

DISSERTATION

THE EFFECTS OF SCENARIO-BASED LEARNING ON
MOTIVATION AND PERFORMANCE
A CASE STUDY OF MULTIUNIT MANAGERS IN A FORTUNE
500 RETAIL ORGANIZATION

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ABSTRACT

THE EFFECTS OF SCENARIO-BASED LEARNING ON MOTIVATION AND PERFORMANCE A CASE STUDY OF MULTIUNIT MANAGERS IN A FORTUNE 500 RETAIL ORGANIZATION

The purpose of this study was to assess the effects of scenario-based learning on motivation and performance in the workplace. The primary focus was whether scenario-based learning can increase motivation by using a training process designed to add value to the concepts being taught, shifting motivation to part of the integrated self, and therefore creating more of a basis for “self-determined behavior” (Deci & Ryan, 2005, p. 15). The suggestion that scenario-based learning could promote self-determined behavior also supports the potential for improved performance (Deci & Ryan, 2005). The study findings were intended to help scholars, human resource employees, and organizational development professionals develop complex leadership skills in their employees more efficiently and effectively to get faster results. The successful practice of performance development in today’s workplace requires the integration of a wide range of complex skills that extend beyond the explicit to tacit, such as change leadership, portfolio management, team building, and high-level problem solving. Although there is abundant psychological literature on performance development, surprisingly little of this research examines the possibility of leveraging scenario-based learning to move motivation from amotivation to more intrinsic motivation to improve employee performance in the work setting (Deci & Ryan, 2002). Rather, development research has been conducted and governed in the

field of human resource development and organizational development (HRD/OD) and focused primarily on performance improvement and on-the-job training. Current organizational training programs cannot provide complex situational development (Lynham, 2002) to accelerate internal employee performance. Given the complexity of development in today's workplace, a development method that could build employee performance by improving motivation (Deci & Ryan, 2005, p. 15) to keep employees developing in their learning would be particularly valuable.

The implied link between scenario-based learning and motivation must first be described, understood, and substantiated before it can be assumed to be of strategic utility to performance development. The researcher proposed the use of scenario-based learning as a mechanism for improving employee motivation in the workplace and implies that the more fully an employee internalizes motivation, the more it becomes part of the integrated self, and the more it is the basis for self-determined behavior" (Deci & Ryan, 2005, p. 15) and improved performance. Scenario-based learning was therefore positioned as a tool to empower and engage employees by providing an alternative path to new experiences, expertise, and performance.

To investigate these assertions, the Situational Motivation Scale (SIMS), which was designed to assess constructs of intrinsic and extrinsic motivation in field settings, was used as a pre-and postintervention survey (Deci & Ryan, 2002). A series of semistructured interviews were also used to bring more of the subjective aspects of the case study to light. Finally, workplace scorecards were used to assess pre-and postintervention performance according to organizational metrics. The study drew data from 169 managers (61 in the intervention group and 108 in the control group) in a Fortune 500 organization.

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DEFINITION OF KEY TERMS

The key terms of this study are (a) narrative scenario, (b) experiential learning, (c) reflective dialogue, (d) motivation and self-determination theory, and (e) performance. Each of these terms is defined below.

Narrative scenario. The use of the word *scenario* in this research is a written or oral outline of events and is similar-to storytelling. For the sake of this research, the word *scenario* is the representation of a specific situation or process of events portrayed or narrated by the learner.

Narrative scenarios defined. The term *narrative* has several meanings, but the word is most often synonymous with the story. Riessman (2008) defined narration as an explanation of events the storyteller deems important. Events experienced by the teller are organized, evaluated based on their meaning, and shared with others through storytelling. Riessman (2008) argued that personal narration could affect social interaction and learning that other modes of oral communication do not (p. 8).

Experiential learning. Experience is an integral part of performance improvement, but it does not stand alone. Gange (1962) said that for experience to create expertise, it must be accompanied by “study, reflection, and the creation of foundational concepts and theories. People will continue to repeat failed experiences if they do not pause to truly learn from them.” Philosopher Dewey (1938), a founding scholar on experiential development, identified that experience alone did not produce ability. He emphasized a transactional approach to experience that required reconstruction and reorganization of experience that adds to meaning and improves ability that can “direct the course of subsequent experience” (Bargh & Chartrand, 1999). He felt

it was necessary to reflect on experience in order for the experience to have its richest meaning (Dewey, 1938).

Experiential learning defined. Kolb (2015) defined experiential learning as “a cycle driven by the resolution of the dual dialectics of action/reflection and experience/abstraction” (p. 51). In his book *Experiential Learning: Experience as the Source of Learning and Development*, Kolb (2015) built on Dewey’s theory and defines the process of experiential learning as, “a four-stage cycle involving four adaptive learning modes—concrete experience, reflective observation, abstract conceptualization, and active experimentation” (p. 66).

Reflective dialogue. Reflective dialogue allows the learner to link memories and knowledge (ATD, 2017). Peer-to-peer reflective dialogue requires attention, listening, sharing, coordinating, perspective taking and collaboration (Schwartz, Tsang, & Blair, 2016). Thoughts can be complex and make connecting around a common goal difficult, but doing things with others can be very motivating, and the exchange of information can enhance personal understanding (Schwartz et al., 2016).

Reflective dialogue defined. Weick (1995) said that to advance the topic of “sensemaking” reflection is the best direction to look. Reflection is seen in Kolb’s (2015) experiential learning cycle as reflective observation and Kolb defines reflection as “the internal transformation of experience.” Many experiential learning theorists see reflection as point (Schon, 2001). For the sake of this, the researcher will use Nonaka and Takeuchi’s (1995) definition of reflection when tacit knowledge becomes explicit when one conceptualizes an image and expresses it primarily in language, which emphasizes the connection between reflection and dialogue.

Many theorists see reflection as a social process when ideas received meaning based on social norms; that reflection is given significance in the context of a social world (Boud, Keogh, & Walker, 1985). “We can invest meaning in our actions only by reference to the forms of life we share with others” (Deitz & Arrington, 1984; Wittgenstein, 1974).

Motivation and self-determination theory. Motivation characterizes the ability of a person to put a new skill into practice. When a person learns new information or a new skill through formal or informal training, putting that skill into practice depends on how motivated they are (Dweck & Elliott, 1983). Self-motivation plays an additional role in how learners apply new information or skill (Deci & Ryan, 2005).

Motivation theory defined. Motivation is defined as the theoretical construct used to explain behavior (Deci & Ryan, 2005) and is included in this conceptualization because, under normal circumstances, motivation is an indispensable element in effort; without it, a person is less likely to perform (Dweck & Elliott, 1983).

Self-determination theory defined. Deci and Ryan’s (2005) self-determination theory of motivation proposes that motivation appears along a continuum, from amotivation (the absence of motivation) to autonomous (completely intrinsic), as depicted in the self-determination continuum (Figure 2). Their theoretical model suggests individuals will regulate the internalization of extrinsic motivation depending on the value underlying it and “the more fully a regulation is internalized, the more it becomes part of the integrated self, and the more it is the basis for self-determined behavior” (Deci & Ryan, 2005, p. 15). This research study uses self-determination theory as the primary definition of motivation.

Behaviour	Nonself-determined					Self-determined
Type of Motivation	Amotivation	Extrinsic Motivation				Intrinsic Motivation
Type of Regulation	Non-regulation	External Regulation	Introjected Regulation	Identified Regulation	Integrated Regulation	Intrinsic Regulation
Locus of Causality	Impersonal	External	Somewhat External	Somewhat Internal	Internal	Internal

Figure 1. The self-determination continuum, with types of motivation and types of regulation (Deci & Ryan, 2002). Adapted from *Handbook of self-determination research* by E. L Deci and R. M. Ryan. 2002, Rochester, NY: University of Rochester Press. Copyright 2002 by E. L Deci and R. M. Ryan. Adapted with permission.

Performance. Performance is not a system design, capability, motivation, competence, or expertise (Swanson, 2007, p. 26-27), but it is necessary to identify the required performance to be able to identify if the process of development has been successful. “Chasing after individual or organizational change without first specifying a valid unit of performance is foolhardy and a waste of time” (Swanson, 2007, p. 27)

Performance defined. According to Lawler and Worley (2006), performance = motivation x ability. Lawler and Worley’s (2006) research outlines a “fundamental truth” about performance—that it depends on two factors, not one: motivation and ability. *Merriam-Webster’s Collegiate Dictionary* defined performance as the ability “to fulfill an obligation or requirement; accomplish something as promised or expected” (“Performance,” 2003, p. 1015). Lawler (2006) proposed that people need both motivation and ability and that motivation to work and perform is based on expectancy theory (Lawler & Worley, 2006), which assumes that behavior is the result of a choice between alternatives that will lean toward maximizing pleasure and minimizing pain (Vroom, 1962). Lawler and Worley (2006) also proposed that the second

half of the performance equation is ability, and that ability consists of knowledge, skill, competence, and personality. In today's complex and ever-changing business world, competence is vital to individual performance.

TABLE OF CONTENTS

ABSTRACT.....	ii
ACKNOWLEDGEMENTS.....	iv
DEFINITION OF KEY TERMS	v
LIST OF TABLES.....	xiii
LIST OF FIGURES	xv
CHAPTER ONE: INTRODUCTION AND BACKGROUND.....	1
The Problem.....	4
Significance of the Problem.....	5
Purposes of the Research	7
Research Question	7
Limitations of the Study.....	7
CHAPTER TWO: REVIEW OF LITERATURE.....	9
Rationale and Methodology.....	10
Narrative Scenarios.....	11
Research Study 1: Bending Moments to Business Models: Integrating Entrepreneurship Case Study as Part of Core Mechanical Engineering Curriculum.....	14
Research Study 2: The Storytelling Organization: A Study of Story Performance in an Office Supply Firm	17
Research Study 3: Photo Voice in the Workplace	18
Summary.....	19
Experiential Learning.....	20
Research Study 1: Active Learning Increases Student Performance in Science, Technology, Engineering, and Mathematics.....	25
Research Study 2: Scientific Teaching in Practice	26
Reflective Dialogue	27
Research Study 1: Combining Peer Discussion with Instructor Explanation Increases Learning From In-Class Concept Questions	28
Motivation and Self-Determination Theory.....	29
Research Study 1: Motivation and Transfer in Professional Training: A Meta-Analysis of the Moderating Effects of Knowledge Type, Instruction, and Assessment Conditions.....	35
Research Study 2: Intrinsic Need Satisfaction in Organizations: A Motivational Basis of Performance and Well-Being in Two Work Settings	36

Performance	38
Research Study 1: Why Peer Discussion Improves Student Performance on In-Class Concepts Questions.....	39
Implications for Further Research	41
Conclusions.....	41
CHAPTER THREE: METHOD	43
Research Question and Hypotheses	43
Research Question	43
Hypotheses.....	43
Research Design.....	43
Pretest/Posttest Metrics.....	44
Organizational Scorecards	45
Supplemental Qualitative Data—Semistructured Interviews.....	45
Scenario Development and Description of the Scenario-Based Learning Intervention	47
Population and Sample	53
Measurement Instruments.....	55
Data Collection	62
Data Analysis.....	63
Surveys.....	63
Organizational Scorecard Data	64
Interviews.....	65
Summary.....	66
Pilot Study.....	67
Overall Chapter Summary	77
CHAPTER FOUR: FINDINGS.....	78
Research Questions.....	78
Scenario-Based Learning Study.....	79
Sampling Method and Demographics.....	81
Assumptions.....	87
Statistical Analysis and Results	91
CHAPTER FIVE: DISCUSSION OF FINDINGS	103
Conclusion	103
Discussion: Research Question.....	104
Two Research Hypotheses.....	104

Limitations	106
Summary of the Findings.....	107
Implications for Theory, Practice, and Research	108
Conclusion	116
REFERENCES	117
APPENDIX A: SCENARIO-BASED LEARNING NARRATIVE SCENARIO.....	127
APPENDIX B: SCENARIO-BASED LEARNING EXPERIENCE.....	137
APPENDIX C: IRB-APPROVED PARTICIPATION LETTER.....	138
APPENDIX D: TEST GROUP INTERVIEWS	139
APPENDIX E: CONTROL GROUP INTERVIEWS	139

LIST OF TABLES

Table 1. A chronological review of motivation	30
Table 2. Humanistic developmental theories of motivation	32
Table 3. Participant search criteria.....	54
Table 4. The Situational Motivation Scale (SIMS)	56
Table 5. Factor loadings from the exploratory factor analysis study 1.....	57
Table 6. Correlations between SIMS subscales, determinant, and consequences of situational motivation: Study 1	58
Table 7. Paired samples statistics for the longboard truck lab survey—Stanford E14.....	70
Table 8. Paired samples correlations for the longboard truck lab—Stanford E14	70
Table 9. Paired samples test for the longboard truck lab—E14	71
Table 10. Paired samples statistics for the bicycle lab survey—Stanford E14.....	74
Table 11. Paired samples correlations for the bicycle lab—Stanford E14	74
Table 12. Paired samples test for the bicycle lab—E14	75
Table 13. Paired samples statistics – control group & test group.....	84
Table 14. Paired samples correlations – control group & test group.....	84
Table 15. Paired samples test (paired differences) – control group & test group.....	85
Table 16. Paired samples statistics – control group & test group OTW.....	85
Table 17. Paired samples correlations – control group & test group OTW.....	86
Table 18. Paired samples test (paired differences) – control group & test group OTW.....	86
Table 19. Paired samples statistics – control group & test group COSDs.....	86
Table 20. Paired samples correlations – control group & test group COSDs.....	86
Table 21. Paired samples test (paired differences) – control group & test group COSDs	87
Table 22. Means, standard deviations, and skewness for study variables	88
Table 23. Cronbach’s alpha for all dependent variables.....	89
Table 24. KMO and Bartlett’s test factor analysis for the Situational Motivation Scale	90
Table 25. Rotated component matrix factor analysis for the Situational Motivation Scale	90
Table 26. Paired statistics samples – test group.....	92
Table 27. Paired samples correlations – test group.....	92
Table 28. Paired samples test (pair differences) – test group	92
Table 29. Paired statistics samples – control group.....	93
Table 30. Paired samples correlations – control group.....	94

Table 31. Paired samples test (pair differences) – control group	94
Table 32. Paired samples test (pair differences) – test group and control group posttest.....	95
Table 33. Paired statistics samples – test group and control group posttest.....	95
Table 34. Paired samples correlations – test group and control group posttest.....	96
Table 35. Paired samples statistics – control group & test group OTW.....	98
Table 36. Paired samples correlations – control group & test group OTW.....	98
Table 37. Paired samples test (paired differences) – control group & test group OTW.....	99
Table 38. Paired samples statistics – control group & test group COSDs.....	99
Table 39. Paired samples correlations – control group & test group COSDs.....	99
Table 40. Paired samples test (paired differences) – control group & test group COSDs	99
Table 41. Code system.....	101
Table 42. Segments and cycles	101

LIST OF FIGURES

Figure 1. The self-determination continuum, with types of motivation and regulation	vii
Figure 2. Scenario-based learning.....	3
Figure 3. John Dewey’s model of experiential learning.....	21
Figure 4. The Lewinian experiential learning model.....	22
Figure 5. Kolb’s experiential learning cycle.....	24
Figure 6. Research design diagram.....	44
Figure 7. Research timeline	47
Figure 8. Brainstorming Session.....	49
Figure 9. Categorization.....	50
Figure 10. Scenario-based learning process with descriptions	51
Figure 11. Deployment and change leadership activity.....	52
Figure 12. Example scorecard for peak customer occasions	61
Figure 13. Example scorecard for average weekend out-the-window (OTW) seconds	61
Figure 14. Example survey from Stanford University pilot (2017).....	68
Figure 15. Population sample and regional organizational structure.....	82
Figure 16. Weekend COSD–customers over the previous year.	97
Figure 17. OTW–out the window over last fiscal year.....	97

CHAPTER ONE: INTRODUCTION AND BACKGROUND

“Organizations need to be good at knowledge generation and appropriation to gain a competitive advantage” (Schön, 1984, p. 30)

This dissertation rests on existing theoretical frameworks and existing research on narrative scenarios by Freire (1970), Polanyi (1958), and Nonaka and Takeuchi (1995); experiential learning by Dewey (1938), Lewin (1951), Argyris (1982, 1985, 1990, 1993, & 1999) and Kolb (2015); reflective dialogue by Smith et al. (2009), Kendall et al. (2013), and Freeman and Dobbins (2013); and on motivation by Vroom and Jago, 2007; deCharms (1968), and Gange and Deci (2005). The dissertation proposes that scenario-based learning can provide a transactional approach (Kolb, 2015) to experiential learning that leverages intrinsic motivation (Deci & Ryan, 2002) to accelerate development. Organizational leaders today are faced with the growing challenge of improving the capability and capacity of their leaders with less time and fewer resources. Most leadership development programs today are inefficient, unsuccessful, expensive, and put little focus on the use of scenario-based learning and motivation as strategic aspects of leadership development (American Society of Training and Development [ASTD], 2013). This research situated scenario-based learning as a cost-effective approach that allows leaders to develop competence at a more predictable pace, incorporates motivation in the methodology to keep learners engaged, and allows leaders to work on organizational topics at the same time development is happening.

According to the ASTD’s (2013) *State of the Industry Report*, companies spent \$164.2 billion on direct learning experiences. The key findings were the following: 61% of expenditures were on internal expenses (\$100.2 billion); a percent of payroll direct expenditures on learning increased from 3.2% to 3.6% from 2012 to 2013; and the top three area of training

content in 2012 were the following: managerial and supervisory (13.5%); mandatory and compliance (10.8%); and process, procedures, and business practices (9.9%). The study showed that managerial and supervisory training was one of the top three areas of training, but is only 13.5% of total training and development costs. ASTD (2013) *State of Industry* report focused on a survey of 475 organizations representing a diverse sample of industry, sizes, and locations.

Scenario-based learning arranges knowledge in a four-step, pedagogical process that allows leaders to anticipate the pace of development more effectively (Schar, Sheppard, Brunhaver, Cuson, & Grau, 2014) and is grounded in the proposition that the facilitation of knowledge vs. imparting knowledge is best achieved through its logical design (Austin, 2015). The idea that scenario-based learning's configuration is the impetus for motivation suggests its capability to keep employees engaged, feeling competent, and empowered to while they acquire knowledge (Deci & Ryan, 2002; Kolb, 2015; Schar et al., 2014).

For the sake of this research, the four-step process starts with a narrative scenario that portrays a problem identified through scenario planning (Swanson & Holton, 1999; Chermack, 2011; Van Der Heijden, Kees, 2005). First, the learner listens to, watches, or reads the narrative scenario, which features a protagonist who has experienced the problem and tells a story that contains relevant information required to solve the problem but does not include instruction (Schar et al., 2014). Second, the learner participates in a 30-60 minute hands-on, field-based activity (supported by video, workshops, and social media platforms) that ties directly to the specified problem (Schar et al., 2014). Third, during or after the hands-on experience, the learner has peer-to-peer, reflective dialogue about their experience, including struggles and successes, failures, and solutions. Finally, the learner makes a decision, conceptualizes the

experience, and applies what was learned to solve the problem presented in the scenario (Schar et al., 2014) (Figure 2).

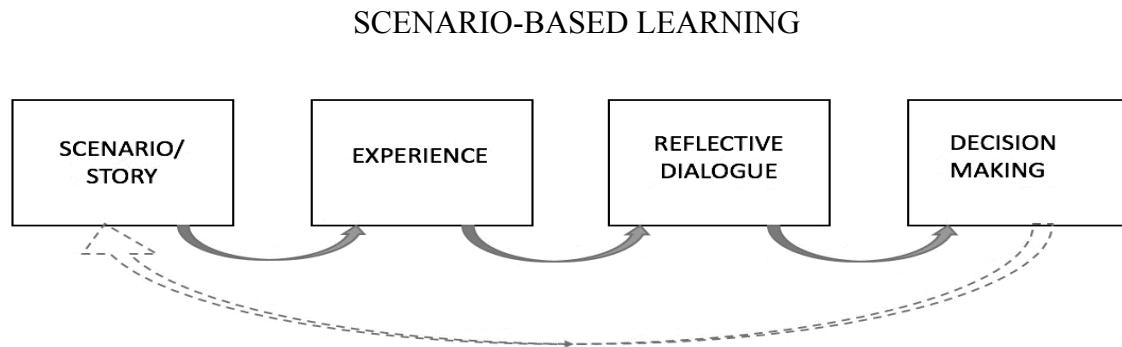


Figure 2. Scenario-based learning (Elwell-Chalmers, 2017; Schar et al., 2014).

The use of a process like scenario-based learning as an employee development tool is becoming more and more relevant (Schar et al., 2014). When faced with a need to develop leadership skills at a more rapid pace, few traditional tools seem to address the issue (Schar et al., 2014). For the past 4 years, Stanford University has been using a scenario-based learning curriculum in their design and education lab (Schar et al., 2014). They developed the curriculum to help their participants with skills that extended beyond the standard engineering program, such as business, communication, influencing others, teamwork, and tactical leadership skills (Schar et al., 2014). Sheppard and Schar’s approach (2014) was developed through and is supported by Kolb’s experiential learning model as the basis of learning as a processing continuum (Schar et al., 2014). The participants work on complex engineering problems while at the same time they get “real” world experience (Schar et al., 2014).

The Problem

Organizational leaders today can isolate the competency gaps of their employees, yet they often struggle to identify and develop competence historically gained over time (Silverman, 2012). Organizational leaders need an evidence-based method of training that mimics a time-based experience to allow for improved predictability in employee development (Lynham, 2002). Studies suggest well-designed training that applies motivation through competency building could give today's workplace a competitive advantage (Schon, 2001; Swanson & Holton, 1999; Vroom & Jago, 2007).

Studies show that talent development professionals are not using training strategies proven to improve employee development, likely because they train the way they were taught (Freeman & Dobbins, 2013; Ho, Jones, Cole, & Robinson 2017; Schon, 2001). The Association for Talent Development surveyed workforce professionals on their use of effective learning concepts and found that the most scientifically supported practices of talent development were the least considered in current organizational development frameworks (Ho et al., 2017). The problem that arises from current practices and sets a foundation for this research study is as follows: Organizational leaders often select approaches to training and talent development based on popular approaches, often without attention to any evidence that might support them.

Books like *Make it Stick* (Brown, Roediger III, & McDaniel, 2014) and *How Learning Works: Seven Research-Based Principles for Smart Teaching* (Ambrose, Bridges, DiPietro, Lovett, & Norman, 2010) and articles in journals such as the *Psychological Review* (Sun, Slusarz & Terry, 2005), *American Educational Research* (Benware & Deci, 1984), and *Psychology of Learning and Motivation* (Jacoby & Brooks, 1984) have focused on “improving how humans learn and how important it is for people who design, deliver, and manage organizational learning

programs to understand current learning concepts to ensure learning and business objectives are achieved, to save companies time and money” (Ho et al., 2017, p. 2).

An evidence-based method of training that allows for a degree of predictability in skill development and shorter time to gain the needed expertise could help organizations improve their internal talent pipeline, increase retention, increase advancement timelines, reduce training costs, and improve organizational performance (Ho et al., 2017). A more predictable, shortened timeframe for development also provides aptitude for a more robust talent strategy that could provide an organization with a significant competitive advantage (Schon, 1984).

With more than \$160 billion spent on organizational training annually according to the ASTD’s (2013) *State of the Industry Report*, scientifically proven training concepts and strategies could significantly contribute to the bottom line. “While the goals of organizations certainly span the entire talent management spectrum, learning continues to be the leader and still has the strongest influence” (Morrison & Dixon, 2017, p. 1) over money and time spent to improve organizational performance. Talent management “ecosystems” that link training with performance objectives are part of today’s modern learning strategies (Morrison & Dixon, 2017, p. 1).

Significance of the Problem

The Association of Talent Development’s (ATD) research, *The Science of Learning: Key Strategies for Designing and Delivering Training* (ATD, 2017) focused on the effectiveness of organizational learning programs. Eight hundred and fourteen participants completed a survey on the strategies of their organizational training programs. Only 304, or 37%, indicated that they discussed the science of learning when creating their organizational learning programs (ATD, 2017; p. 6). Of the 37% of participants who included the science of learning in their

development strategies, research showed that learning is more effective when it uses a variety of techniques, considers multisensory approaches, and uses both mental and physical activities (ATD, 2017; p. 7). Several of the concepts identified as key to effective training transfer in this study are part of the scenario-based learning methodology:

- Scenarios support multiple learning topics and spacing.
- Experiential learning allows for the combination of physical and mental activity.
- Reflective dialogue enables the learner to link knowledge and memories.
- Motivation's role in scenario-based learning empowers self-determination.

Kolb's (2015) work on experiential development, Deci's (2002) work on self-determination theory, and Atman and Turns's (2017) work on reflection serve as the foundation for scenario-based learning. Scenario-based learning also is grounded in more time-honored work of Agyris (1999), deCharms (1968), Dewey (1938), Freire (1970), Lewin (1951), Polanyi (1958), and Vroom (1995). The use of scenario-based learning as a leadership development tool is becoming more and more relevant in a world where organizations need to develop leadership skills, but their current development programs are focused on tactical competency versus leadership development (Lynham, 2002). The connection between experiential learning, specifically Kolb's theory, that indicates learning is transactional and a process of thinking, doing, feeling, watching, and doing, and scenario-based learning is as follows: a preconstructed scenario to joining thinking and doing, a hands-on lab to connect doing and feeling, dialogue to connect feeling and watching, and decision-making to connect watching and doing (Kolb, 2015). Scenario-based learning, in this research, is a pedagogical process and moves beyond the standard case study to incorporate experiential learning. It connects the stages of abstract conceptualization, active experimentation, concrete experience, and observation and reflection

(Kolb, 2015). The design allows operational (tactical) and leadership skills to be taught together and in the boundaries of a specific time frame, which provides predictability. Learners work on complex problems; at the same time, they get practical and applied experience.

Purposes of the Research

The purposes of this research are in these converging streams of thought and practice:

1. To investigate the effects of scenario-based learning on motivation and performance.
2. To present evidence related to this association from related literature, practitioners-scholar expertise and through the conduct of a rigorous research study.
3. To use these discoveries to prescribe an approach to accelerate employee performance using a theory of scenario-based learning.
4. To highlight the implications of discoveries for human resources/organizational discovery.

Research Question

Given the established problem and purposes of the proposed research, the primary research question that frames this study is the following: Can scenario-based learning increase participant motivation and improve performance?

Limitations of the Study

First, the study focused on a Fortune 500 company. As of 2017, the company was one of the few retail companies remaining in the Fortune 500 that still have a physical presence (e.g., a retail shop in a building) that offers a face-to-face consumer experience. Today, the majority of Fortune 500 companies are technology firms or online businesses, which have different consumer expectations, financial capabilities, and employee development needs. They typically have no physical presence for shoppers, and their e-commerce systems are online or Web based.

As a result, the generalizability of the study to non-brick and mortar companies is limited. A second limitation is the study focused on a Fortune 500 organization, which makes it an outlier to private companies in the United States.

A third limitation is that the study is in the context of organizational learning or knowledge management; these boundaries are closed in the organization (Cummings & Worley, 2009), which limits the generalizability. A fourth limitation rests on organizational culture, which is unique to any specific organization and reduces the generalizability of the study results to other companies.

CHAPTER TWO: REVIEW OF LITERATURE

This chapter summarizes and synthesizes what is currently known about scenario-based learning and the research and supporting theoretical constructs that compose its conceptual framework. The chapter also discusses how scenario-based learning works as a mechanism to more effectively motivate employees to learn, grow, and improve performance (Cummings & Worley, 2009). With \$164.2 million spent on learning activities annually (ASTD, 2013) and \$500 million invested by the National Science Foundation into centers dedicated to the science of learning over the last 15 years (Schwartz et al., 2016), organizations need to take advantage of the research investments and use their practical platforms to advance the knowledge of effective organizational training and development to enrich today's most valuable organizational asset: people (Becker, 1964).

Based on a close and careful study of the relevant literature (Bacharach, 1989; Callahan, 2004; Torraco, 2005) there are five key constructs under review: (a) narrative scenarios, (b) experiential learning, (c) reflective dialogue, (d) motivation and self-determination theory, and (e) performance. Each section of this chapter further defines, associates, and provides supporting research for these five constructs.

This chapter also presents two hypotheses, based on the theories and research provided, with the goal of showing how the constructs are foundational to scenario-based learning's effect on motivation and performance. While each construct stands alone in its ability to impact motivation and performance when the constructs are combined to create a learning process, their impact is multiplied (Deci & Ryan, 2004). The five constructs are similar to organizational and academic learning theories that also are foundational to scenario-based learning: experiential learning (Dewey, 1938; Kolb, 2015), action learning (Argyris et al., 1982, 1985, 1990, 1993,

1999; Lewin, 1951; Schon, 2007), adaptive learning (Van de Ven, 2007), and organizational knowledge creation (Nonaka & Takeuchi, 1995). These additional theoretical contributions will be referenced throughout this chapter.

Rationale and Methodology

The methodology for this literature review applied Callahan's (2004) process for the method sections of literature reviews, the six W's: who, when, where, how, what, and why. Following Callahan's structure, the abstracts of approximately 230 articles and 98 books were reviewed by the author between August 2014 and March 2018. The research was collected using relevant databases in Colorado State University's library system, including Academic Search Premier, Business Source Complete, and Google Scholar. The snowball approach also was used with key documents and books to find citations or references on the same subjects by mining their reference lists. The researcher selected 10 books and 20 studies for the critical analysis of the research; the researcher also selected 15 books and 32 articles for the critical analysis of the supporting theories associated with scenario-based learning. The books, articles, and studies were selected based on a review of the abstracts, or the number of times an article, study, or book was cited as well as a specific focus on scenario-based learning.

Based on a review of the research, there is little empirical evidence to support scenario-based learning's use as an organizational development tool, primarily because of its recent development. A majority of the research articles specific to scenario-based learning were theoretical and not data-driven. Because the focus area is emergent, the research identified in this review is a foundational research that supports the key constructs that underlie scenario-based learning. The historical theories that support scenario-based learning are healthy and

explain how scenario-based learning could have a positive impact on motivation and organizational performance (Lincoln & Lynham, 2011).

Narrative Scenarios

The following section further defines narrative scenarios, presents evidence that narrative scenarios are underutilized as a way to promote personal learning, and discusses narration in a social media environment. This section also shows the connection between storytelling and experiential learning, sharing the research that supports the concept of narration as a component to scenario-based learning in an organizational environment.

Nonaka and Takeuchi (1995) featured internalization of knowledge as a process that can help move explicit knowledge to tacit knowledge. They stated that the accumulation of tacit knowledge at the individual level must be socialized with other employees to start a “spiral of knowledge creation” (Nonaka & Takeuchi, p. 69), and for knowledge to become tacit, it should be verbalized through oral stories. Weick (1995) focused on sense-making as the creation of storied accounts that give sense to behavior. As one hears a story, one can deliberate and decide how to act, and, at this point, the knowledge becomes more tacit (Weick, Sutcliffe, & Obstfeld, 2005).

Weick’s (1979) work on sense-making as a category of cognitive psychology emphasized the concept of organizing experiences as a way to make historical meaning of situations. Though Weick et al. (2005) spoke of meaning-making through retrospection and centered most of his work on the human quest for meaning by looking backwards, his perspective on how narratives help us process experiences and learn is more forward-looking, action-oriented, and foundational to scenario-based learning. Narrations can be a springboard to action (Taylor & Van Every, 2000).

Similar to Weick et al. (2005), Freeman (1984, 1993, 1997, 2012) also argued that at the core of narration is retrospection; that narrations require one to look backwards from a present moment. This concept of retrospection is important because it parallels Kolb and Yeganeh's (2011) concept of reflective observation in experiential learning. Freeman (2012) went on to discuss how one has to break the reflection into parts or episodes and then reconstruct the experience in a meaningful way, which also parallels Kolb's concept of abstract conceptualization. All three concepts (retrospection, reflective observation, and abstract conceptualization) allow for reconstruction of an experience in a way that allows internalization, autonomy, and choice, which fosters intrinsic motivation (Gange & Deci, 2005).

The underutilization of narrative storytelling. Narrative storytelling is a natural form of teaching and has a rich history, but its range of use in organizational learning is undervalued (Gabriel, 2015). Since the 1970s, narrative stories have been a significant part of organizational phenomena, including culture, team dynamics, and visioning, but underutilized for performance development (Gabriel, 2015). Mitroff and Kilmann (1979) wrote several features of storytelling in organizations—that they are socialization instruments and that they express unconscious wishes of employees, but most importantly, their ambitious look at storytelling as a vehicle for learning deserves further exploration (Mitroff & Kilmann, 1979).

While organizations might “not, at first glance, look like a natural space for stories, like a café or pub,” the use of storytelling in the workplace is vast (Gabriel, 2015, p. 277). Storytelling in organizations extends beyond cultivating organizational culture and setting direction to affecting social interaction and learning (Gabriel, 2015). Instead of the “banking concept” of learning where deposits are made in the learner's head, narrations provide a platform for underutilized conversational learning and a deeper understanding of the world (Freire, 1970).

The narration provides a capsule for tacit knowledge, culture, organizational phenomena, group dynamics, and so on (Nonaka & Takeuchi, 1995) and can be a processing structure for reflective observation and abstract conceptualization (Kolb & Yeganeh, 2011). Reflective observation focuses on understanding the meaning of an experience by describing it. Explaining an experience through a story provides the learner a platform for recounting their experience. Abstract conceptualization is the breaking down of an event into pieces and then putting it back together again, either in the same or a different order (Kolb & Yeganeh, 2011). This is where the use of logic, problem solving, and prioritization allows the narrator to reconstruct the story into a logically sound theory (Kolb & Yeganeh, 2011). Abstract conceptualization allows for thinking versus feeling (Kolb & Yeganeh, 2011) and is concerned with theorizing versus general understanding.

Narrative stories and experiential learning. The use of a narrative story to present a current problem begins a spiral of successive iterations of reflection, experimentation, and action (Kolb, 2015; Nonaka & Takeuchi, 1995). Narrative stories give learners the autonomy to internalize and socialize the situation at their own pace (Deci & Ryan, 2002) and the space to reflect and share thoughts with others, while experiential learning provides a platform to begin to apply one's current knowledge to a given problem (Nonaka & Takeuchi, 1995).

Schar's et al.'s (2014) work on scenario-based learning at Stanford University combines narrative stories with experiential, lab-based work. The introduction of scenario-based learning into their E14 statics course began with a pilot research project on the integration of entrepreneurship as part of the core mechanical engineering curriculum.

Research Study 1: Bending Moments to Business Models: Integrating Entrepreneurship Case Study as Part of Core Mechanical Engineering Curriculum

Stanford University has been using a scenario-based learning curriculum for the past 4 years to help their design and education students develop skills that extend beyond the basic engineering program, like communication, influencing, teamwork, and tactical leadership (Schar et al., 2014). The program began in 2014 with a pilot study conducted by Shar et at. (2014). It was named “Bending moments to business models: Integrating and entrepreneurship case study as part of core mechanical engineering curriculum.” The study consisted of an instructional technique that used case study narration and lab-based work to teach solid mechanics concepts and entrepreneurship (Schar et al., 2014). The case study involved four to six pages of narrative text, “the narrative of the case study involved a realistic entrepreneurial scenario” (p. 4), including a protagonist who had a current engineering problem. The story they told contained relevant information required to solve the problem but did not include instruction (Schar et al., 2014). Their goal was to see if this format would benefit engineering students’ education by giving them a broader range of career-based skills, specifically in business (Schar et al., 2014). There were four research questions in the study:

1. Does the introduction of entrepreneurial concepts into a core engineering curriculum diminish the learning of core engineering concepts? (p.3)
2. Do students with a career interest in entrepreneurship report greater satisfaction in a case study experience than students with a lesser interest in entrepreneurship? (p.3)
3. Does a case-study experience improve a student’s entrepreneurial self-efficacy (as indicated by confidence in business skills)? (p.4)

4. Will students career interests in entrepreneurship change pre-to-post single entrepreneurial case study experience? (p. 4)

The researchers found that a well-designed narrative case study could deliver basic engineering acumen along with improved business skills (Schar et al., 2014). Research Question No. 3 is the most relevant to the current discussion of scenario-based learning because of its relation to motivation. The results of the pre- and postintervention survey showed that before the case study and lab work, the students showed a highly practical and statistically significant increase in self-efficacy rating (Schar et al., 2014). The improvement in participants' self-efficacy ratings supports the hypothesis that scenario-based learning can have a positive effect on motivation, and further study is required. After concluding their pilot study, the team's next step was to develop case studies for their beginning mechanical engineering course at Stanford, which led to the work they are currently doing in their Design and Engineering Lab (DEL) where Stanford engineering students work on complex engineering problems through a scenario-based learning process (Schar et al., 2014). This application is considerably novel and provides a specific inspiration for the potentially similar dissertation topic to be proposed.

Narration in new social media environments. The blending of old and new storytelling is showing itself in the form of storytelling in the social media environment (Reissman, 2015). This platform allows for more complex participation, a larger audience, and more permeating distribution (Reissman, 2015), and it is an attractive platform for today's millennials and younger generations. These factors alone have the potential for further research. The ability of leaders to exploit the different forms of multimedia could change the way stories are structured and told.

The creativity that social media platforms allow for (videos, photos, quotes, written stories, and so on) promote autonomy and foster dialogue (Gange & Deci, 2005; Kolb &

Yeganeh, 2011). Platforms like Workplace by Facebook, Instagram, and GroupMe are great examples of how employees can collaborate and motivate each other to learn, and they are reconstructing how scholars look at narration, specifically telling and listening. When employees post a story about an experience or an idea they have, they are using reflective observation, and in many cases, abstract conceptualization (Kolb & Yeganeh, 2011). Some argue that the social media platform favors recency versus retrospection (Kolb & Yeganeh, 2011). Future topics for the research of social media platforms and narrative learning could be the following: Does recency impact the use of social media to teach and is social media better used as a supportive tool versus a primary platform? The social media platform is explored in this section because it could function as a vehicle for the first step in the scenario-based learning process. Distribution of a narrative scenario could be on a social media platform via video, audio, or in written form.

Personal narrations and intrinsic motivation. There is an intimate link between experiences and stories that gives motivational power to the storyteller (Polkinghorne, 1988) and the listener. The interpretation of the experience lies with the teller, which gives the power to the learner through choice and internalization (Gange & Deci, 2005). Scenario-based learning postulates that narrative storytelling can exploit the concept of integrating motivation, because integrated motivation is maximized when the locus of control is internal, as with storytelling (Deci & Ryan, 1985). Deci and Ryan (1985) argued that the functional significance of any input affecting regulation of motivation could be classified as supporting autonomy, which is more likely to create sustainable change and improve performance.

Narrative storytelling in organizations. Two developments have enhanced interest in organizational narratives and storytelling (Gabriel, 2015). The first is the consideration of

managers, employees, and leaders as important storytellers in the organizational setting, and the second is the acceptance of stories as a “valuable window” into organizational phenomena, such as culture, knowledge management, and group dynamics (Gabriel, 2015, p. 276). Boje’s (1991) research explains how good storytelling in the workplace can help leaders develop employees, strategically challenge them, and create change.

Research Study 2: The Storytelling Organization: A Study of Story Performance in an Office Supply Firm

Boje (1991) conducted a research study of a large office that shows how people “perform stories to make sense of events, introduce change, and gain political advantage” (Boje, 1991, p. 106). Boje (1991) collected and analyzed social scenes of seven executives and 23 managers (on- and off-site meetings, training sessions, hallway conversations, and others) from an office supply firm. The data set consisted of more than 100 hours of tape recordings (Boje, 1991). The researcher transcribed the tapes to line-numbered transcripts and segmented the findings into two levels: the surface level of the story and how the stories fit in the work setting (Boje, 1991). Level one findings were that employees “abbreviate and accentuate” parts of stories to add to their “performance,” and level two findings were that employees use parts of stories for sense making or to introduce change (Boje, 1991, p. 124). “The broader implications for management education evident in the storytelling-performance paradigm is that people more skilled as storytelling seem to be more effective communicators,” which implies a need to teach storytelling skills, especially as the organizational structure becomes flatter and change becomes more rapid (Boje, 1991, p. 124). This study supported the idea of using scenario-based learning as a storytelling mechanism; it shows that stories can be used to spread tacit knowledge, and that good storytelling can help leaders teach and create change.

Narration in social media and photo voice. The narrative dimensions of stories that are told using social media in the workplace are vast: photos, quotes, short stories, and video (Page, 2015). Multimodal social media platforms allow organizations to appeal to different learning styles, multigenerational workforces, and digitally enabled modes of narration allow for an acceleration to the pace at which stories can be disseminated (Page, 2015). The ability of leaders to manipulate how a story is distributed, using different forms of multimedia, could change the way stories are structured and told. An example is Flum, Siqueira, DeCaro, and Redway's (2010) study of photo voice in the workplace, which found that the use of photos enabled employees to more effectively communicate with senior leaders and solve problems.

Research Study 3: Photo Voice in the Workplace

Flum et al. (2010) studied how photos seen on workplace social media platforms could empower workers to facilitate change in the workplace (Flum et al., 2010). The study asked university custodians to visually demonstrate the health and safety issues they face in their daily work. The “photovoice methodology was selected as a tool to give voice to the workers on campus with policy makers and management” (Flum et al., 2010, p. 1151). Participants took pictures of their work environments and simulated hazardous situations. The photos were then shared with management to help the workers define issues and solve problems. The study not only had an impact on improving workplace safety, but it also had a positive effect on the workplace environment and employee engagement (Flum et al., 2010). The results of the study support the idea of storytelling through photos to improve the work environment, communicate better with management, and solve problems more effectively—similar to how scenario-based learning uses stories.

Summary

Organizational stories and narratives currently are attracting the attention of an increasing number of researchers who are pursuing the connection between narration and knowledge management. Researchers are exploring how storytelling and restorying create critical reflection and learning that could help employees deal with ambiguity, process, and relationships (Kendall & Kendall, 2017; Schedlitzki, Jarivis, & MacInnes, 2015; Tanner, 2009; Weick et al., 2005). Robust evaluation of leadership development practices using storytelling and dialogue still are rare, and the transfer of learning from the classroom to the workplace still is largely unexplored (Schedlitzki et al., 2015). The studies show that storytelling and dialogue in the classroom setting are key to student learning and easy to integrate (Freeman & Dobbins, 2013; Miller, Pfund, Pribbenow, & Handelsman, 2008; Smith et al., 2009; Tanner, 2009). It seems that the exploration of narration as a vehicle for sense-making and a step in the process of scenario-based learning deserves further study. This review of relevant concepts leads to suspicion about how the concepts may interact in modern organizations.

The process of storytelling can create an ongoing discussion among workers and foster an inherent interest and tendency to integrate new aspects of experiences (Deci, 1995, p. 112). The exploration of narration as a vehicle for sense making and a step in the process of scenario-based learning is robust and deserves further study. Storytelling can be messy and unreliable (Gabriel, 2015), but when you look beyond the subjectivity to the story line, the concept may be a useful way to transfer tacit knowledge. A story can be profound, frequent, and textural, leading practitioners and researchers to see that they are an essential construct to organizational learning (Gabriel, 2015).

Experiential Learning

The concept of experiential learning is a well-researched area of study (Kolb, 2015). The following section further defines experiential learning and reviews how the study of learning through experience has evolved, by exploring the seminal work by Dewey (1938), Kolb (2015), Lewin (1951), and Piaget (1971). Following the definition and a review of the founding scholars, this section explores the link between experiential learning, reflection through dialogue, and its tie to performance.

The formation of experiential learning. In Dewey's (1938) book, *Experience and Education*, he celebrated traditional methods of experiential learning like apprenticeships, internships, work-study programs, laboratory studies, and field projects. All experiences in which the learner is in touch directly with the work versus simply thinking about the situation. Dewey believed that education was a process of living, not preparation for the future and that interests were the "dawning of capacities" (Dewey, 1938, p. 69). His mode of experiential learning depicts this with an emphasis on integrating experience and concepts, observations, and action (Figure 3).

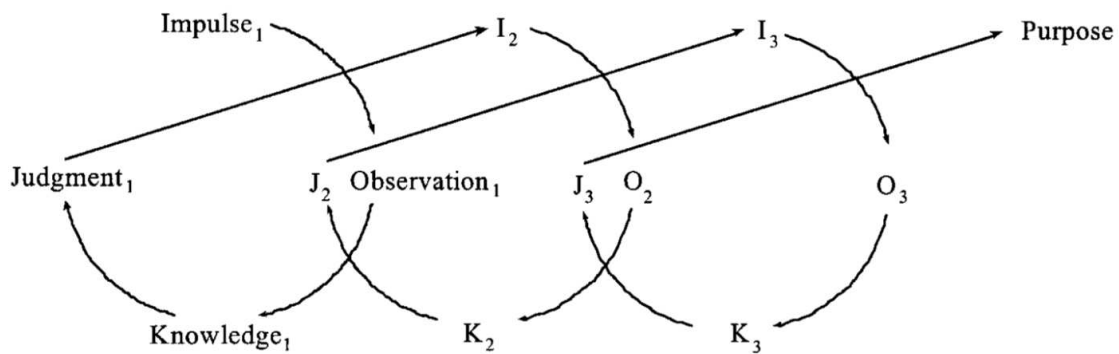


Figure 3. John Dewey’s model of experiential learning. Adapted from *Experiential learning: Experience as the source of learning and development* by D. Kolb, 2015, Upper Saddle River, New Jersey: Pearson Education. Copyright 2015 by D. Kolb. Adapted with permission from Kolb (2015, p. 23).

In the 1930s, Dewey became famous for his perspective on the authoritarian approach to knowledge. He believed that this method was too focused on delivering knowledge and not focused enough on understanding the learner’s experience. Dewey became the philosophical father of progressive (experiential) education. Dewey did not think that experience alone could produce learning. He believed that for learning to happen it needed to be reconstructed or reorganized to add meaning to the experience, which would increase the learner’s “ability to direct the course of subsequent experiences” (Dewey, 1938, p. 74). Further defining his perspective, Dewey stated, “A philosophy of education, like any theory, has to be stated in words, in symbols” (1938, p. 28).

Lewin was considered the grandfather of action learning (Kolb, 2015). His model of action research and lab training method—learning, change, and growth—described an integrated

approach to experiential learning that begins with an experience, followed by a breakdown of the data and reflection on the experience (Kolb, 2015; Figure 4).

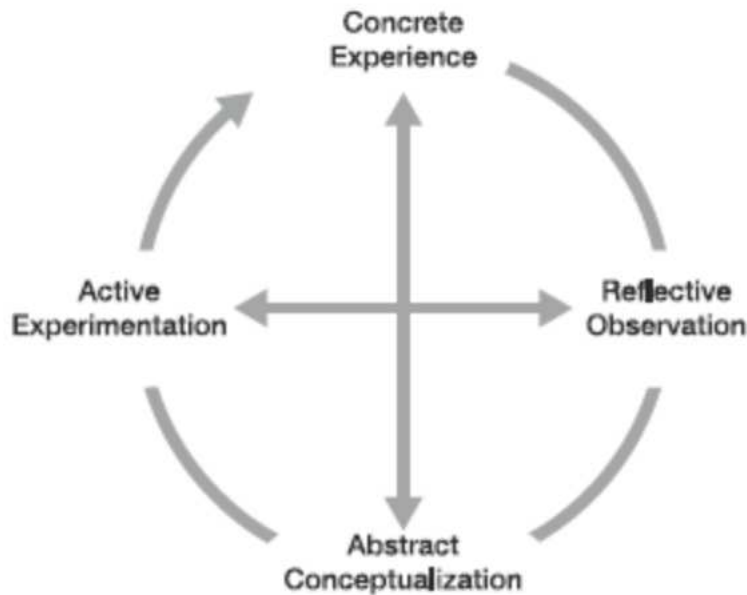


Figure 4. The Lewinian experiential learning model. Adapted from *Experiential learning: Experience as the source of learning and development* by D. Kolb, 2015, Upper Saddle River, New Jersey: Pearson Education. Copyright 2015 by D. Kolb. Adapted with permission from Kolb (2015, p. 23).

Lewin's research centered on a discussion of problems followed by group decisions on next steps. He believed that active participation in solving problems was proportional to solutions (Kolb, 2015). His model consisted of four steps:

1. concrete experience,
2. observations and reflections,
3. formation of abstract concepts and generalizations, and
4. testing implications of concepts in new situations.

Lewin's methodology was pragmatic, derived from Peirce's dialectical process seeking a "best fit." Though pragmatic, he emphasized participation and was equally focused on that process as much as the outcome (Burks, 1946). Piaget (1896-1980) focused on the process of internal cognitive development in the individual and orientation towards problem solving or organizing data (Kolb, 2015). His cognitive development theory identifies the basic learning process from birth to adulthood in four stages: (a) sensory motor, (b) representational, (c) stage of concrete operations, and (d) stage of formal operations (Kolb, 2015). Two other founders of experiential learning are Jung and Rogers (Kolb, 2015). Jung's work explained experiential development as the concept of individualization and integrating opposites, the conscious with the unconscious, thinking and feeling (Kolb, 2015). Similarly, Dewey and Rogers influenced experiential learning in three ways: (a) a focus on experiences as central to the "fully functioning" person (Kolb, 2015, p. 28), (b) identifying that "psychological safety" is essential for learning (Rogers, 1951, p. 165), and (c) the theory of learner movement towards "self-actualization" (Rogers, 1951, p. 162). Kolb's (2015) seminal work on experiential learning and theory development is inspirational in its cycle and structure. Kolb based his theory on four learning modes of integrated complexity and their transactional interaction with each other: (a) affective complexity and concrete experience, (b) perceptual complexity and reflective observation, (c) symbolic complexity and abstract conceptualization, and (d) behavioral complexity and active experimentation. These four learning modes are the basis for the scenario-based learning used in this study (Figure 5). Kolb's experiential learning theory looks at learning as a cycle that transforms experiences (Kolb, 2015). He believed learning happens when experiences transform through reflective observation and active experimentation.

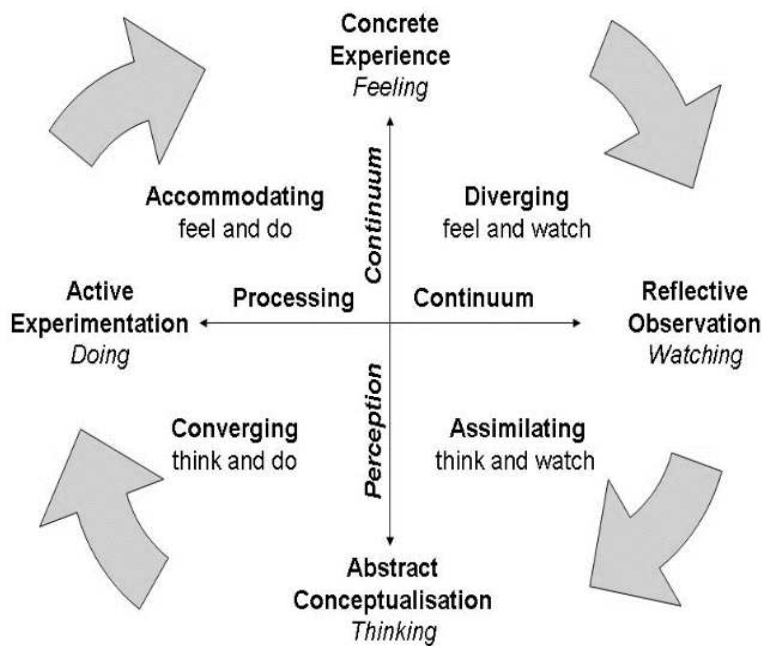


Figure 5. Kolb's experiential learning cycle. Adapted from *Experiential learning: Experience as the source of learning and development* by D. Kolb, 2015, Upper Saddle River, New Jersey: Pearson Education. Copyright 2015 by D. Kolb. Adapted with permission from Kolb (2015, p. 23).

Experiential learning and performance. Instructional- based learning has been the predominate form of teaching for years, but learning that emphasizes experience has challenged the theoretical underpinnings of traditional “teaching by telling” (Freeman et al., 2014). Kolb (2014) defined experiential learning as a “quality of learning that cannot be ignored; it is assertive, forward moving, and proactive; that learning is the transaction between internal characteristics and the external circumstances, between personal knowledge and social knowledge” (p. 198). Freeman et al. ’s (2014) study of experiential learning’s effect on student

performance supports Kolb's assertion that the quality of learning increases through experience, a reality that cannot be ignored.

Research Study 1: Active Learning Increases Student Performance in Science, Technology, Engineering, and Mathematics

The question of teaching by telling versus experiential learning was addressed in the Freeman et al. (2014) study of undergraduate courses in science, technology, engineering, and mathematics (STEM). The study was conducted to advance the teaching STEM to a more evidence-based platform and improve the current statistic that fewer than 40% of U.S. students who enter universities with interest in these disciplines finish with a degree in a related field (Freeman et al., 2014). The study focused on classroom instruction and active learning compared with traditional lecturing—and the results were significant. The results showed a standardized mean difference of 0.47 ($Z=9.781$, $P<<0.001$). On average, student performance improved by just under half a standard deviation with hands-on learning (Freeman et al., 2014). The study also found that students in traditional lecture courses had a risk ratio of 1.5, meaning that on average they were 1.5 times more likely to fail than those who participated in hands-on learning (Freeman et al., 2014). This study provides evidence that experience-based learning has a positive impact on performance and supports the use of hands-on experience as a key pillar of scenario-based learning (Freeman et al., 2014). While there have been similar findings over several of the past decades, this study is particularly relevant because of its timeliness and context related to scenario-based learning.

Experiential learning and reflective dialogue. “Conversational anchors” like scenario-based learning provide a mindful way to integrate experiences (Kolb & Bauback, 2011, p. 11). Gange (1962) determined that for experience to create expertise, it must be accompanied by

“study, reflection, and the creation of foundational concepts and theories.” Miller et al.’s (2008) research on instructional design, using hands-on activities, specific learning goals, and robust feedback provided support for the connection between experiential learning and reflective dialogue.

Research Study 2: Scientific Teaching in Practice

Scientific teaching in practice (Miller et al., 2008), published by the American Academy for the Advancement of Science (AAAS), studied a training program aimed at graduate students and postdocs. The program was created to improve two problems: (a) preparing undergraduate students as scientists and (b) preparing graduate students to teach. It was decided that both problems could be solved by teaching graduate students to teach, using scientific teaching methods (Miller et al., 2008). The program lasted 8 weeks and included an iterative process of instructional design, concrete learning goals, design activities, and revised instruction based on feedback (Miller et al., 2008). The program incorporated action-based work and feedback cycles; peer review and dissemination also was embedded in the process (Miller et al., 2008). The researchers assessed the method with qualitative and quantitative design, and the materials were analyzed for evidence of active learning, indications of reflective approaches to teaching, and the inclusion of methods that fostered discovery (Miller et al., 2008). Examples of experiential learning were “student engagement in small group discussions, responding to clicker questions, analyzing case studies, and any other activity where engagement of most or all students occurred” (Miller et al., p. 1330). Significant gains in knowledge for the core elements of scientific teaching were reported (Miller et al., 2008). An average skill level of 1.7 was reported before the training and 3.8 after the training (Miller et al., 2008), indicating a practically and statistically significant improvement. The graduate students were taught experiential

learning as part of the program and incorporated these elements of scientific teaching into their teaching practices, which moved the students from a teacher-centered approach to a student-centered approach (Miller et al., 2008).

Summary. Experiential approaches to learning focus on how learners acquire and transform new experiences and how those experiences lead to a greater sense of satisfaction and improved decision-making (Kolb, 2015). Scenario-based learning is a mechanism for cultivating experiential learning so learners can become more intentional about their behavior.

Reflective Dialogue

Reflective dialogue is an evolving area of study (Atman & Turns, 2017). The exploration of the meaning of experiences and the consequences of their meaning is essential to learning (Atman & Turns, 2017), and the exploration of previous experiences are more likely to be intelligible through exchanges with other people (Revens, 1982). The following section further defines reflective dialogue and offers additional context to its connection to experiential learning and performance.

Experiential learning and reflection through dialogue. Experience is an integral part of performance improvement, but it does not stand alone (Kolb & Bauback, 2011). Related to this concept, Gange, as an early advocate of reflective practice, suggested that for experience to create expertise, it must be accompanied by “study, reflection, and the creation of foundational concepts and theories. That person will continue to repeat failed experiences if they do not pause to learn from them truly” (Deci & Gange, 1962, p. 334). The “learning way,” as Kolb defined it, is a method of approaching life in a deep, trusting fashion that requires reflection intended to bring about new avenues of experience (Kolb, 2015). Smith et al.’s (2009) study of performance

improvement through peer-to-peer dialogue gives additional context to dialogue as a way to improve knowledge.

Research Study 1: Combining Peer Discussion with Instructor Explanation Increases Learning From In-Class Concept Questions

Smith et al. (2009) gave context and evidence to support dialogue as a key concept in scenario-based learning. The specific study took a close look at student dialogue and how it could improve academic performance and give students time to discuss their ideas and thoughts with other peers verbally, which improves learning, similar to the dialogue step in scenario-based learning. The authors found that classroom dialogue improves performance because understanding increases (Smith et al., 2009). Smith and colleagues used a new classroom technology, the clicker system, to collect data to investigate whether talking creates a deeper understanding of content in undergraduate science courses. Instructors ask students a question individually, students use the clicker to respond anonymously, and then a histogram of the class's responses are displayed to the class. If the responses are inaccurate in aggregate, students are invited to discuss the questions briefly with their peers and then revote. The instructor displays the new histogram and explains the correct answer. In this study, most instructors reported that the percentage of correct answers increased after the peer-to-peer dialogue, as well as students' confidence in their answer. This study supports the value of dialogue as a means to manage knowledge and potentially ties dialogue to building competence and motivation to learn (Smith et al., 2009).

Summary. Reflection and reflective techniques, including peer-to-peer dialogue, are important to learning and development because of the need for broader thinking, better problem-solving, and critical thinking in a complex business world (Atman & Turns, 2017). "Behavior

change is more likely to follow the reinterpretation of past experiences than the acquisition of fresh knowledge” (Revans, 1982, p. 6).

Motivation and Self-Determination Theory

The following section presents foundational work on motivation by deCharms (1968), Deci (2009), Gange (2005), and Vroom (1962), defines self- determination theory; and shows how leveraging the motivation that is the output of experiential learning and reflection through dialogue can improve individual performance. The acquisition of knowledge in a way that is more intrinsic is more likely to create sustainable performance, due to the integration of integrated intrinsic motivation. Motivation characterizes the ability of a person to put a new skill into practice (Deci & Ryan, 2005). When a participant learns new information or a new skill through formal or informal training, applying that skill in real-world situations depends on their level of motivation (Dweck, 2002).

Motivational theories. There are numerous theories and research about what motivates people to perform, why they make particular choices or the reasons that they are engaged and satisfied with their work (Gange & Deci, 1962). Table 1 gives a chronological perspective of seminal theories of motivation from 1943 to 2005.

Table 1

A Chronological Review of Motivation

Major Contributing Theory	Description	Author and Year
Maslow's hierarchy of needs theory	The theory that people need personal growth and development once other foundational needs are satisfied.	Maslow, 1955
Expectancy-valence theory	The theory that an individual will behave in a way that produces an expected result.	Vroom, 1995
Cognitive evaluation theory	The theory that external motivators such as tangible rewards diminish feelings of autonomy and the perceived locus of causality and undermine intrinsic motivation.	deCharms, 1968
Crowd theory and corruption effect	The theory that external motivation, like a monetary reward, crowds out intrinsic motivation and makes organizations dependent on monetary reward to motivate.	Osterloh and Frey, 2000
Self-determination theory	The theory that motivation is driven by a person's interest, concern, and tendency. Intrinsic and extrinsic forces play a significant role in motivation and certain extrinsic motivation, if autonomous, can maximize performance without crowding out intrinsic motivators.	Deci and Ryan, 1970, 1980, 2000, 2005
	Competence —the experience of being able to meet challenges effectively.	Deci and Ryan, 2005
	Relatedness —the experience of belonging.	Deci and Ryan, 2005

Self-determination theory. Self-determination theory is a combination of humanistic developmental theories that suggest humans tend to psychological growth and integration, and that development is an overarching organizing function that meets the vision of new cognitive

structures (Piaget, 1971). To a degree, the modern versions of these theories focus on the human propensity for curiosity and exploration (Deci & Ryan, 2002). Self-determination theory is the combination of four mini-theories: (a) cognitive evaluation theory, (b) organismic integration theory, (c) causality orientation theory, and (d) basic needs theory (Table 2).

Table 2

Humanistic Developmental Theories of Motivation

Major Contributing Theory	Description	Authors
Cognitive evaluation theory	The effect of social context on people's motivation	Deci, 1972; Deci & Ryan, 1980
Organismic integration theory	Concerns the internalization and integration of values and the degree to which individuals experience autonomy while engaged in extrinsically motivated behaviors.	Deci & Ryan, 1985
Causality orientation theory	Individual differences in people's tendencies to orient toward the social environment in ways that supports their autonomy, control their behavior or are amotivating.	Deci & Ryan, 1985
Basic needs theory	The relation of motivation and goals to health and well-being, in part by describing associations of value configurations and regulatory styles to psychological health, across time, gender, situations, and culture.	Ryan & Deci, 2000

Self-determination theory unifies these theories to suggest that personal growth and development consists of both a human's tendency to actively pursue challenges and the idea that social environments can facilitate or block growth tendencies (Vansteenkiste, Simons, Lens, Sheldon, & Deci, 2004). This theory contributes to the idea that scenario-based learning can create a social environment that supports the human tendency to be active, growth-oriented, and challenge-seeking.

Self-determination theory is on a continuum (Figure 2). The continuum ranges from amotivation, or the complete lack of self-determination, to intrinsic motivation, which is self-determined in the majority of situations (Deci & Ryan, 2002). Between amotivation (the absence of motivation) and intrinsic motivation are four types of extrinsic motivation, with external being the most controlled (least self-determined), introjection, identified, and integrated (Deci & Ryan, 2002). The continuum becomes progressively more self-determined. This continuum supports the proposition that scenario-based learning can assist in moving motivation to a more self-determined state, by gradually moving the learner's behavior to a stronger feeling of autonomy, relatedness, and competence based on experiences tailored to maximize motivation.

Self-determination theory and experiential learning. Many scholars see the "self" action as the route to self-determination and motivation (Vansteenkiste et al., 2004). Dewey (1938) proposed the connection between an objective and subjective condition as interactional, and Lewin (1951) showed that behavior was a function of the connection between the person and the environment. The connection between self-determined behavior and experiential learning is dependent on the ability of the vehicle for abstract conceptualization to support the internalization of motivation (Kolb, 2015). Storytelling is a vehicle that can help one conceptualize an experience, embodying the supporting factors for self-determination theory

(Deci & Ryan, 2002; Kolb, 2015). If an activity is autonomous and originated from one's conceptualization, it is more likely to be self-determined (Deci & Ryan, 2002). Experiential learning may be externally motivated initially, but can change to a more intrinsic motivation once the experience is reflected upon, broken down, and reconstructed given one's own choice in the organization of the restructuring (Deci & Ryan, 2002; Kolb, 2015).

To show these connections, Deci, Eghrari, Patrick, and Leone (1994) conducted a laboratory experiment with an uninteresting activity. They changed three supporting factors of the activity: (a) a meaningful rationale, (b) acknowledgement of the person's perspective, and (c) choice versus pressure. They found that they could change the internalization of the participant's motivation through the manipulation of these three supporting factors (Deci et al., 1994). This study showed that the internalization of motivation was affected by the presence of these three supporting factors, all of which are present in scenario-based learning. This supporting factor and the previously mentioned scholarly work on narrative scenarios, experiential learning, and reflective dialogue support the first hypothesis.

H1: Perception of intrinsic motivation will increase for scenario-based learning participants.

Self-determination theory and performance. Organizations are struggling to find new ways to motivate their employees to perform outside the typical extrinsic motivational tools they have historically used (Gagne & Deci, 2005). Some on the cutting edge are decoupling pay from performance, replacing pay conversations with more frequent development dialogue (Gange & Deci, 2005). Many business leaders are investigating the use of Dweck's (1986) work on growth mindset versus a fixed mindset in their training materials to keep employees more open to growth and development (Dweck, 1986). Much of this effort stems from the premise that extrinsic reward is less effective in motivating employees to perform (Gange & Deci, 2005). In

short, these leaders are looking for better ways to connect an individual with the purpose of their work and not crowd out what may be motivating them intrinsically (Gange & Deci, 2005).

Research conducted on the ability of motivation to assist with knowledge transfer and performance, for example, Gegenfurter's (2011) meta-analysis of the moderating effect of motivation on training transfer, supports Lawler and Worley's definition of performance equaling motivation x ability. Gegenfurter's work contributes to the idea that motivation is necessary to sustain development and improve performance, and that motivation needs to be autonomous. This concept also is supported by Baard, Deci, and Ryan's (2004) study of intrinsic needs satisfaction in the workplace.

Research Study 1: Motivation and Transfer in Professional Training: A Meta-Analysis of the Moderating Effects of Knowledge Type, Instruction, and Assessment Conditions

A meta-analysis of 148 studies reviewed the relationship between "motivation and knowledge management in professional training" (Gegenfurtner, 2011, p. 153). Motivation exists in nine dimensions: motivation to learn, motivation to transfer, pre- and posttraining self-efficacy, mastery orientation, performance orientation, avoidance orientation, expectancy, and instrumentality (Gegenfurtner, 2011). The study was seeking to discover if motivation was important to knowledge transfer and found that there was a higher level of motivation in the learner when the training was more autonomous, as is the case with scenario-based learning (Gegenfurtner, 2011, p. 153, 163). Studies like this suggest that well-organized training that leverages motivation through competency building and experiential learning can give organizations a competitive advantage (Swanson & Holton, 1999). According to Gegenfurtner (2011), if we assume that why we act a certain way is mediated by our perception of control over

the situation, then creating a process of knowledge acquisition that puts the control of the narrative in the hands of the learner should increase motivation.

Research Study 2: Intrinsic Need Satisfaction in Organizations: A Motivational Basis of Performance and Well-Being in Two Work Settings

This research study supports autonomy's correlation to motivation and performance. Baard et al. (2004) studied two work organizations and the "autonomous causality orientation" (p. 2045) of employees with managers who provided a more autonomous work environment versus those who were more controlling. According to the research, job attitudes and work motivation studies can provide "heuristic utility" in identifying what is needed in the work environment to create more self-determination in employees and more intrinsic motivation (Baard et al., 2004, p. 2045). Self-determination theory, as defined by Deci and Ryan (2000), satisfies three basic psychological needs: autonomy, competence, and relatedness that can facilitate self-motivation by shifting motivation from extrinsic to intrinsic (Figure 2).

Fifty-nine employees from a major U.S. banking corporation were participants for the pilot study. The employees reported on their most recent annual performance review and completed the following three surveys: (a) the General Causality Orientation Scale (GCOS), (b) Problems at Work (PAW) questionnaire, and (c) Intrinsic Needs Satisfaction (INS) scale. All three surveys measured autonomy orientation. The GCOS and PAW presented vignettes about problems at work and in life. The INS scale assessed the extent to which the three psychological needs—autonomy, competence, and relatedness—were satisfied at work. Cronbach's α for the total of the three scales was reported to be .90 or higher, indicating general score reliability. Intrinsic needs satisfaction was found to correlate positively (.34, $p < .05$) with work engagement, overall job satisfaction, and psychological adjustment, confirming the validity of the hypothesis

that employees are more motivated in an environment that provides more autonomy. A second finding was that intrinsic needs satisfaction was predicted by the perception of manager autonomy and employees' autonomy orientation, the perception of manager autonomy ($r=.42, p <.001$), and employee need satisfaction orientation ($r = .33, p < .01$).

The second primary study invited 698 employees from a major investment banking corporation to participate. The employees were asked to complete a packet of surveys and report on their most recent performance review rating. Again, the GCOS was used to assess the individual differences in employee autonomy orientation. The PAW was used as an additional measure of the perception of a manager's autonomy, and the INS was used to assess the satisfaction of needs for competence, autonomy, and relatedness. As predicted, the work performance correlated significantly with overall need satisfaction ($r = .24, p <.001$). Autonomy orientation correlated significantly with intrinsic needs satisfaction ($r =.21, p <.001$). Results of both studies provide support for the relevance of self-determination's connection to motivation and performance in the workplace (Baard et al., 2004). The studies in this domain were primarily correlational, lending further opportunity for a predictive study using regression as the primary analysis technique.

Summary. Self-determination theory is the only theory that has detailed the process through which extrinsic motivation can become autonomous" (Deci & Ryan, 2005, p. 248) and intrinsic through regulation. These studies indicate that self-determined behavior should be a significant consideration when organizations design knowledge-management programs if improving performance is a goal (Baard et al., 2004).

The presence of self-determined motivation is reliant on autonomy, relatedness, and a feeling of competence (Deci & Ryan, 2002). It appears that scenario-based learning can

facilitate this through narration, field-based experiential learning, personal leaning, and participation in next-step decision-making (Deci & Ryan, 2002). Self-determination theory is not usually presented in a way that positions the modes of motivation as stages. Gange and Deci (2005) suggested that people do not naturally move through these stages; rather, they are presented as an index to identify the level of extrinsic-to-intrinsic motivation one might be experiencing. However, these theories suggest that scenario-based learning can move a learner from one mode of motivation to another if the learning is properly organized. Scenario-based learning also suggests, as did Deci and Ryan (2002), that the modes can be used to predict performance. Gange and Deci (2005) discussed the need for competence, autonomy, and relatedness to be present to integrate the stages of self-determination. “Self-determination theory is the only theory that has detailed the process through which extrinsic motivation can become autonomous” (Deci & Ryan, 2002, p. 248). Much of the work on self-determination theory has occurred in laboratory and field studies (Deci & Ryan, 2002), and there is an opportunity for the more robust study of practical use in organizations.

Performance

“Performance is not a system design, capability, motivation, competence, or expertise” (Swanson, 2007, p. 26-27), but it is necessary to identify the required performance to be able to identify if the process of development has been successful. “Chasing after individual or organizational change without first specifying a valid unit of performance is foolhardy and a waste of time” (Swanson, 2007, p. 27).

According to Lawler and Worley (2006), performance = motivation x ability. Lawler and Worley’s (2006) research outlines a “fundamental truth” about performance—that it depends on two factors, motivation, and ability, not one. *Merriam–Webster’s Collegiate Dictionary*, 2003,

p. 1015) defines performance as the ability “to fulfill an obligation or requirement; accomplish something as promised or expected.” Lawler and Worley (2006) proposed that people need both motivation and ability and that motivation to work and perform is based on expectancy theory (Lawler & Worley, 2006). Lawler and Worley further argued that people act in ways that satisfy their needs to reach their goals. Lawler and Worley (2006) also proposed that the second half of the performance equation is ability, and that ability consists of knowledge, skill, competence, and personality. In today’s complex and ever-changing business world, competence is vital to individual performance.

Performance, dialogue, and motivation. Dweck (1986) expanded on performance and motivation by sharing that accomplishments have a positive relationship with socialization and that determinations around social competence cannot be made without considering personal goals and performance (p. 285). This account also connects to Piaget’s constructivist model, which proposed that mutual discussion and perspective-taking can motivate one to solve problems (Piaget, 1971).

Scenario-based learning proposes that once the learner has improved their performance, the individual becomes even more motivated to share a personal experience with others because of an increased feeling of competence. The learning then can cycle back to the narration.

Research Study 1: Why Peer Discussion Improves Student Performance on In-Class

Concepts Questions

Smith et al. (2009) conducted a study of biology majors in an introductory genetics course at the University of Colorado-Boulder. The researchers asked students an average of five questions, and their responses were recorded through a clicker system over a 50-minute class period, 16 different times during a semester. The students were then encouraged to discuss the

questions with classmates and asked to respond again. The students showed an improvement in the percentage of correct answers after the group dialogue. Students appeared to learn from each other, making better sense of information through dialogue. “The results also showed that peer discussion could be effective for understanding difficult concepts even when no one in the group initially knows the correct answer” (Smith et al., 2009, p. 123). This study supported the idea that peer discussion is an effective means of active learning (Smith et al., 2009) and improving performance. Implications for further research scenario-based learning would benefit from increased measures to develop further the process of understanding how scenarios can benefit learners. Practitioners and scholars might be able to attribute the movement of motivation to the process, along with any increase in organizational effectiveness, learning, and decision-making. This chapter reviewed the research in support of scenario-based learning as a mechanism for shifting motivation to more intrinsic and showed how the research supports the two hypotheses reviewed previously: (a) narrative scenarios will promote integrated motivation because the locus of control is internal, (b) there is a positive relationship between experiential learning, motivation, and performance, (c) when a person is more intrinsically motivated they are more likely to perform at a high level, and (d) the experience of improved performance intrinsically motivates people to share what they learn. The existing scholarship presented lays the groundwork for a rigorous and detailed study of scenario-based learning’s effect on motivation and performance in an organizational setting. A second hypothesis is based on the core premises of competency motivation and the need people have to share what they have learned:

H2: Performance scores will improve for scenario-based learning participants.

Scenario-based learning also proposes that once the learner has improved their performance through scenario-based learning, they become even more motivated to share their

personal experience with others because of the increased feeling of competence. The learning cycle can then go full circle to create the beginning of a new scenario-based learning cycle for another learner, as seen in Figure 2.

Implications for Further Research

This chapter provides the theoretical foundation to support scenario-based learning as a mechanism to shift motivation to more intrinsic in organizations and advocates the use of scenario-based learning as a means to process and organize organizational knowledge. The theoretical foundations of scenario-based learning are explicit and lay the groundwork for a rigorous and detailed study of the process. The impact of scenario-based learning needs to be measured so that the process can be further developed and practitioners and scholars can attribute the shift of motivation to the process, along with any increase in organizational effectiveness, learning, and decision-making.

Conclusions

This chapter has demonstrated how the research literature associated with scenario-based learning could be foundational to motivational shift and performance. Scenario-based learning provides scholars and practitioners a process to enhance performance development in today's workplace by integrating motivation into knowledge-management processes so that performance development is more agile, user-centered, and predictable. The relationship between people and their work has been of interest to researchers and practitioners in organizational development for years (Vroom, 1995). Given the importance of motivation in work performance, the opportunity to theoretically guide research towards dimensions of motivation and the possibility of shifting motivation using a well-organized knowledge platform seems important and identified a gap in the current literature.

Given the complexities in today's workplace—the shift to buying products online instead of from brick and mortar stores, the rate of change and innovation, the growing impact of social media platforms, and the effect of political thought on purchasing—a development method that could build employee performance and shift intrinsic motivation to keep employees moving forward in their learning would be particularly valuable (Gagne & Deci, 2005).

CHAPTER THREE: METHOD

Research Question and Hypotheses

This chapter outlines the research method and design, reviewing the following topics:

- Research question
- Hypotheses
- Research design
- Population and sample
- Measurement instruments
- Data collection
- Data analysis

Research Question

This study focused on answering the following primary research question: Can scenario-based learning increase participant motivation and improve performance?

Hypotheses

In Chapter Two, the researcher developed the following two hypotheses:

H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants (but not for the control group).

H2: Performance scores will improve for scenario-based learning participants (but not for the control group).

Research Design

The basic research design was a quasi-experiment (random sampling and random assignment were not achieved) using pretests and posttests with treatment and control groups.

The research design is depicted in Figure 6.

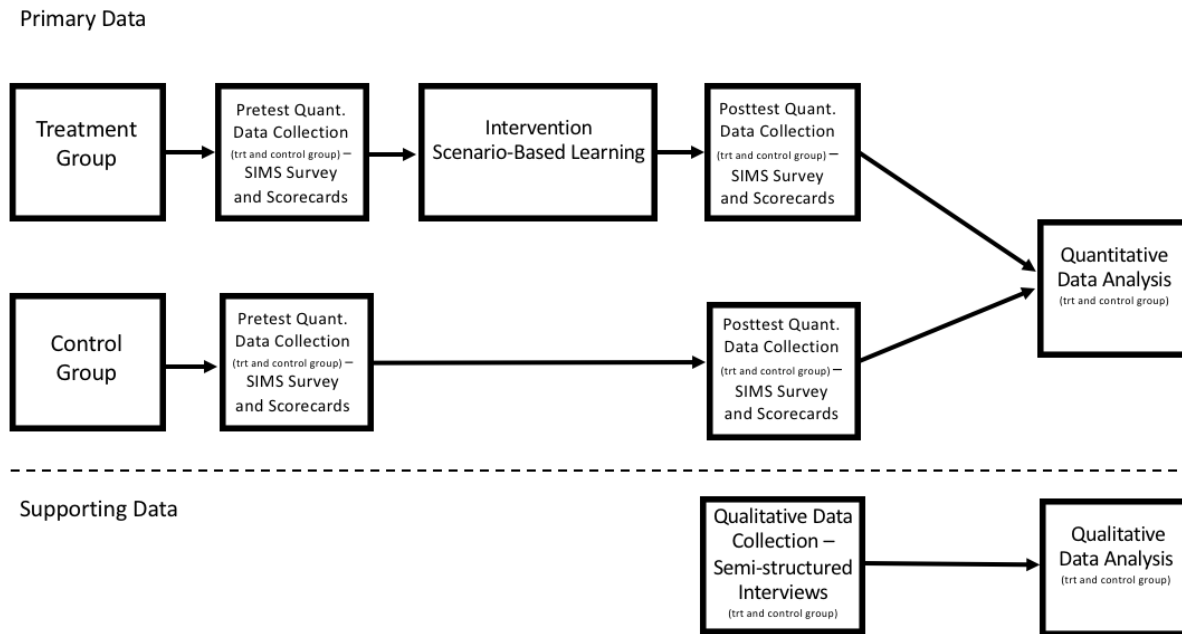


Figure 6. Research design diagram.

Pretest/Posttest Metrics

The survey instrument used for this research was the SIMS, which measured four variables of motivation across a continuum: (a) amotivation, (b) external regulation, (c) identified regulation, and (d) intrinsic motivation (Deci & Ryan, 1985; Guay, Vallerand, & Blanchard, 2000). The portion of the survey that measured amotivation asked about behavior that is initiated and regulated by things out of one’s “intentional” control, where the individual feels helpless (Deci & Ryan, 1985, p. 174). The portion of the survey that measured external regulation asked about behavior that is externally motivated, when one is motivated to obtain a reward or avoid punishment (Deci & Ryan, 1985, p. 185). The portion of the survey that measured identified regulation asked about behavior that is more self-regulated and therefore self-determined, which involves a conscious acceptance of the behavior as “personally”

important (Deci & Ryan, 1985, p. 185). The portion of the survey that measured intrinsic motivation asked about internally perceived loci of control (Deci & Ryan, 1985, p. 185). Identified regulation and intrinsic motivation were important aspects of the survey because they show whether scenario-based learning can transform external motivation into more intrinsic motivation. Consistent with any quasi-experimental design, survey data were collected as pretests and posttests around the scenario-based learning intervention. Details regarding specific data collection procedures as well as a study timeline are discussed later in this chapter.

Organizational Scorecards

The organization has, over time, constructed a complex system through which managers can access specific “scorecard,” or performance data, literally at any time. Access to this system was available for this study, and scorecard data were available at relatively the same points in time as the administration of the SIMS pre- and posttests. Further details, including a scorecard sample as well as specific procedures, are discussed later in this chapter.

Supplemental Qualitative Data—Semistructured Interviews

The study sought to supplement the quantitative pre- and posttests with semistructured interviews with samples drawn from both the treatment and control groups. The purpose of these interviews was to potentially further support any significant (or nonsignificant) findings based on one of the core underlying theories of scenario-based learning. The semistructured interviews were reviewed, segmented by line, and coded based on Kolb’s four learning modes of transactional interaction: (a) concrete experience, (b) reflective observation, (c) abstract conceptualization, and (d) active experimentation to identify the number of times a participant moved through all four learning modes—indicating a more concrete learning experience. Organizational scorecards were used to evaluate the pretest-posttest results of the metric that

field leaders were trying to improve using scenario-based learning. The scorecards are an existing tool used by the organization to evaluate progress towards specific goals, identify areas of operational opportunity, and hold employees responsible for their role in achieving results.

The study sought to evaluate the utility of scenario-based learning to shift motivation from an external to internal participant characteristic and improve metric performance in three ways: (a) the connection between scenario-based learning and the four constructs of self-determined motivation, (b) the ability of scenario-based learning to take the learner through all four modes of experiential learning, and (c) the ability of scenario-based learning to improve metric performance. The study reported on the relationship between the independent variable and the dependent variables during a scenario-based learning activity in a Fortune 500 organization in the spring of 2018.

The topic of the study incorporated an operational and leadership concept, similar to Stanford's work using an engineering and business concept. The operation concept was deployment, and the leadership concept was change leadership, with the metric performance goal of reducing window times in retail drive through locations in the sample group's geographical locations. The intervention lasted over 3 months and began with a scenario that framed the operational and leadership problem without giving a solution, moved to a field-based, hands-on, experiential learning activity around deployment and change leadership, followed by peer to peer reflective dialogue and decision-making (Figure 7).

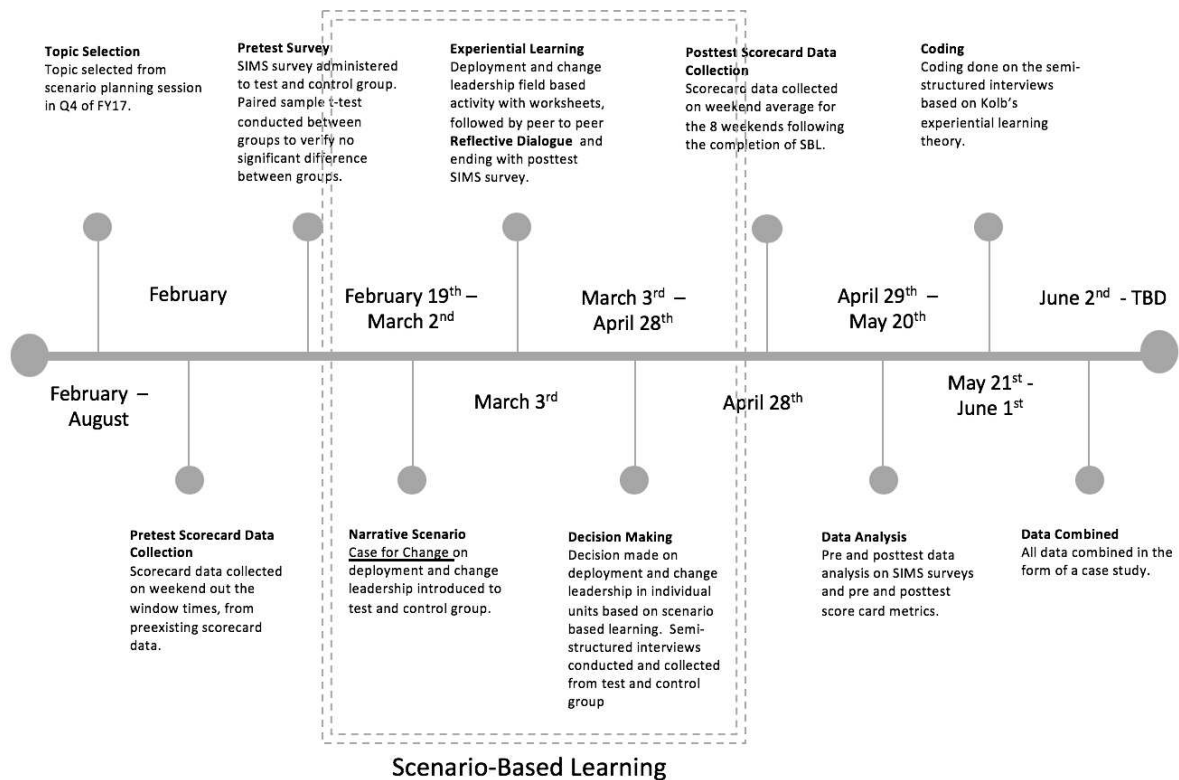


Figure 7. Research timeline.

The above sections have described the general research design for this study. The following sections describe how scenarios were developed and a description of the scenario-based learning intervention, as well as specific information relating to the measures used, data collection and data analysis are detailed. Finally, a small-sample pilot study is presented.

Scenario Development and Description of the Scenario-Based Learning Intervention

“Most organizational interventions begin with the identification of a problem. Effective interventions are based on plans for tackling these problems” (Chermack, 2011, p. 83). The problem identified for this intervention was selected using a two-step scenario preparation process, which occurred during a team meeting at the end of the 2017 fiscal year. Step one consisted of field leaders discussing issues they had faced during the year and identifying one

high-level problem that they wanted to solve, using scenario-based learning: How can we more efficiently and effectively build our top line sales (Swanson & Holton, 1999; Chermack, 2011; Van Der Heijden, Kees, 2005)?

The second part of the meeting involved a scenario development workshop where the team explored field based issues and problems related to the high-level question (Swanson & Holton, 1999; Chermack, 2011; Van Der Heijden, 2005), leveraging the “collective capital inside the organization and building a collective mental model of the issue” (Chermack, 2011, p. 132). The field leaders each had a stack of sticky notes, which they used to write a single operational issue or leadership skill relative to the problem. They then placed these sticky notes on a large white board, as seen in Figure 8 (Chermack, 2011, p. 133).

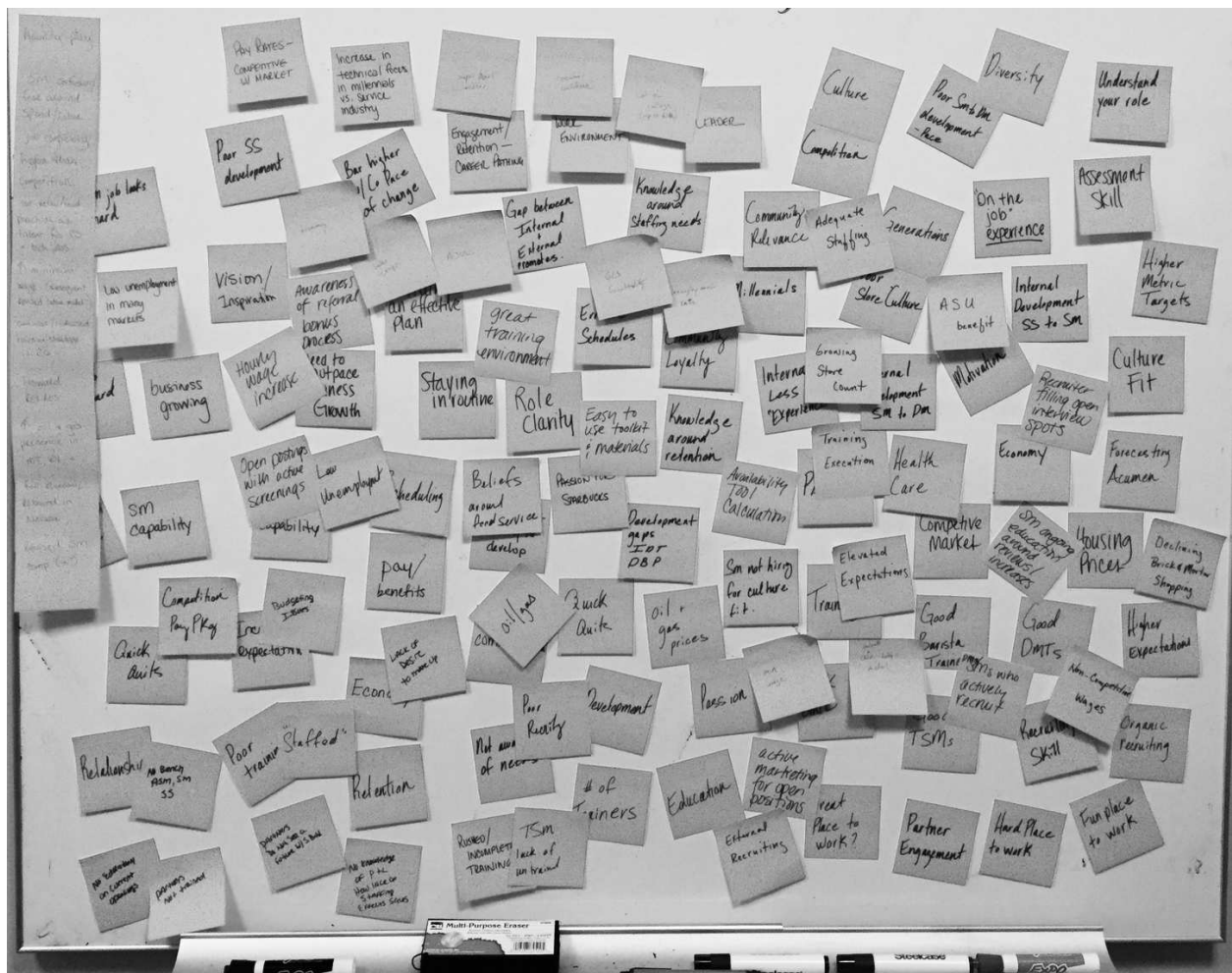


Figure 8. Brainstorming Session.

In the beginning, there was no order to the placement of the sticky notes on the whiteboard, but as the activity progressed the regional director helped the group eliminate duplicates and create categories, which resulted in the identification of key operational and leadership skill issues related to the high-level problem (Figure 9) (Van Der Heijden, 2005; Chermack, 2011).



Figure 9. Categorization.

The categories were then ranked relative to their impact on the high-level problem horizontally, right high impact and left low impact (Van Der Heijden, 2005; Chermack, 2011). Then they were evaluated based on their certainty vertically, up uncertain and down certain (Chermack, 2011). Certainty depends on if field leaders (including themselves) currently could improve the issues, down certain, and up uncertain (Figure 6). The white board divides into four quadrants. The operational issues and leadership skills in the top right corner, those with the highest impact on the problem and most uncertainty, were selected as scenario topics. For this research project, the operational issue of deployment and the leadership skill of change leadership were selected from the top right quadrant to build the scenario-based learning activity.

Following the scenario preparation and the scenario development workshop, the scenario was written to create the case for change around deployment and change leadership, as noted in the first step of the scenario-based learning process (Figure 10).

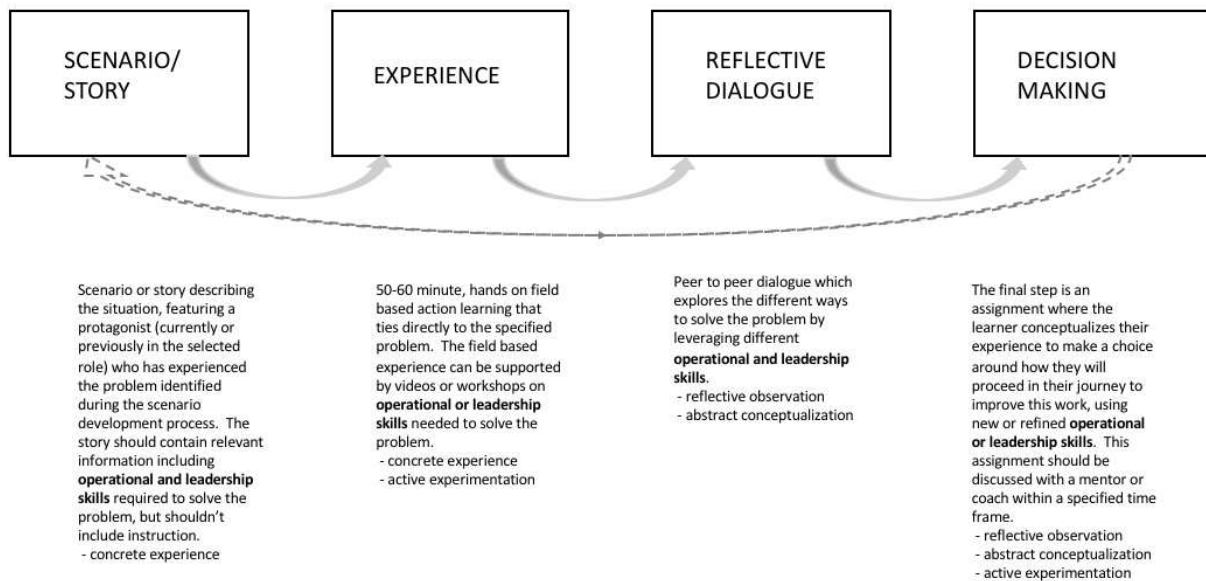


Figure 10. Scenario-based learning process with descriptions.

The scenario framed up the deployment and change leadership problem through the lens of a protagonist, a store manager. It contained relevant information to the operational issue and leadership skill required to solve the problem but did not include instruction. The scenario was delivered to the sample population in written and in video format, to frame up the problem and create the case for change. Two different delivery methods were used to appeal to different learning styles and generational learning preferences (Ranier & Ranier, 2011). The second step in the scenario-based learning process was a 50-60 minute hands on field based experience that

tied directly to deployment and change leadership, in a retail store, using a worksheet to guide the activity (Figure 11).

STORE <input type="text"/> DATE / TIME <input type="text"/> What's the goal? What's the play? <ul style="list-style-type: none"> • Does what you see match the play? • Does the play match the schedule? 	STEP 1 IDENTIFY THE GOAL AND THE PLAY Only proceed to Step 2 if you can see the goal and play in action. Capture the goal (e.g., orders ready at the window, COSD improvement). Capture the play (i.e., the number of partners on the floor, deployed positions and routine assignments). 	STEP 2A IDENTIFY GAPS OR OBSTACLES Consider the Deployment Principles to identify gaps or obstacles. Capture where you see waiting . Drive Thru: Tally the items that are not ready when the car pulls up to the window <table border="1"> <tr> <td>Espresso</td> <td>Cold Beverage</td> <td>Food</td> <td>Other</td> </tr> </table> Cafe: Identify where customers are waiting an excessive amount of time? <input type="checkbox"/> Brewed Coffee <input type="checkbox"/> Espresso <input type="checkbox"/> Cold Beverage <input type="checkbox"/> Warming <input type="checkbox"/> Register Capture where you see motion . <ol style="list-style-type: none"> 1. Draw the store layout 2. Circle where you see items or customers building up 3. Draw lines to represent partner movement out of and between stations 	Espresso	Cold Beverage	Food	Other
	Espresso	Cold Beverage	Food	Other		

Figure 11. Deployment and change leadership activity.

The third step in the scenario-based learning process was a peer-to-peer dialogue where the participants recapped their experience and discussed possible next steps to improve the work. The fourth step in the scenario-based learning process was decision-making. The participants made commitments to improve the work in their stores around deployment and change leadership, based off of their hands-on, field-based experience and peer-to-peer dialogue.

The situational motivation survey was administered as a pretest before the participants were given the narrative scenario and again as a posttest after the store managers participated in the hands-on field based experience, peer-to-peer dialogue, and decision-making. Scorecard data was collected on deployment metrics, specifically weekend out the window times, before the administration of the narrative scenario and for 8 weeks following the completion of the scenario-based learning process. Supporting qualitative data was collected through semistructured interviews conducted with randomly selected participants after the scenario-based learning intervention.

Population and Sample

This section describes the population and sample for the research study in detail. Limitations are identified but discussed in a later section.

Population. This research study focused on employees in the boundaries of a specific organization to see if scenario-based learning could improve motivation, describe if and how participants moved through all four stages of experiential learning (Kolb & Yeganeh, 2011), and whether scenario-based learning could improve metric performance on organizational scorecards. The target population included 435 field leaders in a Fortune 500 retail organization as of 2018, limiting the study to the degree in which the results can be generalized.

Sample. The sample for the treatment and control groups were 169 store managers and district managers, in the target population of 435 field leaders. The sample was a convenience sample due to the researcher's association with the organization. The population of field managers working in the identified geographic area of the organization selected for the study was due to the proximity and region of the researcher's work responsibilities. The study included

169 field managers (61 in the intervention group and 108 in the control group), in nine geographical areas based on the search criteria shown in Table 3.

To ensure that the treatment and the control groups were not significantly different, demographic data were collected and compared. Further, a *t*-test was conducted between group pretest data. Both samples were pulled from the larger field leader population, were store managers or district managers, received the same training for their given role, had similar customer bases, and lived in similar geographical areas.

Table 3

Participant Search Criteria

Criteria	
Level	Store manager, district manager
Department	store operations, field managers
Country	United States
State	Colorado, New Mexico
Metro Industry	Colorado and New Mexico Metro
Industry	Food service
Employees	Full time, salaried
Ownership	Public
<i>Fortune Magazine's Rank</i>	#131 yr. 2017 (15 years on the <i>Fortune Magazine</i> list)

The target population was field managers ranging from store managers to district managers, employed by the Fortune 500 organization. The reason for targeting the mid-level manager was the specific need for accelerated development in this group of employees.

Research aimed at this population of field manager yielded an average response rate of 83%.

Measurement Instruments

This section describes the instruments that were used to measure the dependent variables in the study: motivation and metric performance. For the survey, the researcher summarized prior reports of score reliability and validity. For metric performance analysis, a review of the organizational scorecard is provided. For the qualitative analysis, a description of the interview questions and coding is provided.

Situational Motivation Scale (SIMS). The SIMS assesses the constructs of intrinsic motivation, identified regulation, external regulation, and amotivation in field and laboratory settings (Table 4). The construct validity of the scale is also supported by correlations with other constructs as postulated by current theories. The researcher evaluated the sample based on the implications for multiunit managers as a population and scrutinized each point of data for all possible influences. The scale served as a tool to predict improvement in motivation and performance through scenario-based learning.

Table 4

The Situational Motivation Scale (SIMS)

The Situational Motivation Scale (SIMS)

Directions: Read each item carefully. Using the scale below, please circle the number that best describes the reason why you are currently engaged in this activity. Answer each item according to the following scale: 1: *corresponds not at all*; 2: *corresponds a very little*; 3: *corresponds a little*; 4: *corresponds moderately*; 5: *corresponds enough*; 6: *corresponds a lot*; 7: *corresponds exactly*.

Why are you currently engaged in this activity?							
1. Because I think that this activity is interesting	1	2	3	4	5	6	7
2. Because I am doing it for my own good	1	2	3	4	5	6	7
3. Because I am supposed to do it	1	2	3	4	5	6	7
4. There may be good reasons to do this activity, but personally I don't see any	1	2	3	4	5	6	7
5. Because I think that this activity is pleasant	1	2	3	4	5	6	7
6. Because I think that this activity is good for me	1	2	3	4	5	6	7
7. Because it is something that I have to do	1	2	3	4	5	6	7
8. I do this activity but I am not sure if it is worth it	1	2	3	4	5	6	7
9. Because this activity is fun	1	2	3	4	5	6	7
10. By personal decision	1	2	3	4	5	6	7
11. Because I don't have any choice	1	2	3	4	5	6	7
12. I don't know; I don't see what this activity brings me	1	2	3	4	5	6	7
13. Because I feel good when doing this activity	1	2	3	4	5	6	7
14. Because I believe that this activity is important for me	1	2	3	4	5	6	7
15. Because I feel that I have to do it	1	2	3	4	5	6	7
16. I do this activity, but I am not sure it is a good thing to pursue it	1	2	3	4	5	6	7

Codification key: Intrinsic motivation: Items 1, 5, 9, 13; Identified regulation: Items 2, 6, 10, 14; External regulation: Items 3,7, 11, 15; Amotivation: Items 4, 8, 12, 16.

Prior reports of score reliability and validity. Five studies have been conducted that specifically assess the score validity of the SIMS in various contexts. The first study showed that the SIMS has a four-factor structure that mirrors the constructs of the self-determination theory: intrinsic motivation, identified regulation, external regulation, and amotivation (Guay et al., 2000). The second study showed that internal consistency was acceptable among all five studies. The third study showed that repetitive analysis supports the construct validity of the scale.

The multiple regression analyses showed that the SIMS is sensitive enough to detect intraindividual changes in motivation that are explained by the three self-perceptions proposed by Deci and Ryan's (1985) self-determination theory, perceptions of

competence, autonomy, and relatedness. Fourth, construct validity was reinforced through the experimental design of study 5, which showed that controlling rewards decreased both intrinsic motivation and identified regulation. (Guay et al., 2000, p. 205)

Study 1: Development and initial score validity. The experimental version of the SIMS contained four items for each subscale in the first study of its validity (Guay et al., 2000). The analysis of the original scale revealed that 10 of the 26 items, four per subscale, were weakly related with items assessing the same dimensions. These 10 items were subsequently removed. Table 5 shows the original scale. Means for the remaining six items varied, ranging from 1.56 to 5.55, with a possible range of 1 to 7. The standard deviation for the 16 items showed variability that was acceptable for all items ranging from 1.18 to 2.34 (Guay et al., 2000, p. 183).

Table 5

Factor Loadings from The Exploratory Factor Analysis Study 1

Items	Factors			
	1	2	3	4
Intrinsic motivation				
Because I think that this activity is interesting	0.91			
Because I think that this activity is pleasant	0.90			
Because this activity is fun	0.89			
Because I feel good when doing this activity	0.83			
Identified regulation				
Because I am doing it for my own good		0.77		
Because I think that this activity is good for me	0.31	0.60		
By personal decision		0.57		
Because I believe that this activity is important for me		0.52		
External regulation				
Because I am supposed to do it			0.85	
Because it is something that I have to do			0.75	
Because I don't have any choice			0.69	
Because I feel that I have to do it			0.58	
Amotivation				
There may be good reasons to do this activity, but personally I don't see any				0.83
I do this activity but I am not sure if it is worth it				0.74
I don't know; I don't see what this activity brings me				0.55
I do this activity, but I am not sure it is a good thing to pursue it				0.54
Eigenvalues	5.70	2.63	1.33	0.73
Explained variance	35.60	16.40	8.30	4.50

Maximum likelihood (ML) factor analysis was performed on the SIMS with oblimin rotation which resulted in four factors and a variance of 65%. This result aligns with Gorsuch’s (1983) assumption that extracted variances of 40% to 50% reflect a factor structure that is satisfactory for self-reporting scales. Table 6 shows the factor loading, eigenvalues, and explained variance for each factor (p. 184).

“The internal consistency of the four subscales (Cronbach’s α) were: intrinsic motivation = .95, identified regulation = .80, external regulation = .86, and amotivation = .77” (Nunnally, 1978; Gliner, Morgan, & Leech 2009, p. 184), acceptable for research purposed. The construct validity showed three correlational analyses (Table 6).

Table 6

Correlations Between SIMS Subscales, Determinant, and Consequences of Situational Motivation: Study 1

SIMS subscales	Determinant (perceived competence)	Consequences (concentration)	Consequences (BIFP)
Intrinsic motivation	.54*	.35*	.56*
Identified regulation	.37*	.34*	.47*
External regulation	-.43*	-.21*	-.29*
Amotivation	-.44*	-.44*	-.46*

Note. BIFP=Behavioral intentions of future persistence toward the activity. * $p < .01$

The first study showed that the SIMS has four identifiable factors, which reflect Deci’s and Ryan’s (1985) constructs of self-determination (p. 184), acceptable Cronbach α values, and adequate construct validity (p. 184).

Study 2: A confirmatory test of the factor structure. Study 2 showed that the SIMS could measure the motivational constructs as defined in Deci’s and Ryan’s (1985) self-determination theory, which supported the original hypotheses originating from self-

determination theory. The self-determination theory suggested higher levels of self-determined motivation are correlated with competence, autonomy, and task interest (p. 191). This study supported hypothesis 1 of this study:

Study 3: Score validation based on a motivational model. Study 3 showed internal consistency across different activities and therefore provided additional support for the construct validity, as shown in study 1 and 2. Cronbach's α values for the subscales were the following: intrinsic motivation = .95; identified regulation = .85; external regulation = .62; and amotivation = .83. This study also showed that acting out of personal choice positively influenced one's intention to be involved in the same behavior in the future, which also support hypothesis 1 of this study:

Study 4: Score validation based on motivational changes. This study showed two things:

1. How the SIMS fluctuates across measurement types; how it is sensitive to intraindividual changes in motivation.
2. The validity of self-efficacy theory (Bandura, 1978) and self-determination theory (Deci & Ryan, 1985, 1991).

Both the self-efficacy theory and self-determination theory hypothesized that competence has a positive impact on motivation. The difference between the two is that self-efficacy theory additionally acknowledges collective competence as important to the functionality of team performance (Bandura, 1978) and postulated that one only needs competence to cause motivation. Conversely, self-determination theory postulates that one needs competence, autonomy, and relatedness. This study showed that perceptions of relatedness and autonomy are significant to understanding the self-regulatory process, specifically to the experience of intrinsic

and identified regulation. These findings are counter to the idea that individual and collective competence are sufficient to initiate action (Bandura, 1978).

Study 5: Score validation in a laboratory setting. The purpose of this study was to test experimentally-induced task focus. Historical studies have shown that controlling rewards hampers intrinsic motivation (Deci, 1972; Ryan, Mims, & Koestner, 1983). This study was organized to show the effect of rewards on other types of motivation outside of intrinsic motivation. It included identified regulation, external regulation, and amotivation and potentially supports the construct validity of the SIMS. The results supported the construct validity and were the first study to show a difference in the level of identified regulation. The study seems to show that the controlling aspect of reward impacts not only extrinsic motivation but also the internal regulatory process like the perception of choice and the relatedness of the activity to one's self.

Scorecard metrics/ As described above, scorecard data could be drawn at any time, and the researcher was granted access to the scorecard system. The purpose of assessing scorecard data was to determine if there was a significant improvement in standard scorecard metrics that might be attributed to the scenario-based learning intervention. Scorecard data should show longitudinal improvement in platform results pre- and posttest and allow for causal assumptions relative to the scenario-based learning. An example of the organizational scorecard is provided in Figures 12 and 13.

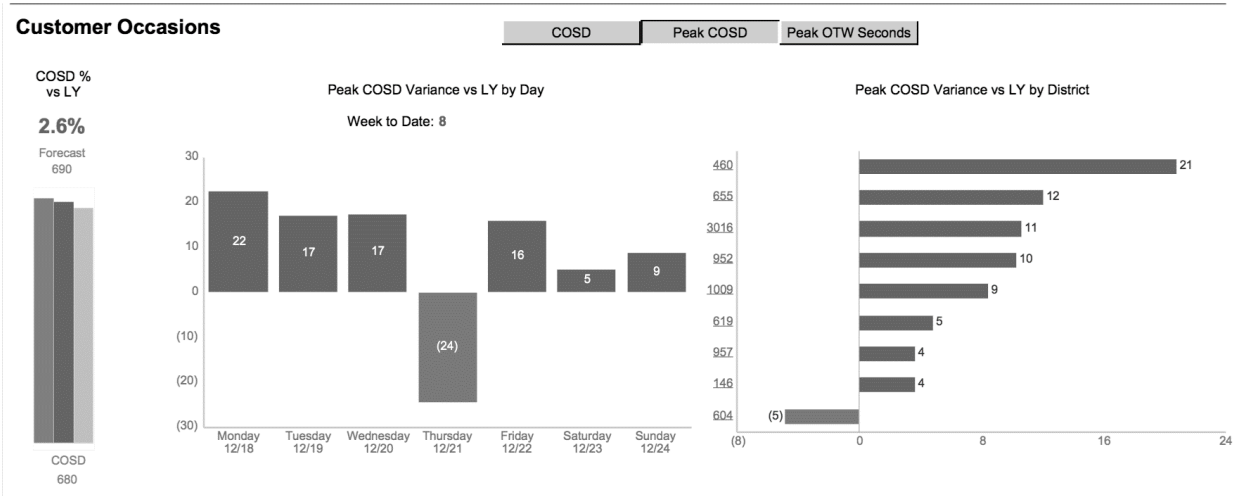


Figure 12. Example scorecard for peak customer occasions or COSDs

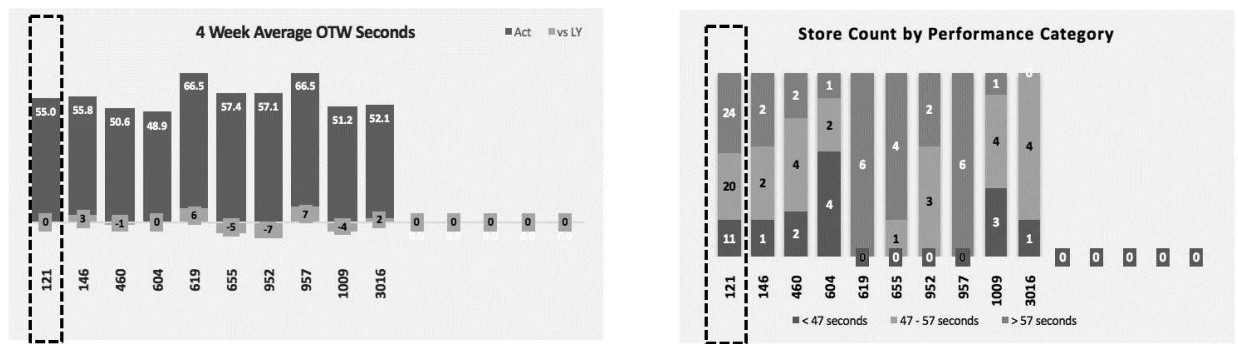


Figure 13. Example scorecard for average weekend out-the-window (OTW) seconds

Scorecards were used to show customer occasion increase during peak business and improvement in speed of service to reduce customer balking on the weekends. Metric data were collected pre- and post-scenario-based learning intervention. Again, the purpose was to assess

any improvement over time that could potentially be attributed to the scenario-based learning intervention.

Semistructured interviews. The researchers conducted interviews with a group of participants after intervention. The interview questions were derived from the four steps of the scenario-based learning process; there were two questions for each part of the process, and they were open-ended to generate reflection about the scenario-based learning activity by the participant. The interviews were then coded by assigning numbers to the level or value of each variable. The values were identified using Kolb's experiential learning theory and recommendations in Krathwohl's (2009) edition of *Methods of Educational and Social Science Research* (p. 589):

- Based on distinctions and items deemed important to the study.
- Exhaustive of the response range, but mutually exclusive so that a given response will always have the same code.
- Consistent, 1 for yes and 0 for no.
- Missing data is coded based on significance.
- Codes are assigned to patterns with multiple responses.

The data was turned into percentages or averages to allow for fewer assumptions.

Data Collection

Official permission to conduct the data collection via survey was given from the Fortune 500 retail organization for the primary study and the Internal Review Board (IRB) at Colorado State University. Once IRB approval was given to conduct the study, scenarios were developed according to the description above, and intervention workshops and meetings were scheduled based on the timeline provided. Once intervention workshops were scheduled, paper surveys

were handed out before and after the intervention, again according to the timeline previously established, at the identified organization and to the participants preidentified using the previously defined population criteria.

Data Analysis

This section describes the data analysis strategies that were used to examine the data collected from the survey, interviews, and scorecards to answer the research questions. The analysis was focused on descriptive statistics to establish normality, reliability, and validity of results for the instruments used, and pretest and posttest quasi-experimental design analysis and interpretation to answer the research question and hypotheses. Because the participants were not randomly selected into their groups, the design was a non-equivalent group design with a pre- and posttest (Gliner et al., 2009). Further, it could not be assumed that the treatment and control groups were equal. Therefore, a *t*-test was used to establish relative group equivalence on pretest scores (Gliner et al., 2009).

Surveys

The following sections present how the survey data were analyzed.

Descriptive statistics. Data analysis began with basic descriptive statistics to determine the distribution of the data set, (specifically skewness and kurtosis statistics) to see if the data fit a relatively normal curve. As mentioned above the statistic used for the pretest and posttest survey analysis was a paired *t*-test because there were two independent variables present and two levels of time. Caution was used in interpreting the data from the nonequivalent group design, because of the issues with intact groups (Gliner et al., 2009).

Reliability. Reliability, as defined by Bravo and Potvin (1991), is the consistency of repeated measurements taken under similar conditions. Cronbach (1990) indicated that

consistency is the key to reliability. Considering these two perspectives, the importance of reliability cannot be overstated. If the outcome measure is not accurate, then the assessment of the results are worthless (Gliner et al., 2009). The quality of a study, in part, is dependent on the reliability and validity of the scores produced by the measurement tool.

Validity. The validity of scores is examined through factor analysis and is defined as the degree to which a method or instrument can measure what the researcher intends to measure (Gliner et al., 2009). Validity establishes the evidence for the use of a specific score from a given measurement (Gliner et al., 2009, p. 165). Scores can be used for different purposes, but the evidence based on the validity of the measurement tool supports multiple purposes (Gliner et al., 2009, p. 165).

Effect sizes. Because the study involved hypotheses testing, effect sizes were also computed. “Effect size is defined as the strength of the relationship between the independent variable and the dependent variable or the magnitude of the difference between levels of the independent variable concerning the independent variable” (Gliner et al., 2009). For this study, the effect size is used regarding standard effect size, which can be computed regardless of the specific measurement scale (Gliner et al., 2009, p. 251). The *d* family of effect size focuses on the extent of the difference that the two levels of the independent variable have on the dependent variable versus the strength of connection (Gliner et al., 2009, p. 251).

Organizational Scorecard Data

The following section describes how organizational scorecard data was collected and analyzed.

Scorecard selection. The scorecards were selected based on the operational platform used for the scenario-based learning activity, customer occasion increase during peak business,

and improvement in speed of service to reduce customer feedback on the weekends. Metric data were collected before and after the scenario-based learning intervention.

Analysis. The metric performance improvement was evaluated based on the improvement in the scorecard data post intervention for both customer occasion increases and reduction in transaction times. The results were then compared to the change in motivation based on the SIMS and the number of times the interviewees moved through the experiential learning cycle, as identified through coding.

Interviews

The following section presents the data collection and analysis strategies applied to participant interview data.

Participant selection. The interview participants were randomly selected from the original 169 field leaders and nine geographical areas. The field leaders with the largest and smallest metric performance improvement were selected from each role and geographical team. The nine geographical areas allowed for 18 total interviews.

Interview format. The interview questions were derived from the four steps of the scenario-based learning process, two questions for each part of the process. There was a narrated scenario:

1. What did the narrated scenario tell you about the operational issue and the leadership skills needed to solve the problem?
2. What further information did you want to have following the narration?

Some questions concerned experiential learning:

3. What impact did you plan to have during the hands-on activity?
4. What would you change?

Other questions concerned reflective dialogue:

5. What did you discuss during the recap with your peers?

6. What did the peer-to peer dialogue teach you?

The last questions concerned decision-making:

7. What next steps did you identify?

8. What is your plan moving forward to improve results?

Analysis. The interviews were coded by assigning numbers to the level or value of each variable. The values were identified using Kolb's experiential learning theory and recommendations in Krathwohl (2009).

Summary

The strategy for the study design was generally a quasi-experiment in a single organization using pre- and posttests with treatment and control groups. The data were entered into SPSS and analyzed according to the specific methods and statistical techniques described above. Scorecard metrics were evaluated based on pre- and postintervention results, relative to the problem topic and individual interviews were coded using Kolb's 2009 cycle of experiential learning and analyzed, and the research design was structured to investigate these two hypotheses:

H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants as measured by the SIMS survey (but not for the control group).

H2: Performance scores will improve for scenario-based learning participants as measured by the organizational scorecards (but not for the control group).

The rationale for the case study design, the use of *t*-test, semistructured interviews, and scorecards were established in this chapter and the preceding chapters. Descriptive statistics and the results of the analyses are presented in Chapter 4.

Pilot Study

During the fall of 2017, the researcher interned at the Scenario-Based Learning Laboratory at Stanford University. A pilot study on scenario-based learning was conducted in an engineering statics course (E14), fall 2017. The purpose of the pilot study was to generate a small sample of data and check the hypotheses. During the pilot, the shift of motivation from amotivation to more intrinsic motivation was measured using SIMS survey (Guay et al., 2000), as shown in Figure 14.

Madison Longboard – Choosing a Truck
Scenario-Based Learning Survey

Directions: Read each item carefully. Using the scale below, please circle the number that best describes the reason why you are currently engaged in this scenario-based learning activity.

Why are you currently engaged in this scenario-based learning activity around choosing a truck, which incorporates these engineering and entrepreneurial concepts:

- **Engineering Concepts:** normal force, normal stress, moments, moments center, planar, systems, and safety factor
- **Entrepreneurial Concepts:** business model, value proposition, revenue model, cost model, profit model

	1 Not at all	2 Very little	3 A little	4 Moderately	5 Enough	6 A lot	7 Exactly
1. Because I think that this activity is interesting	1	2	3	4	5	6	7
2. Because I am doing it for my own good	1	2	3	4	5	6	7
3. Because I am supposed to do it	1	2	3	4	5	6	7
4. There may be a good reason to do this activity, but personally I don't see any	1	2	3	4	5	6	7
5. Because I think that this activity is pleasant	1	2	3	4	5	6	7
6. Because I think this activity is good for me	1	2	3	4	5	6	7
7. Because it is something that I have to do	1	2	3	4	5	6	7
8. I do this activity, but I'm not sure if it is worth it	1	2	3	4	5	6	7
9. Because this activity is fun	1	2	3	4	5	6	7
10. By personal decision	1	2	3	4	5	6	7
11. Because I don't have any choice	1	2	3	4	5	6	7
12. I don't know; I don't see what this activity brings me	1	2	3	4	5	6	7
13. Because I feel good when doing this activity	1	2	3	4	5	6	7
14. Because I believe that this activity is important for me	1	2	3	4	5	6	7
15. Because I feel that I have to do it	1	2	3	4	5	6	7
16. I do this activity, but I am not sure it is a good thing to pursue it	1	2	3	4	5	6	7

Figure 14. Example survey from Stanford University pilot (2017).

The survey was administered to a class of 82 undergraduate engineering students, consisting of a majority of upperclassmen, during two separate scenario-based learning activities: the longboard truck lab and the bicycle lab. Both scenario-based learning activities focused on

engineering and entrepreneurial concepts, with the assumption that the structure of the academic scenario-based learning activities would be transferable to the organizational scenario-based learning activity that is central to this research. The Stanford studies proceeded as follows:

Activity no. 1. The longboard truck scenario-based learning activity told the story of two engineering students as they start a longboard business called Madison Longboards. The problem they faced included entrepreneurial concepts such as value proposition, business model, revenue model, and cost benefit analysis, along with engineering concepts like equilibrium: summing forces, moments, links, and 3-force members. The first SIMS study conducted on the longboard truck lab was early in the students' fall term (class 6). The structure of both labs consisted of a four-step pedagogical process: (a) scenario/story, (b) hands-on lab, (c) team discussion, and (d) homework/decision-making. For the longboard lab, the students divided into small groups of two or three for the hands-on activity. The scenario/story was presented in the form of two videos that students were assigned to watch individually beforehand:

- <https://www.youtube.com/watch?v=k45Bs4Gvxr0&feature=youtu.be>
- <https://www.youtube.com/watch?v=5F6SIEve7BA&feature=youtu.be>

Based on researcher observation, the groups assembled quickly during class, and, for the most part, were based on where students were sitting in the classroom. Before the hands-on activity, the students spent a brief minute or two getting to know their partners, if they were not already acquainted. Some students seemed familiar with the video prework, and some did not.

The students were given the SIMS survey on the entrepreneurial and engineering concepts as a pretest to the lab and again as a posttest. The researcher gave the survey to all the students in the class and collected 63 completed surveys. The results of the survey were as follows (Table 7-12).

Table 7

Paired Samples Statistics for The Longboard Truck Lab Survey—Stanford E14

Paired Samples Statistics					
		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	IM	4.05	63	0.9	0.11
	PIM	3.75	63	1.41	0.17
Pair 2	IRM	4.24	63	1.11	0.14
	PIR	4.05	63	1.43	0.18
Pair 3	ER	5.43	63	1.26	0.15
	PER	5.35	63	1.22	0.15
Pair 4	AM	5.42	63	0.97	0.12
	PAM	5.07	63	1.33	0.16

Note. $n = 63$, all students who answered pre- and postsituational motivation scale questions (IM = Pretest Intrinsic Motivation, PIM = Posttest Intrinsic Motivation, IRM = Pretest Identified Regulation, PIR = Posttest Identified Regulation, ER = Pretest Extrinsic Motivation, PER = Posttest Extrinsic Motivation, AM = Pretest Amotivation, PAM, Posttest Amotivation)

Table 8

Paired Samples Correlations for The Longboard Truck Lab – Stanford E14

Samples Correlations			
	N	Correlation	Sig.
Pair 1	63	0.54	0.00
Pair 2	63	0.74	0.00
Pair 3	63	0.52	0.00
Pair 4	63	0.6	0.00

Note. $n = 63$, all students who answered pre- and postsituational motivation scale questions (Pair 1 = IM & PIM, Pair 2 = IRM & PIR, Pair 3 = ER & PER, Pair 4 = AM & PAM)

Table 9

Paired Samples Test for The Longboard Truck Lab—E14

<i>Paired Samples Correlations</i>									
		Paired Differences			95% Confidence Interval of the Difference		t	df	Sig. (2-tailed)
		Mean	Std. Deviation	Std. Error Mean	Lower	Upper			
<i>Pair 1</i>	IM & PIM	0.29	1.21	0.15	-0.013	0.6	1.91	6	0.06
<i>Pair 2</i>	IRM & PIR	0.19	0.95	0.11	-0.04	0.43	1.62	6	0.11
<i>Pair 3</i>	ER & PER	0.07	1.21	0.15	-0.22	0.38	0.5	6	0.61
<i>Pair 4</i>	AM & PAM	0.35	1.07	0.13	0.08	0.62	2.63	6	0.01

Note. $n = 63$, all students who answered pre- and postsituational motivation scale questions #bold = $p < .05$ (IM = Pretest Intrinsic Motivation, PIM = Posttest Intrinsic Motivation, IRM = Pretest Identified Regulation, PIR = Posttest Identified Regulation, ER = Pretest Extrinsic Motivation, PER = Posttest Extrinsic Motivation, AM = Pretest Amotivation, PAM, Posttest Amotivation, Pair 1 = IM & PIM, Pair 2 = IRM & PIR, Pair 3 = ER & PER, Pair 4 = AM & PAM)

The results of the paired t -tests for all four constructs of the SIMS—intrinsic motivation, identified regulation, external regulation, and amotivation—were not significant. Because this was a one-tailed t -test and the study specifically was aimed at finding an increase in the results, the p values were divided by 2 (Gliner et al., 2009). Consequently, the value for intrinsic motivation was significant ($.06/2 = .03$ $p < .05$) as was the value for amotivation ($.011/2 = .005$ $p < .05$), which means that there was a significant difference between the means for intrinsic motivation and amotivation. By looking at the mean, there was a significant difference in the opposite direction than was hypothesized for intrinsic motivation, and intrinsic motivation decreased. Amotivation also decreased from pretest to posttest.

Based on these results, the null hypothesis was supported for H1. The results were not significant for intrinsic or identified regulation. The pilot did not include interview questions or grade (scorecard) evaluation, so it did not test the null hypotheses for H2.

H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants (but not for the control group).

H2: Performance scores will improve for scenario-based learning participants (but not for the control group).

The students reported a significant decrease in intrinsic and amotivation from pretest to posttest. Before the scenario-based learning experience, students had an overall intrinsic motivation rating of 4.05. Following the scenario-based learning experience, intrinsic motivation decreased significantly to 3.75. Before the scenario-based learning experience, students had an overall amotivation rating of 5.42. Following the scenario-based learning experience, amotivation decreased to 5.07. Interestingly, both extrinsic motivation constructs of the self-determination theory were the most highly rated both pre- and posttest.

Discussion. The pilot study was a small-scale study, and as such, there were issues typical of small-scale research. There was a reduction in the length of the class from previous terms, which condensed the material being covered from 2.5 hours to 1.5 hours. The reduced time frame rushed the classroom facilitation and required some of the curricula to be cut. Some students did not watch the prework video posted on Canvas, which made progressing through the activity more difficult and limited the time spent on entrepreneurial concepts. There was a lack of familiarity with longboards for many of the students, and the materials provided to complete the activity (scale, mock wheels, and mock board) were new to many of them.

While the results of this survey were counter to the hypothesis, they still posed many questions for the next activity. Will the familiarity with the product in the next activity (bicycle) impact the results? Will more students watch the prework video and will that impact the results? Do the students have a feeling of belonging to their groups and is that impacting results? Will the students who have watched the video feel more competent and therefore more motivated around the concepts in general?

Activity no. 2. The bicycle scenario-based learning activity tells the story of an urban bike share program. The business problem was choosing a drive train for the average urban bike share customer. The activity included entrepreneurial concepts such as consumer insight and target audience selection, along with engineering concepts like frames and mechanical advantage. The bicycle lab took place midway through the fall term (class 13). The students had preselected their groups of 3-4 people, and one student from each group brought in their bike to use for the activity.

Based on researcher observation, the opportunity to preselect groups created more engagement and comfort during the activity for the students. More students seemed familiar with the prework video (<https://www.youtube.com/watch?v=jD8CR4tCNU8&feature=youtube>), though the viewings showed fewer students watched the bicycle video than the longboard video (59 longboard viewings/40 bicycle viewings). The number of recorded viewings could have been influenced by students going back to watch the longboard video after the class and before the number of viewings was tracked. For the bicycle activity, the groups could have watched the video together or assigned one student to watch the video.

The researcher gave the students the SIMS survey on the specified entrepreneurial and engineering concepts as a pretest to the lab, and again as a posttest. The researcher gave the

survey to all the students in the class and collected 40 completed surveys. The results of the survey were as follows:

Table 10

Paired Samples Statistics						<i>Paired Samples Statistics for The Bicycle Lab Survey— Stanford E14</i>
		Mean	N	Std. Deviation	Std. Error Mean	
Pair 1	IM	3.78	40	1.18	0.18	
	PIM	4.16	40	1.36	0.21	
Pair 2	IRM	3.92	40	1.27	0.2	
	PIR	4.35	40	1.27	0.2	
Pair 3	ER	5.41	40	1.34	0.21	
	PER	5	40	1.44	0.22	
Pair 4	AM	5.3	40	0.83	0.13	
	PAM	2.69	40	1.21	0.19	

Note. $n = 40$, all students who answered pre- and postsituational motivation scale questions (IM = Pretest Intrinsic Motivation, PIM = Posttest Intrinsic Motivation, IRM = Pretest Identified Regulation, PIR = Posttest Identified Regulation, ER = Pretest Extrinsic Motivation, PER = Posttest Extrinsic Motivation, AM = Pretest Amotivation, PAM, Posttest Amotivation)

Table 11

Paired Samples Correlations for The Bicycle Lab—Stanford E14

Paired Samples Correlations				
		N	Correlation	Sig.
Pair 1	IM & PIM	40	0.72	0.00
Pair 2	IP & PIR	40	0.77	0.00
Pair 3	ER & PER	40	0.81	0.00
Pair 4	AM & PAM	40	-0.58	0.00

Note. $n = 40$, all students who answered pre- and postsituational motivation scale questions (Pair 1 = IM & PIM, Pair 2 = IRM & PIR, Pair 3 = ER & PER, Pair 4 = AM & PAM)

Table 12

Paired Samples Test for The Bicycle Lab—E14

		Paired Samples Test			95% Confidence		t	df	Sig. (2-tailed)
		Paired Differences			Interval of the Difference				
		Mean	Std. Deviation	Std. Error Mean	Lower	Upper			
Pair 1	IM & PIM	-0.38	0.96	0.15	-0.68	-0.07	-2.51	39	0.01
Pair 2	IR & PIR	-0.42	0.85	0.13	-0.69	-0.15	-3.15	39	0
Pair 3	ER & PER	0.41	0.85	0.13	0.14	0.68	3.06	39	0
Pair 4	AM & PAM	-1.9	1.83	0.29	-2.49	-1.31	-6.57	39	0

Note. $n = 40$, all students who answered pre- and postsituational motivation scale questions #**bold** = $p < .05$. (IM = Pretest Intrinsic Motivation, PIM = Posttest Intrinsic Motivation, IRM = Pretest Identified Regulation, PIR = Posttest Identified Regulation, ER = Pretest Extrinsic Motivation, PER = Posttest Extrinsic Motivation, AM = Pretest Amotivation, PAM, Posttest Amotivation, Pair 1 = IM & PIM, Pair 2 = IRM & PIR, Pair 3 = ER & PER, Pair 4 = AM & PAM)

The results of the paired t -tests for the constructs of the SIMS were all significant. A one-tailed t -test was conducted and the p values were divided by two, as seen below:

- Intrinsic motivation significant increase ($.016/2=.008 p < .05$)
- Identified regulation increase ($.003/2=.0015 p < .05$)
- External regulation decrease ($.004/2=.002 p < .05$)
- Amotivation increase ($.000/2=0 p < .05$)

The significance was in the direction hypothesized for all four constructs. Though a specific hypothesis was not made around external motivation and amotivation the reduction in external motivation and amotivation also supports the hypothesis that motivation becomes less extrinsic and more intrinsic as an outcome of scenario-based learning. Based on these results,

the null hypothesis for H1 was rejected because of the increase in intrinsic motivation and identified regulation and decrease in extrinsic motivation and amotivation. The second study also did not include interview questions or grade (scorecard) evaluation, so it did not test the null hypothesis for H2.

H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants (but not for the control group).

H2: Performance scores will improve for scenario-based learning participants (but not for the control group).

Before the scenario-based learning experience, students had an overall intrinsic motivation rating of 3.79. Following the scenario-based learning experience, intrinsic motivation significantly increased to 4.17. Before the scenario-based learning experience, students had an overall identified regulation of 3.94. Following the scenario-based learning experience, identified regulation significantly increased to 4.35. Before the scenario-based learning experience, students had an overall extrinsic motivation rating of 5.41. Following the scenario-based learning experience, extrinsic motivation significantly decreased to 5.0. Before the scenario-based learning experience, students had an overall amotivation rating of 5.31. Following the scenario-based learning experience, amotivation significantly decreased to 2.70. Interestingly, extrinsic motivation and amotivation again were the two most highly rated constructs on the pretest. Also, scenario-based learning had a significant effect on intrinsic motivation in both situations, one supported the null hypothesis, and one rejected the null.

Discussion. To add context to how the results of this study differed from activity no. 1, specific confounding factors were reviewed. For activity no. 2, there still was a reduction in the length of the class from the previous term. Many of the groups ran out of time to complete the

bicycle activity during class and stayed late to finish the exercise. Students ran out of time during both activities, but they seemed less irritated to stay and complete the bicycle activity, which ran the longest out of the two. The extended activity time seemed to negatively impact the number of complete surveys turned in for activity no. 2. More students seemed to have watched the video before the bicycle lab because they were more engaged and familiar with how to run the lab, but the reported number of viewings was less for the bicycle activity (40) than for the longboard truck lab (59). The familiarity and baseline competence the students seemed to have with a bike seemed to help with the group engagement, motivation, and activity completion.

Conclusion and next steps. Based on the findings in the Stanford pilot study, the core research design was adjusted to address a baseline familiarity with the leadership and operational concepts selected, participant group formation prior to the activity, validation prior to the activity that the video/scenario had been viewed, and adequate time to complete the hands-on activity and reflective dialogue.

Overall Chapter Summary

This chapter has presented a general research design preview, followed by specific descriptions of study metrics, intervention details, and data collection and analysis procedures. The pilot study was intended to provide evidence of a moderately successful early version of the study with a small sample size. Results were promising and were positioned as support for refining the research design as presented in this chapter. Chapter Four presents the research results with a detailed discussion of findings.

CHAPTER FOUR: FINDINGS

The purpose of this study was to assess the effect of scenario-based learning on motivation and performance in the workplace. The objective was to assess whether scenario-based learning could increase motivation by using a training process designed to shift motivation to part of the integrated self and create a basis for “self-determined behavior” (Deci & Ryan, 2005, p.15). As described in Chapter Three, two dependent variables were studied, motivation and metric performance. The basic research design was a quasi-experiment using pretests and posttests surveys, with supplemental qualitative data in the form of semistructured interviews.

In this chapter the descriptive statistics, metric performance, supporting qualitative data and assumptions are analyzed and presented in three parts, to explore the effect of scenario-based learning on motivation and performance. First, the research questions and a general overview of the study are provided. Second, the sampling method and demographics showing the assumptions of normality, reliability, and validity for the sample data are provided. Third, statistical analysis and results are presented for the SIMS situational motivation survey, scorecard metric performance, and supporting qualitative data.

Research Questions

The research questions guiding this study were the following:

H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants (but not for the control group).

H2: Performance scores will improve for scenario-based learning participants (but not for the control group).

Previous studies have shown that scenario-based learning can improve an individual’s feeling of self-efficacy (Shar et al., 2014). This study explored scenario-based learning’s effect on

motivation by analyzing four motivational constructs: (a) intrinsic motivation, (b) identified regulation, (c) external regulation, and (d) amotivation, using the SIMS situational motivation scale. Eight hundred publications over the past 2 decades have explored the dichotomy of intrinsic and extrinsic motivation (Vallerand, 1997). The concept of intrinsic motivation means to do an activity for itself, for the inherent pleasure of the activity (Guay et al., 2000). The concept of situational motivation refers to the motivation one feels when engaging in an activity. The purpose of this study is to provide meaningful data to support the understanding of the situational effect of scenario-based learning on intrinsic motivation and performance.

Scenario-Based Learning Study

Scenario-based learning refers to a four-step pedagogical cycle used to develop operational and leadership skills: (a) scenario, (b) an experience, (c) reflective dialogue, and (d) decision-making, as depicted in Chapter One, Figure 2. This study hypothesizes that the use of scenario-based learning can shift motivation from amotivation or extrinsic to more integrated and intrinsic, as defined by Deci and Ryan's (1985) self-determination theory. It also hypothesizes that scenario-based learning can improve metric performance.

According to Deci and Ryan's (1985) self-determination theory, different types of motivation underlie human behavior and these different types of motivation are theorized to differ in their inherent levels of self-determination. These types of motivation are listed on a continuum from high to low levels of self-determination or intrinsic to amotivation, as shown in Chapter One, Figure 2. Amotivation, as defined by Deci and Ryan (1985), is the least self-determined because there are no expectations of reward, similar to a feeling of incompetence. According to the self-determination theory there are four types of motivation: (a) amotivation, (b) external motivation, (c) identified regulation, and (d) intrinsic motivation and each type relate

differently to different outcomes, due to the different levels of self-determination. The self-determination theory postulates an association between enhanced psychological functioning and higher levels of intrinsic motivation or self-determined behavior (Deci & Ryan, 1985). This study hypothesizes that scenario-based learning leverages self-determined behavior to increase intrinsic motivation around given developmental topics and, in turn, can improve performance.

The four steps of scenario-based learning for this study:

- 1. Scenario.** The scenario for this study, as seen in Appendix A, presented the case for change around the operational platform, deployment, and the leadership skill: change leadership. The scenario described the operational and leadership problem relative to deployment and change leadership. The story featured a protagonist, Tim, who is struggling with deployment in his retail store. It portrays the specific issues Tim has with deployment and how he struggles to lead the change that needs to happen. The story contains relevant information about the operational and leadership skills required to solve the problem but does not include instruction or solutions (Schar et al., 2014).
- 2. Experience.** The experience for this study was a 60-minute hands on field based experience that tied directly to the specified problem, as seen in Figure 9 and the Appendix B. The experience provided a detailed description of deployment and change leadership in the retail store, where observations were made around employee awareness, understanding, and ability. The experience was concrete and involved active experimentation with possible solutions (Kolb, 2015).

3. **Reflective dialogue.** Proceeding the field experience employees participated in peer to peer dialogue to explore different ways to solve the problem. This dialogue included reflective observation and abstract conceptualization (Kolb, 2015).
4. **Decision-making.** The final step in this scenario-based learning intervention was an assignment where the learner conceptualizes their experience to choose how they will proceed in their journey to improve this work, using new or refined operational or leadership skills. This assignment is then discussed with a mentor or supervisor in a specified time frame following the experience and peer-to-peer dialogue. This step included reflective observation, abstract conceptualization, and active experimentation (Kolb, 2015).

This four-step pedagogical cycle incorporates motivation in the methodology to keep learners moving forward and allows leaders to work on organizational topics at the same time development is happening. The process allows organizational leaders to isolate the competency gaps of its employees and designs training that creates competence historically gained over time (Silverman, 2012). The IRB letter was received before the study commenced (Appendix C).

Sampling Method and Demographics

Data were collected from February 2018 to July 2018, from 169 field leaders in a *Fortune 500* retail organization. A sample size of greater than 55 field leaders was necessary to achieve a margin of error = .03, with an alpha of .05 and $t=1.96$ (Bartlett, 2001). Data for the SIMS situational intrinsic and extrinsic motivation scale was collected from 169 field leaders, 108 for the control group and 61 for the test group.

The total target population was a region of 435 field leaders, in a Fortune 500 retail organization, as depicted in Figure 15. Two areas were selected from the target population, based on regional segmentation and proximity to the researcher.

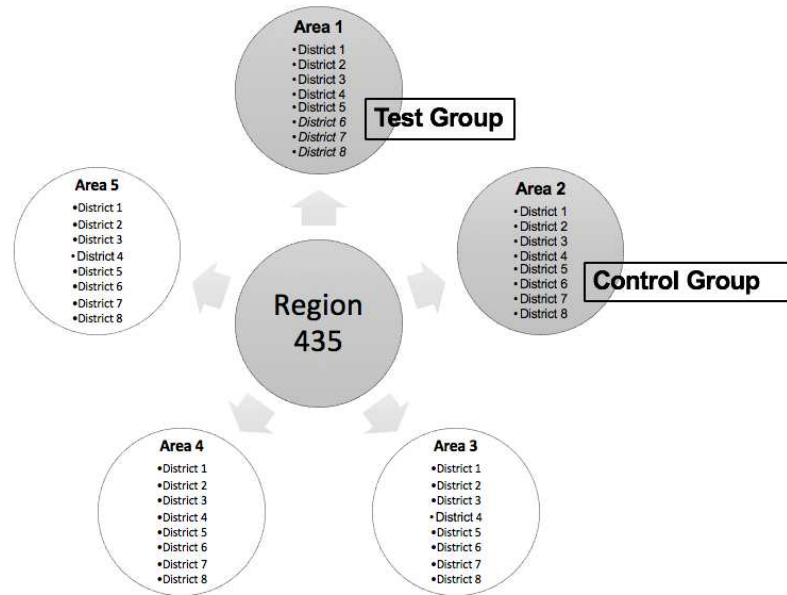


Figure 15. Population sample and regional organizational structure.

The control group, area 2, as depicted in Figure 15, consisted of 117 field leaders (108 store managers and eight district managers) and the test group, area 1, as depicted in Figure 15, consistent of 107 field leaders (91 store managers and eight district managers). In the test group, two district (18 store managers and two district managers) chose not to participate in the intervention because their districts had not completed the introductory work. A third district (13 store managers and one district manager) participated but did not complete the survey correctly. Therefore their results were excluded from the analysis. The exclusion of these three districts from the test group, along with incomplete surveys, brought the test population down to 61

participants. The exclusion of incomplete surveys from the control group brought the control population down to 108. With the exclusion of these three districts and incomplete surveys the target population ended at 169 field leaders, for both the test and control group. Research aimed at this population of field manager yielded an average response rate of (108/117) 92% for the control group and (61/73)—83% for the test group. Response rates were calculated based on the number of complete surveys divided by the number of surveys administered. Tests were removed from the sample if they were not completed, had missing answers, or either the pre- or posttest were not completed.

Demographic profile and sample comparison. In addition to the paired sample *t*-test, to ensure that the treatment and the control groups were not significantly different, demographic data were collected and compared, as depicted in Table 3. This data shows that both sample groups were store managers or district managers pulled from the larger field leader population, that they had received the same training for their given role, have similar customer bases, and live in similar geographical areas. Both groups were employed by the same Fortune 500 retail organization and were targeted because they were mid-level managers who need accelerated leadership and operational development in the area selected for this intervention, change leadership, and operational deployment.

A statistical comparison of the pretest data for the control group and the test group was conducted to ensure the two groups were not significantly different before the intervention. This test was conducted using a paired sample *t*-test for the constructs of the SIMS. The results revealed the differences in the four constructs were not significant, Table 13-15.

Table 13

Paired Samples Statistics – Control Group & Test Group

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	CItrinsicMotivation	14.47	61	3.12	.39
	IntrinsicMotiviation	15.24	61	3.46	.43
Pair 2	CIdentifiedRegulation	16.20	61	3.23	.41
	IdentifiedRegulation	16.79	61	3.06	.39
Pair 3	CExternalRegulation	14.51	61	5.50	.71
	ExternalRegulation	12.43	61	5.48	.70
Pair 4	CAMotivation	6.63	61	3.72	.47
	AMotiviation	5.48	61	2.93	.38

Note. $n = 64$, all participants who answered pre- and postsituational motivation scale questions (C= Control)

Table 14

Paired Samples Correlations – Control Group & Test Group

		N	Correlation	Sig.
Pair 1	CItrinsicMotivation	61	-.02	.86
	& IntrinsicMotiviation			
Pair 2	CIdentifiedRegulation	61	-.27	.04
	& IdentifiedRegulation			
Pair 3	CExternalRegulation	61	.05	.70
	& ExternalRegulation			
Pair 4	CAMotivation	61	-.05	.70
	& AMotiviation			

Note. $n = 64$, all participants who answered pre- and postsituational motivation scale questions (C = Control)

Table 15

Paired Samples Test (Paired Differences) – Control Group & Test Group

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	<i>t</i>	<i>df</i>	Sig (2-tailed)
Pair 1	CItrinsicMotivation-IntrinsicMotivation	-.80	4.71	.60	-2.00	.41	-1.38	60	.19
Pair 2	CIdentifiedRegulation-IdentifiedRegulation	-.59	5.01	.64	-1.87	.69	-.91	60	.362
Pair 3	CExternalRegulation-ExternalRegulation	2.08	7.96	1.02	.04	4.12	2.0	60	.05
Pair 4	CAmotivation-Motivation	1.14	4.85	.62	.10	2.39	1.83	60	.07

Note. *n* = 63, all participants who answered pre- and postsituational motivation scale questions (C = Control)

There is no significant difference between the test and control group in all four constructs of the SIMS scale, before the intervention. The absence of a significant difference between the test group and control group level in all four constructs provides a platform to test H1.

A statistical comparison of the metric performance, customer per store per day (COSDs) and out the window times (OTW) times, was conducted between the control group and the test group to ensure the two groups were not significantly different in their metric performance before the intervention. This test was conducted using a paired sample *t*-test for customers per store per day and out the window performance. The results revealed the differences in COSD metrics and OTW metrics were not significant, Table 16-21.

Table 16

Paired Samples Statistics – Control Group & Test Group OTW

		Mean	<i>N</i>	Std. Deviation	Std. Error Mean
Pair 1	Test Group 19-22	56.92	64	5.92	1.97
	Control Group 19-22	58.26	64	5.49	1.83

Note. *n* = 64, test group and control group OTW times prior to the intervention

Table 17

Paired Samples Correlations – Control Group & Test Group OTW

		<i>N</i>	Correlation	Sig.
Pair 1	Test Group 19-22 & Control Group 19-22	64	.253	.511

Note. *n* = 64, test group and control group OTW times prior to the intervention

Table 18

Paired Samples Test (Paired Differences) – Control Group & Test Group OTW

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	<i>t</i>	<i>df</i>	Sig (2- tailed)
Pair 1	Test Group 19-22 & Control Group 19-22	-1.34	6.98	2.32	-6.71	4.02	-.577	8	.580

Note. *n* = 64, test group and control group OTW times prior to the intervention

Table 19

Paired Samples Statistics – Control Group & Test Group COSDs

		Mean	<i>N</i>	Std. Deviation	Std. Error Mean
Pair 1	Test Group 19-22	-10	64	26.05	13.026
	Control Group 19-22	-22.25	64	14.64	8.32

Note. *n* = 64, test group and control group COSDs prior to the intervention

Table 20

Paired Samples Correlations – Control Group & Test Group COSDs

		<i>N</i>	Correlation	Sig.
Pair 1	Test Group 19-22 & Control Group 19-22	64	-.88	.11

Note. *n* = 64, test group and control group COSDs prior to the intervention

Table 21

Paired Samples Test (Paired Differences) – Control Group & Test Group COSDs

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	<i>t</i>	<i>df</i>	Sig (2- tailed)
Pair 1	Test Group 19-22 & Control Group 19-22	12.25	13.72	6.86	-9.58	34.08	1.78	3	1.17

Note. $n = 64$, test group and control group COSDs prior to the intervention

Assumptions

This section describes and analyzes the assumptions required to establish normality, reliability, and validity of results to answer the studies research hypotheses. The participants were not randomly assigned to their groups; therefore, the design is a nonequivalent group design with a pre- and posttest (Gliner et al.,2009). A paired *t*- test was used to obtain the most information for analysis because the participants were not randomly assigned and it cannot be assumed the differences in the pre- and posttest is unbiased (Gliner et al., 2009).

Normality. Descriptive statistics were evaluated to see if the variables were approximately normally distributed, an assumption of most parametric inferential statistics (Morgan, Leech, Gloeckner, & Barrett, 2013, p.57). SPSS was used to report the mean, standard deviation and skewness. Three of the four constructs of the SIMS scale were normal with skewness of less than 1.0 (Morgan et al., 2013), as depicted in Table 22, except for amotivation at 1.363 and 1.575, which indicates a positive skew and an assumption is that there is a deviation from normality. Because the primary analysis uses *t*-tests, which are robust, the assumption is that the slightly positive skew will not dramatically change the results.

Table 22

Means, Standard Deviations, and Skewness for Study Variables

	<i>N</i> Statistic	Range Statistic	Minimum Statistic	Maximum Statistic	Mean Statistic	Std. Deviation Statistic	Skewness Statistic	Skewness Std. Error
IntrinsicMotivation	61	14.75	7.00	21.75	15.24	3.46	-.26	.30
IdentifiedRegulation	61	12.25	9.50	21.75	16.79	3.06	-.21	.30
ExternalRegulation	61	19.50	3.25	22.75	12.43	5.48	.45	.30
AMotivation	61	9.75	3.25	13.00	5.48	2.93	1.36	.30
PItrinsicMotivation	61	12.75	10.00	22.75	17.34	3.42	-.40	.30
PIdentifiedRegulation	61	11.75	11.00	22.75	18.85	3.05	-.63	.30
PExternalRegulation	61	19.50	3.25	22.75	11.02	5.42	.36	.30
PAMotivation	61	10.00	3.25	13.25	4.86	2.30	1.57	.30
Valid <i>N</i> (listwise)	60							

Reliability. To assess the reliability of the data Cronbach's alphas were calculated to determine the degree of fit for each of the four constructs of the SIMS situational motivation scale. The results of these calculations indicate a high level of reliability for all variables, except identified regulation (Cronbach's alpha = .57 pretest and .69 posttest) and amotivation (Cronbach's alpha = .58 posttest). These results indicate a high level of reliability for intrinsic motivation, external regulation, and amotivation pretest and intrinsic motivation and external regulation posttest, as seen in Table 23.

Table 23
Cronbach's Alpha for All Dependent Variables

	Number of Items	Reported Cronbach's Alpha
Intrinsic Motivation	4	0.80
Identified Regulation	4	0.57
External Regulation	4	0.86
Amotivation	4	0.85
PItrinsic Motivation	4	0.77
PIdentified Regulation	4	0.69
PExternal Regulation	4	0.84
PAmotivation	4	0.58

Validity. Explanatory factor analysis was used to determine the score validity of the SIMS situational motivation scale. The two conditions necessary for factor analysis were first assessed: (a) a relationship between the variables and (b) adequate sample size (Morgan et al., 2013). Once these two conditions were confirmed, the factor analysis was conducted. Several assumptions were tested. Results indicated four factors and the total variance accounted for was 64.3%, an adequate factor structure for self-reporting scales (Gorsuch, 1983). The determinant was .001, more than .0001, indicating the collinearity was not too high. The Kaiser-Meyer-Olkin (KMO) was .739, higher than .70 and not less .50, indicating that each factor predicts an adequate number of items. The Bartlett test shows a significance of .000, showing that the variables are correlated sufficiently to conduct the factor analysis (Morgan et al., 2013). An analysis of the rotated factor matrix indicates a simple structure was achieved. Each item loaded for their respective factor, except for three factors: a) identified regulation Q2, Q3 and Q4 (because I think this activity is good for me, by personal decision, and because I believe that this activity is important for me), which cross loaded on the intrinsic motivation factor, b) external regulation Q4 (because I have to do it), which cross loaded on amotivation, c) external regulation

Q3 (because I don't have any choice), which cross loaded on the identified regulation and amotivation factors. All had smaller cross-loading from .32 to .380, as seen in Table 24 and Table 25.

Table 24

KMO and Bartlett's Test Factor Analysis for the SIMS Situational Motivation Scale

Kaiser-Meyer-Oiken Measure of Sampling		.73
Barlett's Test Sphericity	Approx. Chi-Square	397.27
	df	120
	Sig.	.00

Table 25

Rotated Component Matrix Factor Analysis for the SIMS Situational Motivation Scale

	Component 1	Component 2	Component 3	Component 4
IMFun	.89			
IMfeelgood	.80			
IMplesant	.77			
IRpersonaldecision	.61	.37		
IRowngood		.82		
IRgoodforme	.33	.72		
IMInteresting		.66		
AMnogoodforme		-.64		
IRimportant	.35	.57		
ERhavetodo			.90	
ERsupposedtodo			.89	
ERhaveto			.75	.37
ERnochoice		-.31	.50	.47
AMdon'tseewhatitbringsme				.85
AMnotsureworth				.84
AMnotsuregoodtopursue				.45

Statistical Analysis and Results

The two research questions that guided this study were the following: H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants (but not for the control group) and H2: Performance scores will improve for scenario-based learning participants (but not for the control group). A comparison of the pre- and posttest SIMS survey data revealed that intrinsic motivation increased for both the test group and control group. The data also revealed that intrinsic motivation increased significantly more for the scenario-based learning participants, post SBL intervention, than the control group, post standard training. Based on these results, we must accept the null hypothesis for H1. A comparison of the performance scores for the scenario-based learning participants revealed an improvement in weekend customer occasions by daypart (COSDs) (customer transactions) to the previous year, as depicted in Figure 12, but not for the control group. Performance also improved in weekend OTW times for the control group, as depicted in Figure 13, but not for the control group. Based on these results, we must reject the null hypothesis for H2. Supporting semistructured interviews, which were coded for Kolb's experiential learning cycle, showed that the test group completed two more experiential learning cycles than the control group per interviewee.

SIMS results. Survey results for the test group showed that there was a significant increase in intrinsic motivation and identified regulation and a no significant change in external regulation and amotivation post intervention, Tables 26-28.

Table 26

Paired Statistics Samples – Test Group

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	IntrinsicMotivation	15.24	61	3.46	.44
	PItrinsicMotivation	17.34	61	3.45	.44
Pair 2	IdentifiedRegulation	16.79	61	3.06	.39
	PIdentifiedRegulation	18.85	61	3.05	.39
Pair 3	ExternalRegulation	12.43	61	5.48	.70
	PExternalRegulation	11.22	61	5.58	.72
Pair 4	Amotivation	5.48	61	2.93	.37
	PAmotivation	4.86	61	2.30	.29

Note. $n = 61$, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

Table 27

Paired Samples Correlations – Test Group

		N	Correlation	Sig.
Pair 1	IntrinsicMotivation	61	.48	.00
	PItrinsicMotivation			
Pair 2	IdentifiedRegulation	61	.48	.00
	PIdentifiedRegulation			
Pair 3	ExternalRegulation	61	.41	.00
	PExternalRegulation			
Pair 4	Amotivation	61	.26	.04
	PAmotivation			

Note. $n = 61$, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

Table 28

Paired Samples Test (Pair Differences) – Test Group

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	t	df	Sig. (2-tailed)
Pair 1	IntrinsicMotivation	-2.09	3.51	.44	-2.99	-1.19	-4.66	60	.00
	PItrinsicMotivation								
Pair 2	IdentifiedRegulation	-2.06	3.10	.39	-2.86	-1.26	-5.18	60	.00
	PIdentifiedRegulation								

Pair 3	ExternalRegulation PEternalRegulation	1.21	6.02	.77	-.33	2.91	2.75	60	.12
Pair 4	Amotivation PAmotivation	.62	3.22	.41	-.20	1.44	1.51	60	.13

Note. $n = 60$, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

A one-tailed t -test was conducted, and the p values were divided by two, to test for the possibility of the relationship in one direction (Gliner et al., 2009; UCLA: Statistical Consulting Group, 2018) as seen below.

- Intrinsic motivation significant increase ($.00/2=.00 P > .05$)
- Identified regulation significant increase ($.00/2=.00 P > .05$)
- External regulation significant decrease ($.12/2=.06 P < .05$)
- Amotivation significant decrease ($.13/2=.06 P < .05$)

A comparison of the pre- and posttest data of the control group revealed a significant increase in intrinsic motivation and identified regulation and a significant decrease in amotivation in the control group, as depicted in Table 29.

Table 29

Paired Statistics Samples – Control Group

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	IntrinsicMotivation	14.59	108	3.50	.34
	PItrinsicMotivation	16.32	108	4.18	.40
Pair 2	IdentifiedRegulation	16.63	108	3.31	.31
	PIdentifiedRegulation	17.89	108	3.58	.34
Pair 3	ExternalRegulation	14.04	108	5.39	.52
	PEternalRegulation	13.68	108	6.13	.59
Pair 4	Amotivation	6.36	108	3.45	.33
	PAmotivation	5.53	108	3.49	.34

Note. $n = 108$, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

Table 30

Paired Samples Correlations – Control Group

		<i>N</i>	Correlation	Sig.
Pair 1	IntrinsicMotivation PIntrinsicMotivation	108	.61	.00
Pair 2	IdentifiedRegulation PIdentifiedRegulation	108	.64	.00
Pair 3	ExternalRegulation PEXternalRegulation	108	.53	.00
Pair 4	Amotivation PAmotivation	108	.53	.00

Note. *n* = 108, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

Table 31

Paired Samples Test (Pair Differences) – Control Group

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	<i>t</i>	<i>df</i>	Sig. (2- tailed)
Pair 1	IntrinsicMotivation PIntrinsicMotivation	-1.73	3.47	.33	-2.39	-1.07	-5.19	107	.00
Pair 2	IdentifiedRegulation PIdentifiedRegulation	-1.26	2.95	.28	-1.82	-.69	-4.44	107	.00
Pair 3	ExternalRegulation PEXternalRegulation	.36	3.68	.35	-.34	1.07	1.02	107	.31
Pair 4	Amotivation PAmotivation	.83	3.37	.32	.19	1.47	2.56	107	.01

Note. *n* = 107, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

A one-tailed *t*-test was conducted, and the *p* values were divided by two, to test for the possibility of the relationship in one direction (Gliner et al., 2009; UCLA: Statistical Consulting Group, 2018) as seen below.

- Intrinsic motivation increase ($.00/2 = .00P > .05$)

- Identified regulation increase (.00/2=.00 $P > .05$)
- External regulation significant decrease (.31/2=.15 $P < .05$)
- Amotivation significant decrease (.01/2=.00 $P < .05$)

The increase in intrinsic motivation and identified regulation was significantly larger in the test group than the control group, and the decrease in external regulation was significantly larger in the test group than the control group, as seen in Table 32.

Table 32

Paired Samples Test (Pair Differences) – Test Group and Control Group Posttest

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	<i>t</i>	<i>df</i>	Sig. (2-tailed)
Pair 1	PItrinsicMotivation	1.79	6.19	.79	.21	3.38	2.27	60	.02
	CItrinsicMotivation								
Pair 2	PIdentifiedRegulation	1.27	5.37	.69	-.09	2.65	1.85	60	.06
	CIdentifiedRegulation								
Pair 3	PExternalRegulation	-3.22	9.25	1.19	-5.61	-.83	-2.69	60	.06
	CExternalRegulation								
Pair 4	PAmotivation	-.98	4.92	.63	-2.24	.27	-1.56	60	.12
	CAmotivation								

Note. $n = 60$, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

Table 33

Paired Statistics Samples – Test Group and Control Group Posttest

		Mean	<i>N</i>	Std. Deviation	Std. Error Mean
Pair 1	PItrinsicMotivation	17.34	61	3.45	.44
	CItrinsicMotivation	15.54	61	4.57	.58
Pair 2	PIdentifiedRegulation	18.85	61	3.05	.39
	CIdentifiedRegulation	17.57	61	3.57	.45

Pair 3	PExternalRegulation	11.02	61	5.42	.70
	CPEExternalRegulation	14.25	61	6.29	.81
Pair 4	PAmotivation	4.86	61	2.30	.29
	CPAmotivation	5.85	61	3.90	.50

Note. $n = 61$, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

Table 34

Paired Samples Correlations – Test Group and Control Group Posttest

		<i>N</i>	Correlation	Sig.
Pair 1	PItrinsicMotivation	61	-.17	.18
	CPIntrinsicMotivation			
Pair 2	PIdentifiedRegulation	61	-.31	.01
	CPIdentifiedRegulation			
Pair 3	PExternalRegulation	61	-.24	.06
	CPEExternalRegulation			
Pair 4	PAmotivation	61	-.20	.11
	CPAmotivation			

Note. $n = 61$, all participants who answered pre- and postsituational motivation scale questions (P = Posttest)

A one-tailed *t*-test was conducted, and the *p* values were divided by two, to test for the possibility of the relationship in one direction (Gliner et al., 2009; UCLA: Statistical Consulting Group, 2018) as seen below.

- Intrinsic motivation increase ($.02/2=.01 P > .05$)
- Identified regulation increase ($.02/2=.01 P > .05$)
- External regulation significant decrease ($.06/2=.03 P < .05$)
- Amotivation significant decrease ($.12/2=.06 P < .05$)

Organizational scorecard metrics. A comparison of the metric results for the test group revealed an improvement in weekend (COSDs) and out the window times (OTW). The test group saw a trended improvement in COSDs over last year, where the control group saw a decline over

the previous year, as seen in Figure 16. The test group saw a .04 point improvement in COSDs over the previous year, and the control group saw a (.48) decline in COSDs over the previous year, as depicted in Figure 17. The improvement in both categories was better for the test group than the control group.

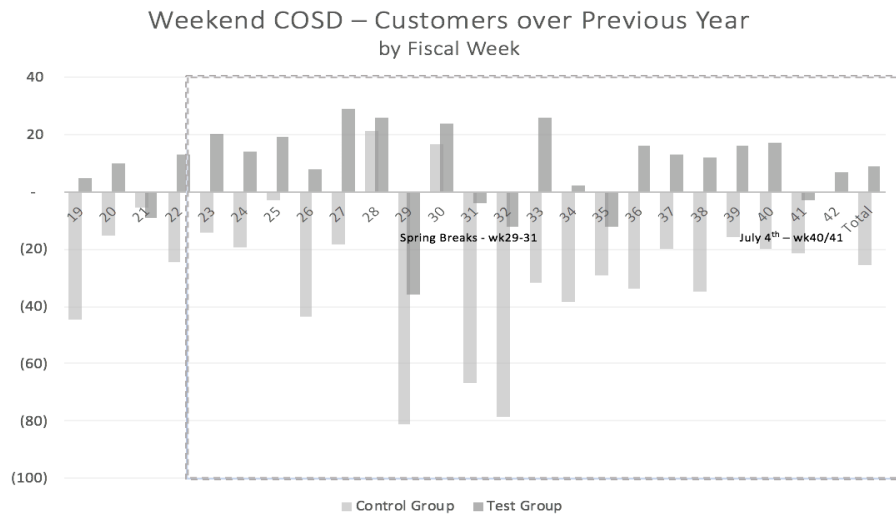


Figure 16. Weekend COSD–Customers over the previous year.

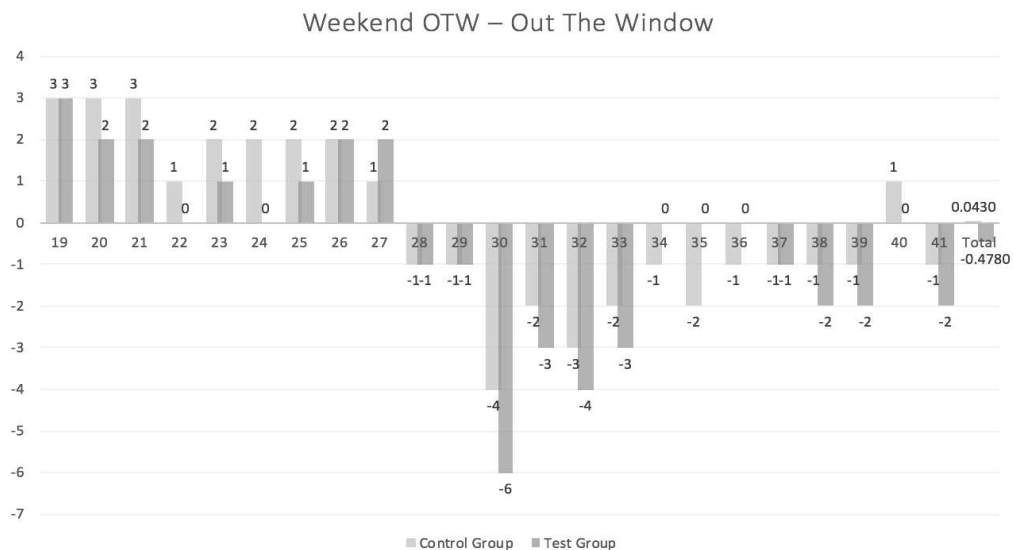


Figure 17. OTW–Out the window over last fiscal year.

A statistical comparison of two performance metrics, customer per store per day (COSDs) and out the window (OTW) times, was conducted between the control group and the test group to assess whether the groups were significantly different in their metric performance after the intervention. This test was conducted using a paired sample *t*-test. The results revealed that the differences in COSD metrics were significant, but the OTW metrics were not significant, Table 35-40. Both the test group and the control group saw a decrease in the mean OTW time after the intervention, and the difference between the test group’s OTW time and the control group’s OTW time increased by .5.

- Preintervention difference in the mean (test group 56.92- control group 58.26=1.34)
- Postintervention difference in the mean (test group 55.72-control group 57.56=1.84)

Table 35

Paired Samples Statistics – Control Group & Test Group OTW

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	Test Group 23-42	55.72	69	6.25	2.08
	Control Group 23-42	57.56	69	5.71	1.90

Note. *n* = 69, test group and control group OTW times prior to the intervention

Table 36

Paired Samples Correlations – Control Group & Test Group OTW

		N	Correlation	Sig.
Pair 1	Test Group 23-42 & Control Group 23-42	69	.464	.208

Note. *n* = 69, test group and control group OTW times prior to the intervention

Table 37

Paired Samples Test (Paired Differences) – Control Group & Test Group OTW

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	<i>t</i>	<i>df</i>	Sig (2- tailed)
Pair 1	Test Group 23-42 & Control Group 23-42	-1.83	6.21	2.07	-6.60	2.94	-.88	8	.40

Note. *n* = 69, test group and control group OTW times prior to the intervention

Table 38

Paired Samples Statistics – Control Group & Test Group COSDs

		Mean	<i>N</i>	Std. Deviation	Std. Error Mean
Pair 1	Test Group 23-42	5.75	69	22.15	4.95
	Control Group 23-42	-26.65	69	27.05	6.04

Note. *n* = 69, test group and control group COSDs prior to the intervention

Table 39

Paired Samples Correlations – Control Group & Test Group COSDs

		<i>N</i>	Correlation	Sig.
Pair 1	Test Group 23-42 & Control Group 23-42	69	-.88	.00

Note. *n* = 69, test group and control group COSDs prior to the intervention

Table 40

Paired Samples Test (Paired Differences) – Control Group & Test Group COSDs

		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference (Lower)	95% Confidence Interval of the Difference (Upper)	<i>t</i>	<i>df</i>	Sig (2- tailed)
Pair 1	Test Group 23-42 & Control Group 23-42	32.40	12.68	2.83	26.46	38.33	11.42	19	.00

Note. *n* = 69, test group and control group COSDs prior to the intervention

Supplemental semistructured interviews. Supplemental semistructured interviews were conducted with a small sample from the test group and a small sample from the control group. Ten interviews were conducted in total: five from the control group and five from the test group. Fourteen participants were interviewed from the test group, four single interviews and one team interview with 10 participants. Six participants were interviewed from the control group in six single interviews. The interviews were structured after the SIMS Situational Motivation Scale, as shown in Chapter Three, but the conversations were not linear. An adjustment was made to the method section coding description, instead of coding by assigning a number or value to each variable, each segment of Kolb's experimental learning theory was labeled based on one of the four segments: (a) concrete experience, (b) reflective dialogue, (c) abstract conceptualization, and (d) active experimentation. Codes and sub codes were identified, as depicted in Table 29. The labels were identified using Kolb's experiential learning theory, recommendations in Krathwohl's 2009 edition of *Methods of Educational and Social Science Research* and can be found in Table 35. The actual interviews are in Appendix D and E. The reason for assigning a label to each of the four segments of Kolb's experimental learning theory was to show how many full experimental learning cycles the interviewees from the test group and control group completed during the scenario-based learning activity. Table 36 compares the full cycles, based on the coding of each lines of text from the interviews. The test group completed 6.5 full experiential learning cycles per interviewee, and the control group completed 4.5. The experiential learning segment that was the most prevalent with the test group was reflective observation. The segment that was the least prevalent was abstract conceptualization. The experiential learning segment that was the most prevalent with the control group was also reflective observation. The segment that was the least prevalent was the concrete experience.

Table 41

Code System

Active Experimentation	Abstract Conceptualization	Reflective Observation	Concrete Experience
feedback	I wanted to make sure	observe	showing
preframing	right place right time	assumption	instructing
follow up	clear understanding	are we	work I'm doing
trying	actual work	i don't know	do the work
trying to	turns out	what do you think	physically
create	teaching	see	coach
action	what I'm going to do	seeing	focused
i do that	don't do that	before	print
i want to know	build	when I think	supporting
i added	make	I think	experience
i put	skill	talking about it	experiences
write out	move	conversation	story
we started	if we	how do you	we succeeded
skill building	biggest take away	talk	results
false starts	believe	debrief	do
move	how you can	we thought	physical
solve	focused	reflect	participate
try	curious	remember	working
plan	felt like	I think	commitment
practice		I need to work on	celebrate wins
apply		I feel like	wins
posted		That's gotta be	
trying		dialogue	
problem solving			
problem solve			
participate			
prepare			

Table 42

Segments and Cycles

Test group interviews		Control group interviews	
Participant 1T		Participant 1C	
- Concrete Experience	13	- Concrete Experience	7
- Reflective Observation	25	- Reflective Observation	58
- Abstract Conceptualization	5	- Abstract Conceptualization	28
- Active Experimentation	20	- Active Experimentation	29

<i>Total cycles</i>	5
Participant 2T	
- Concrete Experience	69
- Reflective Observation	71
- Abstract Conceptualization	25
- Active Experimentation	33
<i>Total cycles</i>	25
Participant 3T	
- Concrete Experience	31
- Reflective Observation	38
- Abstract Conceptualization	6
- Active Experimentation	27
<i>Total cycles</i>	6
Participant 4T	
- Concrete Experience	27
- Reflective Observation	18
- Abstract Conceptualization	15
- Active Experimentation	17
<i>Total cycles</i>	15
Team	
- Concrete Experience	171
- Reflective Observation	200
- Abstract Conceptualization	40
- Active Experimentation	48
<i>Total cycles</i>	40
Average per person team	4
Average per person TG 55	6.5

<i>Total cycles</i>	7
Participant 2C	
- Concrete Experience	10
- Reflective Observation	43
- Abstract Conceptualization	15
- Active Experimentation	13
<i>Total cycles</i>	13
Participant 3C	
- Concrete Experience	1
- Reflective Observation	21
- Abstract Conceptualization	11
- Active Experimentation	11
<i>Total cycles</i>	1
Participant 4C	
- Concrete Experience	1
- Reflective Observation	11
- Abstract Conceptualization	10
- Active Experimentation	13
<i>Total cycles</i>	1
Participant 5C	
- Concrete Experience	1
- Reflective Observation	25
- Abstract Conceptualization	8
- Active Experimentation	12
<i>Total cycles</i>	1
Participant 6C	
- Concrete Experience	4
- Reflective Observation	28
- Abstract Conceptualization	11
- Active Experimentation	14
<i>Total cycles</i>	4
Average per person CG	4.5

CHAPTER FIVE: DISCUSSION OF FINDINGS

This chapter presents a discussion of the findings presented in Chapter Four, conclusions that can be drawn from the results of the research, confounding factors, limitations of the study, implications for practice, theory, and future research. The purpose of this study was to investigate the effect of scenario-based learning on motivation and performance. The research questions that guided this research were the following:

H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants (but not for the control group).

H2: Performance scores will improve for scenario-based learning participants (but not for the control group).

The importance of this study was based on the \$162.2 billion spent on direct learning experiences, according to the ASTD's (2013) *State of the Industry Report* and the large number of resources allocated to the study of the four constructs that make up the four step pedagogical process of scenario-based learning and two predicated outcomes: (a) narrative storytelling, (b) experiential learning, (c) reflective dialogue, (d) decision-making and the two predicted outcome, motivation and performance. The proceeding discussion explored the effect of scenario-based learning on motivation and performance, through the lens of the quantitative and qualitative data analysis.

Conclusion

The findings from the SIMS situational motivation survey, the organizational scorecards, and the supporting semistructured interviews were compelling. As described in Chapter Four, the paired sample *t*-test conducted for this study supported the null hypothesis for H1: Perceptions of intrinsic motivation will increase for scenario-based learning participants as

measured by the SIMS survey (but not for the control group). The analysis of the organizational scorecards resulted in the rejection of the null hypotheses for H2: Performance scores will improve for scenario-based learning participants (but not for the control group). The paired sample *t*-test conducted on the metric performance supported the null hypothesis for the OTW metric, but rejected the null hypothesis for the COSD metric. The supporting semistructured interviews, coded for the four steps of the experiential learning theory (Kolb, 2015), showed that the number of times the test group moved through the experiential learning cycle using scenario-based learning was an average of 6.5 times versus an average of 4.5 times for the control group. The interview data support the general position that scenario-based learning can have a positive impact on motivation and performance.

Discussion: Research Question

The question at the core of this study was whether scenario-based learning could promote self-determined behavior and improve performance (Deci & Ryan, 2005) and if the hypotheses were supported, how leveraging this training process could benefit field leaders, human resource workers, and organizational development professionals. Historically, development research has focused on performance improvement and on-the-job training and could not provide complex situational development (Lynham, 2002). Given the complexity of employee development in today's workplace, a development method that builds capability by improving motivation (Deci & Ryan, 2005, p. 15) and performance, could be of strategic utility to human resource and organizational development.

Two Research Hypotheses

The following section will describe the results for each hypothesis tested.

Research hypothesis one. *Perceptions of intrinsic motivation will increase for scenario-based learning participants (but not for the control group).* The null hypotheses was accepted for H1. The data from the *t*-test showed that intrinsic motivation increased for both the test group and the control group. The data also showed that the increase in intrinsic motivation was significantly more for the test group than the control group. While the null hypothesis was accepted for H1, the research demonstrated that scenario-based learning did have a positive effect on intrinsic motivation, that it did indeed shift motivation from extrinsic or amotivation to more self-determined (Deci & Ryan, 2009).

Three confounding factors for H1 were identified: one, though the hypothesis stated that the control group would not see any improvement in intrinsic motivation, it did not limit the possibility that scenario-based learning could have a positive effect on motivation. Ultimately, it did limit the conclusion that could be reached. Two, though not stated as a hypothesis, the researcher tested the difference between the posttest of the control group to the posttest of the test group to see if the difference between the increase in intrinsic motivation was significant between groups. Results supported the conclusion that intrinsic motivation increased significantly more for the test group than the control group. Three, the control group's mean scores of amotivation and external regulation were higher in the pretest at 6.36 amotivation, and 14.01 versus the test groups mean scores of 5.48 amotivation and 12.43 external regulation. Did the higher level of external regulation and amotivation pretest for the control group make the increase in intrinsic motivation more probable?

Research hypothesis two. *Performance scores will improve for scenario-based learning participants (but not for the control group).* The null hypothesis was rejected for H2. The scorecard data showed that metric results improved for the test group and not for the control

group, as shown in Chapter Four, Figure 14 and 15. Scorecard data were collected before the intervention for both the test group and the control group and tracked by week for the duration of the intervention and for a period following the intervention to evaluate the sustainability of the results, as shown in Chapter Four, Figure 14 and 15.

Limitations

Although the results provide support for both hypotheses, the research contains limitations related to the population selection and sample, measures and procedure.

Population sample and sampling limitations. Four limitations related to the population and sample should be considered when interpreting the findings. First, the generalizability of the study outside of the population of brick and mortar companies, like technology firms or online businesses are limited, as the features of the organization are different. Brick and mortar organizations have different consumer expectations and employee development needs, due to the employees' physical proximity to the customer, the physicality of the product, financial capabilities, and consumer expectations. Second, because the study focused on a Fortune 500 organization, the results may not apply to a sample or population outside of a private U.S. organization. Third, the uniqueness of the organizations' culture may reduce the generalization of the study to other organizational cultures. Finally, the closed boundaries of knowledge management and organizational learning (Cummings & Worley, 2009), limit the generalizability of this study outside these boundaries.

Research measures and procedure. Five limitations should be taken into consideration surrounding the research measures and procedure: the survey, the scorecards, and the semistructured interviews. One, although there is strong support for the SIMS situational motivation scale survey, the testing of the survey showed strong correlational versus causal

outcomes. Two, the initial development studies of the SIMS scale were conducted in three life contexts, namely education, interpersonal relationships, and leisure; work was not included. Three, all the participants selected to in the initial development studies of the SIMS scale were college students. Four, though the scorecard data is compelling and the null hypothesis for H2 was rejected, the scorecard data is unique to the organization in its structure and collection. COSDs are tracked by day parts, unique to this organization's customer flow and are collected by transaction versus sales unit, which may make the metric performance improvement unique to a limited number of organizations. Five, because the semistructured interviews are provided as supporting data, the number of interviews is limited; thus, additional qualitative research is needed.

In sum, the study of the effect of scenario-based learning on motivation and performance is progressing following this research. Although additional research needs to be conducted on scenario-based learning, this study shows that overall, scenario-based learning can be useful in the face of complex employee development. These limitations are tenable, but should be abridged with further research.

Summary of the Findings

Chapter Four presented the research evidence of a link between scenario-based learning and motivation, substantiating its strategic utility to performance development and its use as a mechanism for improving employee motivation and performance in the workplace. Though the null hypothesis was supported for H1 because intrinsic motivation also improved for the control group; the research also showed that intrinsic motivation increased significantly more for the test group than the control group, which provides implications for future research. The results show that the more fully an employee internalizes motivation, the more it becomes part of the

integrated self, and the more it is the bases for self-determined behavior” (Deci & Ryan, 2002, p. 15) and improved performance. The research showed that scenario-based learning increased motivation and improved metric performance, which suggests that scenario-based learning can function as a tool in the workplace.

Implications for Theory, Practice, and Research

This research study contributes to several prevailing foundational theoretical frameworks and research done on narrative scenarios, experiential learning, reflective dialogue, motivation, and performance. The results of this research study help corroborate several preceding assertions that narrative scenarios can create critical reflection, foster interest, and help to integrate new aspects of experiences (Deci, 1995; Kendall & Kendall, 2017; Schedlitzki et al., 2015; Tanner, 2009; Weick et al., 2005), shown in this study by significant increases in intrinsic motivation found in the test group versus the control group. The evidence provided in this study supports studies that have shown experiential learning leads to a greater sense of satisfaction and improved decision-making (Kolb, 2015), that scenario-based learning can be used as a mechanism to improve the intentionality of behavior. The use of reflective techniques to change behavior post reinterpretation has historically proven to be an important part of learning and development (Atman & Turns, 2017; Revans, 1982). This study supports reflective dialogue as a step, in a larger pedagogical process to improved metric performance.

Theoretical implications. This research study has implications for theory related to narrative storytelling, experiential learning theory, theories around reflective dialogue, motivation theory and performance theory. What follows is a discussion of the implications for scenario-based learning theory and the theories that make up its foundational framework.

Implications for theories of narrative story telling. Robust evaluation of leadership development practices using storytelling and dialogue still are rare, and the transfer of learning from the classroom to the workplace still is largely unexplored (Schedlitzki et al., 2015).

It seems that the exploration of narration as a vehicle for sense-making and a step in the process of scenario-based learning deserves further study. This review of relevant concepts leads to suspicion about how the concepts may interact in modern organizations.

Implications for experiential learning theory. One of the foundational theories of scenario-based learning is experiential learning theory (Kolb, 2015). While scenario-based learning is an undeveloped topic, theorizing about experiential learning theory spans decades, from Dewey and Lewin in the early 1900's to Kolb in 2015. Many of the early researchers of experiential learning founded ideas that were pragmatic, emphasized participation, and oriented towards problem solving (Dewey, 1938; Kolb 2015; Lewin, 1951; Piaget, 1971). The results of this study support these foundational ideas.

Theory building in the experiential learning body of knowledge continues to progress through cycles of conceptual development, application, and operationalization (Kolb, 2015). Researchers and practitioners continue to pursue new theories and ideas about how to implement and measure experiential learning. This research study contributes to the conceptualization of the theory of experiential learning by building on existing models, through identifying units, explaining the interaction between these units, defining the boundaries, and system states (Dubin, 1978).

Implications for theories related to reflective dialogue. The results of this study show a positive relationship between reflective (peer-to-peer) dialogue, motivation, and performance. This positive relationship provides supporting data for theory building around reflective

dialogue. The assertion that talking is an important part of learning because it facilitates the integration of new knowledge through reflection, which is a key part of scenario-based learning.

During the operationalization phase of theory building, the units are defined and interactions between the between the units are explained (Dubin, 1978). This dissertation research study contributes to the conceptualization of the theory of reflective dialogue by building on the operationalization of the units through observation and conformation of the relationship between the elements of reflective dialogue, motivation, and performance (Dubin, 1978; Swanson & Chermack, 2013).

Implication for motivation theory. This research showed that the process of scenario-based learning is operative at the situational level and that the constructs are positively related and theoretically predict a shift from amotivation or external regulation to more self-determined or intrinsic motivation (Deci & Ryan, 2009). The self-determination theory is a conceptual framework with vast empirical research to support its existence in organizations (Deci, Connell, & Ryan, 1989). This research contributes to the theory of self-determination by showing the presence of the elements of self-determination (autonomy, relatedness, and competence) in scenario-based learning (Swanson & Chermack, 2013).

Implication for performance theory. In addition to contributing to the theoretical frameworks for narrative scenarios, experiential learning, reflective dialogue, and motivation; the scorecard results showed that metric performance, specific to the operational platform, improved post scenario-based learning intervention. By the self-determination theory, these results could largely be explained by the improved self-perception of competence, autonomy, and relatedness relative to the operational platform and leadership skill presented through scenario-based

learning. The results from this research provided support for the idea that performance is a product of motivation times ability (Lawler & Worley, 2006).

Research implications. This research study provides implications for future research related to the study of pedagogical processes, which shift motivation from amotivation and external regulation to identified regulation and intrinsic motivation (Deci & Ryan, 2002) and improving performance. The following is a general discussion of implications for future research, as well as a more detailed framework for potential research studies.

Potential research projects on scenario-based learning. Follow-up research studies related to scenario-based learning and its effect on motivation and performance might include the following:

1. *A qualitative study to construct a theory of scenario-based learning.* This study would conceptualize the theory building, using the variables of the scenario-based learning phenomena to create a structured conceptual framework (Lynham, 2002; Swanson & Chermack, 2013). The research questions guiding this study could come from the first four steps of Dubin's eight step theory building methodology: (a) to define the units, (b) to explain the laws of interaction, (c) to define the boundaries of this interaction, (d) to define the system states, (e) to identify the propositions, (f) indicate the key terms, (g) to form a hypothesis, and (h) to test the hypothesis. This research could create a conceptual framework for a scenario-based learning theory, along with a platform to empirically validate the theory through research (Lynham, 2002). The results of this research study would contribute to the conceptualization of the theory of scenario-based learning by building on the existing foundational

frameworks of narrative storytelling, experiential learning, reflective dialogue, motivation, and performance.

2. *A qualitative study of the effect of scenario-based learning's on experiential learning cycles.* This study would involve a scenario-based learning intervention, followed by a significant number of participant interviews used to evaluate the number of times a participant moves through Kolb's experiential learning cycle. The results of this study suggest that scenario-based learning has a positive relationship on experiential learning theory and that the number of times a participant moves through the experiential learning cycles is likely to be greater if participating in scenario-based learning versus standard teaching my telling. The method for a future study would follow the methodology in Chapter Four of this research; however, the number of interviews conducted would be increased to provide a sample size necessary to achieve a reliable margin of error (Bartlett, 2001). The research study would provide supporting data for Kolb's experiential learning theory and contribute to the operationalization phase of theory building to form a hypothesis and test the hypothesis based on multiple cycles of scenario-based learning versus a single cycle.
3. *A qualitative longitudinal study of recurring cycles of scenario-based learnings effect on performance.* This study would allow a researcher to assess the number of scenario-based learning cycles necessary to move a leadership behavior from a skill to a competency and the number of cycles necessary to move a behavior to a station of sustainability.
4. *A quantitative study of the use of auditory or video based narrative storytelling in place of written narration, in step one of the scenario-based learning process.* This

study could replicate the method from Chapter Four of this research, but substitute auditory or video based narration for step one of the scenario-based learning process. The research could also include supplemental auditory and video based narration to reinforce the performance goal throughout the scenario-based learning process. The research question guiding this research would be the following: The effect of audio/video based narration versus written narration in the scenario-based learning process. This research study would contribute step two of Dubin's theory building methodology, to explain the laws of interaction between the units (Dubin, 1978), how the change in the platform for step one could strengthen the interaction between the units and improve the shift in motivation to more intrinsic and enhance performance results.

Practical implications. This research study has implications for practice related to pedagogical processes, scenario-based learning, motivation, and performance in the workplace. What follows is a pragmatic look at the practical implications for organizational learning, through the experimental and reflexive processes of organizational life (Elkjaer & Simpson, 2011). A pragmatic lens provides focus on the practical consequences of action in scenario-based learning, the presence of social context found in reflective dialogue, and the grounding of problem solving through inquiry (Bernstein, 2010; Korte & Mercurio, 2017).

Implications for practice related to pedagogical process. The presence of knowledge and action in the scenario-based learning process (Argyris & Schon, 1996; Elkjaer & Simpson, 2011; Elkjaer & Wahlgren, 2006) has practical implications in organizational learning. The results of this research show that scenario-based learning can solve organizational problems, while modifying behavior, through action, the social context (Bernstein, 2010) of reflective

dialogue and storytelling. The results of this research have practical implications for organizational pedagogy.

Implications for scenario-based learning practice. The study of the scenario-based learning process, while based on robust foundational theories, requires further study. The implications for practice follow many streams, from employee motivation and engagement to the duality of organizational problem solving and employee knowledge transfer (Argyris & Schon, 1996; Elkjaer & Wahlgren, 2006; Elkjaer & Simpson, 2011). Practitioners can use scenario-based learning to assist them in building leadership and operational capability while solving problems in the workplace. The practitioner may also find that scenario-based learning can provide a platform for creativity and innovation while generating new knowledge in action (Elkjaer & Simpson, 2011). Scenario-based learning also has the potential to offer new insight into organizational learning by conceptualizing learning through the following (Elkjaer & Simpson, 2011, p. 71):

- Its transactional approach to all levels of the learning system instead of singling out the individual and then the organization.
- Its approach to knowledge and action in a continuous cycle instead of knowledge transfer then practice.
- Its inclusion of social interaction and creative practice together to provide a real-life experience.

The scenario-based learning approach brings together individuals, knowledge, and situations into a “dynamic whole,” avoiding the need to “glue them together after the fact (p. 73).

Implications for motivation practice. Motivation is critical to the achievement of performance in the workplace (Lawler & Worley, 2006). Practitioners working with

organizations to assist them in metric performance improvement now have additional information to help them develop employees while improving performance. Scenario-based learning defines motivation through self-determination and uses narration as the informational conduit to support autonomy and promote competence (Deci & Ryan, 1989). The implication for motivation practice comes from the ability of scenario-based learning to promote “inquiry” or “how we think” into the methodology through which the learning takes place (Elkjaer & Simpson, 2011, p. 73). The way scenario-based learning is structured allows the problem to be presented in a way that is informative, which evokes emotion and judgement (Deci & Ryan, 1989, p. 1040; Elkjaer & Simpson, 2011, p. 73). Practitioners working with employees who need to build leadership and operational competency should focus on how the design of scenario-based learning promotes self-determined behavior. The implication for a method that improves self-determined behavior holds power to potentially systematically improve and sustain metric results.

Implication for performance practice. The implication that scenario-based learning can improve metric performance by increasing self-determined behavior can be seen in the results of this study and is compelling for organizational strategy. Lawler and Worley’s (2006) definition of performance, that performance equals motivation times ability, ties together the implication for motivation practice and performance practice and supports the construct organization of scenario-based learning. If Lawler and Worley’s (2006) definition of performance connects ability to knowledge, skill, competence, and personality, competence is vital to individual and team performance in today’s complex and ever-changing business world; the implications for performance practice are vast.

Conclusion

This research study contributes to the body of knowledge around scenario-based learning by rigorously examining the hypothesis that scenario-based learning can increase intrinsic motivation and improve performance. Based on the general assumption that leadership and operational capability (ability) in combination with an inclination (motivation) to act will result in improved performance (Lawler & Worley, 2006), scenario-based learning should be an appealing avenue for future research.

There is an opportunity for further quantitative and qualitative research into each variable of the scenario-based learning cycle, individual versus group impact, and variation of work group size and structure. More extensive research into the conceptual frame work of scenario-based learning is also necessary to define the relationship between the variables, evaluate the weight of each variable in relationship to the outcome, and explain the number of repetitions of scenario-based learning necessary to sustain performance over time.

By solidifying a theory of scenario-based learning and confirming its ability to motivate employees to perform, researchers can arm organizations with a method that would help scholars, human resource employees, and organizational development professionals develop complex leadership skills in their employees more efficiently and effectively to get results faster. This is a critical organizational capability to the long-term financial success of organizations, but, more importantly, the functional significance of scenario-based learning has positive ramifications for people's work lives in its ability to positively orient employees on their work.

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Scenario-Based Learning – Step 1, Story

Deploying to Create the Starbucks Experience

Deployment

Change Leadership

...starting in FY18, company operated field leaders are being introduced to a new deployment program. The goal of the improved deployment standards is to ensure that our stores are set-up to deliver the ***Starbucks Experience*** for partners and customers.

The company mission is to inspire and nurture the human spirit. Starbucks has always been about human connections, about people. In April, partners were asked to rally around creating the ***Starbucks Experience*** for partners and customers. Each partner made a commitment to this as their top priority. At the SM summit partners were introduced to the North Star Plan as the operating plan for the year and they reflected on their role as leaders to create the ***Starbucks Experience*** in their stores. District managers and store managers spent Q3, Q4 and Q1 focused on bringing the customer service commitment to life and now they will move to the second chapter in the ***Starbucks Experience*** conversation. This chapter is about the work they need to do to become world-class operators and build great team. It is aligned with the company value of “delivering our very best in all that we do, holding ourselves accountable for results” and it is supported by the commitment to do fewer things better.

Here is a story to help prepare you for what is to come...

...Tim, a store manager at a downtown Denver drive through, is sitting at his desk in the back room, thinking about the work he and his team have done around the customer connection and the upcoming work they need to do around deployment. Tim is a tenured store manager. He has three kids, and recently decided to take advantage of the opportunity to finish his under graduate degree through Starbucks College Achievement Program. Tim started with Starbucks in 2009 and over the years he has noticed things have become more and more complex operationally. The way he had gotten things done in the past is not getting the same kind of results, he is working more than he wants to, and is frustrated.

...Tim thought to himself...the deployment initiative is just around the corner, yet he still feels like his team has significant work to do around the customer service commitment, and he has been working on this for over three quarters. His store is in low customer connection and they just gotten to high store operations, after months of hard work around clean safe and ready...And he still feels like he is doing a lot of the heavy lifting to keep his store clean and organized. Tim knows he needs to change how he is approaching the work....he’s tackling the work the same way he did in 2009, yet the work has become more complex, team dynamics have changed, and his partners today, while he enjoys working with them, are not excelling under his leadership, like they had in the past.

...There are three issues Tim is the most confounded by: 1) His best two “advising” shift supervisors continue to get frustrated every time he introduces something new. It is like they rebel against the change and they are very vocal about it, which makes it take longer to implement anything new, 2) His DM also seemed to show up this way sometimes, sharing how she isn’t sure about a new approach and that she isn’t going to put too much focus on the new program until she knows it is going to stick, 3) Last, historically he would introduce something new by having a store meeting, running through what was changing and posting the new program in the back room, this process isn’t working anymore.

...Tim knows needs to update his leadership approach to ensure the new deployment changes are implemented effectively and then take what he learns to continue to improve his customer experience results. He is looking forward to his upcoming district meeting, where is will learn more about the deployment changes and his upcoming performance and development conversation where he is going to ask his DM for support and guidance in updating how he is leading change. He knows that with his DMs help he can implement change in a way that is more sustainable and makes his and his partners jobs easier.

Deployment

Effective deployment creates space for human connection. It is also the best possible starting place for meeting basic customer service expectations, that earn stores the privilege of seeing their customers again and again. Starbucks has had a lot of success with deployment, yet they still have a lot of work to do.



Figure 1 – FY18 North Star Plan

The data shows that when stores deliver on the fundamentals around store operations, they create space for partners to connect with customer. This data validates what field leaders observe every day in their stores. In stores where they see high marks for store operations, they hear from their customer that they experience great connections. When customers feel that partners have made an effort to get to know them or connected in some way, they are more likely to visit again, driving comp and helping field leaders achieve their goals.

Stores who score highest in store operations, score highest in customer connection

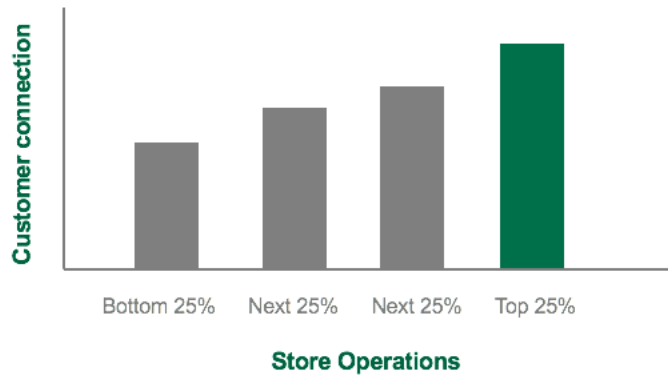


Figure 2 – Customer Connection Compared to Store Operations

Problem: Organizationally the standard work to serve customers is not simple, up-to-date, or broadly understood. Business has changed but the standards of deployment haven't changed since 2012. Since the launch of playbook, the organization has layered several components onto core operations. This has had a negative impact on the business, at an organizational level. Stores are not meeting customer demand. Customers can be seen in long queues and frequent balking (customers leave) occurs.

Organizationally, stores miss out on the opportunity to serve 230,000 customers per day, due to balks. This equals approximately 10 customers per store, per day or approximately \$21,000 in sales per year, per store. Outside of peak, stores are seeing negative to flat COSD growth. The *Starbucks Experience* is at risk. Customers experience long lines and the lack of evolution in company deployment standards have made the work more difficult than it needs to be for partners.

...Tim is ready to embrace changing the way he deploys, but he is concerned about how his partners will react and he knows he needs to change how he communicates and coaches his partners around change in general.

We Have a Problem


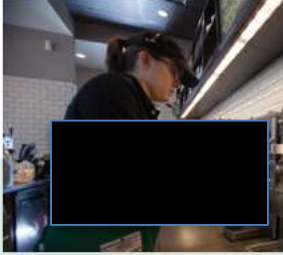
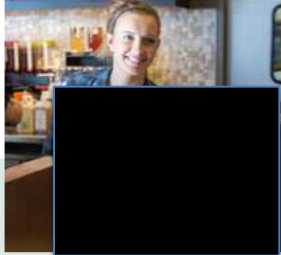
		
<p>Our deployment has not evolved with our business</p>	<p>We are not meeting customer demand at peak</p>	<p>The [REDACTED] is at risk across all dayparts</p>

Figure 3 – The Deployment Problem

...Tim knows that in order to meet expectations around the *Starbucks Experience* he needs to ensure his partners are delivering on the customer service commitment **and** that they are deploying effectively to ensure speed of service. He has become acutely aware that both of these things are foundational to creating the *Starbucks Experience* and while the operational issue are centered around deployment, the ability to effectively Lead this Change is the key.

...Tim soon learned, during his district meeting, that the changes to deployment are an evolution, not a revolution. The big change was learning how to do a better job leading change.

Change and Your Approach

 <p>Portfolio Responsibilities</p>	 <p>Business Analysis & Problem Solving</p>	 <p>Prioritizing & Planning</p>	 <p>Culture & Effective Communication</p>	 <p>Coaching for Performance & Development</p>
<p>Do I understand the change? What does this mean for my portfolio?</p>	<p>What are the implications me and my team?</p>	<p>Who do I need to spend time with and when?</p>	<p>What is my leadership footprint?</p>	<p>How do I move partners through the change?</p>

Figure 4 – Leadership Skills

...Tim had been around for a while and he was familiar with the Change Equation, which describes the vision, skills, benefits, resources, and support that are required for responsive change, but he had never used it as a diagnostic tool.



Figure 5 – Change Equation

Change Equation

...Tim decided to look back through some old materials he had on the change equation and read that getting clear about the components of change is a great way to prepare and to check in on how far partners have traveled down the path towards the change.

...However, Tim was still struggling to understand how to deal with the emotional transition his partners went through anytime significant change came down the pipe. Tim brought this up during a connection he was having with one of his peers, Kim. She showed him an old yet well-established model of change called behavior transition, that she had read about in college.

Behavior Transition Model

...As Tim learned more about the behavioral transition model, he started to understand that change is a subjective experience, based on the individual and their life experiences. He learned that providing the right support at the right time, can help people navigate through change more quickly.

The Behavior Transition Model is a great way to think about the stages of change and how, as a leader, you can support. There are three stages of the Behavior Transition model:

- 1) Endings: The first phase of transition begins when people identify what they are losing and learn how to manage these losses. They understand what must be left behind. People may feel loss related to control, expertise, or identity. During this phase, that feeling of loss can show up as over-reaction or grief. Even changes that are accepted as improvement require people to give something up that was familiar or that they worked hard to conquer.
 - a. Your role in this stage is to gain partners' commitment. Acknowledge and accept the signs of loss while you seek to understand how the change affects them as an individual. Build your understanding of what is ending for that person, show compassion, and determine how to help them move forward.
- 2) Neutral Zone: One of the most difficult aspects of the neutral zone is that most people expect to move straight from the old way to the new way. People go through an in-between time when the old is gone but the new isn't fully operational. We should expect a drop-in productivity to accommodate new learning. As partners try to work in the new way, they may experience anxiety or disillusionment. It is tempting to start performance managing instead of providing positive reinforcement.
 - a. Your role in the neutral zone is to set realistic, short-term goals that account for the impact of the change. Partners need small goals because as they experience setbacks, they may lose trust and try to go back to the old way. What people learn and experience here will shape what they bring into the new beginning.
- 3) New Beginning: In the final stage, the change has found a foothold but people will need regular and repeated reinforcement. The new way of doing things presents a gamble: there is a possibility that it won't work. After all of the preparation, hard work and reinforcement, we are finally at the starting line of the change.
 - a. Your role in the new beginning is to clarify and communicate the purpose of the change. Ensure each partner understands what role they play in the success of the new way.

The Emotional Stages of Change

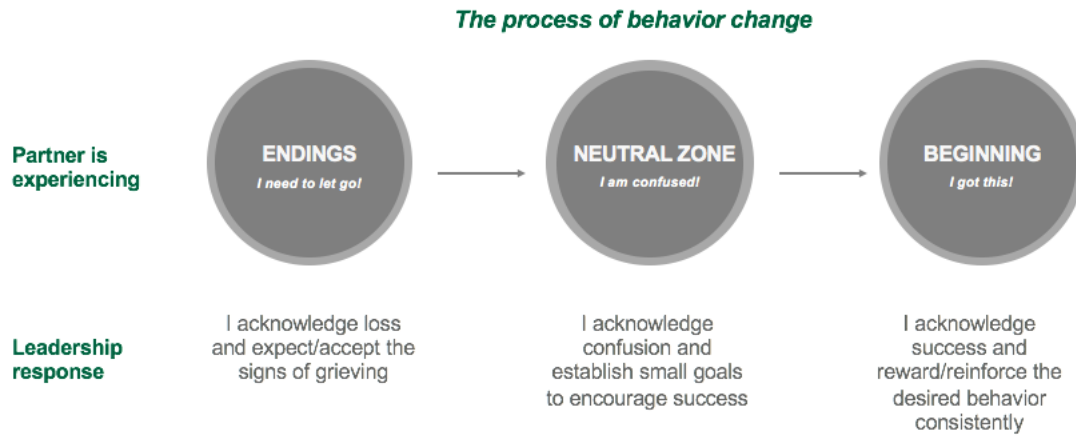


Figure 6 – Behavior Transition Model

...Tim connected what he was learning about leading change to the companies established way of assessing where partners are on their development path, Learning-Owning-Advising (L-O-A). L-O-A has helped him know how to show up as effective teacher and coach... This was when Tim realized that the two shift supervisors he has who are advisors, but seemed to struggle with change, were simply moving back into the learner mode, though he kept treating them like they were advisors. That was a problem...

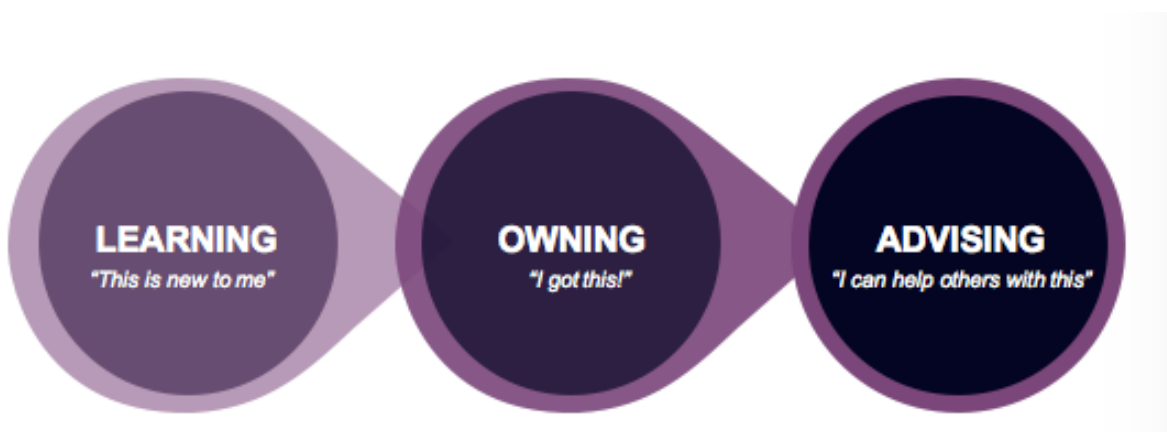


Figure 7 – Learning, Owning, and Advising Model

...To become a better leader of change, Tim continued to read more about change leadership...he learned new beginnings depend on endings, that his partners need to learn to let go of the old, to embrace the new, and that a leader's role is to *assess* which partners will be the most impacted by the change, then address what support they will need to overcome those obstacles.

How it Comes Together

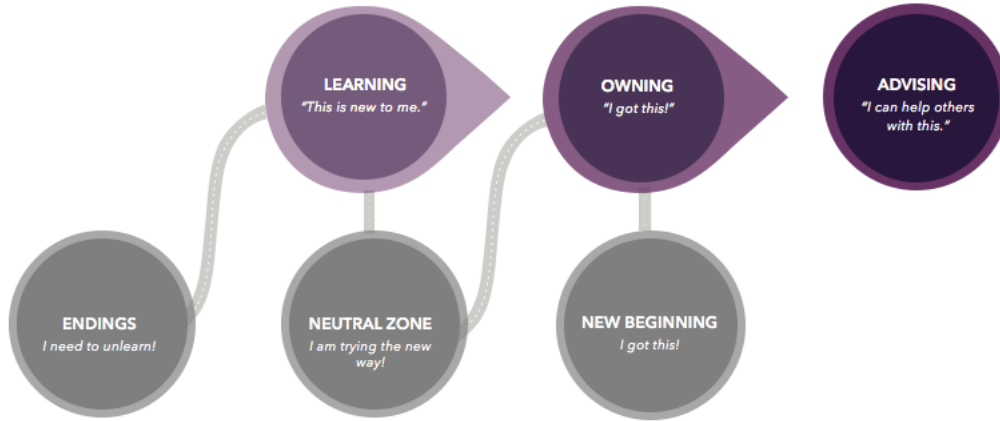


Figure 8 – Learning, Owning, and Advising Model with the Behavioral Transition Model

The change equation will help you prepare for the elements needed to introduce a change by helping you understand the change and think through what the it means for your portfolio. Using the change equation will help you effectively lead partner through change, regardless of what the change itself is, customer service commitment, shift supervisor and barista approach, deployment, and etc.

Your Approach to Change



Figure 9 – Leadership Skills with the Change Equation and Behavior Transition Model

What is “Evolving” with Deployment

Our commitment to innovation is part of what helps us remain viable in a changing marketplace. Rigorous lab work was done to build consistent methods of work, routines. Work was balanced to support product mix, to give our partners balanced work and customers a consistent wait time and provide less variation across the US.

DEPLOYING TO CREATE THE [REDACTED] EXPERIENCE

2012 Playbook

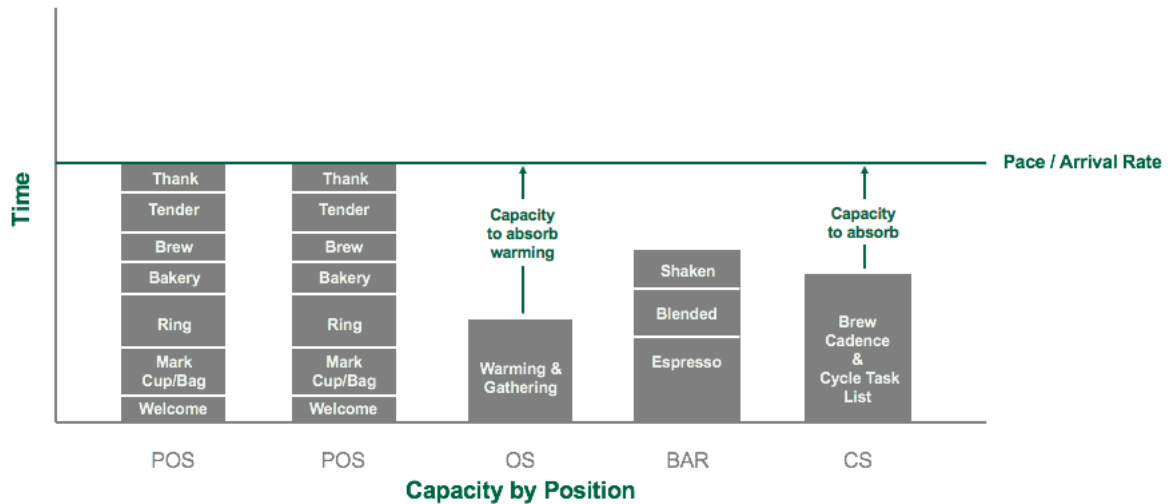


Figure 10 – Playbook 2012

Today, we have added several initiatives to evolve the business, but we did not evolve the deployment logic. The impact on the business has been that Café/POS and OS no longer have capacity to gather food in routine and meet customer pace. CBS mix increases have driven more movement between hot and cold bar, creating a greater need for a planted CBS barista. MO&P creates a mosh-pit problem at the handoff as beverage production cannot keep up with intake.

Where We Are Today

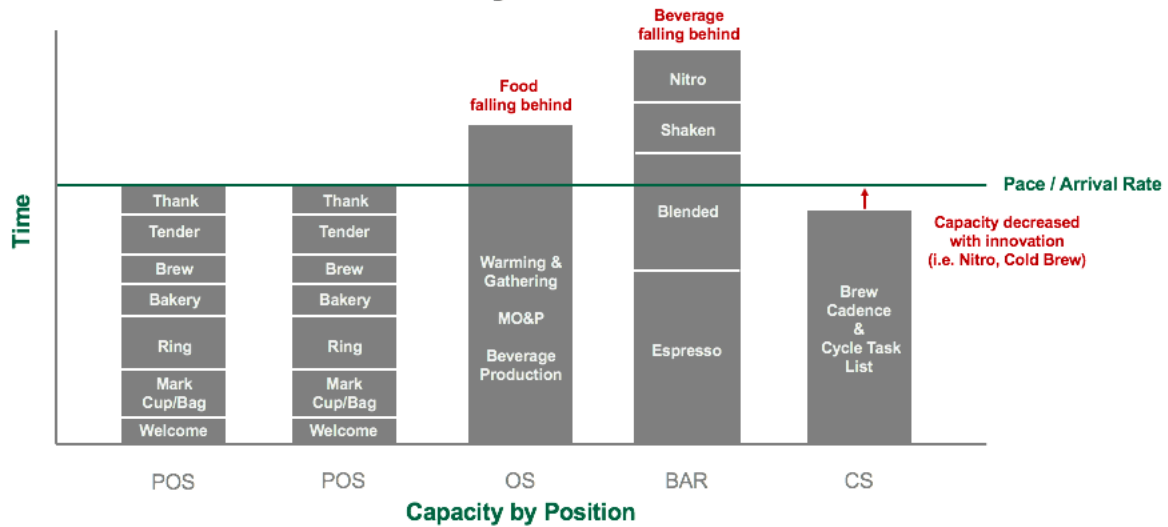


Figure 11 – Playbook 2012 with Additional Initiatives

Work has become unbalanced for our partners and we can no longer provide a consistent wait time for our customers.

...Tim realized the evolution that needed to happen with deployment was to more effectively balance the work and that he needed to understand how to do this effectively, in order to lead this change with his team...to make it easier to be a partner...and to provide the *Starbucks Experience* to his customers.

APPENDIX B: SCENARIO-BASED LEARNING EXPERIENCE

<p>STORE</p> <input style="width: 100%;" type="text"/>	<p>STEP 1 IDENTIFY THE GOAL AND THE PLAY</p> <p>Only proceed to Step 2 if you can see the goal and play in action.</p>	<p>STEP 2A IDENTIFY GAPS OR OBSTACLES</p> <p>Consider the Deployment Principles to identify gaps or obstacles.</p>				
<p>DATE / TIME</p> <input style="width: 100%;" type="text"/>	<p>Capture the goal (e.g., orders ready at the window, COSD improvement).</p>	<p>Capture where you see waiting.</p> <p>Drive Thru: Tally the items that are not ready when the car pulls up to the window</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;"><input style="width: 95%;" type="text"/></td> <td style="width: 20%; text-align: center;">Cold Beverage</td> <td style="width: 20%; text-align: center;">Food</td> <td style="width: 30%; text-align: center;">Other</td> </tr> </table>	<input style="width: 95%;" type="text"/>	Cold Beverage	Food	Other
<input style="width: 95%;" type="text"/>	Cold Beverage	Food	Other			
<p>What's the goal?</p>	<p>Capture the play (i.e., the number of <input style="width: 40px;" type="text"/> on the floor, deployed positions and routine assignments).</p>	<p><input style="width: 40px;" type="text"/> Identify where customers are waiting an excessive amount of time?</p> <p><input style="width: 100px;" type="text"/> <input type="checkbox"/> Cold Beverage <input type="checkbox"/> Warming <input type="checkbox"/> Register</p>				
<p>What's the play?</p> <ul style="list-style-type: none"> • Does what you see match the play? • Does the play match the schedule? 	<p>Capture where you see motion.</p> <ol style="list-style-type: none"> 1. Draw the store layout 2. Circle where you see items or customers building up 3. Draw lines to represent partner movement out of and between stations 	<p>Capture where you see motion.</p> <ol style="list-style-type: none"> 1. Draw the store layout 2. Circle where you see items or customers building up 3. Draw lines to represent partner movement out of and between stations 				

APPENDIX C: IRB-APPROVED PARTICIPATION LETTER

Quality and Efficiency Survey:

Area:

District:

DT or Café:

Time in role:

Thank you in advance for taking the time to complete this survey. It should take you approx. 15 minutes to complete. We will use the results to help us structure our regional strategy around operational and leadership work related to quality and efficiency (Q&E) for the remainder of FY17. The survey is structured to help our regional team understand what our field leaders know about operational efficiency and quality, how they plan to lead their portfolio around efficiency and quality, and how motivated they are around the work.

The survey is being administered by the regional partner resource team and your participation is completely voluntary and anonymous.

Thank you,

Human Resource Department

APPENDIX D: TEST GROUP INTERVIEWS

APPENDIX E: CONTROL GROUP INTERVIEWS

APPENDIX D: TEST GROUP INTERVIEWS

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Interviews

Test Group:

1. TGP1 – Store Manager

Researcher: I wanted to ask you some questions about...

TGP1: Yeah.

Researcher: the activity that we did as an area. So we did, the store manager conference calls, kind of crept into the afternoon OC, which was similar to the weekend OC that we did ...

TGP1: Yes.

Researcher: You had prework. Did you find the prework valuable? I'm trying to remember what the prework was for the weekends.

TGP2: Um ... It was pulling DCRs, identifying ...

Researcher: Peak.

TGP2: For both days, people played color wars.

Researcher: Did you play color wars?

TGP1: Yeah.

Researcher: Did you find that valuable?

TGP1: Mmm ...

TGP2: I, I would say-

TGP1: No.

Researcher: Okay.

TGP2: ... TGP1's probably more on top of that than everyone else.

Researcher: Because you ... why ...

TGP1: So like, the only reason why I don't find it valuable is because I already do that.

Researcher: You already do it. Okay.

TGP1: In a sense, like in my brain ... and I, I am lucky to have a very consistent scheduling for my store.

Researcher: Yes.

TGP1: So I know other stores, like, they've got a different

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play-caller Saturday and Sunday ...

Researcher: Right.

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TGP1: ... week after week. I don't. I watch mine because she's always consistent.

28

Researcher: Yep.

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TGP1: Um, so for me, some of the things that I ... I sent those things to TGP2, but then I added into my shift. I said, "I wanna know when you're running breaks. I wanna know ..."

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Researcher: You added to the prework.

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TGP1: Yep, I added to the prework. S- And I said, "I wanna know when you're running breaks, I wanna know when it felt the heaviest."

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Researcher: Yep.

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TGP1: Even if the numbers said that it wasn't the heaviest, I wanted their personal feelings towards the shift, and so I added a couple of those things in, and it was actually pretty enlightening. Um, I put a lot of my people in that morning time, from like 10:00 to 11:00 ...

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Researcher: Yeah.

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TGP1: ... but it felt the worst from 1:00 to 3:00. And so I started to problem solve in that area versus focusing on that peak spot. And it's because of the overlap and the different schedule change that happens during that time, too.

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Researcher: Right.

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TGP1: So, we problem solved throughout that problem. But it's not that it's not valuable, it's just those things are already happening for me.

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Researcher: Yeah.

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TGP1: Um, I think meeting everybody at their needs, that was the right default to me. Because I think some of ... specifically some of my peers sometimes have trouble identifying


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if it's the business, or if it's a play-call moment, or if it's scheduling. So having them start writing those things out where I can count them, identify like oh, this might not be the right play call, actually, for this day.

40 Researcher: Yeah.

41 TGP1: And you know, or I need to work on this or actually, is this more than this issue. Things like that. So I know it's valuable for me, but for me that's already kind of there, in the head.

42 Researcher: What was your biggest learning from doing the group observation on the end?

43 TGP1: You know, one, I loved having peers pop in on the weekend. It's great. It's a spot that I think, because we get so used to, used to that Monday through Friday, your peers coming in the day. Um, but I think the biggest takeaway for us was, like, collaborative leadership sometimes through our play-callers, and that accountability. And I feel that the most.

44 TGP1: Right now I do have a, a play caller who's a little shaky on Saturday and Sunday, and I'm performance managing her very, very closely. Um, and I think that was the biggest takeaway. Everybody's kind of like they're great Monday through Friday, and then when I put them on Saturday and Sunday it was like ... because you're not there. You know, or maybe ... I don't know. They think business is different on Saturday and Sunday. And I'm like, you know what? It shouldn't be. It should be just as busy, if not busier ...

45 Researcher: Yeah.



46 TGP1: ... because everybody isn't working, you know? Like,

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they should be out and about. So that was something I think I heard from the feedback from everybody. There was a lack of leadership, and kind of that maintaining consistency without having a manager present.

47 Researcher: What did you and your peers ... or what did you then go do with that information?

48 TGP1: Well, we started mapping it. Our DCRs got a lot more strict, which I appreciated.

49 Researcher: For the weekends?

50 TGP1: For the weekends, yes.

51 Researcher: Did that come from ... is that something you decided to do? Or did you pick that direction?

52 TGP1: I ... TGP2 moved in that direction. My DCRs have always been pretty darn strict, I'm gonna be honest. I, it's because I don't normally work the weekend. I, like, float through every third week, but I usually have them off. And so, if you're gonna work those weekends, I actually expect more out of you. That communication, following up, I have to see numbers, you have to be writing notes. And that's a part that one of my girls is having trouble with right now. She worked with me Monday through Friday for almost a year, and then I moved her because she wanted that. And she's like, "Holy smokes, you're really on me." And I'm like, "Yeah, because you're running my business. You've gotta lead."




53 Researcher: Good.

54 TGP1: And that is really important to me.

55 TGP2: You just met Jane.

56 Researcher: Yes.

57 TGP2: You know a Jane?

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58 Researcher: Yes.

59 TGP1: But I did move Jane, she is my Monday through Friday girl.

60 Researcher: Okay.

61 TGP1: And we're talking all of this growth, I do wanna say she's been a key point to that. And that was a hard call to make, but making her my Monday through Friday business driver was major. But now I've gotta make sure that two day ... she used to just be Saturday and Sunday.

62 Researcher: Yeah.

63 TGP1: And so I'm really fortunate to have her there, but now it's too small.

64 Researcher: Okay.

65 TGP1: So I've gotta ...

66 Researcher: So, do you feel like the problem to solve on the weekend is different than the problem to solve in the afternoon?

67 TGP1: I think they're a lot alike. I think the bigger picture ... And if you, if you ask it this way, every team is made up of A players, B players, and C players. In a sense, you know, people are still learning.

68 Researcher: Right.

69 TGP1: But I think sometimes you're playing all your As Monday through Friday, and then sometimes you'll put ... just have a B-player team that doesn't have the right mix of partners.

70 Researcher: Yeah.

71 TGP1: I think that people need to start looking at their partner-

72 TGP2: and that's when I got really intense, uh, in my conversation with them.

73

1. TGP3 - Store Manager

74

Researcher: So, tell me a little bit about the preparation work you did for the day, was it valuable to you?

75

TGP3: Yeah.

76

Researcher: Why was it valuable?

77

TGP3: It just kind of like reframed everything and what we were supposed to be getting out of it, and it aligned with the, like, focusing on weekends and getting more experience. I think everything was there in the prep work and it made it so much clearer what we were doing and what, kinda of like, what it was.

78

Researcher: Can you walk me through the prework, what was the initial presentation about it? Um, and then the day, just like tell me what happened.

79

TGP3 Yeah. So we got the case for change story, we got the email. Um, the email had the information all over it and the prework. Um. It was a little long, like there was a lot of information, which was kind of, um, like initially I was like overwhelming Like, this is so much stuff for right now. But once I read through it, um, and then kind of like talked a little bit more about, um, what we were gonna be doing, it made sense and it was like enough communication, um, to understand what we were doing. And then, like, the prep, the prep-work for it, like, I led a group, um, but I don't think that I had any more work than anyone else. Um. But-

80


Researcher: Did you have any ASMs in your group? Is that where you put them?

81

TGP3: Yeah. So I just made sure that like my store was ready for the Go Team 'cause we did it at my

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store. Um, but it was, it just needed like two seconds just to validate that I have, you know, my time off the floor. That was like what I had been doing with my team conflicted to what like the priority was for the Go Team. I didn't have to change anything that I was doing, 'cause I like already had my play deployed, I've already been focused on weekends. Like, really the only big difference was I have a new play caller.

82

Researcher: Did you go see your store?

83

TGP3: Mm-hmm (affirmative).

84

Researcher Did you feel like your group knew, um, what they were, what problem they were going to observe or solve? And how did they do that?

85

TGP3: Um, we, I didn't preframe it. Like, I wasn't under the assumption or feeling that we were solving a problem.

86

Researcher Okay.

87

Researcher: Other than ... It was more so like when you tried the go see, and we're going and we're looking at the things, so we always deal with the intention of are we creating a customer experience on the weekend the same way that we are any other time?

88

Researcher: You already know a lot about this kind of go see in general. Do you feel like the people that you were with understood the things that it involved?

89

TGP3: Um, yes. He just, he had not seen the new toy yet, so I just spent time with her like pre-framing what was different about it. Everything and hers was a pre-base. Yeah-

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TGP3: That, right.




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Researcher Because she wasn't-

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- 92 Researcher: She wasn't at your specific store was she? Has she been through that?
- 93 TGP3: Yeah. She's like two weeks in.
- 94 Researcher: Okay.
- 95 TGP3: So I just had to spend a little bit more time instructing her, just showing her the actual tool.
- 96 Researcher: Okay.
- 97 TGP3: Um. She had never used it before. Like, she printed it and read the prework, but I mean ...
- 98 Researcher: Is there other information that you think that they should have had so that they were better prepared? This is for me. I like to understand, like, what works with .
- 99 TGP3: Um. I mean, I think that ... I don't know if I'm the right person to ask that question because everyone knows a lot about my store and work that I'm doing.
- 100 Researcher: Yeah.
- 101 TGP3: Um.
- 102 Researcher: But that's good, like there's.
- 103 TGP3: Yeah.
- 104 Researcher: Yeah.
- 105 TGP3: Um. But I, what I did, was I did not tell them what I was focused on, like what my priorities and goals were. And I, I had them as the team. And then before that, I had again. Like, based on just what you're seeing right now, like, what do you think we're focused on?
- 106 Researcher: When you think about the meeting that you had where you went through the kind of case routine, up to the graph they had like the imbalance of work.
- 107 TGP3: Yeah.
- 108 Researcher: Do you think we did a good job, job tying that to the efficacy? Could that have been better?
- 109 TGP3: I think, I think if we're talking about a case per case,

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like, that worked. Like that is ... Like I think it tied a lot together. Um. I'm just, our store is, like, all of our managers are at a level where they can like comprehend, like what we're actually trying to do the work

110 Researcher: Okay.

111 TGP3: Um.

112 Researcher: What would you do now to include that?

113 TGP3: I mean, I, like what we did.

114 Researcher Yeah.

115 TGP3: Like, physically like and like holy crap, I, I'm seeing right here, right now, that I am not based on, like, actual factual basing. Because that's like step one.

116 Researcher: Yeah.


117 TGP3: Like we're training staff on a schedule. I think our store managers don't have the level to analyze their and say, "Hey John," like proactively say, "Hey John. I'm seeing this. Here's what I'm gonna do about it." It changes the situation, like, today, where we're like, "Hey, like, are you seeing what's happening? Like you should put another person here for that." So-


118 Researcher Maybe even kind of back to that last that showed like we need to balance the workout better. And when we watch your store, where is the balance? Uh, where is the bottleneck? So like be more overt about that, particularly.


119 TGP3: Yeah.


120 Researcher: What impact did you plan to have during the activity?


121 TGP3: So, the impact, like, I wanted to make sure, for myself, for my store, I wanted to make sure the things that I was focused on where the



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things that were showing up. I meant, like, the method was not convoluted and that those goals were speaking to the work. So, um, like he, like, making sure that the experience was great by having the right partners in the right places, at the right times. So that was my goal. Uh, and then also facilitating it correctly in a way that was like good for Bob and Barb who are both at very different places, like, got value and understood how to take the information back to their store and, like, do the same thing.

122 Researcher: What did you discuss during your recap with your peers?

123 TGP3: Like, the full one or just the group?

124 Researcher: Doesn't matter. Either one.

125 TGP3: Um, we went through, um, each of the pieces of the change equation.

126 Researcher: Yeah.

127 TGP3: Um, and identified-



128 Researcher: So did you find it had impact?

129 Researcher: That was hard. Or was it good?

130 TGP3: It was really good, because it gave us a very clear understanding of what problems there were. And it was like pretty much the same as us before, um, just before any skills.

131 Researcher: Okay.

132 TGP3: And I think, when I think about it, like, our, it's exactly what we were talking about. Like, problem-solving and coaching for performance and development. Like she is not in, the environment to like zero to 100 herself. And then, like, and then some of our other store managers, like, do they even know how to like solve the problem?

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'Cause they cannot just throw away something or make an excuse like, I don't have. Like, that's like, there are ways to get around it, but our store managers don't know how to do it.

Researcher: Yeah. Did you feel like the peer-to-peer dialog was, more helpful than maybe the group conversation? Or did you feel like the group conversation, which I'm kind of guessing was more facilitated by you?

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TGP3: Um, I think, you mean the group, like the total group, the district group?

135

Researcher: Yeah.

136

TGP3: I think that was better.

137

Researcher: Okay.

138

TGP3: Um, only because I think, like to my point, like I, like I spent a lot of time with Bob and Brenda, who I have a good relationship with. I haven't like spent a lot of time with her as a store manager, um, but like they knew a lot about what I was doing and like what my team's been trying to do. Um. So like I was just trying to focus on like teaching her how to do the work at their store. But as we were talking about it as a group, that's when like the actual, real was happening. And I was like, I'm a problem-solver, so just like, what do we need from each other? And like, what is the overall theme that we're and our store managers that is gonna help us focus.

139

Researcher: Yeah. What would you do next? What would your next steps be?

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TGP3: I think that we should do a with the team, and we did, and we did a little bit. Like we had a conversation, um, as a team about how do you plan for

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Researcher: Yeah.

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TGP3: But we didn't have, we didn't have enough time to like actually go through it. So we're trying to figure out, like, how to facilitate it in a meeting. Like, exactly the activity that we did? Because what was interesting is like we thought we had advisors and owners in that category that like understood what we were saying. Teaching them how to do that work and then also like empowering-

143

Researcher: Yeah.

144

TGP3: Them to be a business leader and say, like, we're 20 transactions over forecast this half hour, every day. Here's what I'm doing about it." Not like, my manager coming in and being like, "What the heck is happening during peak?" (laughs).

145

Researcher: Yeah.

146

TGP3: Because you don't do that. She doesn't do that, but like we've all had those moments where like, somebody walks in and we're drowning. And we're like, I can't, like, this is reality right now.

147

Researcher: Do you think that when you debrief, that your last step of the dialog should have been next steps?

148

TGP3: Yeah. Everybody's, um, next steps were every single manager has their own focus based off what they were gonna do to either ... If their thing was support and they felt like their customer or partners in the there was a significant ... So some of the team is, like, wanting to support my partners better, building a better schedule, and making sure that they have the right amount of

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TGP3: Right.

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TGP3: Someone, like, um, I'm working on skill. And skill for

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the playbuilder, I need to, um, explain very tactful of what I'm expecting of them. I need to follow up with them and make sure that they feel comfortable doing that.

151 Researcher: Well that would be my question. So now it's been two weeks. How many has been, have lived out this?

152 TGP3: We talked about it on our huddle call on Monday.

153 Researcher: Okay.

154 TGP3: And my question was, where are we at with time

155 Researcher: Right.

156 TGP3: We have so many little spaces. We need to move on.

157 Researcher: Yeah.

158 TGP3: And I think one of the important points when you talk about support activity or something that reflects the act.

159 Researcher: Right.

160 TGP3: Prioritizing more .

161 Researcher: Well, yeah, and that's important.

162 TGP3: And this is analysis and problem-solving.

163 Researcher: I think that the biggest gap is planning and prioritization, because you have to plan every Monday, go back and look at the half hours. And then you're checking the timer. When I'm thinking about it, I know this is a part of my routine but it's a lot of stuff.

164 TGP3: Mm-hmm (affirmative).

165 Researcher: And as a store manager, the second skill overwhelms this stuff.

166 TGP3: Yeah.

167 Researcher: So, it's gonna require a lot of follow-up from you to make sure that people get steps at different spots.

168 TGP3: Mm-hmm (affirmative).

169 Researcher: Did they actually plan to do the thing? Do they know what to do?

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170 TGP3: Yeah.
171 Researcher: Do you need to go back through prep? Did you do that, and then they did it and it didn't work, and then they gave up? Because we see that a lot. They tried it. Um-
172 TGP3: Yeah. And where, back to other things, uh, like-
173 Researcher: Yeah.
174 TGP3: Um. It's really hard to explore one thing in person . Even if I do planning on Monday, you're gonna talk about doing the training thing. And I'm almost wondering if we did prioritize, does it the partner? And we're not necessarily anymore.
175 Researcher: No.
176 TGP3: But that we're trying to during the day could be more stressful. And so, um ... Like, we have like two hours-
177 Researcher: Yeah.
178 TGP3: To start, start with business, What do we see, like, what do we need to evaluate? Are we overcoming through, um, everybody has their own steps together.
179 Researcher: Yeah. And two weeks from now when we come back, and follow up
180 TGP3: Yeah.
181 Researcher: We've really found that over in the stores that are engaged around OTW declined because they're all excited about it.
182 TGP3: Yeah.
183 Researcher: They feel like they're proud, that they represent something. The encouragement is higher and then people stay. They're excited.
184 TGP3: Yeah, I think that's a good idea. I do think that we still should go to a creating plan, 'cause it is . I don't even know [crosstalk 00:16:23].

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TGP3: I just think like it's, it went from being communication to action.

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1. TGP4 – District Manager

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TGP4: It's been so hard to, uh, not problem solve. Know that I'm coming back in.

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Researcher: (laughs)

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TGP4: I could solve this! I'm like, wait.

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Researcher: You could tell me.

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TGP4: Oh I could, uh, oh no. Oh, are you going?

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Researcher: Yeah.

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TGP4: Whoa. Okay, so...

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Researcher: You said it really worked.

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TGP4: At store A, the number one thing we were trying to get out of it, the weekends are not different, man the plan, focus on routines, give it work. Uh, so, here, that could grab protein, stay planted, no breaks, they hit 48 seconds which was their all time record. And the best part was that, uh, I was here with John and Jack, uh, we just asked the partners- it felt super slow. So we were like, literally, we were making come out like, man of course, they're slow on the day we're doing this, that sucks.

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Researcher: Right?

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TGP4: So then, we, I just said hey, they'll print the receipt and every single half hour we had done more transactions from the previous week. And so I was like, oh my gosh. So we went and asked the team like, hey who was here last week? Busier not, busier then, everybody said, way busier now, it's so slow. So, oh, well we're up 40 transactions-

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Researcher: Nice.

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TGP4: -What do you guys think? And they're like, oh we

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cannot, we can't believe that. So, that was awesome.

Store B was uh, very similar so they were, high fifties, the, the, they call it coaching the first ball on the that but that would be profit, which was DTO. Then that kind of opened it up, was the next bottleneck so they coached that, said, hey, um, what's up with the bar? So then they just focused that to change that routine. And they went from I think 58 seconds to 51 seconds in a half an hour. And they had already been at peak for two hours, so the average was who knows, but way down. So that was awesome.

TGP4: Store C, kind of similar. Not as big of a win, but kind of similar but then the next, that Sunday, it was like everybody was breaking their weekend records, because they were just, so uh,-

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Researcher: Would you have done anything differently?

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TGP4: Uh-

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Researcher: With the activity itself.

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TGP4: From like, area perspective or just from mine?

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Researcher: Yeah. On of the things might be-

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Researcher: Yeah.

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TGP4: Uh, and it was really, like we talked a little bit on the call before I left, it's, I couldn't see just where we were at on an emotional scale. And, just different pieces of it, like some

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pieces were totally bought in and some pieces we think were bought in but, like the routines that you were still trying to solve the layout at store C We spent 25 minutes, like, personal opinion on where something should go. And I was just like, why are we talking about this? The guy was at a routine because he couldn't handle the beverage mix and your transactions were too low, I'm like, and they were like, well, we don't think he was, but if it was just boredom.

209 Researcher: Thank you.

210 Researcher: Yeah. I thought we were doing it.

211 TGP4: I guess we are. Uh, but, uh, so it was just fascinating that, even though we've seen, we've seen the wins, we know it works, we're still like, get in the detail, solve these little problems that are new instead of like, that guys got a routine, there's a green triangle, let's go solve that, you know?

212 Researcher: Why do you think that is?

213 STGP4: I think we like to be the experts and special, like on my team you've got Bob, you've got Greg, you've got all these big timers, hot shots that are good at it-

214 Researcher: Right.

215 TGP4: And so that's where we go, we're like, oh, we probably need to solve these 27 little things instead of just where's the green triangle, solve that problem.

216 Researcher: Okay.

217 TGP4: And I think we know it, and we're announcing the win so we believe it, but it's breaking that habit of going to the

218 Researcher: Based on what you learned, is there any next step that you would advise Jane to take?

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219 TGP4: Uh, I think your three outliers are still store A, and
store B.

220 Researcher: Yup.

221 TGP4: I think store B is gonna take care of itself. Uh, the day
that I left they posted 33 seconds. Uh, so,
I, I don't know how much time means to
them.

222 Researcher: I noticed something when I was there.
So, I remember you telling me that
so I went in there and Gary actually was
running the floor.

223 TGP4: He was already there?

224 Researcher: Yeah. He was severely over-supporting
and they were like 37 seconds. He was
sticker-

225 Researcher: -cups. He was pulling notes, he was-

226 TGP4: No now you got your new project.

227 Researcher: Yeah. So they were at 37 seconds. I
decided then, I-

228 TGP4: Craig, Craig.

229 Researcher: What I noticed, what I'm seeing right now is that
over-supporting, and he said, "I'm not over-
supporting." I said, "Yes you are." And
watching you over-support, and I gave him
several- like you started a hot
beverage for this bar, on this bar, bu then,
then you got a cold beverage and then you
had to have your dry bar swept over here,
and then I was like, so I think we may
have a different problem solver.

230 TGP4: Yeah?

231 Researcher: Over at store C.



232 TGP4: Think about, uh, that is a perfect, perfect example of
how you can use this little fellow. Gary is
gonna have some very deep-rooted beliefs.

233 Researcher: Yeah.

234 TGP4: And will not change them until you get there-

Concrete Experience	235	Researcher: Oh yeah, I had a different experience, so I made him stay in the cold bar, it went down two seconds.
Concrete Experience	236	TGP4: And what'd he say?
	237	Researcher: He said, "Oh."
	238	TGP4: Oh, cool.
	239	Researcher: Just, like-
	240	TGP4: And he's probably thinking-
Active Experimentation	241	Researcher: -just stay planted in your role. That's all I want you to do. I don't want you to- you do not need to make a third bar. You do not need to make drinks on a third bar, when they have, when he has one drink. You do not need to do that. You're taking him out of routine. So, I think I gave him an experience. I meant, I think I have to get more repetition around it.
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Reflective Observation	242	TGP4: So that's good. So, anyways, those are your three outliers.
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Concrete Experience	243	Researcher: Yeah.
Reflective Observation	244	TGP4: And I think, with, without those, except with those guys, I would start focusing big time on coaching.
Reflective Observation		
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Concrete Experience	245	Researcher: Yep.
Concrete Experience	246	TGP4: So, where's the green triangle and now what is the shift you want? How are they coaching it, how are they touching it?
	247	Researcher: What's the green triangle? Is that like the twilight zone?
	248	TGP4: In the routine that they have, they have the-
	249	Researcher: I have the, was so-
	250	TGP4: -circle triangle bouncing around, and it says-
	251	Researcher: Oh yeah.
	252	TGP4: -all over a circle, a blue circle, and it says, and you would be able to see the green triangle on the switch.
Reflective Observation	253	Researcher: Yeah.

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254 TGP4: So, we-
255 Researcher: Okay.
256 Researcher: That's good.
257 Researcher: It's good.
258 Researcher: Cool. Okay.

259 **1. TGP2 – District Manager**

260 Researcher: So, what do you feel like has been the vision
around deployment?

261 TGP2: Um, for me, the vision around deployment is how to
become more efficient, better to gain
capacity to elevate connections, and then
have more opportunities to focus on the
fun stuff like development, um, tastings,
stuff.

262 Researcher: If we move back to thinking about kind of our
original work around weekends, what was
the vision? We did, what was that? So
prior to ... Why were we thinking about
going after weekends? Then, I'm gonna
work into the afternoons.

263 TGP2: Okay, so, weekends, specifically, was about how do
we create a more consistent experience for
our partners and customers, uh, through
the planet, uh, and creating better plans
that aren't trying to take an event and
shove it into the work we do Monday to
Friday. Um, I felt like we were trying to
approach weekends from a problem-
solving perspective of peak Monday
through Friday, but Saturday's different,
Sunday's different, and it's longer and it's
drawn-out. How do we do that a little bit
better through communication and skill-
building.

264 TGP2: I think a part of that, too, was, uh, peak, last round, the
round before weekends was focused on
having the right partners working who are

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able to make good decisions that we're asking.

Researcher: Yeah.

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TGP2: Um, or do we need to slow down and build skill?

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Researcher: I thought that was a big part of Jackie's kind of response to why she improved so much on the weekends. Um, she, she saw a 13 seconds improvement on the weekend. Just like that and the, like, "What in the freak are you doing?" She was number two. It was like point- I was with her when she saw the biggest improvement

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TGP2: But it was the weekend, man.

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Researcher: Yeah, it was the weekend.

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TGP2: They were, like, right there Wednesday, but the weekend was the-

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Researcher: Lynchpin.

272

TGP2: We talk about efficiency, that still have good times, Monday through Friday, there's, there are less obstacles for top performers on the weekend.

273

Researcher: Yeah, well, Jackie's response was "My main focus has been leadership," to your point. Like, who's working? Um, how present are you? Even if you're not there, are you setting your playcaller up for success?

274

TGP2: What's been interesting to me, um-

275

Researcher: She's been steadily improving every week. She was at 44.2 last week.

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TGP2: I mean, that's gotta be ... 44.2's gotta be one of the best in region

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Researcher: Per weekend, because we're averaging 51 as an area.

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TGP2: I'm just, I'm guessing it's one of the best, uh, in the company.

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Researcher: Right.

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Researcher: Right. If you, what do you, so then, if we think

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about ever moving into the afternoons, what ha- what is the vision, um ...

TGP2: Well, I already talked about it, but it's just creating that consistent experience for our customers, uh, no matter what day part they are coming in, but also slowing down to build skill and business acumen with the partners. I think, for me, clearing the path and removing the barriers to our primary objectives in order.

Researcher: When we had, when we talked, because part of what we did was we had the store manager conference call right before we went out for the initial kind of ... I mean, just the first kind of experience around the afternoons, and I know you had already been doing some of that work, but what was your takeaway in that communication to- You weren't the audience, but, um-

TGP2: Um, feedback from my store managers? Or ...



Researcher: Yeah, or for you.

TGP2: I mean, for- It was interesting for us because we went to a store outside area, but the vision for me was to just go out and see what the current state is so that we can identify what we need to focus on first, um, because there's a lot. We saw a handful of things go in different directions that you could go, um, but for me, I specifically wanted to see what the store felt like from a customer perspective, um, and did we feel welcome and what were the partners doing?

Researcher: Do you think we did a good job creating the case for change? Like, was there, to Sean's point, like, was there an emotional piece to why the afternoons are important?

TGP2: Um, I mean, for me, yes, because I've had it in my

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sights for a while, so I've been working towards it. Um, I can't speak for my peers, though.

Researcher: I'd be curious. Or even for the store managers, because one of the things we were trying to do, similar to what we did with the information when we did initial deployment, where we kind of said, "Hey, we haven't changed plays in this long, look at how many of these roles are overcapacity." Um, I really loved that the COSD slide that kind of says, "Hey, we're behind. If we improve by five, what will happen." Do you think that that resonated with them?

289

TGP2: Um-

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Researcher: Or more with you?

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TGP2: Uh, no, I think, well, it resonated with some of my team for sure, but that report specifically that we saw on workplace and she was like, "Can we get this?" And so I Um, but they, they wanted that data.

292

Researcher: The COSD report, yeah.

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TGP2: Um, I mean, I, honestly, uh, it would be surprising to me if people didn't care, um, or it didn't personally resonate with them because that is a potential where we're not delivering the right experience and it could be stressful for our partners.

294

Researcher: We have reporting now that we didn't have then, so how are we tying that back? Especially if you have stores that have low customer experience scores in the afternoon.

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TGP2: Yeah, so I already pulled all that and sent it out. What was interesting to me was a lot of my cafes had higher scores than stores.

296

Researcher: Yeah.

Concrete Experience 

297 TGP2: So my next step was gonna go through kind of
correlate how m- Like, who's down
afternoons, um ...

298 Researcher: How did you feel like the activity went for you?

299 TGP2: The, which activity?

300 Researcher: The deep dive.

301 TGP2: Um-

302 Researcher: The DMs ended up going to- We tried to not
cross paths, so the DMs ended up going to
stores in other areas, which we hadn't done
before.

Concrete Experience 

Reflective Observation 

303 TGP2: Um, I wasn't surprised by anything. I guess, uh,
TGP4 did a really great job. He went and
talked to the partners. Um, had we been in
a store of our own, I think we probably
would have been a little bit more willing to
go and project ourselves and ask questions.
Um, we just let Frank do it because he's
our. Uh, (laughs), um, but none of it was
surprising.

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304 TGP2: Uh, there wasn't a moment that Bob, Kathy, or I were
like, "This isn't happening store."

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1. Team Recap:

306 TGP12 – District Manager

307 TGP11 – District Manager

308 TGP6 – District Manager

309 TGP5 – District Manager

310 TGP8 – District Manager

311 TGP2 – District Manager

312 TGP7 – District Manager

313 TGP4 – District Manager







314 TGP9 – District Manager

315 TGP10 – District Manager

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Researcher: I'll go ahead and get us started. The first question we had on the agenda is, based on how your team showed up what was your team struggling with the most around change leadership, based on your perspective? And, how does that tie to your leadership? What do you want to work on? So, we'll start with change leadership.

317


TGP4: I can go. Um, I think what I saw my team in regards to change, that we are, um, if I believed we were further along on the emotional piece than we were, uh, specific to, uh, problem solving routines. So, I think we're still in endings when it comes to routines being the problem to solve. Um, that I've, too, my leadership is that I, I don't know that I gave us enough time in endings that we went on from that faster, just based on results. Uh, solely on results. So, uh, we ran the play. We succeeded, we're, like, um, when I think in reality we're actually still trying to solve problems that aren't really the problem, uh, that I think we know in our minds that the routines is where we need to be spending out time.

318



TGP4: But, I think we actually, emotionally go to a place where it's how many partners do I need to be scheduling, I mean, not that that's not important. But, we solve all the other problems first before actually going to a routine. We're obviously, it's not 100% and not all this from one, but I think that's


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
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where I saw, just from an emotional standpoint we are uncomfortable having it be that simple. Uh, so that's kind of what I saw.

Researcher: Do you think it was, that is because it's hard for you to ... Why was it hard for you to see that? Like, in hindsight, right, it's easier to say in hindsight. But, why do you think it was hard for you to see that.

320

TGP4: I think two reasons. I think one, because I, uh, I had a couple of strong experiences up front that, that made me very excited and bought into that, it's routine. Um, and so functionally, I assumed they were coming along this journey with me. Um, and I don't know that they're not. But, I also think that we're great operators, right? So, they just went straight to doing the play, which equal some metric results. And, I equated that with emotional, emotionally they're coming along.

321

TGP4: Um, and so I think, for me, results doesn't necessarily tie to you an emotional feeling. Um, I think it can be an indicator of, but I, I think I ba- uh, based most of my assessment on both numbers on completing time.

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Researcher: So what do you need to do as a leader to help people move through endings? What are you going to do differently?

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TGP4: I can just be more intentional about the conversations. So I, uh, in our conversations often this is talked about like it's assumed that that's what we're gonna go do. Um, I think Karen's story, having store managers share stories. And then, specific to the store managers that aren't

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quite there yet.
Researcher: Mm-hmm (affirmative).
TGP4: Uh, physically participating with them or inviting them with Jenna. Um-
Researcher: (Laughs).
TGP4: To participate and kind of give them some more experiences around it. I don't think anybody's is, is not the problem to solve. But, it's just not where we go right away.
Researcher: Okay. Thank you.
TGP4: Yeah, so Jenna committed to working every weekend for the next three months.
Researcher: (Laughs).
TGP4: Is what she said, so ... That's what we'll do.
Researcher: Sweet. As long as she carries around that little headphone in her one ear. (Laughs).
TGP5: Oh, are they sharing headphones?
Researcher: They are.
TGP5: I know it's totally not a private message. I think that it's interesting. It's like drinking a milkshake.
Researcher: (Laughs).
TGP4: It's not quite like that, not quite.
Researcher: Eh.
TGP6: I'll go next.
Researcher: Okay.
TGP6: Um, ours are a little bit different. Um, in our debrief we went through each one of the, um, just change components.
Researcher: Mm-hmm (affirmative).
TGP6: And we were talking about, um, two in particular, skills and support. So both with, um, store managers and our play callers still seeing a level of anxiety during peak. And also, some false starts. And as we, um, started peeling back what that, how that was showing up. Um, in the area of skills, um,

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we're seeing some opportunity, um, with store managers comfortability to couch their play callers. Um, in the moment in a way that will help them build understanding and be able to make changes quickly. Um, we're really good at explaining things conceptually, either before or after the fact. But in the moment, finding the right ways to, um, really point out, uh, whether it's coaching in the moment or helping the play callers see the bottle necks and redeploy.

TGP6: Um, we as a group of leaders all identify that that is a problem to solve. And, we need to get more creative around how we're approaching it. So for me, um, what that means is I'm thinking about how I'm doing the deep dive observations. And, um, how, how do we get on the floor more? How do we talk about more in the moment what we're seeing with the play-caller, asking them to make the adjustment in the moment, giving them feedback in the moment, and, um, uh, like we've been talking about having those quick wins, but not being overwhelming. But, picking the right things to help them fell successful, but to help us get some traction there.

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TGP6: So skills were really big. And then we also, um, in the context of support spent a lot of time still talking about scheduling. Um, and this idea of when the coverage graph is showing that you have a peak for a small period of time and saying that maybe you need to schedule nine, but you are only needing to schedule nine for a half hour. And, you have eight people on the play.

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How do we get better for preparing for the flex, and not just flexing in the moment? And really getting that person in production, 15 minutes after the fact.

TGP6: So, we spent a lot of time talking through that. But then also, too, just, um, perfecting, um, who we are placing in what roles, particularly and the AM and the PM peak. And, um, my managers were saying like they felt like they could provide more support to their team by getting better with those things. My commitment around that is to make, um, looking at the coverage graphs and the DCRs, um, again part of my weekly routine. I had stopped doing that, and then started doing it for just a isolated group of stores.

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TGP6: Um, but I'm hearing from my managers that they could use my support and just being an extra set of eyes to take a look at that and call out things that, um, maybe they aren't necessarily seeing. So those were two areas that we, that I would say took up, like, the majority of our time in the debrief, around what we need to look at doing differently.

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Researcher: That's great. Thank you.

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TGP2: I can go next. Um, I assess so that my team is still in skill building, um, is still practicing. That's what were working through, um, how to elevate their shift supervisor. One thing that I recognize after the on Saturday is I think that they're trying to skip towards resources. Um, and kind of moving past them if it's so. Um, I'm going to very intentionally going to make sure that I'm celebrating our wins amongst the team and

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tying it back to the work that they're doing. So that they can see, oh, if you do X, Y, and Z it gets us results, or it attacks this behavior, or whatever. Um, I'm going to do that really intentionally on our workplace as I'm celebrating.

TGP2: One thing that was really great was they all showed up and were ready to recognize and celebrate their partners. And so one thing I did, um, on our huddle today was like tie it back, um, or our biggest comp day was on Saturday. It could have been that it was nice, but also we were present in stores. And I don't think that was by coincidence. Um, but all of that positive recognition goes a lot further than I think they realize. And so making sure that they're showing up that way, and they're moving forward. A few of them had a-ha's around that, like, it was best to go into the peer store and see and recognize success. Um, so that they're gonna be able to take that back to their stores.

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Researcher: That's great. Thank you. When you think about ... So, you said skills, you're gonna make sure, and you think that they may be stopping or jumping to resources. So, making sure that you're tying them back to the benefits, I love that.

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TGP2: Yeah.

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Researcher: Very literally. Is there anything else that you want to do around skills, in particular?

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TGP2: Um, I really loved what TGP7 was talking about yesterday. Um, and so actually during our go see, I was with William as he was flex-calling into the play-caller

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position and pulled the shift off so we could connect with her about what we were seeing. I want to make sure that we're doing more of that. And we talked about that, I think last week or the week before. Um, I have been in stores doing deep dives, that's made for managers there. I want to be able to flex them at the store and have them coach me, because I think that's just fun. Um, and then they get to practice their coaching, um, and show their team that we're, we're all being held responsible for the same things.

355 TGP2: Um, and then if they're doing their go see and if they can pull their shift off and have the shift coach them, um, I think that just makes us stronger. So, I'm gonna be adapting some of that as we move forward.

356 Researcher: So flexing the, the store manager into the play caller role? Or, flexing the store man-

357 TGP2: Yeah, so if I'm there doing a go see and the store manager is working, I would flex in and the store manager would flex off to observe. And, they would coach me. And then, vice versa. If the store manager is doing a go see, um, they can have the play caller flex off for them to coach the store manager in front of the team, so that we're all learning together and being able to step back and see.

358 Researcher: That's great. Thank you. I love this, you guys. Good stuff.

359 Researcher: Anybody else want to share? Or anything that you felt like hasn't been mentioned?

360 TGP8: Can you hear me okay?

361 Researcher: Yes.

362 TGP8: Okay, my phone doesn't always have the best

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reception. Um, so I would say, uh, it was interesting for me because it was kind of half and half. So, the work I had done with drive thrus grew differently than the work I had done with cafes. So specifically, the cafes all put themselves in a gradual change category, um, which needs necessarily see the benefit in how we rolled this out. I would say that from my leadership perspective, I spent a lot of time, more so with the than I have with the cafes. And, I think it showed up there. And just, uh, what their understanding of the change was or their buy in to the change.

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TGP8: So, the that I had made is I was gonna meet each partner where they are. And so I, I took, um, commitments from each of them and I'll be, kind of, circling back. But as a general feel, I saw differences in my drive-through group, versus my café groups, which I thought was interesting.

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TGP8: Um, and I think-

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TGP8: When I look at the plays themselves, um, the least change is the four that are like cafes that run three people, four people. So how do I get their buy in and, and stress to them the different benefits. I think that the biggest learning and skill set perspective, all of our is the deep dive observation and having those conversations around that tool was probably the most skill set building that I saw from a team perspective that covered both drive-through and café.

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Researcher: Considering that we have more cafes than drive-throughs, I think that's a great call out. And it doesn't surprise me at all. I think we've been trying really hard

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to make sure the cafes feel relevant. So I think making sure we're being more overt around that is super important.

Researcher: That's good. Anybody else? Okay. Let's go to this next question. So, based on how your team showed up, what was the biggest struggle from a deployment perspective? And, how does that tie to your leadership?

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TGP7: I can talk about that. So for something that we saw in, uh, our district was primarily around weekend. Um, we were noticing that our play callers were really being planted in roles where they were not able to flex or even identify bottlenecks. I know we talked a lot about that in our meetings. Um, our last area meeting. But, um, we definitely noticed that, like, a lot of play callers were primary bars, just because it was B team on the weekends. And they really didn't have another choice. Um, so I think really helping my team solidify a better weekend plan is what, um, I will really focus on moving forward.

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TGP7: Um, we still have some efficiency work Monday through Friday to kind of circle back to. But, um, with the weekends I feel like it's a really easy win just if we continue building skill in our baristas and shift supervisors, and solidify just a better plan for the weekend.

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Researcher: That's great, a lot of these things sound a lot like great commitments for this week. I would just be specific about what stores. Because, you want your commitment to be measurable. So, you might say this is said commitment, I'm going to do it in these three stores this week.

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Researcher: Anybody else on deployment?

TGP7: Um, I'll go. A little bit of what was, uh, talked about earlier, particularly with cafes. Um, my two cafes both said, no, we're already doing it. Uh, we already know what to do. Um, and then Adam actually had his big a-ha moment, um, this past week. And he was able to, just get so excited about his Saturday. And he actually sent a groupme out, um, specifically around where he placed the play caller and how he ran the play. Um, they actually called for a warmer at the mall. And you're like, wait a second.

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Researcher: (Laughs).

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TGP7: Uh, but he said it ran so smooth. So I think trusting deployment, specifically at our cafes, was the benefit for them. And, um, uh, why it's important that our play callers understand the benefit. Um, the other, uh, thing that I think are ... My store managers are struggling with is we had a big, massive week last week. And I'm recognizing that they're just realizing that our play callers are able to identify a problem, but not necessarily be able to have the time or space to coach to it. Um, so we're talking a lot about how can we give them that kind of space. Because, I think our store managers are typically really good at jumping in, fixing the problem, and then exiting. (Laughs).

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TGP7: Um, and I think that I've even done a little bit of that over the past couple of months. And, this last week I tried different things specifically around creating an experience for them and stories to tell. Um, and

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actually giving the play caller capacity to intentionally coach the problem. And what I mean by that is, um, not coach your out of beverage routine, but where specifically in the beverage routine are they out of. So, uh, start your milk before you pour your milk, on how to ... I literally coached a partner that way. And I don't know what happened, but afterwards she said, "That was the best feedback I ever got. I never thought of it that way."

Researcher: Nice.
TGP7: So something very intentional and specific, uh, that I think it a gap in our play callers ability to effectively coach and create a behavior change.

TGP6: When you were talking about giving them capacity, did you actually take something off their plate, or were you talking about you actually jumped off the floor so they could have the capacity to look at it?

TGP7: Uh, well, I actually put myself in a play caller last week to feel it. a kinesthetic learner, and I have to actually feel what's going on. Or, I came up with three capacity building ways. Uh, one is to flew the play. Um, so if you're in like a seven man, flew that seventh person into the position where the play caller is. So, the play caller can then go to the problem and intentionally coach the problem. The second would be actually to drop the play. So, on Friday I was in an eight man play. I dropped it to seven, I was on full beverage station. And I said, hey Bart, you're gonna make your own cold beverages. And, I actually worked drive through window routine for five minutes



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with that partner to show them and walk them through the steps.

TGP7: Um, and then the other one would be, um, changing, uh, well really ... Gosh, uh, level out your playing field. So if you have advisors in other positions, maybe it's another shift supervisor, maybe it's an advising barista in a specific event, uh, position, let that advisor know, hey, I'm looking for gaps in beverage routine today. Uh, I want you to observe your partner, your right bar partner, uh, and coach them specifically on what gaps you're seeing in beverage routine.

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TGP7: Um, so those are kind of three capacity building ways so our play caller can become more intentional with coaching.



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TGP8: I love all of that. I just, uh, took notes on all of that stuff, like, to go back to my store and do that. Um, I think that we spent an hour, an entire hour today talking about exactly that in the huddle. Like, how do they get better at being better coaches and not jumping in and try to solve the problem, which I saw a store manager do during the huddle today. (Laughs). Um, but to be intentional and creating a space for shift supervisors to actually coach, instead of saying, this is what you need to fix in your routine, observing and figuring out how to ask questions to get the partner to understand where their gaps are. I think that's awesome.

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TGP7: And just, like, figuring out why that's a gap. Um, you know, you'll realize that partners either don't recognize it or it's something as simple as like, hey when that second

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beverage is filling, pull your third sticker. They're like, wow, I never thought of that. Um, get really just specific with it.

Researcher: Are you guys seeing anything, um, just to kind of tag on to it from a deployment perspective. Are you seeing issues with emotions around motion, whether it's the DTO starting to move or a register partner moving? When we go back to TGP4's point, I didn't realize that we had still so much going on around endings. Um, are you all seeing that? Um ... Yeah, do you see anything with that right now? And then, I have a follow up question to that.

TGP7: Talking specifically about motion?

Researcher: Specifically about motion. So, uh, maybe a play that's creating motion that you're not used to?

TGP7: Yeah, uh, a lot of these lower volume plays, the five man, six man, they're sacrificing motion for balance, balancing the work. And I actually think we're seeing better results. I saw it in Eureka, I was there on Thursday. And, they were running the support role, uh, I don't want to say wrong ... But, ineffectively, um we actually made an adjustment. I walked to the store manager through the support role, and then I suggested that the play caller start there.

TGP7: The next day, they hit 49 seconds out the window with that play caller in that support role, versus constantly flexing customer support to balance. That was a five man].

Researcher: I think that's great.
The other thing I've noticed is

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in some of those plays where it's saying the DTO, um, should flew potentially to warming, also recognizing that usually in those plays, it's also saying another person could potentially be flexing to warming. So, are we making the right decision to flew the right person to warming? If the through put is still coming through the drive-through, then the person that should be picking up the warming maybe shouldn't be the DTO in that moment. Um, so I think really getting yourself super familiar with all of the routines for each play.

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TGP4: I think that's a great point. I think, uh, one thing that I've seen is that, um, it's so funny how quick you are to assume that you know the material just with them on.

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Researcher: (Laughs).

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TGP4: And the plays are different for store, so I even found myself saying, oh, in a seven man play X and falls, uh, is something they play at one certain store that might be the case.

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Researcher: Right.

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TGP4: But, um, for example, like, store B and ways, four, two supposed to do, um, one to beverage and espresso. And I can't remember what store I was in, but I just kept asking, like, why is your primary bar making cold beverage? That's a problem, and I looked at their play. And, they were supposed to based on their store.

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Researcher: (Laughs).

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TGP4: So just really paying attention to, uh, we are still somewhat at learning, and it's different for every store.

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Researcher: Absolutely. I found myself doing exactly that.

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I was making an assumption that the DTO was the only person, um, that should have been flexing. It wasn't true. Um, so I think making sure that we're super familiar with the routines. And, each store is different, potentially based on their sales mix.

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Researcher: That kind of segways me into the, the next question. And that is, was there anything this weekend that you were surprised, uh, about?

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TGP9: Um, I'll share on that. It wasn't necessarily around deployment. Um, it was more around the ability of my team to stay positive and not go into a store and coach every single thing that they say was wrong. I think as operators, we tend to go straight for that.

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Researcher: Mm-hmm (affirmative).

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TGP9: Um, and the amount of celebration and positivity that my district came back with after this go see was so great. Um, I think that they'll be able to take that mindset back to their stores and apply it there and be more specific around recognition. Um, with the store managers, um, and then me being more specific around that was well, instead of always coaching the opportunity, being able to celebrate what's going right.

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Researcher: That's good.

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TGP9: Yeah.

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TGP6: I think to tag on to that, I was surprised just how much they got from just the deep dive observation. , in an of itself.

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Researcher: Mm-hmm (affirmative).

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TGP6: Helping with that issue, where there's, you know in the go-to we might have seen like 20 things going on. But then, coming

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down to that bottom box and saying, okay, if we were to fall next week for one thing, what would that help ... How would that help, you know, 10 of these? Instead of going an nitpicking all the things, get to the root of the problem. So, I thought there was good learning. Um, and it surprised me how much they just wanted to go after every little, single thing, versus get the big, like, the roots.

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Researcher: Really problem solving?

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TGP6: Yeah.

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Researcher: Okay.

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TGP4: I think, um, in my district it was around the vision.

Um, a couple of the stores we found that the play callers were doing it because they had to, and didn't really understand that they shouldn't.

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Researcher: Mm-hmm (affirmative).

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TGP4: So, as we're coming up into that mess, if you were in the stores then say, you know, this might fit better One partner said that, well, the vision is to grow, uh, FDs. I said, is that your vision? Or, is that your goal? So, that's a goal. So, the vision is that partners would stop moving and run the play. I said, is that the vision or is that the expectation? And it is just fascinating that, um, we were in the office door with these visions with emotional response or emotional reaction. But instead, with this is the clear goal. These are my expectations.

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TGP4: Um, which were tied to you guys why we are lacking in the stores vision.

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Researcher: Mm-hmm (affirmative).

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TGP4: Because they thought it was set you just setting an

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expectation and not producing it is what it is, instead of getting partners emotionally bought in. Um, so that was pretty fascinating, great learning.

Researcher: I think that's good one. We, uh, that's something that we really learned this year. So, it might be a lot to expect the store managers to completely understand that at this point. So, you have a great opportunity to remind them what a vision is and that visions should tie to emotion. That vision isn't a goal, it's, um, something that's aspirational that's gonna tie them back emotionally.

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Researcher: Anything else that surprised you? I think, um, I think Jesse said this. I think I was surprised, um, and then had to remind myself. I was surprised that the ... We had store managers that were still super green in using the deep dive. And, uh, I had to remind myself that, uh, it's still pretty new to them. So, I think how do you get reps around that. And, I think one thing that could really accelerate that is how do you get reps around it with coaching, and a check and adjust?

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Researcher: So, uh, you're doing a deep dive, but you're also, um, adjusting something to get a win so that they're leaving with that positivity.

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Researcher: Um, anything ... So, uh, what are you gonna do next? Or, is there anything that you feel like we should do as an area based on your experience this weekend?

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TGP4: Uh, so one thing came up with, uh, and I'll let TGP10 share, come on. It's. Yeah


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Researcher: (Laughs).

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TGP10: Um, so we were talking about what we could do next time to keep this fresh, new,

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and exciting. And, we thought it was, would be a really cool idea to do like a myth busting series. So typically on the weekends, you get, um, a lot of push back on to get higher average ticket, or we sell a lot of food, and that's why we can't achieve window time. So we thought it would be really cool to do, uh, sort of a ... but we thought it would be cool to do like a series like myth busting some beliefs and create an experience around it. So, um, the store managers are a little bit more bought in. So, that's what we have right now.

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Researcher: That's good. I like that, super fun.

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TGP9: I know, I'm gonna go back and re-create the experience for the four stores that did not get a go see this weekend.

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Researcher: Mm-hmm (affirmative).

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TGP9: Um, I think the teams that got go sees benefited so much from having their peers in their stores that in April we're gonna schedule another Saturday go see for the four that were not ... Didn't have their peers in their store this weekend.

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Researcher: Okay. That's good.

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TGP7: I love that.

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Researcher: That's really good.

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Researcher: What else?

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TGP7: I would love to continue the conversation on workplace. Um, I know, it's really out of my conform zone to make a video-

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Researcher: You did great.

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TGP7: But I, I took a ton away from TGP4. I'd love to continue the conversation on workplace. Um, yeah. And then, I love the ... TGP9, I'm stealing that. We're gonna do it at the other stores.

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Researcher: I think that's great.

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TGP8: I'm thinking about, and I don't have anything developed out now. But more of a weekend shift focus, like, who are my weekend shifts, and how do I get more time with them. Um, how do we kind of view them, I don't know, differently. But, I just, I have a vision that we can do something with our weekend shifts to get them as strong as the weekday shifts. Because it was interesting to me to watch the same store do the same play on a weekend as a calls for on a weekday, and see it's so different.

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Researcher: Mm-hmm (affirmative).

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TGP8: And it, with the first shift that's good on the weekdays. So, it was interesting. And, I think about, like, how do we even do a business concept of a weekend a little differently. And is there anomalies in there that do need to be adjusted differently? And how do we, how do we go about that? So, I think there's some work to do there.

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TGP9: I like that. I was also thinking, like, we put so much prework into this weekend. Um, we don't do that every week. So what shift-mind shift do I need to have for my store mangers so that they do the same prework and are an intentional as they were this weekend, every weekend. Because, I had two stores hit their best Saturday window times this past weekend. But, why can't ... Like, what's the barrier from us being able to do that all the time?

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Researcher: I love that, TGP9.

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TGP11: I love that, TGP9.

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Researcher: Yeah, go ahead

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TGP11: Um, I was just gonna add that something that my team aligned on because they really appreciated this activity so much, is that, um, the schedules that we're currently writing, so three weeks from now, they're gonna go do a big back thing. They're gonna go do another deep dive, same store, same people. But this time, they're going ... One store manager is gonna go on the floor, and the other store manager's gonna, um, do the deep dive with the shift supervisor that's on the floor during that time. And then, they each opted to do it on a Sunday, because that's usually our biggest opportunity day. And, um, I really appreciated that my team, uh, aligned on that.

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TGP11: They also aligned on doing weekly deep dives with one other shift supervisors, um, every week as we continue to work through knowledge, knowledge checks with our ...

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Researcher: That is great. And we kind of bounced that. I love that, I love the idea of one, doing this again. Um, and, uh, definitely doing this with any store potentially that didn't get visited. I think that's great. And then, this continued, like, concept of pulling, um, uh the store manager being on the floor and the shift supervisor doing the deep dive. I think that's great.

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Researcher: Is there anything that you guys want to do as an area? Anything, and that kind of falls just in the line of support. Is there ... So, definitely I hear to continue the conversation on workplace. Continuing to share best practices. I think one of my goals this week is that we really

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top line some of the biggest successes and opportunities that we saw this weekend for the store managers. So, our work would be that we are using a social media platform to continue to communicate around deployment and change leadership, and highlighting some of the biggest opportunities and successes that we're seeing.

Researcher: Is there anything else that you guys would like to do as an area?

TGP11: Uh, I would say that I have, like, an activity that I think we need to do. Um, but I love the amount of recognition that we saw on Saturday. Like, I don't think we need to do that every single day. But for us to get better at using workplace as a platform for us to celebrate and recognize partners, I think we'll just role model that behavior for the store managers, um, and continue that positive focus that we had this weekend.

Researcher: I love it, I think definitely keeping alive.

Researcher: TGP5, what's your plan for your team at this point. You're kind of, you're able to learn from all of this, which is awesome.

TGP5: Yeah, that's what I'm doing is-

Researcher: (Laughs).

TGP5: Taking notes here on what I'm gonna do as far as, uh, uh, getting them set up and how to make the activities as beneficial as possible. Uh, after ... My plan, is after this deep dive here, I'm gonna start setting prework, because we have almost three weeks. We're just shy of three weeks until we're doing ours.

Researcher: Yep.

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TGP5: Um, I want to take the learnings from here and start intentionally doing the prework, based on the learning, especially some of the other things, like what TGP4 shared earlier. Uh, we're starting to get some traction. We shaved five seconds, versus last week.

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TGP5: And now, we're starting to get, um, you know, some forward.

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TGP11: That's awesome.

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TGP5: Uh, and so, want to say ... Thank you. I want to stay focused on the recognition piece and recognize that they're all in learning.

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Researcher: Mm-hmm (affirmative).

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TGP5: Uh, and just, and living and learning with a little bit of teach and tell. But my plan for our go see is to learn from y'all and then start doing prework. Um, but I would share briefly, like, our team, uh, our team has had some lulls around this metric, like, some emotional lulls around, like, this is not our thing. And so, I have moved from talking about a number to talking about the behavior of something there. Uh, specifically machine's busy and making it easier to be a partner and customer by, like, having great routines and the shift supervisor having a plan. We just have these touch points. And that's what we're talking about.

460

TGP5: Uh, and oddly, the numbers are falling on their own, uh, without me having to say out the window times. It makes their eyes roll.

461

TGP9: TGP5, we should talk. (Laughs).

462

TGP9: I got, it's the same thing, right? It's sustainable, and it's something that, you know, they don't ... If they feel like they can't compete, like, but they can move, move their leadership of

their team, like, that's ... That's where the bread and butter is.
Yeah.

463

TGP9: Uh, well Jane said that she was, uh, I paired her with Alex. And they went to store D. And she actually told me today on their one on one she was like, man, Alex and I, we were sparring and it felt really good.

464

TGP9: Um, and she felt challenged. Um, that was good, because I think normally I position her in a place where she's the teacher-

465

Researcher: A teacher.

466

TGP9: Um, so it was really good, positive feedback.

467

Researcher: Thank you so much, you guys. Great job this weekend. Think about your own personal commitments and get those in the system. And then I will get my commitments to you, just to help support you in keeping this work moving forward. Awesome job, have a great day. Bye.

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APPENDIX E: CONTROL GROUP INTERVIEWS



Interviews

Control group:

#1 CGP1

4 Researcher: Alright, so relative to the deployment cascade.

Did you feel like the information that was given allowed you to understand what the problem was? What problem you were trying to solve around deployment?

5 CGP1: I don't know if it made it look like it was a problem around deployment but it was more of let's make this pretty official and unified across the board for every store is what we were trying to go after. If a customer or even a partner were to, it was pretty easy to look at the play and comprehend what was gonna happen and what your role was in that.




6 Researcher: Okay. Did you feel like you wanted more information? Was that enough for you at that point, did you feel satisfied with that amount of information?




7 CGP1: I felt great about the information that I was filing out to the staff, but as a manager I would've liked more information about how the percentages on the top of the place correspond to where they actually put the people. Specifically, at what number did they think that you should've gotten a warming partner or it should've been cold bev, and kind of how those decisions went.

8 Researcher: Do you remember those graphs that they showed us where I think it showed the different routines, and how in the past those routines kept everyone kind of at capacity. But over the last few years, the routines were

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always over capacity. Was that helpful in understanding that we need to level set the routines and-

CGP1: I mean overall we knew that specific partners were over capacity, and yes that tool helped kind of explain that, and that, so you're trying to level out the playing field a little, you know, the work, right? So between the partners on the floor, and being specific about where, then, within the play, where they're supposed to be. So yeah, it helped. Because everyone thinks they're working at capacity or over capacity at the time so it was like, let's be honest, this is the clear picture of what's going on.

10

Researcher: Right. How about changed leadership? Because we talked about the operational platform of deployment, but then the leadership skill we were trying to teach along with it was change management. Did you feel like we painted a picture about why that was important?






11


CGP1: I think we painted the right picture, it definitely helped, especially when you talked about what we have to let go of to move on, and then it was very easy, again, to cascade that to staff and shift supervisors. What are you missing, and this is what you need. Like the bottom graph part of the whole changed management. It makes it very easy, you ask them one pointed question and you figure out where they are on that scale? So that was helpful. As far as always using a change management tool, in now everything we do? I don't think I'd push it that far.






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Researcher: When you were cascading this information to

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your shifts, or when it was being cascaded to you, did you do any kind of hands-on, like literal physical activity to help reinforce what you were learning?

CGP1: Not hands-on, just role-played. 'Cause a lot of it, the deployment talked about how it was gonna allow partners to stay planted and make corrections, so we did more role-playing in those scenarios, like if you were this specific partner, what you would now be able to do and what that would look like. But we didn't go out on the floor and actually do that. It was more we talked about it and again talked about it when we were on the floor later. Like, "Hey, remember we talked about what this new, your role at warming looked like, or your role at hand-out plane or cold bev would look like." 'Cause there were changes.

14

Researcher: Is there anything you would've changed in how it was cascaded? So you mentioned, "I don't feel like the change management piece has filtered into other things," so is there anything you would've done differently to make the training more impactful?

15

CGP1: Not specifically for that, but I think if they want changed management to be more part of everything, then that has to also be incorporated into the learning materials better. I'm trying to think of what we just rolled out that should've been ... like the third play stuff? To my recollection, I don't remember seeing anything about changed management in that, so, 'cause it feels like the same thing but we have to let go of seeing the vision.



16


Researcher: We say that a lot, like we do stuff and it's event-

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based and then we don't repeat it and so it needs to be woven in. I think one of the exciting things is we're starting to see that it's gonna be a platform with the new operational excellence guide.

17 CGP1: Just so the language is all the same, sometimes it's in there, but it's not the same language so then it's missed.

18 Researcher: Did you have a chance at all to talk about the training with your peers, or what was changing with your peers?

19 CGP1: I did talk to some of my peers about the deployment right after it happened, but basically again about what changed in their store, and what was working and what wasn't working, not specifically about the training rollout. But how living in their store, how has that impacted their business.

20 Researcher: What's working, what's not working.


21 CGP1: Do you have new roles, are there new deployment places, what does that look like?

22 Researcher: Right. Did you talk at all about the changed leadership part, or more about the operational changes?


23 CGP1: More about the operational changes. The actual like deployment maps and, again, about the percentages of ... why does that make it a warming partner on this day and not on this day? The weekend versus-


24 Researcher: That's really good. When you had more peer-to-peer dialogue, did it teach you anything?


25 CGP1: I did learn a lot. Specifically about deployment, but also ... Before we rolled out the training we talked about the people that are gonna have the most trouble with this would be tenured partners. And so I talked specifically to managers that have actually



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managed some of my tenured partners, and then now they work at my store, and thought the problems that I might incur, conversations I may have around it. Because tenured partners tend to be leaders at your store, so it was like how do I really make sure that they're honing on that this needs to change today. Yeah, so changed management, so that was good. We learned just how to have these conversations.

26

Researcher: In hindsight, do you think you learned more about the program from having that dialogue with your peers than you did from your DM? And that's not meant to be critical, it's more about when do you learn the most? Do you learn the most when you're having a peer-to-peer, kinda nonthreatening kind of conversation, or when it's being cascaded?

27

CGP1: I think I learn the most after it's in place, and then I'm observant. Especially going to another store, to observe what's happening. So we did a lot of go-sees around the new deployment, and so that's when it was more eye-opening about what they're doing right, what they're doing wrong, what I need to take back to my store and improvise, so that really was helpful. But that's how I learn, from doing, and then it's like okay. But it made it easier, because they weren't my partners, I wasn't watching for anything else but deployment so I was just focused on this is what we're doing, this what I need to do, which is harder at my own store.

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Researcher: During that observation, what kinda next steps

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did you identify, or did you identify any next steps?

CGP1: I identified that ... explaining makes more operational. So explaining when the plays are changing is the most crucial part of this. That, hey, we're going down to five-person, and then those people, everyone on the floor kind of understanding what that meant, which was the biggest ... took the most time. Now it's just common knowledge, but it wasn't that easy right away. So how to make them there faster.

30

Researcher: Once you kind of went through those stages, and you identified that those transitions were a problem, what did you do? What did you do with that information?

31

CGP1: When I knew it was a problem when I went through the shifts using the same language so that we were on the same page with the store. So that you know, if like we're like going down to a four-person play rather than we're going to send someone on lunch. Just making sure the language was the same so that they knew what that meant actually and it always meant the same thing, right? You know which people were totally getting it and totally weren't, so started with the ones that weren't, and kinda showed them the vision of how this was gonna work, used the deployment maps, like this is what happens, you see the change. Just a clearer picture of what was going on.

32



Researcher: Anything you would want to add about how the training was cascaded?

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CGP1: Not about how it was cascaded, but more-


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Researcher: In hindsight?

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CGP1: Yeah. I mean, again, the percentages ... so you try to flat out, if we're gonna do this deployment 100%, this is where these people are, and then it felt like people were still under and over capacity at different deployment positions. So ironing that out a little bit better. 'Cause I know it's trying to make it as store-specific as possible, and like even time-specific but it's ... I don't know if the times need to be shorter, or times to make that happen better, I don't know if the numbers would change.

36

Researcher: Do your partners still feel that, or was that just like a newness thing? If I'm a new partner, I feel at capacity making a cold drink. You know what I mean?

37


CGP1: I would say, at times, and it's basically like weather, right? And how that impacts this is for like a special event. So you really have to as the manager know your business. Like the weather, we're not gonna need a cold bev person, you know? So it's like an alternate, I guess, deployment plan? If something changes, or if you have like Easter Sunday at the same time as in my parking lot. That's gonna really change what my deployment map says.


38

Researcher: Do you feel like you were able to ... because that's a lot of decision making. Do you feel like you were equipped to teach your shifts how to do that?

39

CGP1: I did feel equipped, and I think my shifts were fine with it, and it was just more of those triggers like how many people are in line, and what should you flex? Really utilizing customer support to flex into the register, into the making drinks or ... I think they

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really learned how to decrease bottlenecks in a very short period of time.

40 Researcher: Is that because you figured that out, and you taught that to them, or do you feel like the training incorporated that.

41 CGP1: I think it's because I figured that out and taught that to them. That didn't come from the training.

42 Researcher: So if we're gonna improve the training, that's important.

43 CGP1: Something also we implemented was that the shift supervisor was customer support for a very long time, as that's probably the hardest role in this deployment. Because they're the one flexing, constantly flexing, and making sure everything comes together. It was helpful at first, but now trying to slide floor staff into customer support is eye-opening. It just takes practice and time. Work on one person to do it, then another, just like any other role.

44 Researcher: In hindsight, we figured that out along the way. Cool. Thank you so much.


45 CGP1: Thank you. Good to see you.


46 #2 CGP2







47 Researcher: So, the first, kind of, question I have is, when you went in to the deployment meeting, did you understand what problem you were trying to solve? Was the, kind of, pre-information enough to, for you to understand why you were there?

48 CGP2: Yes. The problem we were trying to solve is improving the customer experience. Then, deployment was our first big tool to accomplish that.



49 Researcher: Yeah. What part of the prework was the most impactful in helping you understand that?

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And, it could have been conversation more than prework. So, like, it doesn't have to be something you wrote down. It could have been something that your leader told you or your peers talked about.

50 CGP2: Yeah. It was the pre-frame that we did in the area meeting-

51 Researcher: Okay.

52 CGP2: With John giving us visibility to what was coming and talking about that. So, I don't believe we did any type of written or, any tools. It was just more of the conversation, I think.

53 Researcher: Was there any, going into it, do you wish that you had had any more pre-frame prior to the meeting?

54 CGP2: No. I felt like, you know, we knew what we were coming into, and then, I thought the meeting was pretty thorough in how we received the information, so I didn't, it was like, after ...


55 Researcher: Did you do any hands-on training after the meeting? Where you, as an area, did, like, literally did stuff on the floor or as a district, literally ran plays, any hands-on activities?



56 CGP2: We didn't do anything as an area. For my district, we put together a deployment task force project group, and it included store manager, a couple of chill supervisors and a couple of floor staff.

57 Researcher: Okay.

58 CGP2: And, so, they would get on our Monday meetings. We would talk about our routine, specifically that week, and then, they would go do random go-sees at different times of the day. We tried to make sure that we got

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each store, all different day parts. And, then they'd share the feedback on the next week's meeting. So, that's the, kind of, hands-on stuff that we did.

59 Researcher: With any of the hands-on work, did you do anything where they, literally, like, you or the store manager, did the role? Or was it more observation?

60 CGP2: It was more observation.

61 Researcher: Okay. And, using the deep dive I'm assuming?

62 CGP2: Yes.

63 Researcher: Okay.

64 CGP2: Absolutely.

65 Researcher: Okay. In hindsight, is there anything you would've changed about the training?

66 CGP2: Not the DM training. I think the DM training was really good. I don't feel like I had a lot of support around the changed management piece from DM to SM. So, we had the framework, but as an area team lead I didn't really address that too much other than here's the tool.

67 Researcher: Right.

68 CGP2: And, so, I used that tool individually with each store manager as we were working through implementation, but I feel like there was a, and opportunity. And, because, in hindsight, there were a couple store managers who didn't get all the way through that change curve probability.

69 Researcher: Okay.

70 CGP2: So, if I could have done that work better on the front end, that's what I would do differently.

71 Researcher: When you think back, was it more of a, was it something revolving around the changed equation, or was, because we went through the pyramid, the change equation, and then

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the behavioral transition model, which is, kind of, an older model, right? It's about letting go.

72 CGP2: Right.

73 Researcher: What was the problem?

74 CGP2: It was that. It was the, the "I have to let go, to get to learn."

75 Researcher: Okay. And, they couldn't let go?

76 CGP2: Yeah. Well, what they said is, "I let go." But then, their actions demonstrated, they hadn't let go.

77 Researcher: Were they more tenured?

78 CGP2: Yes.

79 Researcher: Partners?

80 CGP2: Yes. Yep. And ...

81 Researcher: Did you have time, at any point during the training, and, this could have been after the meeting. But, where you got back together and had peer-to-peer dialogue around what was working and what wasn't working, the formula, or?





82 CGP2: We did it somewhat informally, in our area huddles. But, there wasn't a specific meeting or a field time peer-to-peer to review.


83 Researcher: When you did have informal dialogue, did, what was the outcome of that? So, if you were more organically talking about it, did it change your mind about anything? Did you go take action on that discussion?



84 CGP2: Yeah, I think, the one that I remember is a, some discussion about what the customer support role truly is, how it got a little bit lost with the transition of support, versus customer support, and that.

85 Researcher: Right.

86 CGP2: So, like Sally was one of the first to say, "I'm noticing that the customer service role isn't doing what it's, we've lost the cadence of

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the cycle, and the cycle task lists need to be updated." And, so, LAB then brought focus to that for me, and I know to several of my peers to. So, yeah, I guess that would be the one example I can think of.

87 Researcher: Did you do anything different after that.

88 CGP2: Yeah. Yeah. Then, I took it to my team and we updated cycle task lists, we had every store manager make sure that they were working customer support. Which, we had talked about at the beginning, but they weren't doing consistently. So, and then who was going to be the successor. Like, who was the next person I'm going to train to make sure that they're really clear on customer support, so that we don't just have managers in shifts, working that, indefinitely.

89 Researcher: When you think about the timing of the training, how long did it take you to learn that problem and to solve that problem?

90 CGP2: When was our, was it February or was it March?

91 Researcher: Like, February.

92 CGP2: That's what I was thinking.

93 Researcher: Yeah.



94 CGP2: So, I think, probably early May.



95 Researcher: Okay. If you, is there anything we could have done differently to help you learn some of those things faster?

96 CGP2: Well, I mean. I think it's just actually getting in there and doing it. So, I don't know. If we would have had, maybe on a test store, do it first, so, and then, DM's go in and work the different roles. I mean, that, we maybe could have problem solved it that way.

97 Researcher: Yeah.

98 CGP2: And then, had it, yeah.

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Researcher: Yeah. Okay. How do you feel? So, last question. How do you feel like it's going now?

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Anything you want to continue to adjust?
CGP2: I think it's going well. My goal with having that little task force in the district was, I told all my district managers, or all my store managers, "I don't want to re-launch this."

101

Researcher: Right.

102

CGP2: "In six months because we didn't do the work consistently and well." Like, we, we've all been here-

103

Researcher: Right.

104

CGP2: Long enough, and done that. So, I was committed that we would not do that. So, I feel like that was very successful.

105

Researcher: Mm-hmm (affirmative)

106

CGP2: We definitely did launch it. It's launched. There's not a store that's not practicing deployment. There's still gaps, of course. So, I feel like that was successful, and continues to be a part of how we do business every day. I think that the link for me has been to labor and scheduling metrics. And, I think, how those two things work. And, so, really helping the store managers get through the process of, it's not just schedule how you've always scheduled, and then pick the play that matches, but really look at the plays.

107

Researcher: Right.

108

CGP2: What's your ideal number of people on the floor? Do you have people working eight hour shifts that could be working four hour shifts?

109

Researcher: Yeah.

110

CGP2: To maximize the number of people on the floor. So, we're still in process with that. So, I would say, it's good. But, that's been the biggest,



"Ah ha," is, kind of, the store managers and my opinion tend to see GLS and scheduling as one bucket, and deployment as another bucket. And, it's getting them to use those two tools together, has been the-

111 Researcher: Any suggestions on how to do that?

112 CGP2: Well, yeah, I mean, for me the, the best thing has been just to pull up GLS with the store manager, write a schedule together. I mean, I don't spend six hours writing the schedule. But, really, like, scrubbing the whole thing. What would it look like to write the short shifts? How many people are ideal? Let's look at your play. So, not just talking about it, but having the book open, having GLS open, and doing that work to help them have the, "Ah ha," moment, yeah.

113 Researcher: I like that. Very cool.

114 CGP2: It's, it's been good, and in every case, the first, you know, the first de-railer is, "Oh, I don't have enough people." Yes.

115 Researcher: Yeah.

116 CGP2: So, then that necessarily pauses it a little bit, while they get staffed. But, so it's a little, that part is a little bit stop and start, but-

117 Researcher: Yeah.

118 CGP2: At least, then you know, you can put a deadline on, "When will you have enough people?" Look at, I can do the rest of this for them at point, so.

119 **#3 CGP3**

120 Researcher: Great. Okay. Here we go. For the deployment training that happened in the spring, did you go into that meeting understanding what problems we were trying to solve

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around deployment and change leadership?

CGP3: I believe I had an understanding of what we were trying to accomplish, yeah.

122

Researcher: What would you say the problem was that we were trying to solve and also around change leadership?

123

CGP3: I felt like, if we're talking about in the meeting, what did I feel like we were going after or before?

124

Researcher: Either one.

125

CGP3: I felt like the company was introducing a new tool and a tool that we needed to have used and referred to, in order to have a clear understanding of the work that everybody was going to be doing. I understood the change piece, the change management piece, just from having used the tool before.

126

Researcher: In hindsight, do you wish you had more pre-frame or less pre-frame?

127

CGP3: Because of the kind of learner that I am, it would have been more beneficial to understand that the majority of the meeting was going to be about the change pyramid rather than deployment piece.

128

Researcher: That's good. During the training, was ... and, I know the answer to this already, but I'm going to ask it to you so it gets recorded. Was there any hands-on activity that we did where you physically did the work?

129

CGP3: I don't believe so.

130

Researcher: Do you feel like having some kind of physical participation to work would have been helpful?




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CGP3: I do. I think there were definitely things that taking it back to the store and disseminating that information then again, could have been helpful. Having more hands-on would


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- 132 have been more helpful.
Researcher: During the training, and it doesn't have to be during that day, but within the week or so after the training, did you have time to have peer-to-peer dialog around what you were learning around the deployment changes and the change management?
- 133 CGP3: Yes. We did have a conversation about content and the changes in the program, and I think perspectives were really good to have.
- 134 Researcher: Did you take anything that you can remember specifically out of that peer-to-peer dialog, like any key learnings just from listening and talking to your peers?
- 135 CGP3: In hindsight more so than in the moment, because specifically, what I remember is thinking that we all had it. Well, we'd been doing a lot of this already, and so there was an assumption of competence in ourselves that was probably overstated.
- 136 Researcher: Did you take action on anything that you learned from your peers?
- 137 CGP3: Yes, but I had to make up time for it, because the action that I took was about slowing down for the change management in a different way, because they took it more to heart that people were going to have a harder time with it than I did, because I was, "Why would we have a hard time with this?" So, yes, definitely.
- 138 Researcher: So what you're saying is you slowed down?
- 139 CGP3: Yes.
- 140 Researcher: So last question. In hindsight, is there anything you wish we had done differently in cascading the training relative to deployment or change leadership?
- 141 CGP3: Yes. As an operator, it would have been helpful for me

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to talk about the differences more of what we were actually doing before, versus what was being rolled out. Again, I had to slow down and go back to the change pyramid after the training, when I was rolling it with my team. So I think that was good in hindsight, but truly understanding the deployment apps, understanding that bigger piece of it, and what the change was would have been more helpful, the actual work piece of it, because of the assumption of, "We're doing a lot of this already."

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Researcher: Right. Okay. That's it. Thank you so much.

143

CGP3: Absolutely.

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Researcher: This was really helpful. Let me, just to explain a lit bit more about ...

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#4 CGP4

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Researcher: Thank you. I wanted to talk a little bit about deployment from the spring. When you went into that training, did you feel like you had a good understanding of why you were there and what problems you were trying to solve around deployment and change of leadership?

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CGP4: I wouldn't say I had a lot of fore-knowledge about it. I mean, all I heard was deployment's changing and we're going into a meeting about it. You know what I mean? It wasn't a lot more than that, just to be honest.

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Researcher: What further information did you want or would have been helpful prior to going to the meeting?






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CGP4: Maybe just some visibility to Hackett or something. Saying like, "This is something you could look at and we're going to discuss this at

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- 150 the meeting," versus just, "We're going in to do training on deployment."
- 150 Researcher: Did you do any kind of hands-on training with it, or was it more like a facilitated, particular way?
- 151 CGP4: We discussed in a district meeting, I believe.
- 152 Researcher: Did you do anything, like where you practiced it hands-on?
- 153 CGP4: Not before it launched, no.
- 154 Researcher: In hindsight, do you think hands-on training would have been helpful?
- 155 CGP4: Yeah, absolutely. Just to be able to kind of see it and understand and visualize it a little bit better would have been nice.
- 156 Researcher: In hindsight, anything else, aside from having maybe a little bit more pre-frame, and some hands-on, that you would have changed about the training?
- 157 CGP4: I probably would have reiterated a little bit more about trusting the plays, because for me, I was trying to analyze it, so I was looking at it and saying, "Okay, I see what it's saying, but I wouldn't have that person make the drink in go mode. I would have this person make the drink in go mode." You know what I mean? Or, kind of getting a better understanding like why up until 10 partners don't I show a drive-through bar on there? Like, there just wasn't a lot of whys and just, trust it, do it, versus the why of, "This is about why when it was in test market this is what we saw the result from and this is why we're saying do it this way and it's worked." You know what I mean? Versus, "Just trust it."
- 158 Researcher: Is there anything you would have changed around the changed leadership part of it?


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So you had kind of the operational platform, which was deployment, and then the leadership skill, we were really trying to drive home those changed leadership. Is there anything you would have done differently or wanted to see differently around the changed leadership component?

159 CGP4: No. I thought that was really good. I mean, I thought there was a lot of good supporting material for that. And being able to read through it, look at it, and then be able to share it, have it shared with me and then share it with my team, I thought that part was really good.

160 Researcher: Did you have time during the training where you just looked at or had dialog with your peers around what you were learning?

161 CGP4: A little bit at our district meeting, the one that followed it, right afterwards, we talked about it.

162 Researcher: Did you find that helpful ...

163 CGP4: Yeah, absolutely.

164 Researcher: ... to talk to your peers about it?



165 CGP4: Mm-hmm (affirmative), yeah.

166 Researcher: Did you have any peer-to-peer dialog after it started?

167 CGP4: Yeah, for a little while, uh-huh. Absolutely. Like on our conference calls, we would follow up like, "How did it go last week with deployment? What were some strengths? What were some opportunities?" And we were able to share that with one another.


168 Researcher: When you had the peer-to-peer dialog was there anything specific that you took away and that you took action on after talking to your peers more about it?

169 CGP4: Yeah. It was again that, okay, we tried it. We stuck to the plan, and it worked. So then now that gave me a little bit more confidence to

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trust it, right, because one of my peers is now saying, "This component of it worked." Right? So okay, I trust that person already and they're saying, "Trust the system. It works," versus just reading it and saying, "Trust it." You know what I mean? Does that make sense?

Researcher: Yeah. Last question, what was your plan after the training? Did you feel like the information you had allowed you to go cascade it in a way that was effective?

171

CGP4: Yeah. Well, and I wanted to really have a first follower kind of a mentality. I wanted to really be excited about it when I was giving the information out, because I feel like if I'm not excited about it, and if I brush it off, "Well, it's just another change that the company is putting in front of us," the message isn't going to get out well to the team, and if I want them to buy into it, I've got to show my enthusiasm and excitement for it. And I felt like the material that I had, enabled to prepare it, to present it to my team was fine, it was great, yeah.

172

Researcher: Cool. That's all I have. Thank you so much.

173

CGP4: Yeah, absolutely.

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Researcher: I super appreciate your making the time.

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CGP4: Yeah, no problem.

176

Researcher: Thank you.

177

#5 CGP5

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Researcher: Okay, so when you went into the deployment training, did you feel like you knew what you were getting into, like why you were there, what problem you were trying to solve?

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CGP5: Yes, I did. I think the meeting was set up where we

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180 knew what was going to be explained. We didn't know the details of it, but we knew the base knowledge that we were supposed to be getting out of it.

181 Researcher: Okay. What would you say was the problem that you were trying to solve, or that we were trying to solve organizationally?

181 CGP5: Yeah, I think just making sure the deployment was kind of store specific and that we could serve our customers at the most efficient manner for each store.

182 Researcher: Awesome.

183 Researcher: Did you feel like you had enough information around the change leadership part that what we were trying to solve around teaching you how to be a better leader of change?

184 CGP5: Yeah, absolutely. I think throughout ... I've been with the company for seven years, so throughout those we've talked about change a lot, so having those conversations kind of semi-regularly helps me as a leader be able to understand how my team me to show up for that change management.

185 Researcher: During the training or the cascade within your district, did you do any hands on training where you literally did the work?

186 CGP5: And when you say literally did the work, do you mean like in the store?

187 Researcher: Like deployed yourself, like worked some of the positions.

188 CGP5: No. I did not, not that I remember.

189 Researcher: In hindsight, do you think something like that would have been helpful?

190 CGP5: Yeah, I mean I remember when we launched the playbook, we did that kind of thing. Right? Where we split up the district and we had a

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two day meeting and we physically went into a store and did that kind of stuff and that really helped, so I definitely think that would have helped in this case as well.

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Researcher: Is there anything else you would have changed about the training?

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CGP5: No, I think it was comprehensive.

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Researcher: At any point during the training did you have time just to talk to your peers about how things were going, so having more peer to peer dialogue versus discussion?

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CGP5: You know I don't remember specifically if we had, like during the training, if we had just peer to peer time, but I know after and leading up to it, we had a lot of time where we as peers would connect and talk about it just because it was a big thing that we wanted to make sure that we were doing the right thing for, coming out of the gate, doing the right work.

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Researcher: Did you find that peer to peer conversation valuable? And what would you say was the biggest thing you learned from talking to your peers?

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CGP5: You know I don't remember specifically, but I know that in those peer to peer conversations there were a couple of things that we had to clarify with each other that maybe I wasn't understanding or my peer wasn't understanding, so helping to talk that through was really helpful.

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Researcher: Awesome.

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Researcher: And then last question, anything after the training was done, in hindsight, was there anything that you felt like could have been improved relative, again, to the deployment cascade and the changing? Do

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199 you feel like they were equally impactful or was the operations
piece more impactful than the leadership
piece or vice versa?
CGP5: I would say the operations was more impactful than
the leadership piece just because I've been
through something of that piece multiple
times. It's always a good refresher, but it
was definitely more impactful the
operations piece.

200 Researcher: Okay. That's it.

201 **#6 CGP6**

202 Researcher: My first question is, going into the Deployment
and Change leadership training, did you
have enough of a pre frame, did you know
why you were there and what problems we
were trying to solve?

203 CGP6: Yes. Yeah, I would say I did.







204 Researcher: Okay. What would you say those problems
were?


205 CGP6: Across different scores, we had a play, kind of a
standard set of plays, for different numbers
of partners, and they did not differ store to
store. And they didn't work as effectively
as they could in different stores. We had
all made our own solves at a store level,
for, hey, even though the deployment maps
as you're doing this, actually you're going
to do this. Because that's what our store
needs.




206 Researcher: Okay.

207 CGP6: And so I really felt like what we were solving for is
saying, okay, our stores do have different
mixes. We have different relative volumes
through the drive through, through cafes,
and the company is going to basically use

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the data to create a more personalized deployment map that actually works.

Researcher: Awesome. Did you feel like you had the same understanding around the problem we were trying to solve around change leadership?

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CGP6: Around change leadership ... Yeah, I think that ... whenever we have a change like that rolling out, where it's going to be something that, we all know at a store level, "Okay, I'm accountable for it happening in store, holding owners accountable for it." Of course, the first thought is, "Oh my gosh, resistant to this change." That means I have to go from zero to one, and yikes, right?

210

CGP6: Yeah, I do feel like that was ... it was good to bring that up in the midst of kind of the operational change we were looking at, getting us ready for that.

211

Researcher: In hindsight, is there any other information you would have wanted to have before you went into training?

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CGP6: I think that even coming in before the meeting, having a plan for what it's going to look like moving forward, so if we look at it through kind of a change management lens, so, okay, one week out, how are we going to assess where we're at ... with the change? One month out, how are we going to assess where we're at? At three months, six months, a year. What is it going to look like with us, what is it going to look like with our partners?

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CGP6: Really having kind of a implementation plan. And, that was laid out, if I remember right, it was kind of a long time ago, but it was laid out,

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I feel like more explicit, is always helpful.

Researcher: Okay. During the training did you do any kind of hands on training where you literally practiced the work?

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CGP6: I would say the hands on training, we looked ... it's kind of coming back to me now. We all brought our plays for our stores, and we also brought DCRs. And the hands on work we did was, okay, take out the play, take out the DCR, and say, okay, at 3:00 PM, find your play, find your play, what is each partner doing? On that play. But we weren't actually in a store for that.

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Researcher: Do you think it would have been beneficial to physically do some of the work?

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CGP6: Absolutely, yeah. Yeah.

218

Researcher: And any time during your training, did you have time set aside to have peer to peer dialogue about what was working, what wasn't working?

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CGP6: Yeah. If I remember right, we followed up, followed up on it during conference calls, for, I would say probably a month. Let's see, this isn't exactly peer to peer. And drop in visits, that would be always something that we're looking at.

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CGP6: And then, yeah, just peer to peer. Nothing overly formal, though.

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Researcher: Okay. Were there any key learnings you took away from that peer to peer dialogue?

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CGP6: Yeah, absolutely. One of the things that I remember us learning is, okay, so when the map's rolled out, as store managers, we all flip through them, and I remember one of my peers marked them up like crazy, and said, "Oh, actually this is what this person did, this is what that person's doing." And we shared

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that learning, because really what we had done is turn the new plate back into the old plate. Right, because we were worried about what the rolls.

223 CGP6: I hadn't made that mistake yet, but I definitely have made that a couple times since, and it's identified in the moment. I'm like, "Uh oh." I'm doing exactly what happened over there.

224 Researcher: Said, don't do, right.

225 CGP6: Right.





226 Researcher: Work the play.

227 CGP6: Exactly, exactly.

228 Researcher: Just in total reflection, when you think about the cascade of new information relative to deployment, which was the operational platform, and then the new information around change leadership, so we did the pyramid, the change equation, the behavioral transition model, is there anything you feel like we could have done different or better?

229 CGP6: Again, I think it's all in follow up. I think that the training was effective. I think I walked away knowing exactly ... almost over prepared, to the point where I was like, "Yeah, I totally got this."

230 CGP6: And then of course, in the past, almost year, I think, continuing to walk into the store every day, and kind of interrogate reality, and say, "Okay, what are the partners on the floor doing? What does the play say? Is the shift seeing it? Is the book even open and on the right page?" I mean the focus definitely on store manager change leadership ... personally, I felt that, I felt like I moved from A to B.

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CGP6: Just continuing on, how do we really impact the partners with this to gain their commitment, move them all the way through the change pyramid, and help them along the way. I feel like that's where, again, the execution piece, as to what's actually happening in the store, I think that's the part that always needs the extra focus.

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Researcher: Fantastic. That's really good. Cool. That's it.

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CGP6: Awesome.

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Researcher: Thank you so much.

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CGP6: Thank you.

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Researcher: Appreciate the insight.

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CGP6: Absolutely. I hope you have a good rest of your day.

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Researcher: Thank you, you too.