

JAMES M. KOUZES | BARRY Z. POSNER
WITH JANE BOZARTH

the
challenge
continues

PARTICIPANT WORKBOOK

challenge
the process

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Why *The Challenge Continues?*

We're assuming that you have completed an introductory course based on *The Leadership Challenge*, have completed the *Leadership Practices Inventory* (LPI), and have had some experience in **living The Five Practices.**

You may have developed a basic understanding of this practice and have had some experience in working to **Challenge the Process.** You already may have embarked on—or even completed—a challenge project using The Five Practices framework. Completing the activities in this workbook will help to support and sustain the work you already have begun on your **journey to becoming a stronger leader.**



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PRACTICE 3

**CHALLENGE THE
PROCESS**





Search for opportunities by seizing the initiative and by looking outward for innovative ways to improve.

Experiment and take risks by constantly generating small wins and learning from experience.

Small Wins

As you may recall, the third practice of exemplary leadership, Challenge the Process, includes two commitments listed on the opposite page.

When did you first begin to implement strategies for Challenge the Process?

Month _____ Year _____

A key tenet of *The Leadership Challenge* is the idea that success is built from small wins. In the trenches, day-to-day, and in the face of mistakes and obstacles, it is easy to lose sight of this. Remember, leadership is a journey. Before you continue on your journey to better Challenge the Process, take a few minutes to document some successes you have had so far. Write down a few specific things that have gone well as you worked to Challenge the Process. Consider times when you have stretched yourself, encouraged others to try a new way of working, and made a real effort to learn from a mistake. These do not have to be breathtakingly big successes. Think about small accomplishments.

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Now look at your list of small wins. Take a moment to breathe and savor them. Although this workbook will help you to continue to improve in how you Challenge the Process, it is critical that you not fall into the trap of focusing only on things that do not go well and things that still need work. Your wins are important and should not be discounted. Give yourself a pat on the back! Go ahead; *really* give yourself a pat on the back.



Rate Yourself

Below are the six behaviors from the *Leadership Practices Inventory* (LPI) related to Challenge the Process. If you completed the LPI some time ago and have retaken it recently in preparation for this professional-development experience, write your scores for “then” and “now” in the spaces provided. (If you have not taken the LPI, you will be given a few minutes to take it now.) Where do you think you are strongest? Circle those items. What areas would you like to work on further? Put an asterisk beside those items.



THEN

NOW

3. I seek out challenging opportunities that test my own skills and abilities.

8. I challenge people to try out new and innovative ways to do their work.

13. I search outside the formal boundaries of my organization for innovative ways to improve what we do.

18. I ask “What can we learn?” when things don’t go as expected.

23. I make certain that we set achievable goals, make concrete plans, and establish measurable milestones for the projects and programs that we work on.

28. I experiment and take risks, even when there is a chance of failure.

NOTES:

Handwriting practice lines consisting of 12 rows. Each row is defined by a solid top line, a dashed midline, and a solid bottom line.



Who Do You Know Who Challenges the Process?



Often in discussing those who have challenged the process, we think of people who have changed history, such as Martin Luther King, Jr., and those who have accomplished extraordinary physical feats, such as climbing Mt. Everest.

Can you think of someone less prominent who has successfully challenged a process?

.....

.....

What did the person do?

.....

.....

Why did he or she do it?

.....

.....

What was the outcome?

.....

.....



“ We cannot get
extraordinary things
done by keeping things
the way they are. ”

When I Challenged the Process

Think of a time when you challenged a process and then complete the items below.

1. The process I challenged was _____

2. The challenge was consistent with my values and vision because _____

3. Was I being pressured to make this challenge? What were the forces driving me?

.....

.....

4. The beliefs and feelings that drove me to challenge this process were

.....

.....

5. What other choices could I have made? What would have been the likely result(s)?

.....

.....



6. After I challenged the process, what happened?

.....

.....

7. My challenge brought changes (how or what) in these ways:

.....

.....

8. Challenging the process changed others in these ways:

.....

.....

9. Because I challenged this process, the people I lead or I obtained the following results:

.....

.....



10. The effect this had on my current and future status is

11. I am satisfied with the outcome in these ways:

12. I am not satisfied with the outcome in these ways:

13. What I learned from challenging the process is



Still Stuck on Identifying Opportunities to Challenge the Process?

Walk around your work area. Where and why do people seem frustrated? Where are roadblocks and bottlenecks? What factors, processes, and so on are at the root of delays, grievances, and customer complaints? Ask: “How can this be improved?” Try some upside-down thinking: “Why do we do *this*?” “Why don’t we do *that*?” “Why do we do it *this way* and *not that way*?”

Things to Watch For

- Ineffective procedures
- Ineffective policies
- Strategies that are not working
- Systems that are not working
- Commonplace bad behaviors
- Practices that irritate customers
- Lack of proper training
- Projects that need redirection
- Reports we don’t use
- Mediocre results that we accept
- Work that does not add value
- Useless or ineffective meetings

New Opportunities to Pursue

- New products or services
- New customer groups
- New markets
- New technologies
- New processes
- New systems
- New procedures
- New policies
- New projects
- New competitive strategies
- New performance goals
- New behavioral/cultural norms
- New personnel
- New organizational structures



70 Reasons Not to Challenge the Process

Whenever someone suggests a change, it seems that a choir of negative voices is waiting to shoot down the idea. Which of these reactions or objections have you heard? Which are the top three that your organization, and those whom you lead, tend to use? How many are valid?

1. The savings are only peanuts.
2. That's not our responsibility.
3. That's Joe's job, not mine!
4. We don't have enough help/manpower.
5. It's against company policy.
6. We don't have the authority.
7. We've always done it this way.
8. Have you gone through the proper channels?
9. It's too complicated.
10. You can't teach an old dog new tricks.
11. It's a good thought, but impractical.
12. Let's think about it some more.
13. Management would never go for that.
14. The client won't like it.
15. They won't hold still for that.
16. Write up a formal proposal on it.
17. We'll be a laughing stock.
18. We tried something like that years ago, and it didn't work.
19. We would lose money in the long run.
20. We've done all right without it.



21. Let someone else try it first.
22. What's the use?
23. There's not enough time.
24. It's too hard to sell.
25. I don't see the connection.
26. It's not practical.
27. What you are really saying is. . . .
28. It leaves me cold.
29. Let's all sleep on it.
30. You're right, but. . . .
31. We can't afford the tools/machinery.
32. It would cost too much.
33. If I thought it would work, I'd have done it.
34. It's not in the budget.
35. Where will the money come from?
36. You can't do that!
37. We're not ready for that.
38. This isn't the right time for it.
39. Everybody does it this way.
40. It isn't progressive.
41. It would be too hard to administer.
42. It's too radical.
43. It's too complicated.
44. The idea is unsound.
45. Production won't accept it.
46. We can't hold up production for that.
47. Engineering won't approve it.
48. My boss won't like it.





49. It's too much trouble to get started.
50. So what? We're making a profit.
51. The schedule doesn't allow any changes.
52. Who is going to do it?
53. Our product is different.
54. It won't apply to our problem.
55. Don't move too fast.
56. It will set a bad precedent.
57. I don't have enough background information.
58. Is there an easier way to do it?
59. We've got something just as good now.
60. I'm too busy to decide now.
61. It doesn't match our mission statement.
62. It will take too long to test.
63. It will make our present equipment obsolete.
64. Let's form a committee to study it.
65. It will increase our overhead.
66. That's too "ivory tower"/theoretical.
67. What do our competitors do?
68. Has anyone else ever tried it?
69. It won't work in our industry/business.
70. We have too many projects now.

What are some typical reactions/objections to innovative ideas in your work area or organization?

.....

.....

Which three reactions/objections are most frequently used in your work area and by those you lead?

- 1. _____
- 2. _____
- 3. _____





Try to turn each reaction/objection into a question, starting with the words, “How can I?” or “How can we?” For example, if the objection is, “Our staff isn’t ready for this,” you might ask, “How can we prepare our staff for this?” Sometimes what look like red flags are opportunities in disguise.

QUESTION 1:

QUESTION 2:

QUESTION 3:



“ Rules and processes
exist to expedite
business,
not ritualize it. ”

-MARGARET HEFFERNAN

Reflection: Your Reasons to Not Challenge the Process

Be honest. When you see something that needs to be challenged, what does your inner critic say? What reason *really* holds you back?

1. I don't have the time.
2. I've got too much on my plate.
3. I'll be punished if I fail.
4. They don't pay me enough to take on this kind of project.
5. I'm not disciplined enough.
6. Someone will steal my idea.
7. If it ain't broke, don't fix it.
8. If I succeed, too much will be expected of me.
9. I'm too close to retirement.
10. I've never done anything like this before.
11. I don't want to go to any more meetings.
12. I'm trying to simplify my life, not complicate it.
13. My other projects will suffer.
14. I'm not sure how to begin.
15. I'm not smart enough to pull this off.
16. Summer's coming.
17. Maybe next year.
18. I'm thinking of quitting.
19. It's not my job.
20. Other _____
21. Other _____



Which three do you think or use most frequently?

1. _____

2. _____

3. _____

Try to turn each into a question, starting with the words, “How can I?” or “How can we?”
For example, if the reason is, “It’s not my job,” you might ask, “How can I make it my job?”
or “How is this actually part of my job?”

QUESTION 1:

.....

.....

QUESTION 2:

.....

.....

QUESTION 3:

.....

.....



What Else Holds You Back?

“WHAT IF I FAIL?”

What's holds you back from challenging the process? For many leaders it simply is the fear of making a mistake. Here are some ideas that may help you to overcome that fear.

The Mistake Bank. With the slogan “Learning from faux pas, mistakes, and decisions gone wrong,” the Mistake Bank provides an online community in which people share “your mistakes that you think others could learn from.” See <http://mistakebank.ning.com/>.

The Dutch Institute of Brilliant Failures. Using Christopher Columbus as the definitive example, the site (<http://www.briljantemislukkingen.nl/page/engelse-pagina/>) defines a “brilliant failure” as meeting the following criteria:

- The innovator strives with good intentions (not at the expense of others or society at large) to achieve his or her goal.
- The innovator does all he or she can to avoid unnecessary errors: failure through poor preparation or silly mistakes is not brilliant failure!
- The innovator does not achieve the original goal; if the actual result was not intended but has value for the individual or society, we can officially classify it as a brilliant failure!
- The innovator learned something from the failure; even if it was not what was intended, he or she learned what not to do. Above all, the person's experiences, courage, and perseverance may well inspire others.

The Queasy Eagle Award. The Mayo Clinic gives this award to individuals who attempt innovation but fail for the right reasons (and while upholding the clinic's “do no harm” value).

One common reason for hesitating to Challenge the Process is the expectation that we will get everything right on the first try. How do you react to the mistakes of others? Do you overreact? Do you ask, “What did we learn?” Do the people who work for you trust you to let them make, and learn from, mistakes?





“ Nothing undermines innovation more effectively than fear. By the same token, nothing encourages innovation better than finding ways to cope with fear. Real innovation is most likely to take place among those who aren’t hamstrung by anxiety. ”

—**RICHARD FARSON**, *WHOEVER MAKES THE MOST MISTAKES WINS*



Risk-Taking Worksheet

In many ways, to Challenge the Process is to take a risk. List the risks that you anticipate facing in the near future and circle the level of each risk:



1.

.....

.....

Risk 1 is LOW MEDIUM HIGH

2.

.....

.....

Risk 2 is LOW MEDIUM HIGH

3.

.....

.....

Risk 3 is LOW MEDIUM HIGH

For each of the risks listed, answer the following questions:

1. What results do you expect?

2. What concerns do you have about this risk?

3. What is the best possible outcome?

4. What is the worst possible outcome?

5. What do you stand to gain or lose?

6. What can you do to increase the chance of success and positive outcomes?



7. Write a brief action plan related to each risk.



Risk 1.

Risk 2.

Risk 3.

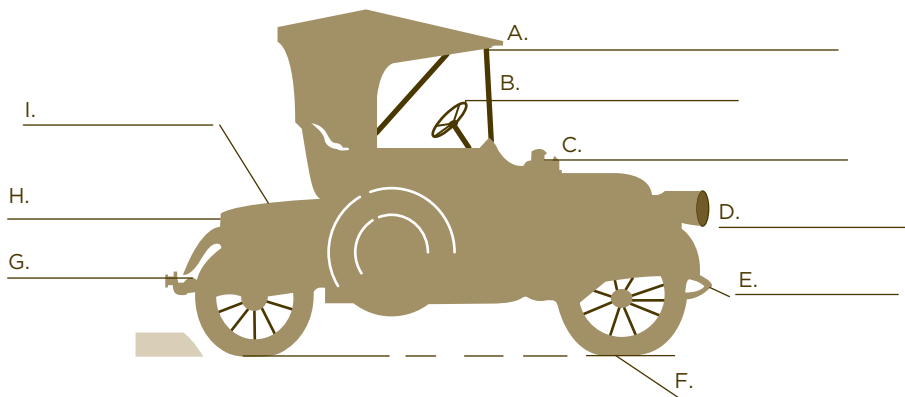


“ There always are
endless reasons *not* to do
something—take action,
make a decision, etc.
Get out of that box. ”

What Holds Back Those Whom You Lead? Do They?

THE CAR

Think about those whom you lead. As a group, they form the vehicle with which to successfully Challenge the Process. What functions does each of your constituents fill?



- A.** Rear-view mirror: Always looking at where we've been and what we used to do.
- B.** Steering wheel: Keeping things on course.
- C.** Horn: Shouting out warnings, sometimes unfounded.
- D.** Headlight: Keeping the vision in focus, helping to see into the distance.
- E.** Engine: Propelling the car.
- F.** Tires: Smoothing the ride over the bumps.
- G.** Spare tire: Resources, ready with "Plan B."
- H.** Fuel: Providing energy and spirit.
- I.** Trunk: Full of old baggage.

Which functions help in moving forward successfully? Which hinder?

.....

.....

.....

What do you need to do to develop a sleeker, faster car?

.....

.....

.....

Sometimes what you perceive as blocking behavior is really an important asset—like the horn. Sometimes an obstacle is a person who is always looking backward. How can you maximize your assets? How can you help the person who is having trouble moving forward?

.....

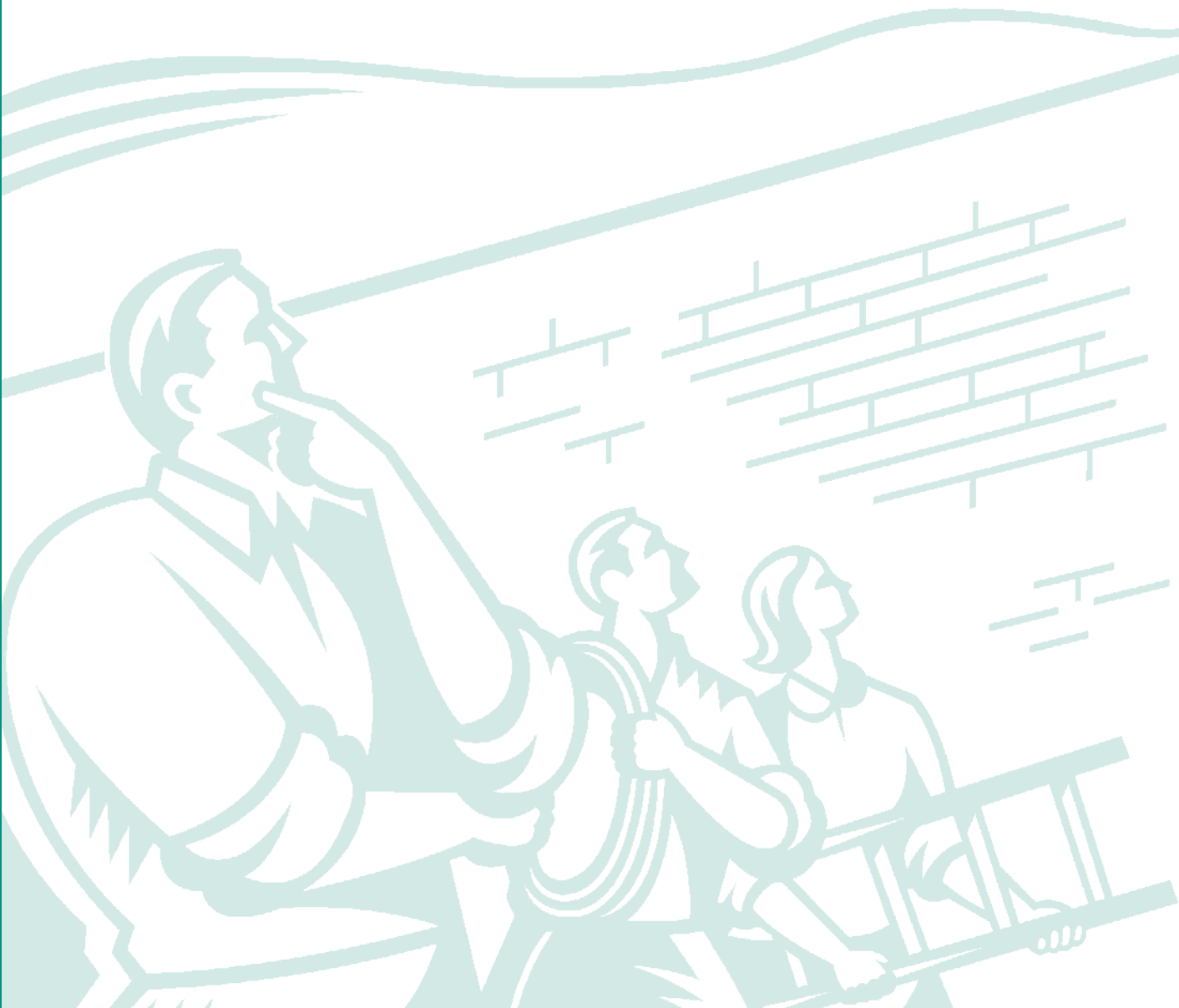
.....

.....

Which part of the car are *you*?



When asked to comment on the secret of success, Soichiro Honda (yes, *that* Honda) said that it was 90 percent failure and 10 percent introspection (understanding cause of the failure and fixing it).



What Holds Back Those Whom You Lead? Do You?

Part of your job as a leader is helping others to Challenge the Process by encouraging risk taking. Encouraging risk taking requires:

1. Instilling trust

- How do you respond to missteps and mistakes?
 - Do you overreact?
 - Do you become angry?
 - Do you punish your constituents for failing?
 - Do you help them to save face?
 - Do you say, “What can we learn from this”?
- How do you respond to their ideas and suggestions?
 - Have you ever said anything on the list of seventy-two reactions/objections above?
 - Do you shoot the messengers?
 - Do you support them?
 - Do you say, “Let’s see if we can figure out a way to make that happen”?
 - Do you celebrate small wins and small steps?

2. What have you taught those you lead about Challenge the Process?

- Do you encourage activities that stimulate thinking about when and how to Challenge the Process?
- Do you help to provide them with “hindsight”?
- Do you provide them with interesting training opportunities (including those not directly related to work, for instance, “lunchtime learning” programs)?
- Do you give them credit when they succeed?



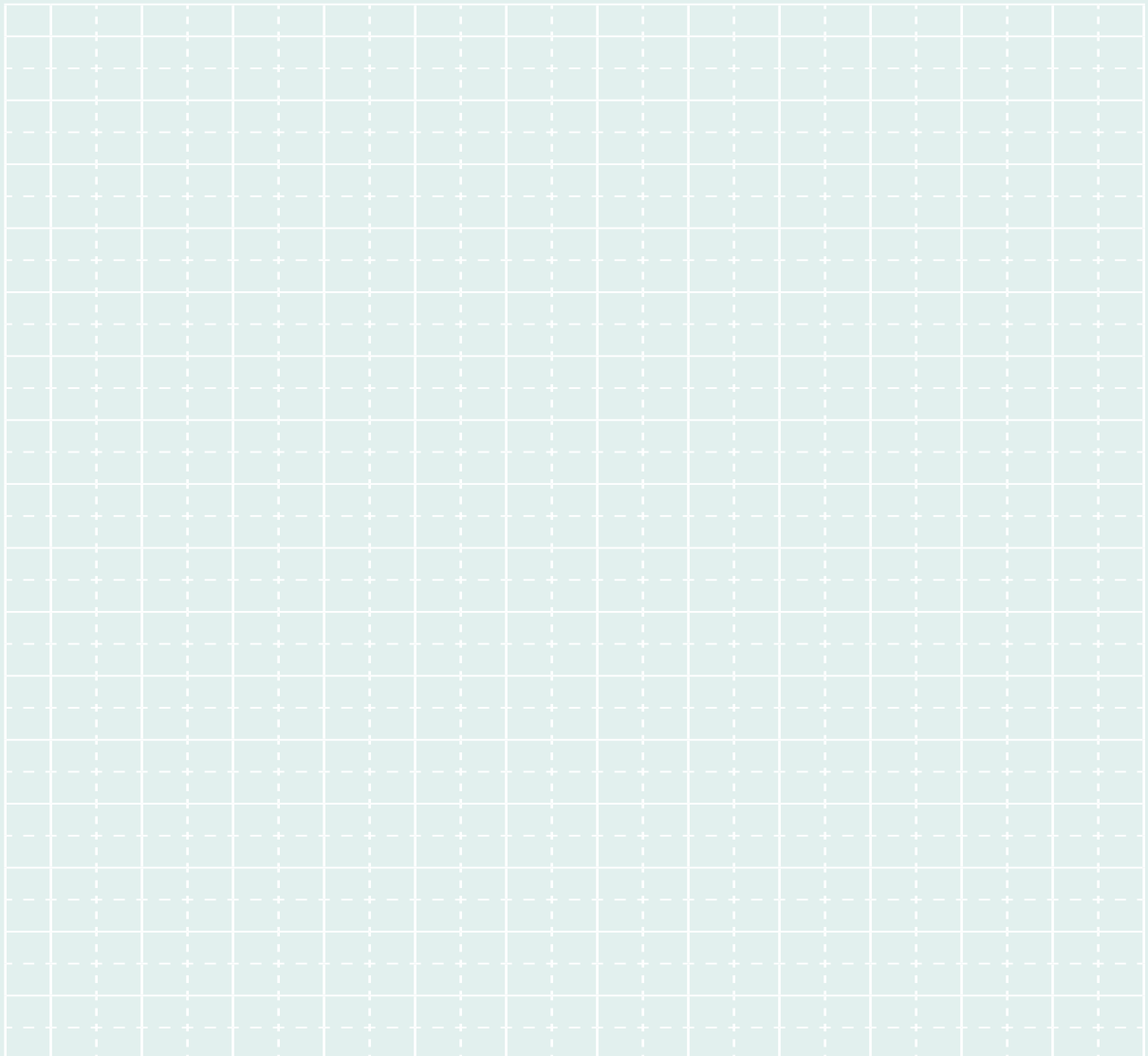


“ Nothing undermines innovation more effectively than fear. By the same token, nothing encourages innovation better than finding ways to cope with fear. Real innovation is most likely to take place among those who aren't hamstrung by anxiety. ”

—RICHARD FARSON, *WHOEVER MAKES THE MOST MISTAKES WINS*

What Is the Real Problem?

In the book *Unleashing Innovation*, authors Nancy Tennant Snyder and Deborah Duarte share reports of Whirlpool's failed approaches to getting its workforce to be more creative, including sending people to "creativity" workshops. Management finally realized that the problem was not that employees were not creative, but that processes, systems, politics, and old rules were blocking creativity.



Helping Those You Lead to Challenge the Process: What's in It for Them?



Sometimes the change initiatives introduced by someone else just sound like additional work. In thinking about encouraging those you lead to support you when you Challenge the Process and to Challenge the Process effectively on their own initiative, consider what makes a challenge meaningful and important to them. Some people are energized by a challenge itself. Others find meaning in the chance to contribute to something important, the chance to learn something new, and/or the chance to improve something that affects them.

How can you help your constituents to find meaning in this practice? Be as specific as possible.

PERSON 1.

.....

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PERSON 2.

.....

.....

PERSON 3.

.....

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PERSON 4.

.....

.....

PERSON 5.

.....

.....





“ People eagerly engage
when they want something
to improve.”

—SETH GODIN

Reflect: *Lorenzo's Oil*

Watch the 1994 film *Lorenzo's Oil* (available for purchase from sellers such as Amazon.com and for rent from sources such as Netflix). It is a film about a young boy with a devastating medical condition and the journey his parents make in challenging the processes of the medical establishment and the attitudes of their peer group. After watching it, reflect on these questions:

- 1. In what ways did the parents, Augusto and Michaela Odone, Challenge the Process?**
- 2. What were some of the small wins?**
- 3. What were some failures?**
- 4. At one point Michaela Odone expresses her concern that spending time looking for a treatment will take her away from precious time with her son. Why did she move forward with the challenge?**
- 5. What other sacrifices did this challenge require?**
- 6. It often is easy to dismiss the objections of others as mere resistance to change.** However, sometimes objections are legitimate concerns that need to be addressed. Thinking about *Lorenzo's Oil*, what objections were raised by others as the processes were challenged? Were all the objections unfounded? What were the points of view of those who expressed resistance? Consider, for instance, the frequency with which doctors encounter desperate parents willing to grasp at any straw.
- 7. How did the Odones deal with these objections?**
- 8. The Odones were not leaders in any traditional sense; they had no position in the medical community.** How did they exercise their influence in the absence of formal authority?
- 9. What lessons are here for those who may not have titles or positions that give them authority over others?**



Conclusion

What are two or three actions you can take to enhance your success when you Challenge the Process?

1.

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2.

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3.

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Additional Resources

If your impulses or emotional reactions, such as over-reacting to bad news, affect the ways in which you respond to mistakes, resources on emotional intelligence may prove useful. A good starting point is Daniel Goleman's book, *Emotional Intelligence*. There also are many resources on EI available on the web.

For more general information on innovation and risk taking, consult:

Anthony, S., Ehring, M., & Gibson, L. (2006, May). Mapping your innovation strategy. *Harvard Business Review*. Available at <http://ww3.harvardbusiness.org/corporate/assets/content/SDAnthony.pdf>

Block, P. (2003). *The answer to how is yes*. San Francisco: Berrett-Koehler.

Gawande, A. (2008). *Better*. New York: Picador.

Gladwell, M. (2008). *Outliers*. Boston: Little, Brown and Company.

Snyder, N., & Duarte, D. (2008). *Unleashing innovation*. San Francisco: Jossey-Bass.



About the Authors

Jim Kouzes and Barry Posner are co-authors of the award-winning and best-selling book, *The Leadership Challenge*. This book was selected as one of the Top 10 books on leadership of all time (according to *The 100 Best Business Books of All Time*), won the James A. Hamilton Hospital Administrators' Book-of-the-Year Award and the Critics' Choice Award from the nation's book review editors, was a *BusinessWeek* best-seller, and has sold over 1.8 million copies in more than twenty languages. Jim and Barry have co-authored more than a dozen other leadership books, including *A Leader's Legacy*—selected by *Soundview Executive Book Summaries* as one of the top thirty books of the year—*Credibility: How Leaders Gain It and Lose It, Why People Demand It*—chosen by *Industry Week* as one of its year's five best management books—*Encouraging the Heart*, *The Student Leadership Challenge*, and *The Academic Administrator's Guide to Exemplary Leadership*. They also developed the highly acclaimed *Leadership Practices Inventory* (LPI), a 360-degree questionnaire for assessing leadership behavior, which is one of the most widely used leadership assessment instruments in the world. More than four hundred doctoral dissertations and academic research projects have been based on the Five Practices of Exemplary Leadership model.





Among the honors and awards that Jim and Barry have received are the American Society for Training and Development's (ASTD) highest award for their Distinguished Contribution to Workplace Learning and Performance; Management/Leadership Educators of the Year by the International Management Council (this honor puts them in the company of Ken Blanchard, Stephen Covey, Peter Drucker, Edward Deming, Frances Hesselbein, Lee Iacocca, Rosabeth Moss Kanter, Norman Vincent Peale, and Tom Peters, who are all past recipients of the award); and named among the Top 50 Leadership Coaches in the nation (according to *Coaching for Leadership*).

Jim and Barry are frequent conference speakers, and each has conducted leadership development programs for hundreds of organizations, including Apple, Applied Materials, ARCO, AT&T, Australia Post, Bank of America, Bose, Charles Schwab, Cisco Systems, Community Leadership Association, Conference Board of Canada, Consumers Energy, Dell Computer, Deloitte Touche, Dorothy Wylie Nursing Leadership Institute, Egon Zehnder International, Federal Express, Gymboree, Hewlett-Packard, IBM, Jobs DR-Singapore, Johnson & Johnson, Kaiser Foundation Health Plans and Hospitals, L. L. Bean, Lawrence Livermore National Labs, Lucile Packard Children's Hospital, Merck, Mervyn's, Motorola, NetApp, Northrop Grumman, Roche Bioscience, Siemens, Standard Aero, Sun Microsystems, 3M, Toyota, the U.S. Postal Service, United Way, USAA, Verizon, VISA, and The Walt Disney Company.

Jim Kouzes is the Dean's Executive Professor of Leadership, Leavey School of Business, at Santa Clara University. Not only is he a highly regarded leadership scholar and an experienced executive, but *The Wall Street Journal* has cited him as one of the twelve best executive educators in the United States. In 2006 Jim was presented with the Golden Gavel, the highest honor awarded by Toastmasters International. Jim served as president, CEO, and chairman of the Tom Peters Company from 1988 through 1999, and prior to that led the Executive Development Center at Santa Clara University (1981-1987). Jim founded the Joint Center for Human Services Development at San Jose State University (1972-1980) and was on the staff of the School of Social Work, University of Texas. His career in training and development began in 1969 when he conducted seminars for Community Action Agency staff and volunteers in the war on poverty effort. Following graduation from Michigan State University (B.A. with honors in political science), he served as a Peace Corps volunteer (1967-1969). Jim also received a certificate from San Jose State University's School of Business for completion of the internship in organization development. Jim can be reached at jim@kouzes.com.

Barry Posner is professor of leadership at Santa Clara University (Silicon Valley, California), where he has received numerous teaching and innovation awards and served as dean of the Leavey School of Business for twelve years (1996-2009). An internationally renowned

scholar and educator, Barry is author or co-author of more than a hundred research and practitioner-focused articles. He currently serves on the editorial review boards for *Leadership and Organizational Development*, *Leadership Review*, and *The International Journal of Servant-Leadership*. Barry is a warm and engaging conference speaker and dynamic workshop facilitator. Barry received his baccalaureate degree with honors from the University of California, Santa Barbara, in political science; his master's degree from The Ohio State University in public administration; and his doctoral degree from the University of Massachusetts, Amherst, in organizational behavior and administrative theory. Having consulted with a wide variety of public and private sector organizations around the globe, Barry currently sits on the board of director of EMQ Family First. He has served previously on the board of the American Institute of Architects (AIA), Junior Achievement of Silicon Valley and Monterey Bay, San Jose Repertory Theater, Public Allies, Big Brothers/Big Sisters of Santa Clara County, the Center for Excellence in Nonprofits, Sigma Phi Epsilon Fraternity, and several start-up companies. Barry can be reached at bposner@scu.edu.

Jane Bozarth is an internationally known trainer, speaker, and author. A training practitioner since 1989, Jane is a graduate of the University of North Carolina at Chapel Hill, has an M.Ed. in training and development/technology in training from North Carolina State University, and holds a doctorate in adult education/training and development. She is an accomplished training practitioner and her work in virtual classroom training design and delivery has garnered her Live and Online and *Training* magazine Editor's Pick Awards. Jane is also the recipient of a North Carolina State University Alumni Award for outstanding contributions to the training profession.

She enjoys business writing and, in addition to her regular column in *Training*, Jane's work has appeared in trade and academic journals and as book chapters. She is the author of Pfeiffer's *e-Learning Solutions on a Shoestring*; *Better Than Bullet Points: Creating Engaging e-Learning with PowerPoint*; *From Analysis to Evaluation*; and the forthcoming *Social Media in Training*. Jane Bozarth and her husband, Kent Underwood, live in Durham, North Carolina. She can be contacted via her website at <http://www.bozarthzone.com>.





NOTES:

Handwriting practice area with 15 sets of lines. Each set consists of a solid top line, a dashed middle line, and a solid bottom line.