The Organizational SCAN:

The Periodic Table for Change

By

Donald T. Tosti, PhD CPT

The Periodic Table of Elements brought great advancement to the field of chemistry. It provided a means to order the millions of potential chemical changes. It provided greater prediction and control through the understanding of the relationship between elements. The break through that created the Table model was to order the elements of chemistry based on the concept of their underlying atomic system.

In a similar way the Organization SCAN (System Centered ANalysis) has the potential to greatly advance organizational “chemistry”. It provides a way to order the million or so things that can effect organizational productivity and results. It too provides greater prediction and control through the understanding of the interdependent relationship among organizational elements. The break through that created the SCAN model was to orders the elements of the organization based on the concept of an underlying human performance system.

In its simplest form the SCAN identifies 17 critical elements. Changes in any one of these organizational elements can greatly impact results. But just as important to realize is that changes in any one element can effect and be in turn be effected buy any or all the other elements. Not recognizing the fact of inherent interdependence of the elements of the organization is the fatal flaw in most change efforts.

Overview of the Elements of the Organizational Performance System

There are three main environmental elements—they may be vied as the “the props”—they are the preexisting conditions before any action takes place

The physical environment – the tools, equipment, plant or store, the raw materials to be worked, the goods to be sold etc

The social environment--- The behaviors and conduct of the people. They are the cultural, collaborative, leadership, follower ship etc. practices

The organizational environment—-the structure, reporting relations, policies, regulations, decision making distribution etc
There are three principle receiver systems for which results are important

**Investors**- the people that supply capital - primarily owners and bankers

**Customers**—the people that supply revenue

**Employees** – the people that supply labor

The next nine elements are ordered in terms of an **input-process-output** system flow arranged within a hierarchy of scope

There are at least three levels of scope within the organization

- **Organizational level**
- **Operational level**
- **Job level**

Finally there are two forms of feedback

**Formative**—consequence information that is used to change the form of action—to correct or regulate subsequent action –i.e. Dashboards

**Evaluative**—consequences to motivate or determine the worth of continued action- to increase or decrease the likely hood of subsequent action—i.e. Scorecards

The organizational SCAN framework is as follow with some factors that may be considered listed under each element
## The Organizational SCAN

<table>
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<tr>
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<th>PROCESS</th>
<th>OUTCOMES</th>
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<td>Administrative systems: flexibility, links, centralization</td>
<td>Business plan data</td>
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<td></td>
<td>External demands</td>
<td>Information systems: timely, accurate, relevant</td>
<td>Marketplace indicators</td>
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<tr>
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<td>Financial indicators</td>
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<tr>
<td>PHYSICAL ENVIRONMENT</td>
<td>DEMANDS, SCHEDULE</td>
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<td>Operations</td>
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<td>Predictability</td>
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<td>Timeliness</td>
<td>Satisfaction with product, company experience</td>
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<tr>
<td></td>
<td>Resources availability</td>
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</tr>
<tr>
<td>SOCIAL ENVIRONMENT</td>
<td>DIRECTION</td>
<td>PERFORMERS</td>
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<td>EMPLOYEES</td>
</tr>
<tr>
<td>People</td>
<td>Priorities</td>
<td>Skill/knowledge</td>
<td>Performance data</td>
<td>Money, benefits</td>
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<td>Initiative</td>
<td>Feedback sources/</td>
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<td>Assignments</td>
<td>Selection</td>
<td>Expectations</td>
<td>Job satisfaction</td>
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**FORMATIVE FEEDBACK**

**EVALUATIVE FEEDBACK**

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CHANGE AND THE WHOLE ORGANIZATIONAL PERFORMANCE SYSTEMS

Deciding what to change is never simple. Why? Because you are dealing with a complex system; the organization. Just like the human body, organizations have built in ways of adapting to or nullifying the effects of any change effort. But like in Medicine it helps to understand the “anatomy” of the organization before we attempt to make any changes.

The SCAN model is a model that reflects the organization’s “systems anatomy” so that we have some way to organize all the millions of variables that effect organizational results in order to:

1. Find areas where our change efforts can have the greatest impact on desired results
2. Identify other organizational factors that may facilitate or inhibit a change effort
3. Act as a guideline for designing an effective a change effort
4. Provide an overall framework so people can see where a particular change initiative fits in the bigger picture of things

The major advantages of using systems models to do this are two:
First, they do not just identify variables but they provide insight into the interdependent relationships between the variables
Second, systems models are scalable. That is “systems logic” can be applied to individuals, to operations, to the administration of the whole organization and to the organization’s interactions with its marketplace and community.

This provides those who are involved in change with the opportunity to apply his/her knowledge to virtually every aspect of an organization’s functioning. And is exactly what is happening. Using the SCAN managers and their consultants have successfully re-engineered whole companies, change organizational cultures, created new brand support programs to increase customer retention, provided effective training programs that assure mastery and fluency, installed better quality assurance programs, smoothed the transition in mergers, developed ways to accelerate new product development and helped customer relationship software developers provide more effective implementation.

The list seems endless. In almost all these cases, the person in charge of the change effort did not do it alone. Instead he/she worked with many other disciplines, sometimes taking the lead – and on other times not. The power of SCAN is that it allows one to integrate many different approaches into a focused solution.

Change Management vs. Change Analysis
There are many models that focus on “HOW to implement a change initiative” that is the steps you must take when you have decided on a particular change. The SCAN is not a model for HOW but for “WHAT to change. It allows us to consider a variety of alternatives and aids us in selecting the best target opportunity that will positively impact our results.

There are many places we can address our change efforts. These changes can take place at any level in the organization. We believe that the next logical development in the
technology of organization improvement is not more IT but the use of comprehensive system modes like the SCAN built on a “scaled” progression of organizational elements. The power of this approach is derived from the fact that certain common principles operate at all levels. Whether a change analyst is working with issues at an individual position, a business unit, or the entire organization in its environment/marketplace, the principles that apply are consistent. The differences are largely a matter of scale.

THE BASIC PERFORMANCE SYSTEM
Just as the periodic table for chemist is based on a “scaling” up of the underlying atomic system so the organizational scan is based on expansion of the underlying human performance system. That system derived from work in the laboratories of behavioral scientists may be diagrammed as follows.

The simple performance systems model above provides a comprehensive framework for examining performance of people. For purposes of change analysis, it is common to find the seven components condensed into five and relabeled to reflect the way they are perceived by the performer -- Conditions, Direction, Performers, Consequences, and Feedback. This is because the performers often don’t “see” the receiving system or distinguish between operational or value feedback. Typically, their awareness is limited to the feedback and consequences they receive as a result of work products and how they are measured or used by the receiving system.

This moving back and forth between a “big picture” systems view of performance and language that reflects a “performer’s view” can be very helpful to those involved in planning and executing a change. It enables us to consider the whole performance system.
LOOKING FOR CHANGE OPPORTUNITIES AT THE JOB LEVEL
BY TROUBLE SHOOTING THE INDIVIDUAL PERFORMER SYSTEM

-- Analysis Questions --
The questions below were derived from the components of the individual performer system. Taken as a whole, these questions will help change planners locate factors that may be supporting or hindering effective individual performance on the job—or that may be creating positive or negative consequences for simply being in the workplace, if the factors are widespread.

CONDITIONS: Do people get support that contributes to effective performance?
- Do people have the tools they need to do the job well? Are they in good condition, easy to use?
- Are resources readily available and accessible when performers need them –
- Are managers leading in such a way that they support their people in delivering the business

DIRECTION: Do people get effective direction?
- Are appropriate expectations set with performers? Do standards exist? Are expectations reasonable? Clear? Are they presented in a way that is positive and respectful?
- Is information about how to perform clear? Accurate? Logical? Given when people need it?
- Are people provided with information about priorities for their work?

PERFORMERS: Are people able to perform well?
- Do they have the right repertoire – the skills, knowledge and experience they need?
- Do they have the capacity to perform the job well—the physical strength, manual dexterity, intellectual ability?
- Does the work fit with the performer’s psychological, emotional, and working style characteristics?

CONSEQUENCES: Are there appropriate consequences for good performance?
- Do people view the balance of consequences for good performance as positive?
- Are contingencies clear – are consequences clearly linked to good performance, from the performer’s viewpoint?
- Are consequences timed to come as soon as feasible following good performance?

FORMATIVE FEEDBACK: Do people get helpful feedback about their performance?
- Does feedback fit performer’s needs – appropriate amount of detail, given in a way people can understand?
- Is feedback clearly focused on improving performance – on how to improve, rather than what went wrong: on improving the work, rather than criticizing the person?
- Is feedback given at a time when people can best use it to improve?
One of the most important conclusions that one can take away from a view of the individual performance system is that most problems are not with the performers themselves. Poor conditions, inadequate leadership, unclear directions, lack of feedback, and so on are more likely to be at the root of most “on the job” problems. It is so easy however to blame the employees when things are not working according to plan.

**Scaling Up From the Performer system**

Thinking systemically – viewing performance as the result of a system – is fundamental for selecting, designing and implementing change initiatives. Performance that leads to desired results is a function of all the system variables. Some focus their change efforts on performers (the common focus of training and organizational development interventions). Others concentrate primarily on processes like reengineering, most quality efforts focus on trying to reduce variance in process to the lowest possible level. Some organizations only peruse change at the organizational level through such efforts as reorganizing or establishing a new strategy or introducing balanced scorecards. Focusing only on process or on scorecards or on performers and their actions should not be the sole center of scrutiny. Each of these should be viewed as but one class of the variables that can significantly impact results.

**The importance of the receiver systems**

Every organization in the world has the same purpose that is to provide value to its stakeholders. It is therefore critical that the receivers are considered to be part of the system. Any change activity should have its focus its impact on the stakeholders. The SCAN model recognizes this fact. This has a twofold effect first any change must be evaluated it terms of it’s impact on results. Secondly when it is positioned in terms of it’s benefit to the company then it becomes easier for people to support. It is something we need to do to ensure our success as a community.

**Element Experts**

There are many people who specialize in one or more of the system elements. For example there are strategy experts, leadership experts, process improvement experts, and so on. This has its advantage in that it permits them to know a great deal about the impact of a particular element and how to affect it. But it also can blind them to appreciating the interaction of that element with others. It also tends to bias these experts to consider their element as most important in a change effort. For example there are those that believe that culture is the most important area for change while others insist that it is process that is most important. Some claim that the main people problem is the lack of appropriate incentives other attribute it to the lack of clear direction And they are all right...and all wrong.

**The major failing of almost all the experts is that they generally do not take a systems view of the organization.** Whether it is Organizational Development, Business Process Improvement, Black Belt Quality Improvement, Strategic Planning, or Customer Value Analysis. Each of these disciplines tends to stress only one or two elements and largely ignore or give lip service to any interdependencies. Without a system view you can never determine if a given change represents a “best opportunity” or the is just the most loudly
touted flavor of the month: We have seen so many “hot” change opportunities explode on the scene and fade like, TQM, empowerment, balanced score cards, business process management, emotional intelligence, 360 feedback, the delighted customers and many more have at some time been promoted as the answer to virtually everything.

What is lacking is a way to compare these or any other change initiative. But expert advocates can shout very loudly and write best selling books crammed full of interesting anecdotes that support there particular change initiatives.

Clearly we need a balanced systems view of change. Yet the problem arises that no one can know all the elements to the degree that they can be effective in any implementation. There are two possible solutions to this situation. First we can pair a Performance System expert who has a comprehensive understanding of SCAN with the appropriate element experts to form a change partnership. This has been done quite successfully. Or secondly we can train the element experts in understanding SCAN technology... (Unfortunately there’s still residual element bias that tends to remain with the experts) This second alternative has great promise but it is hard for many element experts to acknowledge their need for such training. Expertise too often breeds arrogance.

Probing the System
We have devised a series of probes for each of the elements of the organizational system. Above we scanned the people subsystem by taking a horizontal slice. We can also look vertically for example going down conditions a series of probes is as follows

A FEW SAMPLE PROBES

<table>
<thead>
<tr>
<th>CONDITIONS</th>
<th>Performance System Factor</th>
<th>Questions</th>
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<tbody>
<tr>
<td>ORGANIZATIONAL ENVIRONMENT</td>
<td>Assures the organization is structured in a way that contributes to effective and efficient performance of the work?</td>
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</table>
| Functional Divisions | • Are organizational functions set up to produce clear outcomes that are useful to other units or the organization as a whole?  
• Do people typically know what other functional groups do and how it is related to their own work or that of the organization? | |
| Degree of Centralization | • Are support functions sufficiently decentralized so that geographically or functionally separate groups can easily obtain support that matches their situation and needs?  
• Are support functions sufficiently centralized so that they can provide support cost-effectively? | |
| Reporting Relationships | • Do people who do similar or closely related work typically report to the same manager or management group?  
• Do managers in the organization have a reasonable span of control | |
<p>| PHYSICAL ENVIRONMENT | Assures the work environment set up to make it as easy as possible to work efficiently and effectively? | |</p>
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<tbody>
<tr>
<td><strong>Equipment, tools,</strong></td>
<td>• Are necessary equipment, tools and information available?</td>
</tr>
<tr>
<td><strong>information</strong></td>
<td>• Are they designed to be easily used and to effectively support the work?</td>
</tr>
<tr>
<td></td>
<td>• Are they cost-effective?</td>
</tr>
<tr>
<td><strong>Support Services</strong></td>
<td>• Are necessary support services available?</td>
</tr>
<tr>
<td></td>
<td>• Are they designed to be easily used and to effectively support the work?</td>
</tr>
<tr>
<td></td>
<td>• Are they cost-effective?</td>
</tr>
<tr>
<td><strong>Accessibility of</strong></td>
<td>• Are equipment, tools and information readily accessible when and where they are needed?</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td>• Are support services easily accessed when needed?</td>
</tr>
<tr>
<td></td>
<td>• Are supplies and raw materials readily accessible when needed?</td>
</tr>
<tr>
<td><strong>Physical Environment</strong></td>
<td>Are space, light and temperature adequate to work effectively?</td>
</tr>
<tr>
<td></td>
<td>• Is the environment free of physical obstacles that get in the way of doing the work?</td>
</tr>
<tr>
<td><strong>SOCIAL ENVIRONMENTS</strong></td>
<td>Assures people throughout the organization typically behave in a way that support effective performance</td>
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<tr>
<td><strong>Leadership Practices</strong></td>
<td>Do organizational Leaders typically . . .</td>
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<tr>
<td></td>
<td>• Provide people with clear direction about goals?</td>
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<tr>
<td></td>
<td>• Create a compelling vision about purposes and what the future could be like?</td>
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<td></td>
<td>• Provide advice and coaching when needed?</td>
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<td></td>
<td>• Demonstrate through their own behavior what they expect of others?</td>
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<tr>
<td></td>
<td>• Offer recognition/reward for improved or excellent performance?</td>
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<td></td>
<td>• Encourage initiative?</td>
</tr>
<tr>
<td><strong>Hierarchal Practices</strong></td>
<td>Do people accept and even encourage information, opinions and ideas from people who are below them in the organizational hierarchy?</td>
</tr>
<tr>
<td></td>
<td>• Do people readily provide relevant information, ideas and opinions of people who are about and below them in the organizational hierarchy?</td>
</tr>
<tr>
<td><strong>Peer Relationships</strong></td>
<td>Do organizational peers or colleagues typically . . .</td>
</tr>
<tr>
<td></td>
<td>• Share relevant information with each other as well as encourage/accept suggestions and feedback from each other?</td>
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<td></td>
<td>• Treat each other with respect?</td>
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<td></td>
<td>• Share the risk and responsibility for mutual efforts?</td>
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<tr>
<td><strong>Cultural Values</strong></td>
<td>• Has the organization defined and communicated its values to people within the organization – and to suppliers and customers well?</td>
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<td></td>
<td>• Do people typically behave in a way that reflects those values?</td>
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<td></td>
<td>• Are the practices supportive of the organization’s strategy and goals?</td>
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<tr>
<td></td>
<td>• Are the values compatible with the needs and expectations of the organization’s customers?</td>
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Using the SCAN as a change planning tool
When a company makes the decision to implement a new strategy it usually requires some significant changes in the organization. Too often such changes are not fully thought through. Changes are made but the implications of how that change will effect the rest of the organization and how the other elements of the organization in turn effect the change.

A few years back we had an opportunity to work with an Italian bank. They had made the decision to expand their financial offerings to include insurance, financial advice and additional forms of savings. They felt this was necessary in order to stay competitive. The major organizational change involved making the branch managers take on the duties of a sales manager The bank had been working steadily for more than a year to implement this change without much success so they called us in to find out what the problem was. Talking to branch managers provided the first clues. They saw it as a loss of status. They saw themselves as bankers not salesmen. But that was only one problem. The branch employees also resisted the change. They felt the branch manager had less time for them and they suffered from lack of clear direction

We then went to the group in charge of the change and gave our report. We then had them use then SCAN model to rethink and replan the change effort. That is we had them consider the branch managers new role and then look at all the other 16 elements to see if what the implication that change may have on those elements or in turn how those elements may affect their suggested change. After only 45 minutes they had developed a comprehensive plan that they then implemented with great success

Garry Doyle an Australian consultant has used the SCAN model extensively in his change workshops. Garry said “I describe the SCAN framework with examples of how I have used it in different organizations and attempt to get an understanding of how it might work. I then use a case study for practice. I use the video on The Morgan Motor Car Company from the BBC on the Trouble Shooters series with Sir John Harvey Jones. I show the video and have small groups watch and take notes using the SCAN model as a guide. I ask them to reflect on the changes that are needed and they observe quickly that Sir John failed in his attempts to make the necessary change happen.

Each group then gives feedback to me acting as Sir John in an attempt to firstly change me and my approach following the SCAN model and then to suggest ways of changing Morgan I then ask them to use the SCAN framework and apply it to their change effort. Usually there is little shared understanding of what the deliverables are for the receivers. This is the first point of disconnection. We spend some time strategizing and developing a list of outcomes that have specific measures. I then ask them in small groups to look at their organization like they did with Morgan and develop some actions to ensure the change effort is likely to succeed. I often get strategies that affect all cells on the matrix so there’s a need to prioritize these. This exercise has the ability to align the top team. It also gets some very practical strategies together that will be the hallmark of the real change effort they now can embark on.”

Case Examples
We recently worked with a group of senior executives from a large service organization. They had announced a major change and had begun a restructure effort across all division aimed at improving the level of service provided in key areas. Customer expectations had changed and the company had placed extra demands on the cost-savings managers were expected to deliver. The only change initiative to date was the restructuring. Previous efforts had involved downsizing and outsourcing services.
When asked to describe the specific outcomes required for each of the receivers there was silence across the group. They had little knowledge of the important outcomes. They were focused only on the mechanics of the restructuring and had set the process in motion to happen in three weeks. They certainly needed to get back on track and do so quickly before they lost the entire group below them.

They then used the SCAN framework to identify possible interactions and what needed to be actioned to move forward and ensure the change was sustainable.

The results were two strategies to be implemented within the two weeks following their meeting. The first was to agree on the key measures for each receiver group and communicate that amongst all managers. The second strategy involved looking at the structure and key supporting elements becoming very clear on how that was going to help them achieve their goals. This was also communicated.

**Success in targeting “best opportunities” for change**

As in the above example the best way is to start at the end. That is to be clear about what the desired result is. This is often best done in the context of improving stakeholder value e.g. more profit, better value to customers, etc.

A few years back we worked with British Airways during their transition from a government owned to a privately owned business. Our SCAN indicated that the best opportunity for improvement lay in changing the leadership and cultural practices. BA had been very operational oriented they had developed many great processes to handling aircraft but the people and customer handling skills were generally second rate. When we started to work with them they were losing money and were about the same size as Air France. When we finished our finale project ten years later they were five time larger than Air France. They were the most profitable airline in the world while Air France needed a four billion dollars infusing of government funds.

Shortly there after a group of our colleagues began working with the London Underground. Here the change efforts focused on operations. By reworking and better defining processes we produce a documented savings of over 150 million pounds.

**Alient Tech Systems** a major defense contractor was suffering from the cutback in military spending. The SCAN revealed they needed to exhibit greater agility and innovation. Here our change efforts focused on the leadership and the administrative systems. They had adopted a military type bureaucracy which required multiple levels of approval for the simplest decision. We streamlined the administrative control systems and modified many approval point to make them reviews instead.

**SITA** an International telecoms wanted to improve their business to business customer relations. A SCAN found that the marketing department collected a lot of information about customer satisfaction for its own purpose but never shared that data with the operations folks. (It’s confidential they said). Our solution here was to establish a new formative feed back system by creating a Department of Marketplace Performance reporting to the CEO whose job it was to get collect customer data and make it available and understandable to operations.

**General Motors** brought us in to fix a communication problem our SCAN indicated the best initiative would to focus on leadership So we developed a performance based leadership program that was given to over 65,000 managers world wide.
In the above examples We used the SCAN to identify Culture change-Process change—Administrative system change- Structural feedback change and Leadership change. The SCAN provides us with an unbiased approach to determine what best to change.

CONCLUSION
Understanding that every organization at its most basic level is a Performance System is critical for the success of virtually any attempt to improve or maintain performance. It is as important for every manager and every consultant concerned with change to grasp this reality as it is for a medical doctor to recognize that the human body is at its basic level a biological system. Too many so called “change efforts” have either failed or are short lived precisely because they failed to adequately address the “systems” issues with this understanding.

Using a scaleable systems approach we can develop a broad-scale logic that could allow us to accommodate every performance element and to identify the inter-dependency between such elements. It also allows us to integrate our analytical methods with our change interventions.

Problems are not just with the people or the process or the management, or any single element of the system. Virtually every element must be taken into consideration when planning a change including the interaction among the elements and the SCAN provides a framework for doing just that. Just as the Periodic Table does, the SCAN framework supports an assessment of the interrelationship of the elements. Its rows represent the various” system flows” of the organization and its columns assist in creating the required “vertical” alignment of the organization, integrating the whole in terms of each sub-systems’ contributions to the results This integrated framework enables us to test new change applications against an existing understanding of organization systems and the need for alignment focused on results.

In a short paper like this we cannot possible do justice to the SCAN model. One could easily write a chapter or perhaps even a book on each SCAN element and their interactions with the other elements. Nor can we go into a great deal of detail on the many applications of the analytical model. We have done extensive work employing the SCAN over the past 20 years and have learned a lot. We would be glad to make this information available to any who want to know more. Just contact me Dr. Donald Tosti at change111@aol.com

The SCAN framework has the potential to serve as a base that will provide any organizational improvement expert or change agent with a comprehensive foundation to select, predict and control all forms of organizational change. The future is unlimited.

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Dr. Donald Tosti is the managing partner of Vanguard Consulting in San Rafael, California, which specializes in the alignment of organizational processes and people with the stated strategy of the organization. Donald has a range of expertise in the areas of performance feedback, value creation, systemic change and leadership. He can be reached at change111@aol.com.