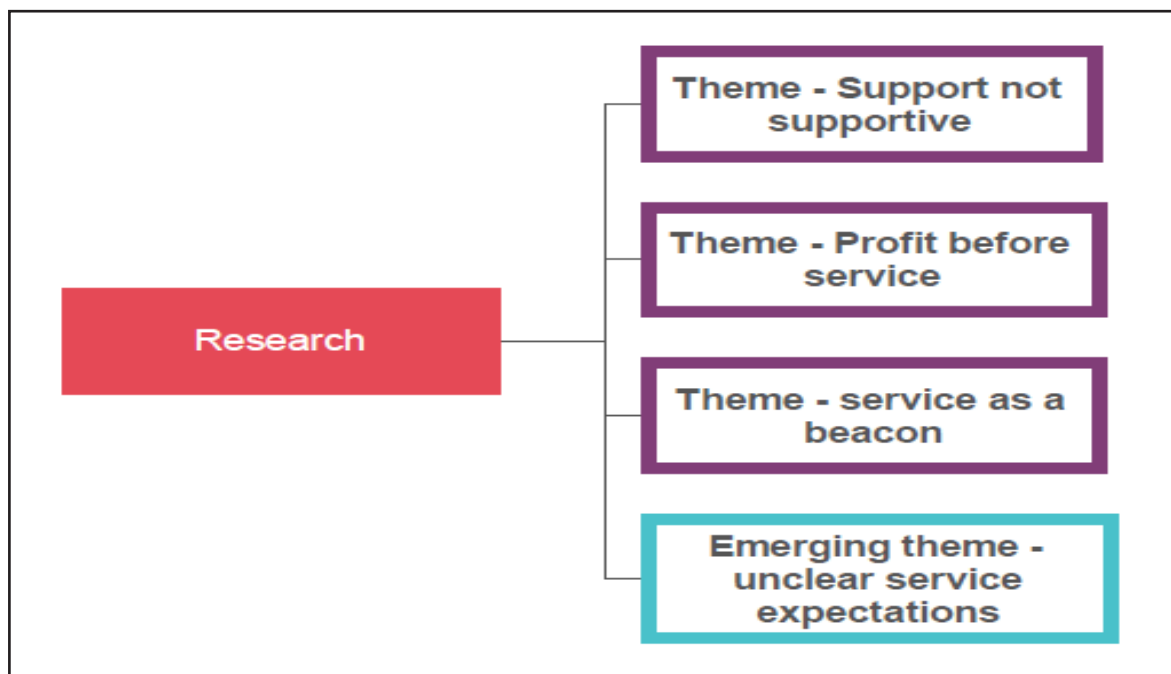
Not much to learn here, just an extension of the common theme, frontline Managers want more help and support from Support Office.

## 5.18 Key themes

(As per Research Exec Summary)

The initial qualitative interviews yielded distinct themes, which became more prominent as the subsequent qualitative and quantitative questions narrowed the focus. Three clear themes emerged (highlighted in purple), while another theme (Unclear service expectations) did not expand further but appeared to be connected to the root causes of the other three themes. It is possible that unclear service expectations serve as a symptom contributing to the presence of the other three themes.

**Figure 5.10 - Research Themes**



### 5.18.1 Root cause analysis - Five Whys

In root cause analysis (RCA), the five whys technique is employed as a method to delve further into the underlying cause of a problem. By persistently asking “why” even when we believe we have reached the root cause, we can uncover the true underlying cause that goes beyond apparent causes, effects, or symptoms that may initially seem significant. (ASQ.org, n.d.; Rybkowski & Glenn, 2008; Serrat, 2017). Frontline Managers, including me, are amazingly good and quick at problem solving, often a little too quick. We tend to jump to the solutions before getting to the underlying root cause. I often ask people whether the problem ever resurfaces. If it does, we did not fix the root cause in the previous attempt.

By delving further into the emerging themes from research and posing “why” questions, we can gain better clarity on the root cause, enabling us to enhance the service provided to customers and empower Frontline teams to deliver exceptional service.

**Figure 5.11 - Root cause analysis - themes**



Whilst all roads lead to Rome here, it is unsurprising that the absence of a clear purpose holds significance, and furthermore, the absence of a customer obsessed purpose holds even greater importance in a service-based Business.

My ultimate focus lies with customers, and along the way, if Frontline Leaders can also sense that connection and recognise its importance, they, like myself, may transform into lifelong champions of customers. The overwhelming influx of respondent feedback, all so focused on their customers, others fiddle while Rome burns, figuratively and literally, for all those on the frontline. Leadership-wise, my primary focus lies in assisting Frontline leaders, similar to how I was in the past, in improving their ability to serve our customers. Additionally, I aim to cultivate a level of enthusiasm and dedication, which we fondly referred to as “ketchup in the veins”, to consistently surpass our customers’ expectations. This metaphorical “ketchup” symbolises our unwavering commitment to customer obsession, guided by a well-defined purpose.

# Chapter 6

## Discussion and Conclusions

### 6.1 Context of findings

This research is conducted within a finite context in Operational environments where Frontline Leaders manage teams ranging from 5 to 50+ individuals, and where a direct customer relationship is present. The specific context pertains to a fifth-generation Family-owned Business with national operations in diversified markets.

The findings of this research matter, as a customer obsessive purpose helps align Businesses from top to bottom in sensible and meaningful ways. The frontline workforces are led by individuals who may not always have the highest level of training or education.

### 6.2 Limitations of this research

This research specifically examines several parameters within Dahlsens domain. It is important to note that the scope of this research is limited to these specific parameters. However, future studies may consider extending beyond these parameters to explore additional findings. The identified specific parameters are as follows:

- Dahlsens is a service-based business.
- Dahlsens operates in a service-based logistics environment, specifically focusing on trade-based operations.
- Dahlsens is a 5th Generation, 100% Family-owned Business.
- Dahlsens is solely owned by John Dahlsen.
- Dahlsens is engaged in the aggregation and supply of whole-of-house building materials.
- The research primarily focuses on Frontline Managers who oversee teams ranging from 5 to 50 people.

The limitations of this research do not necessarily negate the potential relevance of these findings in other contexts. Additional research is needed to establish the applicability and validity of these findings in broader settings.

## 6.3 Overview

Where we started and where we ended up.

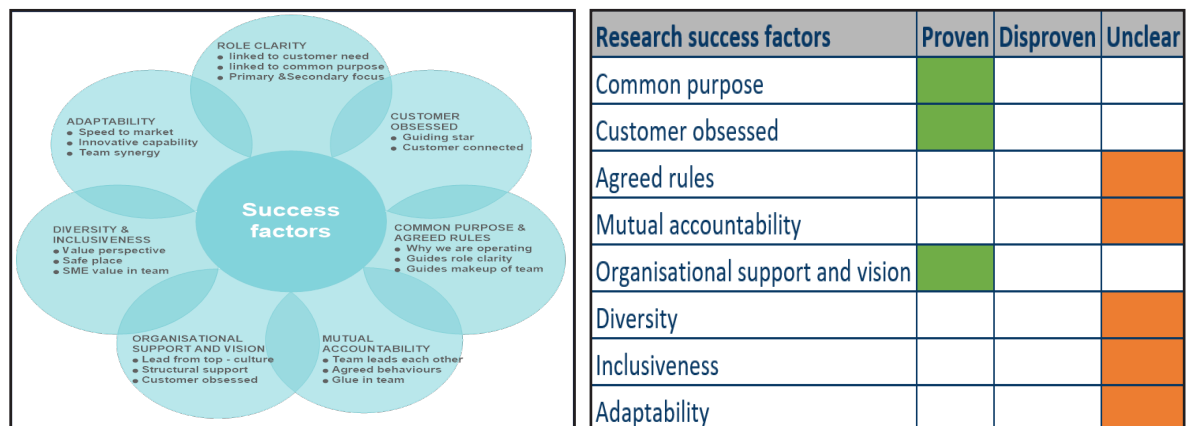
I began contemplating the key attributes that contribute to the success of leaders, particularly Frontline Managers in my case. I pondered the dynamics within teams and sought to comprehend the vulnerabilities present in the Organisations I have been a part of. Bias and the absence of meritocracy in numerous workplaces also occupied my thoughts, as I envisioned a future where a clear guiding purpose would diminish bias and encourage a merit-based reward system.

I used to work as a Frontline Manager, and I've noticed that Frontline Managers often receive the least developmental attention, despite being the primary point of contact with customers in many environments. It is crucial to provide pragmatic and tangible support to help Frontline Managers deliver the best possible service to their customers. We cannot expect them to be subject matter experts in operations and then ignore their feedback and concerns. Based on my research, I now have a better understanding of my role as a customer champion and the importance of aligning customer-focused Businesses with their customers' needs.

### 6.3.1 Literature Review Purpose

The initial success factors were determined through a literature review and case study research within Agile and HPT domains, encompassing both successful and unsuccessful case studies.

**Figure 6.1 - Research success factors**



The research initially focussed on the attributes related to service and purpose. Follow-up qualitative and quantitative studies delved deeper into these primary themes. During the early discussions, it became evident that the primary issues needed to be resolved before drilling down into secondary attributes, as the main themes were particularly strong and crucial. For further research, I may consider studying an organisation that has a clearly defined customer-obsessed purpose. This would allow for further examination of the significance of diversity of opinion, inclusiveness and admiration for different types of people and thinkers, as well as mutual accountability and agreed-upon rules.

## 6.4 Research Findings

In the context of Business, particularly for operational Frontline Managers, the primary learnings are as follows:

1. Purpose matters as a primary success factor.
2. A customer-obsessed Purpose holds greater importance in service-based Businesses and serves as a primary success factor.
3. In the absence of a clear purpose, or better yet, a customer-obsessed purpose in service-based Businesses, certain secondary success factors may be limited in their effectiveness;
  - a. Mutual accountability
  - b. Role clarity
  - c. Adaptability
  - d. Diversity ( of individuals, thinking, and opinions)
  - e. Inclusiveness
  - f. Agreed-upon rules

### 6.4.1 Purpose

Purpose seems crucial in helping Frontline Managers and their teams deliver superior service compared to situations where no purpose or an ambiguous purpose is present.

Purpose holds even more significance in service-based Businesses where the purpose is obsessively customer-focused.

#### **6.4.2 Customer-focused purpose**

Managers highlighted the importance of a more defined purpose, emphasising that a customer-focused purpose surpasses a mere purpose improvement. In Dahlsens, Frontline Managers acknowledge that the current purpose centred around profit, is already quite evident.

However in order to facilitate Frontline Managers and their teams in delivering enhanced service, it is imperative to adopt a clear customer-focused purpose.

#### **6.4.3 Secondary success factors**

The reason the list of unproven research success factors is referred to as secondary is simply because, in the case of Dahlsens, they took a backseat to all the purpose-related constraints that Frontline Managers have to handle.

### **Contribution to Field**

#### **6.5 What does all of this mean?**

The themes of purpose misalignment and a lack of customer focus appear to be prevalent beyond just the Dahlsens experience. Personally, I have noticed it in numerous other customer-facing Businesses operating in the hospitality, retail, manufacturing, and logistics sectors, both from an operational standpoint and in software development for addressing operational issues. The literature review has brought to light numerous instances where a lack of customer focus or obsession has resulted in unsuccessful Agile and HPT case studies.

If the scope of this issue is isolated to the sector, business type and ownership type, such as Dahlsens, I will have a lifetime's worth of work, However, if the scale extends beyond those initial constraints, then others may find these findings intriguing and discover further research or application opportunities. I would be interested in collaborating, learning, and supporting the work of others in developing the research findings presented here.

Personally, my overarching aspiration throughout my Doctoral work was and is to assist emerging Frontline Managers who are younger and more intelligent versions of myself. Over the years, I have witnessed how organisational misalignment diminished performance, primarily because customers were not given priority. I believe such challenges could have

been addressed and resolved, allowing for remarkable customer experiences and frontline teams that take pride in their accomplishment and job execution. I would have greatly appreciated such a scenario, and now I am motivated to help others to overcome their misalignment struggles.

To help Frontline Managers, the purpose and focus components of organisational alignment drive the elimination of unsupportive behaviours and their replacement with supportive ones. This is accompanied by strategic decision-making aligned with a service-obsessive purpose.

## **6.6 Doing things better**

While reflecting on how this Dahlsens experience impacts me as a leader and striving for improvement, my main focus is on how I could have effectively managed this situation more efficiently.

Before I can contemplate the future of my work and delve deeper into this research, I must reflect on how I could have enhanced my ability to sway decision-makers at Dahlsens. It is crucial for me to exhaust all efforts in supporting Dahlsens, and this compels me to confront a significant question.

***What would I do differently, considering my current knowledge and the lessons I have acquired on this Doctoral journey? How can I apply these learnings to Dahlsens and beyond?***

### **6.6.1 As a Business Improvement Specialist**

I would like to establish a baseline earlier. To achieve this, I would require tools to assess two aspects of the Business. Firstly, I aim to assess the level of customer focus within the company. Secondly, I aim to evaluate the alignment of the business with a purpose, preferably one that is customer-centric. By combining these two perspectives, I believe we can establish a solid foundation for creating a roadmap for improvement and conducting further analysis or taking necessary actions. Obtaining this information would greatly enhance our ability to guide leaders more effectively. Therefore, my goal is to develop tools that can provide such insights.

More importantly, the baseline information should have more clearly outlined what I was asking them to sign up for and the path to achieve it.

### 6.6.2 Diagnostic - Customer Alignment Assessment

To gain insight into the level of purpose alignment and customer obsessiveness in an Organisation, the following tools facilitate this ability.

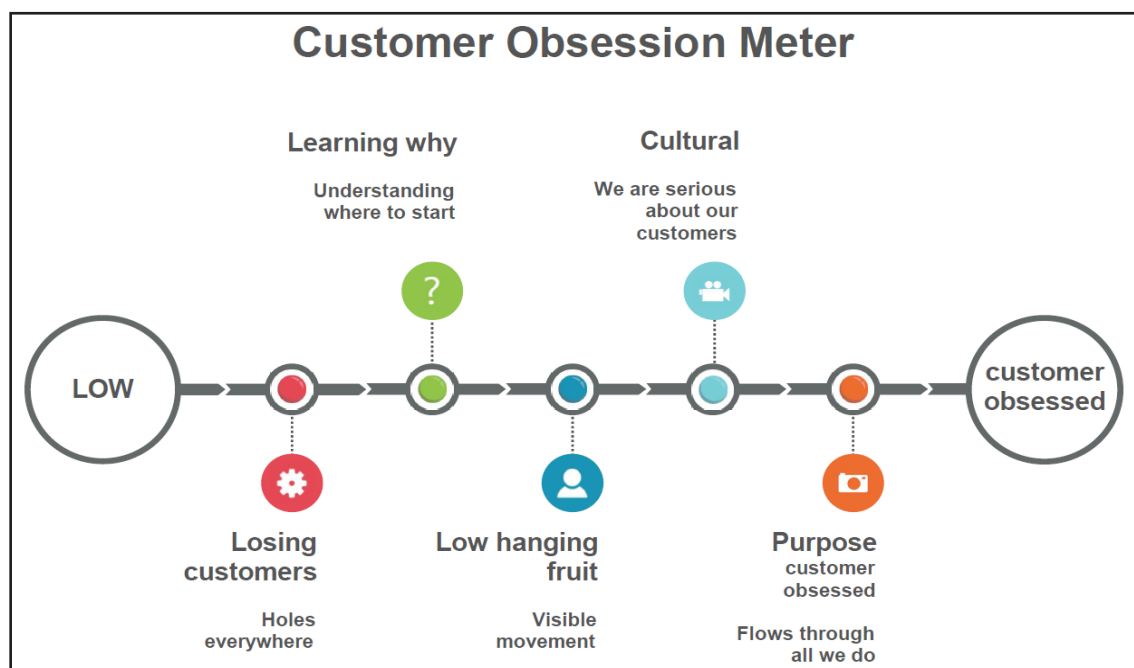
The Customer Alignment Assessment (CAA - in development) aims to provide a multi-layered assessment baseline capability for Businesses seeking to enhance their level of customer obsession and align their focus accordingly. The CAA incorporates the customer obsession meter assessment alongside the purpose assessment, which together offer perspective, a starting point, and a roadmap for improvement.

In hindsight, these tools would have assessed Dahlsens issues more formally in a manner that required buy-in prior to commencement and an outline of the commitment required would have been clearer. Instead, I have utilised this research as a means to influence the Business. Whilst the goals remain unchanged, the approaches diverge.

### 6.6.3 Customer obsession meter - Measurement Tool

This measure is only relevant within a Business that is directly customer-facing. The assessment tool is a statistical instrument designed to gauge the extent to which an Organisation is customer-obsessed. By employing a set of validated qualitative and quantitative questions that address specific typical pain points within the organisation, the level of genuine customer-centricity can be determined.

Figure 6.2 - Customer Obsession Meter



This tool has evolved from the research conducted here as part of this critique. It will continue to evolve with each use, allowing me to apply the knowledge gained to improve its performance across varied contexts. The key distinction is that the assessment will be guided by online survey formats, rather than relying solely on qualitative one-on-one interviews. However, other interview methods may also be suitable depending on the client's needs. Conducting assessments online helps minimise the cost per respondent while maintaining a strong emphasis on data quality.

This meter, on its own, will provide a certain level of quality regarding customer service and can function as a standalone measurement tool assessing the level of customer engagement. It can be included as part of an initial focused assessment that specifically targets customer obsession. The survey question set of the overall Customer Alignment Assessment (CAA) can be divided to enable separate polling on the customer-obsessed scale. Additionally, the assessment of purpose alignment can be incorporated at a later stage. Ideally, these two aspects should be implemented simultaneously.

#### **6.6.4 Purpose Assessment - Diagnostic Tool**

This part of the assessment focuses more on alignment throughout the organisation towards a purpose, particularly aiming for a customer-obsessed purpose. It is important to note that this assessment is distinct from the meter used to measure the level of customer obsessiveness, as it may exist in certain areas of the Business while lacking in others. The assessment will involve surveying individuals at crucial customer-facing touchpoints within the Organisation, as well as those who provide support to them. It is worth mentioning that the assessment diagnostic will be conducted using a validated statistical instrument.

The alignment of the meter with the purpose assessment is crucial for optimal effectiveness within an organisation, from top to bottom.

##### Sample of the assessment logic:

1. Assessing multiple customer-facing roles.
  - a. More locations mean more touch points to gather data from
    - i. Frontline Managers
    - ii. Various touch points

2. Assessing measurable interactions at touch points.
  - a. Time taken to return calls
  - b. Quote return timeline
3. Customer assessments - what is their level of trust in our service?
4. Metrics
  - a. DIFOT (Delivery In Full, On Time)
  - b. NPS (Nett promoter score surveys)
  - c. Others

#### **6.6.5 Frontline Managers**

A comprehensive set of tools designed to assist an aspiring Frontline Manager in their professional growth and confidence-building journey. While I greatly appreciate the training I have received thus far, I believe that additional guidance on certain fundamental aspects would have immensely benefited my early development.

##### Discipline and repetition

Those leadership learnings I acquired during the early stages of my journey, as discussed in Chapter 1 of this Critique, remain significant when contemplating how they can assist others on their own path. The three key learnings were as follows:

1. Problem-solving was helpful in improving and honing my shift management
2. Role clarity, including primary and secondary responsibilities
3. Harnessing the collective energies of a team

I refrain from giving advice, except for sharing my own experiences and the lessons I've learned from my mistakes. I've made numerous mistakes in the past, but each one has helped me improve. With that in mind, I will proceed with the next section.

##### **Frontline Manager - Cheat Sheet**

A non-exhaustive list of thoughts I offer for consideration is:

- Preparation - Planning is crucial in addressing relevant matters, utilising the strengths of the team, and considering primary and secondary responsibilities.
- Role clarity - A crucial aspect of preparation that remains relevant throughout the day or shift, given the appropriate context.

- Calmness - The team is looking to you for Leadership, and that starts with not losing your head in moments that require it. Being calm also helps in assessing situations, gaining the fullest perspective of the environment, and being in the best position to make good decisions to help your team and yourself in tough situations. Nothing helps keep you calmer than preparation and everyone knowing what they are doing.
- Finger on the pulse - No matter where your team is, stay updated on their activities to identify when they are facing challenges and require assistance.
- Floor walk - An extension of the “finger on the pulse” theme, specific to environments where physical presence is required to be in contact with your team, such as hospitality, retail, manufacturing, and any environment where your team is dispersed across a site. Imagine how it feels like if a team member comes to work and goes home without any interaction with their Leader. That can be demoralising and can lead to problems with morale and maintaining consistently high standards.
- Analysis - Root causes win every time if we take the time to do them properly. Iterating and improving can be powerful when approached as a team task. Imagine how team members feel when they are involved in opportunities for improvement. After all, nobody knows their job better than they do.

Many things I was taught about leading teams mattered less than getting the above mentioned things right, and in getting those above things right, I learned more about Leading people than any of the training I got in engagement techniques, motivation of staff, etc. Working closely alongside teams, actively listening to their feedback, and insights for improvement, all while remaining committed to our customer-obsessive purpose; proved to be the most effective method, based on experience, for fostering exceptional teamwork. Through disciplined repetition of these tasks and prioritising the aforementioned key points, I found tremendous support in tackling the most challenging obstacles faced by leaders: how to effectively lead a team. If only I had known to apply these disciplines earlier. Ultimately these practices and consistent repetition became crucially significant, forming the foundation for developing the confidence to make decisive, calm decisions and to lead in an empowering manner.

The fundamentals listed above closely resemble the Shewart cycle, originally conceived by Dr Walter Shewart as a product development cycle. It was further developed by Dr W. Edwards Deming, who is known for the Plan-do-Check-Act (PDCA) continuous improvement

cycle. Deming also referred to it as PDSA, with the S representing study (Chakraborty, 2016; Moen & Norman, 2009; Pietrzak & Paliszkiewicz, 2015). Even though Deming developed the PDCA, he consistently referred to it as the Shewart cycle, an honourable act by the generally acknowledged Godfather of Quality (Byrne, 1994; Legon, 2019).

#### **6.6.6 Removing Bias**

Diversity and inclusiveness are being discussed more and more these days. Imposing quotas, whether apparent or not, may not effectively eliminate bias. There has certainly been a lot of talk, and many people are in agreement. Purpose may guide the mitigation of bias with a focus on clear performance behaviours. However, the implementation of action seems to be progressing too slowly in practice.

I reflect on McDonald's in the late 80s and 90s, a time when an impressively disproportionate number of Women held Managerial and higher positions. One notable example is Catriona Noble, who achieved the top job at McDonald's Australia— an outstanding accomplishment for an incredibly capable professional. Merit underpinned the balanced success of Women in that Company, and merit itself was underpinned by a strong purpose driven ethos, enabling that meritocracy to exist and flourish through performance.

My recommendation for removing bias is to promote and cultivate a meritocracy by staying purpose-driven and focusing everything on that purpose and customer obsession, especially in a service Business.

To accomplish this, establish values that explicitly encourage the appropriate behaviours to reward based on merit and strongly discourage any form of bias.

## 6.7 PCLP - Aspirational

As described by our esteemed Professor Ramzi Fayed, Dean of our Australian Graduate School of Leadership (AGSL), the PCLP journey is iterative in nature. Our pursuit is not of perfection, but rather continuous improvement of ourselves and our effectiveness in our work (Fayed, 2020). As a practitioner of continuous improvement, I find this iterative approach and journey of PCLP to be in alignment with my desire for constant self-improvement. A statement by Ray Kroc, the founder of McDonald's Corporation, resonates on this topic.

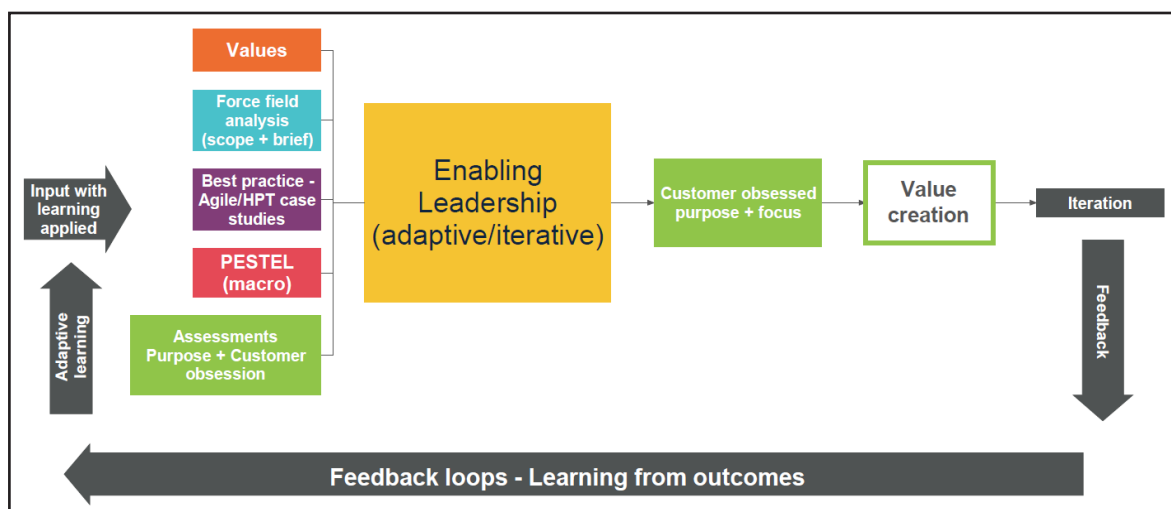
*"As long as you're green you're growing, as soon as you're ripe you start to rot."*

- Ray Kroc, Grinding It Out: The Making of McDonald's (Kroc, n.d.)

This quote from Ray Kroc, I have heard many times in many different situations. It has always inspired me to be curious and ask questions. Ray Kroc played a significant role in shaping my career at McDonalds and beyond. I am extremely grateful to him for being my very first mentor.

My PCLP iteration at this point needs to prioritise a more dynamic focus on customer obsession and purpose. In the latest iteration, I have included a stronger emphasis on customer obsession and purpose as an input and as a Leadership practice in motion. Additionally, I have incorporated assessments as an input component, further highlighting the importance of customer obsession and purpose in practice. Considering its significance in the work I do, particularly in customer-facing Businesses, I believe it is reasonable to give it a higher priority, as indicated.

**Figure 6.3 - PCLP - Current**



### **6.7.1 Learning**

This Doctoral journey began with a desire to improve, to learn from mistakes, and to view those mistakes as opportunities. Throughout this journey, I have gained a new perspective on processing and evaluating situations. I now firmly believe that I am constantly growing and I eagerly seek out learning opportunities.

### **6.7.2 Key Moment of Failure**

I initially presented the proposal for a top-down change management strategy to Geoff Dahlsen and then Jamie Dahlsen, requesting their leadership or sponsorship as key Family figures. The goal was to enhance service and connectivity for our customer's benefit. It was a tough one for Geoff to openly admit that Dahlsens, a 5th generation family-owned business, needed to improve customer care. Jamie also balked to seize the opportunity, I felt, due to the presence of their fathers on the Board at the time.

When Geoff and Jamie rejected the opportunity to guide their Family Business towards a more strategic position, I found myself reevaluating my choices. I adapted my approach and tactfully introduced the necessary changes by constructing everything that I have described in these pages. From the perspective of a change program, I recognised that the solutions I had been entrusted to implement overlooked the crucial aspects of cultural mindset and behavioural transformation essential to align with an unwavering customer obsessive purpose. Additionally, the program tools I was developing lacked the necessary leadership direction to fully support the initiative.

In hindsight, that moment was pivotal in the Business not taking accountability for its customers seriously enough, and it was the moment where I lost traction in redirecting the organisation's commitment and focus towards customers. My acquiescence did a disservice to Dahlsens, and it continues to have an impact on them to this day. I failed to fulfil my job by not pushing harder in that pivotal moment when I had a professional obligation to do so. I had a clear vision of what excellence looked like, while they did not. Recognising this failure now, I must harness it as motivation in two ways: to assist Dahlsens and to enhance myself for future situations.

## **6.8 What next?**

### **6.8.1 Dahlsens**

My future with Dahlsens will depend on its desire to get serious about its vulnerabilities and opportunities as highlighted in this work. If not, it will be time to move on from Dahlsens and focus on working more precisely and purposefully in the domains that help advance my learning and research within my specific context. When wrapping up my work with Dahlsens, I intend to tailor this research specifically for them as a tool that can genuinely improve their customer connections and ensure alignment throughout the Business. Dahlsens has many remarkable individuals who exhibit consistent pride in their work.

### **6.8.2 Beyond**

I wish to develop these assessment tools and align with like-minded Businesses serious about their connection to their customers, Focusing on obsessive customer service rather than mere lip service. Wherever this journey takes me, there is an opportunity to deliver on some of the things that genuinely inspire me. I plan to dedicate the remainder of my working life to that purpose.

### **6.8.3 High-Performing Teams**

If a Business is or aims to be customer-obsessed and aligns its purpose accordingly, while exploring the journey to transform mindsets and behaviours, it increases the likelihood of developing high-performing teams (HPT) within that specific context. The synergy derived from HPT truly inspires me. I have rarely witnessed such sustainable extrapolation and organisational alignment beyond the scope of McDonald's, and I yearn to experience that, to see that in motion and to study it in an investigative light. I believe this presents numerous research opportunities, and I intend to prioritise this theme in my future work. Purpose is the key enabler of synergy.

### **6.8.4 Frontline Managers**

I want to engage with and empower more Frontline Managers as they emerge. I want to support them in learning their craft and be inspired by their progress. Since my selection of organisations to work with is based on their customer-facing nature, I will

mostly have the chance to collaborate with Frontline Managers in that dynamic. I hope to foster beneficial partnerships in other workplaces. While I was highly focused on learning from the Incredibly dedicated and insightful Dahlsens Frontline Leaders, their guidance and insights profoundly pointed my work to the right areas. However, I realise i didn't allocate enough time to assist them in fully and directly emerging. In the future, I will actively pursue such opportunities and develop tools to suit.

A common complaint among team leaders is the challenge of keeping their teams and promoting effective collaboration. By establishing a clear and straightforward aligned purpose the team can unite in a way that enhances their collective output. This concept is often referred to as synergy, which becomes even more crucial when dysfunction, self-interest, or internal conflicts hinder the team's effectiveness. If an Organisation can provide guidance to its employees by articulating a clear purpose that is supported by underlying values and drives the overall strategy, while also implementing appropriate structures and investing in key roles and projects, and regularly evaluating alignment with the overarching purpose, then this clarity can cascade down to the departmental and divisional levels. Consequently, decision-making and focus become evident for the teams, providing them with necessary guidance in their operational or project assignments.

Regardless of the purpose, this discipline can hold significant meaning in a customer-facing organisation, where the purpose is being obsessively focused on the customer. This laser-like concentration throughout the organisation can be a potent force, offering a potential competitive advantage and fostering synergy.

#### **6.8.5 Me as a Leader**

I lead differently today than I did almost four years ago when I embarked on this Doctoral journey. Reflection on myself, as prescribed by the program, was something I engaged in as part of the curriculum. Then, as I learned to truly reflect and assess myself, my insights began to evolve. I thoroughly investigate situations, observing them objectively, and I devise solutions to improve Businesses. Now, I also examine myself with objectivity a practice I seldom engaged in before. Its remarkable how simple and effortless it is; by removing self judgement, shame, and guilt I used to burden myself with, I can critically and objectively evaluate myself more effectively, free from biases.

Part of developing the assessment tools is a pragmatic reflection on what I could have done differently if faced with the Dahlsens scenario again. If I missed the opportunity to assist them, I can now assist others.

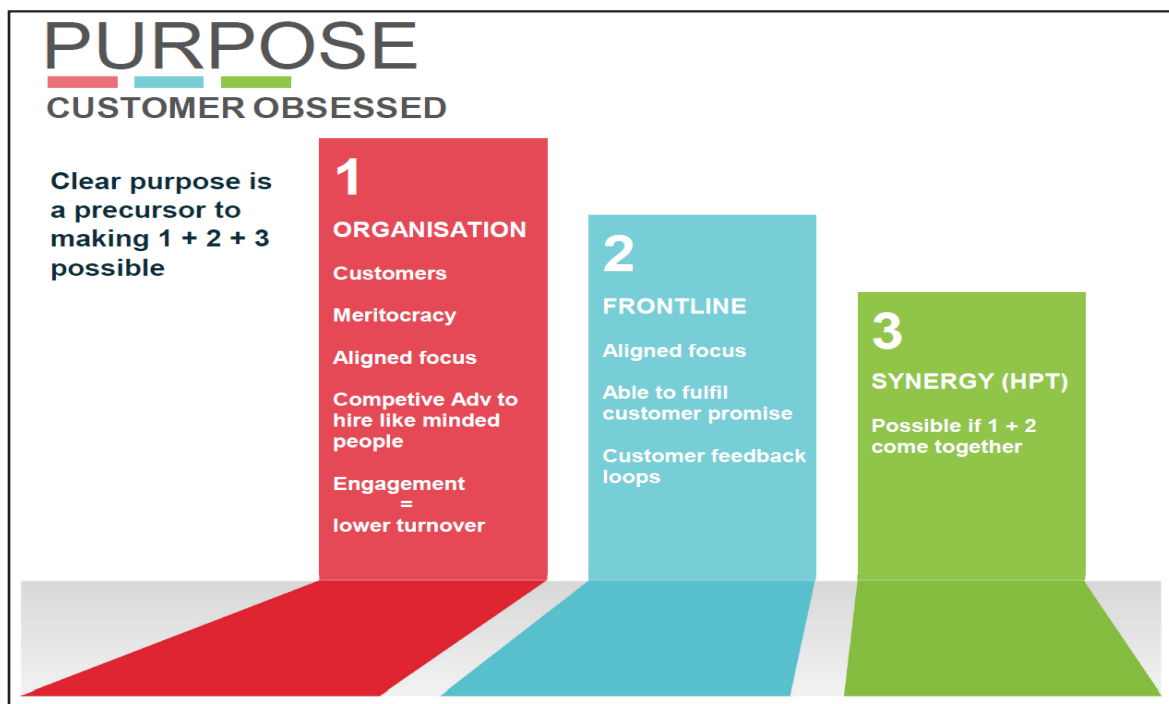
## 6.9 Summary

The consistent theme presented through the research responses pointed to the importance of purpose in enabling better leadership and, for me, in fostering genuine team synergy. These principles will guide me throughout my remaining work days.

- Purpose establishes a distinct focus that underpins strategy and decision-making - alignment. Better still a customer obsessed purpose where customers exist.
- Purpose offers a competitive advantage by promoting a clear set of values, expectations and espoused behaviours - attracting like-minded individuals.
- Purpose promotes opportunities based on merit - meritocracy.
- Purpose supports and enables Frontline Leaders to Lead - providing support and alignment and a clear direction.
- Purpose forms the foundation for synergy to emerge.

Without a clear purpose, some of these other factors may still occur, albeit inconsistently.

Figure 6.4 - Purpose summary



## 6.10 Further Research Considerations

Those, including myself who may find a scope for applying the research findings or outputs here might consider some of these options. However, we may also perceive possibilities beyond what I am currently observing.

Further research considerations;

- Breadth of ownership type - I am uncertain if the fact that it is a fifth-generation family-owned Business constrained the research or influenced the outcomes here.
- Industry type - I am uncertain if the industry type played a role in limiting the outcome here.
- Size of Business - I believe the scale does impact the parameters of this research. As the size of the business changes, numerous variables come into play. With larger businesses, the scale of geographic locations changes. This research was conducted in one geographic region of Dahlsens, specifically in the New South Wales and Victorian markets.
- Contemporary evidence and application - Contemporary application of these themes beyond an SME family owned Operation may exist, more so by removing the constraint parameters governing this research, numerous other factors may be considered for future research:
  - Customer obsessiveness - Is the purpose for my work and the research in these pages was driven by my lifelong connection to customers and the belief that everything we do must focus from the customer back to what we do and that measured against customer service excellence. Amazon emerged over time as a dominant Company in its domains with an obsessive focus on their customer. The Amazon leadership principles foundational first point is customer obsessed focus (Amazon, 2021) and that ethos permeates all they do (Bezos 2020a, Kirby and Stewart 2007, Hyken 2023). Amazon Founder Jeff Bezos still maintains the discipline of keeping an empty chair in some meetings to remind people of their customer obsessiveness in their decision making (Denning 2019, Bezos 2020b).

- Agile and Amazon's customer obsession - Amazon found alignment with Agile specifically in its focus on customer obsession and the removal of bureaucracy to allow the agile continuous innovation approach to flourish with structural support of solving problems in small chunks constantly iterating as well as a network type structure to remove top down command and control (Denning 2019a; Kirby and Stewart 2007; Denning 2019b).
- Systems Thinking - Peter Senge - The interconnectedness between the parts of a system that links a Business like Dahlsens (and others) to its customers is complex and interdependent. Applying the principles of systems thinking to Dahlsens would evaluate the impact of this interconnected system approach on the end-to-end supply of goods. I believe that implementing systems thinking would enhance customer service and facilitate the alignment of competing forces or departments.
- Learning Organisation - Peter Senge - The notion of a living and breathing organisation or organism connects to the systems thinking view (Systems thinking is one of the pillars of the learning Organisation), and a company like Dahlsens could potentially benefit from adopting a more introspective and interconnected, goal-oriented approach to Business. Embracing these philosophies may facilitate a more tangible alignment with purpose.

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## Definitions

**Customer Obsessed** - A term used in this document to describe the way I have felt about customer service, where all primary actions are centred on the customer and the fulfillment of their needs.

**Customer order** - an order of good to be supplied to a customer

**Dahlsens Group** - A Group of wholly owned businesses in Victoria, New South Wales, Queensland and the Northern Territory

**DIFOT** - Delivered in full on time

**ERP** - Enterprise Resource Planning software

**Linked PO** - a PO is a purchase order and a linked one is connected to a specific customer order (sales order - internally)

**POD** - Proof of delivery - In Dahlsens case, POD was used to gain on site proof we delivered all the promised goods - contained photos.

**R&D** - Research and development

**RED** - A status on Dahlsens E-despatch system flagging an exception to be dealt with.

**Sales order** - Often referred to as an SO, a sales order is the Dahlsens internal name for a customer order including a unique numerical identifier

**Trade sales** - Operational sales team in a Dahlsens trade Branch. The operational contact for placing orders.

**TAF** - Truss and Frame - Refers to the manufacturing function for wall frames and roof trusses for residential housing.

**VOC** - Voice of customer

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