1996

Project advocacy : an application of embedded communication training theory

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**PROJECT ADVOCACY: AN APPLICATION OF
EMBEDDED COMMUNICATION TRAINING THEORY**

**A Thesis
Presented to
the Faculty of the Department of Communication Studies
San Jose State University**

**In Partial Fulfillment
of the Requirements for the Degree
Master of Arts**

**by
Susan Ann Burrowes
May, 1996**

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ABSTRACT

PROJECT ADVOCACY: AN APPLICATION OF EMBEDDED COMMUNICATION TRAINING THEORY

by Susan A. Burrowes

Many theoretical guidelines have been developed to aid in the design of training in learning organizations, but few case studies provide practical models for communication training practitioners. This thesis is a qualitative case study describing the application of theoretical precepts for embedded communication training in learning organizations within the context of social constructionism and organizational culture.

Five sessions of embedded communication training at Apple Computer were observed, and interviews were conducted with participants before and after the process. Field notes and transcripts yielded data consisting primarily of accounts and metaphors.

The implications of using accounts and metaphor as diagnostic tools are discussed, as are the development of specific criteria for embedded training, including the focus and specificity of issue selection, structure in the training process, facilitation levels by trainers, preparation of participants, program closure and generalization to other organizational situations, trainer-participant immediacy, management participation and long-term organizational commitment.

ACKNOWLEDGMENTS

Apple is described in the following pages as a learning organization, and I think that their ongoing support of academic effort certainly speaks of their dedication to learning. In particular, my thanks to Robert Hon, who not only inspired and sponsored this unique new training model, but also allowed me to report it. Throughout the training process my admiration of him and of the people I interviewed in his organization continued to grow.

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Judith Barnes directed this thesis as she has directed me through so many other experiences in my graduate career: with warmth, wisdom and wit. I thank her not only for her knowledge and skill, but also for her unwavering support.

My family has suffered and celebrated with me through this long process as well. I'm truly grateful that love does indeed seem to conquer missed meals, messiness and a general preoccupation with things less important than they are.

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CHAPTER I

RESEARCH PROBLEM

"Tomorrow's effective organization will
be conjured up anew each day."
(Peters, 1987, p. 11)

Industry Overview

With U.S. organizations facing increased competition, decreasing quality and quantity of production, worker dissatisfaction, high turnover and an increasingly uncertain work environment, positive change has become a critical component of organizational success (Manz & Sims, 1987; Peters, 1987). Organizations are answering the internal and external challenges they face with a demand for higher levels of skill and participation from existing employee bases, and an ability for employees to learn and adapt continuously (Johnston & Packer, 1987). This demand, in turn, has led to an increased focus on formal and informal learning, with U.S. training budgets increasing by \$10 billion in the last five years alone (Shaw, 1995).

This emphasis on learning has spawned a plethora of popular literature theorizing about corresponding changes needed in the focus and style of formal organizational training (e.g., Argyris, 1994; Calvert, Mobley & Marshall, 1994; Gordon, 1990; Hendrickson, 1990; Kofman & Senge, 1993; Schein, 1993; Wick & Stanton Leon, 1993; Ulrich, Jick & Glinow, 1994). But although it is largely agreed that organizational members must be ready to evolve and adapt their contributions to the organization's needs through reconstructing their organizational identities during their careers (Peters,

1987), the manner in which formal training can help them accomplish that remains experimental. In other words, it is not yet known what training will "look like" in learning organizations, which are collaborative environments that are committed to learning (Senge, 1990). However, with the emphasis on role reconstruction and the collective nature of the learning model it is likely that training in learning organizations will necessarily have communication as a focus.

This thesis is a case study describing a communication training model at Apple Computer, designed to meet the precepts of the learning organization. It is called Project Advocacy, and is set against the backdrop of intensive change and competition typical to the computer industry.

Computer Industry

After a brief decline in the early 1990s, the U.S. computer industry has swelled to levels nearing \$70 billion, reflecting over 60% of the world market in information equipment and services (Reference Press, 1994a). In spite of impressive dollar volumes in 1993, fierce competition and reduced profits, combined with an increase in critical research and development funding forced the elimination of nearly 15,000 computer industry jobs. Those 200,000 workers who remained in the industry found themselves asked to raise productivity levels, reduce costs and shorten product cycles (The Reference Press, 1994b). One organization struggling to successfully meet these challenges is Apple Computer, a company that at one time held nearly 19% of the U.S. market in home computers (The Reference Press, 1994c).

Apple Computer

Apple Computer was one of the first Silicon Valley success stories. Founded in 1976 by Steven Jobs and Stephen Wozniak, it had grown into a \$117

million business by 1980, creating opportunities for numerous other third party peripheral companies through its phenomenal growth. Two decades and many "firsts" later, Apple has suffered through a maturation process that has included several marketing misdirections and a painful downsizing and reorganizing as it moved from technology innovator to technology provider (The Reference Press, 1994c). In 1995 Apple found itself standing at a critical strategic crossroad. Decisions were required regarding its goals of 1) the solidification of its commitment to existing markets (e.g., the educational markets) versus seeking additional revenue from competitors in new markets (e.g., challenging Microsoft's operating environment) and 2) managing its recent decision to license Apple technology to companies seeking to clone technology while maintaining its own market share (Gurley, 1995; The Reference Press, 1994c). Gurley (1995) called the accomplishment of all of these goals simultaneously "paradoxical" (p. 4). In fact, Gurley's comments foreshadowed the difficulties that Apple experienced in early 1996, as it posted a last quarter of 1995 loss of \$68 million in spite of healthy sales in most business sectors (Apple PR Newswire, 1996; Yandle, 1996).

Now, Apple is moving to abandon these paradoxical goals in favor of a narrower marketing focus that concentrates on higher profit margins (Langberg & Takahashi, 1996; Reuters, 1996), focusing over 6% of their first quarter of 1996 \$9.2 billion annual revenue on the research and development (R&D) of the powerful new technologies needed to maintain and gain market share. This is in keeping with overall high R&D expenditures across the computer industry, averaging 8.3% for all size companies and making computer R&D the second highest R&D investment in industry (health care investment leads at 9.7%) (The Reference Press, 1994c). These figures support

an argument that R&D is the focal point of success or failure for computer companies in general, and Apple Computer specifically.

R&D at Apple Computer.

With product cycles decreasing from five years in 1981 to a breathtaking six months by 1994, the pressure on computer industry R&D has become tremendous (The Reference Press, 1994b). A pipeline of new technologies must be available on a constant basis, integrated and applied with existing technologies. Each new technology decision that the company makes becomes a new corporate commitment, as internal resources must be devoted to technically supporting software developers and end users. Adopting or dismissing new technologies developed in R&D is a long-range, critical strategic decision which can determine the future direction of an entire company.

In the gentler 1970s and 1980s, a central, corporately funded Apple R&D group acted as a think-tank to muse about long-range (10 years out) innovation. The group was isolated, and largely protected from organizational realities. In the fiercely competitive 1990s, this group was asked to reconstruct the role that they played in the organization. Their new charge at Apple was to envision and develop shorter range technologies, and to advocate those technologies in the context of Apple's strategic business goals. This objective was nothing less than culture shock to these R&D professionals. They were being asked to modify the way that they viewed themselves in the make-up of the organization, and take an active role in the success or failure of the company by effectively presenting the technologies they thought would further the company's strategic goals. A positive response to this request would see these professionals transform their relative passivity and

isolation to active advocacy of what they believe in. To facilitate the change they were asked to make in their organizational role, they participated in a progressive new communication training model, entitled Project Advocacy.

This thesis describes the transformation process at Apple R&D as facilitated by Project Advocacy. The research goals are 1) to describe the case: A description of the advocacy training program in the context of socially constructed culture and current communication training trends in learning organizations and 2) to assess the reaction of participants to this unique type of communication training. These goals were pursued through the gathering of observational and interview data (metaphor usage and juxtaposed accounts) from participants before, during and after the training program. Metaphors and accounts help to provide a fluid view of the constructed realities and priorities of participants, particularly when analyzed temporally and thematically (Marshak, 1993). Results are reported as qualitative description with an interpretive analysis of the data.

Because this work is interpretive in nature, the limitations include possible researcher bias and improper assumptions in relating the data to specific outcomes. Because it is a case study, it also limits the scope of observation and the generalizability of the findings (Faules, 1982; Van Maanen, 1988).

The review of literature that follows is designed to establish a foundation for our discussion of the communication training model and its implications by overviewing 1) social construction and its influence on organizational culture, 2) change and learning in organizations, and 3) training.

Social construction and organizational culture are separate bodies of literature both espousing communicatively created reality. The perspective that we constantly construct reality establishes the ever-changing nature of that reality and facilitates a discussion of learning organizations. Finally, learning organizations provide the environments driving the development of new training techniques.

REVIEW OF THE LITERATURE

Social Constructionism

Viewed through the lens of social construction, the order of our lives and therefore the order of the organizations we create is a construction born of communication (Pearce & Cronen, 1980). According to Shotter and Gergen (1994), the conversations we have (in any context) determine the meaning or relative importance of the subject under consideration, and in fact, constitute our realities (Gergen, 1985; Goffman, 1959; Harre', 1994; Pearce, 1994; Shotter & Gergen, 1994; Willmott, 1994).

In other words, constructionists posit that communication is not the means for finding out what the reality is, it actually constructs our reality (Shotter & Gergen, 1994, Watzlawick, 1976). This perspective of shared meaning as reality (Smircich, 1983) views change as a constant (paradoxical though that might seem) and so adds a fluid, dynamic quality to self-identity. In describing our reality as self-made, constructionists also hint at tensions that might be felt between the mandates of our roles (e.g., organizational roles such as defined job descriptions) and identities (e.g. communicative realities in opposition to the organizational mission) and the effect that those tensions might have on our communication and resultant realities. For example, in the

case of Apple R&D, technical professionals formed an organizational identity based on isolated and relatively passive communicative behaviors. Now they are asked by the organization to assume a new role requiring that they demonstrate active communicative behaviors as advocates. This role change, then, in the constructionist perspective will necessarily change their individual and collective identities as well.

Shared communicative meaning and the construction of reality in the constructionist tradition is sometimes referred to as *culture* in the context of organization (Deal & Kennedy, 1983; Deetz, 1982; Pacanowsky & O'Donnel-Trujillo, 1982; Sackmann, 1991; Trujillo, 1992).

Organizational Culture

In spite of lingering beliefs that culture is something that is acted out upon employees of organizations (Kotter & Heskett, 1992), or that consists of a set of habitual practices by employees (Hofstede, Neuijen, Ohayv & Sanders, 1990), many current writings in the constructionist perspective view *culture* as a reflexive phenomena (Bantz, 1993; Deal & Kennedy, 1983; Morgan, 1980; Pacanowsky & O'Donnel-Trujillo, 1982; Trujillo, 1992). From the perspective of these authors, the realities of *culture* are clearly accomplished communicatively in organization. Morgan (1980) described *culture* as: "continuously negotiated, renegotiated, affirmed or changed" (p. 352). *Culture* in organization is created when pieces of knowledge are shared communicatively by group members (Sackmann, 1991). It is, therefore, constantly reinvented under the influence of internal and external forces (Bantz, 1993; Pacanowsky & O'Donnel-Trujillo, 1982). Those forces might include events such as management or marketing changes, personnel shifts or other daily occurrences. In turn, the overall manner and amount of

interaction that people have in their daily functions carry implicit messages and provide an orientation to the organizational culture that is being constructed by members (Deal & Kennedy, 1983; Deetz, 1982).

Conceptually, several authors touch on the type of talk that makes up organizational reality: e.g., talk about work, about social issues, jokes, and tips (Deetz, 1982; Pacanowsky & O'Donnel-Trujillo, 1982), but there are far fewer case studies than one would expect examining culture as a direct result of communication. Notable exceptions include Barker, Melville & Pacanowsky's (1993) description of changes in organizational communication practices during a company transformation to a team environment, Carbaugh's study of speech at a television station and Trujillo (1992) and Trujillo and Dionisopolous' (1987) examinations of how talk at a ballpark and police organizations contributed to their respective cultures. DiSanza (1993) and Ruud (1995) use disparate examples of part-time bank tellers and symphony members respectively to discuss cultural divides that can occur through communication.

Popular literature provides several case studies regarding change through training in communication-related areas, but either perceive the training as simple skill acquisition (Downs, 1995; Galagan, 1990; Taylor & Ramsey, 1993) or refer to cultural change as the process of "bombarding" employees with communication about what the new culture will be (Hequet, 1994, p. 78). Honold (1991) speaks about cultural change at the Johnsonville Foods assembly line as teaching (communicating to) employees that they are expected to think for themselves, but stresses the cognitive results of the communication.

Agar (1994) focuses resolutely on communication's link to culture in his book *Language Shock*. In it, he provides rich proof that you cannot separate

language and culture, and has coined the term "languaculture" to describe the marriage between the way we think and talk. In other words, the way that people in organizations talk reflects who they are and forms the culture of the organization. Marshak (1993) goes even further, claiming that identifying organizational uniformity in talk, specifically in root metaphors, help us to determine the type, unity and strength of organizational culture.

This conception of organizational culture as the talk between organizational members has been revolutionary in that it has changed the way employees were viewed by management in organizations and has forced management to seek the approval and participation of this previously unacknowledged cultural force. The acknowledgment of employees' communicative interactions as a cultural phenomena spawned a flood of static management practices like open door policies, 800 numbers, suggestion boxes, brainstorming groups and newsletters (Dobbs, 1993; Kirkpatrick, 1993; Levering, 1988; O'Neill, 1990) that claim to have cultural impact. In essence, employees have finally been recognized as "stakeholders" in the future of organizations (Deetz, 1988, p. 338), continuously charting and changing organizational culture through communication. On a theoretical level then, one assumption of Deetz's work leads us to speculate that if R&D professionals at Apple changed the way they talked about their role in advocating their ideas in the organization, and changed their communication behavior accordingly, they would have changed the culture around them as well.

Cultural change.

Change is a necessary but sometimes difficult part of a successful organizational culture (Johnston & Packer, 1987; Peters, 1992; Schein, 1993; Ulrich, Jick & Glinow, 1993; Wick & Stanton Leon, 1993). Charles Hampden-

Turner (1990) found a paradox in organizational change, calling the balancing act between change and core values, between employee inclusion and speed of adaptation, the "horns of a dilemma" (p. 19). In addition to the practical challenges that management faces in the dissemination of information, employees may have a general ambivalence and resistance to change (Yarbrough & Freidman, 1985). Hennecke (1991) finds resistance on a broader level, with organizations often resisting change and unwilling to reevaluate their operations until catastrophic occurrences force them to do so. Interestingly, Apple, known as an industry innovator, was cited as an example. During the mid-1980s, under the leadership of Steve Jobs, Apple persisted in denying the impact of other computer giants in the development of strategy at Apple, refusing to change the company's course. This resistance led to a difficult period in Apple's history, with high inventories, low sales and the ultimate ousting of Jobs.

Much of the popular literature in the late 1980s and 1990s has focused on the manipulation of culture in the quest for greater performance during competitive times. For example, Kotter & Heskett (1992, pp. 23-29) and Bates (1994) link organizational culture directly to performance, claiming that an "appropriate culture" (and not a "strong" culture) is the key to corporate success. By "appropriate," Kotter and Heskett (1992) mean that a culture should "fit" the business environment. For example, the relaxed, creative freedoms at Apple would not be appropriate for, or "fit," a banking establishment, regardless of how unified or unbreachable a culture it was. Overall, organizational cultures that "fit" the environmental demands of the organization showed a revenue performance up to three times that of poor "fits." Furthermore, Kotter & Heskett (1992) also found that employees seemed

aware of the cultural factor in their success, as attested to by self-report surveys (p. 36). The authors address this "fit" as part of the need for cultures to adapt to changing circumstances in order to maximize success. In other words, if the "fit" seems not to be working, organizational leadership should encourage cultural change. This advice overlaps the work of author Tom Peters, who, in *Thriving on Chaos* (1987), urges organizations to allow customer needs to drive cultural changes. In short, organizations should become "change seeking" (Peters, p. 477), and change agents in those organizations should be rewarded by the organization's leadership, even when their change efforts are not completely successful (Bates, 1994; Hampden-Turner, 1990; Kotter & Heskett, 1992; Peters, 1987).

As popular as the concept of cultural change has been, it will always be a complex, inexact and incomplete process since it is impossible to understand or control all of the ongoing, changing, fluid communication that constructs each organizational reality (Shotter, 1994). If one considers culture as inherently multidirectional, then the metaphor "changing it's direction" becomes problematic. Titles such as *Navigating Organizational Change* (McKnight & Thompson, 1990), and *Leading Change* (Kotter, 1995) can be misleading, particularly when coupled with Kotter's (1995) language regarding a "direction" for the organization. In spite of the language, Kotter (1995) does urge organizations to adopt an empowerment process within a shared vision, implying that change lies in the communication constructions of the organizational members. This employee involvement in the construction of culture is echoed by Steinburg (1992), who encourages organizations to promote change through developing employees who think generatively. For example, Steinburg's writing leads us to speculate that

employees at Apple R&D would not wait for problems to arise and then solve them (creatively or otherwise), but instead would seek out opportunities to advance the organization's goals. Generative thinking and the resultant communicative behaviors are at the heart of change cultures, popularly known as learning organizations (Issacs, 1993; Kofman & Senge, 1990; Wick & Stanton Leon, 1993). Although this new set of expectations is generally presented by the authors as an advantage to employees, dangers to employees who make bad suggestions or decisions do occur as managers fail to "let go" of responsibility, or remain responsible for the decisions of their employees in the existing organizational hierarchy (Dobbs, 1993; Kizilos, 1990). This focus could lead to abuses by organizations that fail to balance the needs of the individual with the demands of organizational life.

Learning organizations.

Even though learning in organizations has spawned an abundance of material dating from the late 1980s, Peter Senge observed that we are only now "developing the key understandings, practices and tools" to create learning organizations (Galagan, 1991, p. 37). Indeed, a confusing number of terms are found in description of the learning organization. "Action science" (Argyris, 1985), "action learning" (Revans, 1980) and "action-reflection learning" (Marsick, Cedarholm, Turner & Pearson, 1992) are all terms that have been suggested to describe a learning culture in U.S. organizations. Although Calvert, Mobley and Marshall (1994) found more than twenty definitions of this organizational personification, two commonalties manifested themselves: 1) learning organizations employ strategies and tactics geared towards continual learning and 2) learning organizations create a collaborative environment that is conducive to learning (p. 40). Senge

(1990), author of *The Fifth Discipline: The art and practice of the learning organization* describes it as a place

where people continually expand their capacity to create results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together (p. 3).

More practically, Senge also describes a learning organization as one where members are 1) immersed in systems thinking, 2) focused on personal mastery, 3) flexible in their mental modeling, 4) committed to a vision and 5) team-oriented (thus, the five disciplines from the title). Notably, Senge (1990) sees the learning culture springing not from the management of the organization or from the employees, but from a collective spirit that focused on growth and empowerment. Models of a learning organization present many positive benefits, including improved problem solving, increased sensitivity to other organizational members' needs and an overall increase in employee motivation (Wick & Stanton Leon (1993).

The actual process of learning in learning organizations relies on the empowerment of the individual. Organizational members are expected to self-direct their own learning process, drawing lessons from everyday experiences and through a creative collaboration with other organizational members (Baskett, 1994). According to this learning model, teaching professionals at Apple R&D how to communicate in a certain style would not be as effective as showing them how to reframe the way they think and talk about communicating, helping them translate their ideas into messages and then having them review and learn from their efforts. This aspect of learning organizations has far-reaching implications for formal training in organizations, as the focus of

training shifts from skill acquisition to the metacognitive, sometimes communal, task of learning how to learn (Gordon, 1990; Sorohan, 1993).

Training

According to *Worker Training, Competing in the New International Economy* (Office of Technology Assessment, 1990), 67.5% of the then \$40 billion dollars spent on intentional learning (training) in U.S. was accomplished by only .5% of all employers. So, training for intentional learning is by no means the norm in American business. Of this small percentage of organizations committed to training, many have become mired in traditional training methods that may not be optimal in today's learning culture (Wick & Stanton Leon, 1993).

According to Wick & Stanton Leon (1993), much of the learning that took place in U.S. organizations was "disconnected" from the organizations' daily reality, and did not give participants the tools they needed to generate creative solutions beyond the specific skill sets being taught. The learning was often placed in traditional mental models in classrooms, and ignored the communicative reality of the organizations' daily needs, becoming a diversion from the construction of a learning organization, instead of an integral, reflective part of it. In the case of communication training, a separation would occur between the training and resultant (proposed changes to) communication behavior. This phenomenon of separated learning could contribute to the cultural dysfunction described by Kofman & Senge (1993) as "fragmentation" (the lack of holistic thinking), "competition" (the lack of understanding of the communal nature of organization) and "reactiveness" (the lack of generative thinking) (p. 6).

According to Wick & Stanton Leon (1993), training decisions often fail to take into consideration 1) the need to tie the training into the organization's goals and strategies, 2) the difficulties in bringing off-the-rack training sets into unique organizational cultures, 3) managers' tendencies to undermine training that they haven't "bought into," 4) the conflicts that might face those who are trying to implement training, 5) the lack of motivation for employees to implement new behaviors, 6) the lack of understanding or support afforded new training behaviors by others in the organization and 7) the lack of time to effectively train for new or complex learning. These concerns regarding traditional training models may well be at the root of Senge's (1990) exhortations to build learning organizations through an immersion in systems thinking, bringing a holistic, communal and generative focus to the learning process.

Management has often eschewed traditional forms of training. Many employers in the competitive technology market cannot afford the short-term productivity loss experienced in training their employees in the fragmented manner typical of traditional models and so resist training entirely (Johnston & Packer, 1989). Lending support to their resistance is Shaw's (1995) contention that the rewards of traditional training are often not justified, since the average participant remembers only 20-25% of any given seminar day's content.

Organizational management is not alone in resisting training. Training and the idea of change can cause an array of negative feelings, as well as varying levels of stress in organizational members (Barker, Melville & Pacanowsky, 1993; Wick & Stanton Leon, 1993). Writings on resistance to

training imply that learning is commonly thought of something done in addition to, or outside of, the work life in an organization.

To achieve what learning organization theorists consider greater effectiveness in training, Kofman and Senge urge readers to focus on constant, generative learning in an applied, integrated manner. Knowles (1973) provided an early foundation for their guidelines with four assumptions about adult learning: 1) adults prefer self-direction, 2) adults learn best through experiential techniques, 3) adults are aware of how real-life events generate learning needs and 4) adults want applicable knowledge. These assumptions about adult learning led Zemke and Zemke (1995) to draft seven maxims for effective adult training in organizations: 1) training should be problem-centered and relevant to the participant's personal goals, 2) management goals and participant skill levels should be assessed prior to training, 3) content should be integrated with existing knowledge, 4) exercises and cases should have a real-life, reflective quality, 5) feedback should be guided, but given, 6) learning style differences should be taken into consideration, 7) training should accommodate the adult's continued growth and changing values (pp. 33-36). Typical of the literature on training in learning organizations, little or no guidance is provided regarding actual delivery systems for trainers working in this model.

The same gap of practical direction appears in related work. For example, Braun (1979), Friedman & Yarbrough (1985), and Wick & Stanton Leon (1993) advise trainers that building a training model must begin with management support, and be supported by an organizational vision. Managers should not only support but also model expected behaviors to maximize a developmental process with immediate and long-term benefits for the

employee and the organization. The training program and timing must be right and relevant to the business environment. These generalized theoretical recommendations are not limited to the nature of the training. Friedman & Yarbrough (1985) give generalized advice to trainers as well, suggesting that they can facilitate the change process by creating an environment of trust that is supportive and nonevaluative. Training effectiveness can be enhanced through a willingness by the trainer to "let go." This means that the trainer does not become involved as a leader/lecturer but as a facilitator in a learning process. Necessarily, a trainer working in this relatively impromptu fashion must employ a broad repertoire of communication and training skills. Wooten & White (1989) suggest that a trainer can facilitate change by remaining flexible, and assuming various roles during the process of change, including trainer, model, researcher (ferreting out problems) and resource linker (p. 655). Although general, it is obvious that these precepts are in direct contrast to the classroom models often utilized.

Although a great deal of the popular trade literature has been devoted to training, and even training in learning organizations (see, for example, Clavert, Mobley & Marshall, 1994; Gordon, 1990; Hendrickson, 1990; McKnight & Thompson, 1990), few real, applied case studies exist to help trainers design the real-time, embedded training experience recommended by theorists. A survey of the literature in the two leading training trade publications (*Training*, and *Training & Development*) from 1990 to 1995 provides little guidance for the training practitioner who has a goal of implementing this type of training in the learning organization. In fact, 240 issues of training periodicals ran only six case studies that clearly utilized any of the concepts of the learning organization paradigm (Cheng, 1990; Downs, 1995; Galagan, 1990; Hequet, 1994;

Honold, 1991 and Taylor & Ramsey, 1993). The six case studies contain little or no description of the actual training process. All six are written about manufacturing, assembly level or retail employees. There are no detailed descriptions in either of these popular publications of cases in which executive or managerial level professionals engage in what has theoretically been called effective training in the model of the learning organization. Nor are there any articles focusing on communication-centered training.

Theoretical advice in the popular trade publications is frequent but contradictory. Hendrikson (1990) calls for "simulation" of a workday as part of effective training design. Stucky, of the Institute for Research on Learning, in an interview by Galagan (1993), espouses trapping the learning in everyday occurrences in organizations. Berry (1990) is a proponent of objective-linked learning. There is an apparent commonalty in these writings in respect to the need for training to be more "real" to the participants. Training for the sake of training and incidental skill development is giving way to immediate, integrated and problem-centered learning. In the words of Peter Block (1994) "Learning and performing will become one and the same thing. . . . the hard part will be to connect training and learning" (p. 38). So, at Apple, the trainers' goal was to customize and integrate the communication training into the work goals of the employees, providing not only immediate applications, but the processes to extend new communicative behaviors into future situations. The participation of employees was key, with trainers and management playing supporting roles. In other words, what made this training new was that it began with a problem instead of a skill set.

In summary, new ways of thinking about reality have subsequently affected the way that we view organizations and their cultures: as fluid,

changing and complex constructions that must learn in order to flourish in these competitive times. To date, little writing has been done to demonstrate what training "looks like" in the new learning organization. Apple R&D is undertaking a communication training project that strives to meet the demanding theoretical guidelines for training in learning organizations. Emerging from this review of related literature are several working assumptions: 1) organizations are constructed communicatively, 2) organizations are constantly changing, 3) learning organizations are change seeking and 4) training in learning organizations must adapt to change.

These assumptions, in turn, lead to the generation of questions regarding: 1) the actual, practical process of training in learning organizations on a surface level, 2) deeper implications of the model which may be of interest to organizational communication scholars and which may be revealed through the participants' talk (accounts and metaphors), 3) participants' perceptions of the learning that took place in this model and 4) observed communication behaviors that participants may not be aware of. Stated as research questions (RQs):

- RQ1: How do theoretical guidelines for formal training in learning organizations translate to applied training at Apple Computer?
- RQ2: Were there distinctive content areas, topics or tensions in the accounts and metaphors that emerged during the course of the training or interview process?
- RQ3: What is the reaction of participants to the training model?
- RQ4: Will the training change the way that participants talk about (construct) their role or the culture at Apple?

This thesis concerns a new role for communication training in organizations. It attempts to answer these questions by describing a single case of embedded training at Apple Computer during a time of intense change.

CHAPTER II

METHOD

Research Perspective

Case studies allow an in-depth study of specific components in a social situation and are appropriate when individualized outcomes for participants are expected (Arneson, 1993, Patton, 1980, Stake, 1994). The "thick description" of a case study (Geertz, 1973) reveals the changing meaning in the individual employee's relationship to his/her organization. In this case, employee reaction was studied through the observation of a full training course and dialogic (loosely-scripted), in-depth interviews before and after the training took place.

In the constructionist perspective, research interviews can be viewed as relationally constructed speech acts grounded in a contextual framework, and can establish a greater understanding of the underlying issues in an organization (Mason, 1993). In keeping with this transactional model of qualitative investigation (Patton, 1980), the interview questions were designed to open a channel for discourse about the way the professional has reacted to the training, and if there was any influence on the way that he/she constructed his/her role (See Appendix D: Interview Schedules). Specifically, questions were written to elicit accounts as well as free and forced metaphors in order to explore the relationship of the participant to the organization, to draw out the reaction of the participant to the training itself and to assess the impact that the training has had in the way the participant functioned in the organization. This data helped to suggest the participants' surface level reactions, as well as their underlying responses to the training. In other words, answers to interview questions provided an explicit description of the

actual training process and reaction as well as the opportunity to interpret the implicit meanings in the language. Similarly, interviews and observations provided an opportunity to explore the gaps between the subjective perceptions of the participants and my somewhat more objective observations. Patton (1980) and Faules (1982) recommend this mix of methodology and perspective in exploring the possibilities of the data and Bantz (1993) urges researchers to remain flexible, and ultimately to let the data help guide final analysis decisions. He recommends analyzing messages for a diverse group of factors, including vocabulary, architecture, themes and temporality. In other words, additional symbolic trends must be considered as the data is gathered and analyzed (p. 112).

• Data Collection

Entry to the organization and the training program was achieved through the sponsorship of Dr. John Baird, one of the two program designers and trainers, with the knowledge and approval of the second trainer as well as the appropriate organizational management. Organizational permission (Appendix E: Letter of Agreement) was provided with the caveat of confidentiality for participants and the protection of proprietary technical information. Data was collected from a convenience sample and involved two existing project teams undergoing joint training during the six-week timeframe of this study (See Appendix F: Field Log). All participants were male and between the ages 22-40. Participants were given a general explanation of my involvement prior to the interview and training process (See Appendix G: Informed Consent). All interviews took place in the private offices of training participants (See Appendix F: Field Log). Interviews were dialogic and permitted discussion and digression as warranted in my opinion (See

Appendix D: Interview Schedules). The training itself took place on-site in various conference and training rooms. Detailed descriptions of the training program are attached as Appendix B and C: Training Program and Training Material, and as researcher I was involved in the central training process to the following extent:

1. I attended a meeting with the sponsor/trainer to become enculturated to the organizational environment and the design principles utilized in developing the training. Field notes were taken.
2. I attended a management meeting that set the context for the upcoming training, embedding it in the overall strategic goals of the company. Field notes were taken.
3. I was able to interview three of seven program participants prior to advocacy training (see Appendix D: Interview Schedules). Dialogic interviews were audio taped and transcribed. Interviews lasted 20-45 minutes.
4. I observed four weekly training sessions lasting approximately two hours each and variously involving between four and seven participants representing both teams. Field notes were taken, preserving actual quotations wherever possible.
5. I observed a "practice" organizational advocacy event on the fifth week. Field notes were taken.
6. I observed the debriefing of the advocacy event on the sixth week. Field notes were taken.
7. I interviewed six of the seven participants subsequent to the above program (see Appendix D: Interview schedules). Dialogic interviews lasting from 20-45 minutes were audio taped and transcribed.

As stated above, due to confidentiality considerations, no technical product or operational information was transcribed or used in the analysis of the data (see Appendix E: Letter of Agreement). Data consisted of transcribed excerpts displaying 1) accounts (statements, series of statements or stories of any length that related to beliefs or events about the training, role construction or culture, including answers to interview questions) and 2) metaphor use.

Data Analysis

As touched on in the literature review, accounts and metaphor were selected over other qualitative data sets (for example, stories or narratives) for their synchrony to the research questions and their potential to aid in viewing data in several ways, including reaction, learning, and behavioral and organizational impact (Friedman & Yarbrough, 1985). Ultimately, metaphor and accounts give concrete impressions of the sometimes intangible processes of communication and the resultant cultural reactions that were central to the study (Arneson, 1993; Barker, Melville & Pacanowsky, 1993). In other words, the use of accounts and metaphors provided the tools to describe and to interpret data at explicit and implicit levels.

Accounts

Accounts take the form of simple statements or elaborate stories, and aid in gaining insights to the interpretation and meaning that the participants have placed on an event or behavior (Geist & Dreyer, 1993). According to Geist and Dreyer (1993) the answers to interview questions (in part or in whole) can be constituted as accounts. A further selection of data narrowed accounts to responses that related to the training, role construction and organizational culture. These discrete accounts were particularly

interesting when juxtaposed against the accounts of other organizational members, and revealed gaps and similarities in the expectations and understanding of complex, contextual interactions (Harre & Secord, 1972; Geist & Dryer, 1993). Accounts and their juxtaposition afforded insight into how these professionals situated themselves in the organization (Geist & Dryer, 1993; Pacanowsky & O'Donnel-Trujillo, 1983). For example, if R&D professionals at Apple gave an account of how training had (or had not) changed their role, and it differed in a substantial manner from others' accounts, it would then be possible to explore why the gap in understanding had occurred. Similarities in juxtaposed accounts were significant as well, indicating a unified cultural context (Levering, 1988).

Metaphors

Metaphors, symbolic expressions of reality, were selected because they come from and shape how people think about their world (Lakoff & Johnson, 1980; Marshak, 1993; McCorkle & Mills, 1992; Morgan, 1990; Pacanowsky & O'Donnel-Trujillo, 1982). Because of this link between talk and perception, metaphor is a tool well-suited to both description and interpretation. This study was concerned with three aspects of metaphor: 1) What was the prevalent type of root metaphor used in the organization? Morgan (1990) points out that the choice of metaphor can facilitate or blind people to organizational shortcomings (p. 13). 2) Was the metaphor type common across the participants being studied? Lakoff & Johnson write of the coherence and understanding that can be fostered with the use of common metaphor (p. 235) 3) Was there a change in metaphor use across the training? Not only does metaphor indicate change, but it also indicates the way that people are thinking about the meaning of change through their communication

(Czarniawska-Joerges, 1994; Marshak, 1993). The use of metaphor in this case provided clues to organizational unity, gaps and similarities in the way the participants perceived the organization and the training.

Procedure

Although written research reporting is by necessity somewhat static, the description of change brought about through the use of accounts and the interpretation of the process through the use of metaphors helped to portray the sense of movement inherent in the embedded training process. A review of the transcripts yielded five sets of data: 1) a narrative reconstruction of the interview and training process highlighting accounts and metaphors. This data set provided a descriptive narrative that preserved a holistic sense of what the training process looked like. 2) Elicited content areas, topics and tensions. 3) Emergent content areas, topics and tensions. Both elicited and emergent content was reviewed for similarities and gaps in the participants construction of reality and in assessing the participants' reaction to the training on an explicit level. 4) Marshak's root metaphors. The transcripts were reviewed for metaphors that matched Marshak's (1993) three types of organizational metaphor (developmental, transitional and transformational.) Marshak considers these metaphors as diagnostic tools to gauge the unity of purpose in an organization. 3) Other root metaphors. The use of metaphors was generally helpful in interpreting the roles, role changes and resultant effect of the training on participants and organizational culture.

Specifically, all of the audio tapes and field notes were transcribed (omitting approximately 10% as sensitive technical and proprietary information) and checked, and then read for meaning. Once a sense of the whole was achieved, data were highlighted in a variety of colors to indicate

the data sets delineated above (accounts in yellow, metaphors in pink, Marshak's metaphors overmarked in orange, other root metaphors overmarked in blue.) Of the 138 pages of data, approximately 50% were marked as having a relationship to one of the research questions. The next step was to sort the metaphors falling outside of Marshak's categories into distinct categories of their own. The metaphors clustered around what I have called separationism (the sense of being apart from the organization), personification (technology as a living thing) and adversity (roadblocks to organizational success.) Root metaphors were considered a cluster only when used in some form by at least five respondents out of nine interviews (55.5%). Accounts, (statements or stories of any length having the training, roles or organizational culture as a subject) were sorted next. Shorthand versions of accounts were listed in seven columns, one for each individual respondent. The accounts were studied for similarities and tensions across responses and even within columns. Similar or contrasting interpretations of events or experiences were noted and highlighted (in yellow and pink respectively) and then resorted into distinct content areas, including organizational culture, research and development, training and organizational politics. The content areas were checked against the interview schedules to determine if they were elicited or emergent. Finally, the tensions in accounts and metaphors were reviewed temporally in the context of the transcript, to see if there had been a change during the training process.

The development of these particular sets of data facilitated a presentation of a narrative reconstruction of the training and an interpretation in the context of the research questions driving the study. In this way the need to preserve the process of embedded training was preserved,

and an opportunity to analyze the potential reconstruction of role and culture was provided.

CHAPTER III

RESULTS

In order to accurately preserve and describe the process involved in embedded training at Apple, my results are first presented as reconstructed narrative. They begin with my first impressions of the organization's physical environment. Interview results follow, with a detailed account of participants' training and post-training reflections. I then review interview data for prevailing content areas, topics, tensions and metaphors. Finally, I summarize the data in the context of the research questions. In this manner the descriptive and interpretive aspects of the research questions can be addressed.

The Training Environment

Based on my 15 years of experience in company lobbies, I have come to believe that the first metaphor that one encounters in any organization is physical; this held true for Apple Computer. The organization's commitment to innovation and creativity was first evident in the architectural features of the lobby. Color and texture abounded, with striped chairs in shades of purple, green and tan set in a lofty atrium of glass and stone. I was reminded of the competitive nature of the business by the security encountered at a check-in station situated in front of locking security doors. Endless streams of people entered and left the area. Attire was casual, formal, local and international. So were the languages spoken. Through the glass walls separating the lobby from the authorized personnel area the organization's commitment to its casual culture was evident, with a cafe and lounge area hosting what appeared to be several animated meetings. People were leaning forward and motioning emphatically. Energy appeared to be high.

As the first participant escorted me into the secure area of the organization (see Appendix F: Field Log), I noted the colors becoming more vivid. Upstairs in the office areas, purple, orange, red and blue surrounded me. A veritable riot of colors accented the working environs of the organization, as diverse as the directions of the groups in the lab I was visiting. As I traveled through the building the feeling of casual, creative energy intensified. Frequently encountered working lounges typically had wall size dry-mark boards, often with scribbled remnants of technical work still evident. Remnants of late nights remained too, with empty pizza boxes, coffee cups and fast food containers strewn around even in the early morning hours. Some of the modular working areas had refreshment centers built in; others had wall size video screens. One free standing refreshment center featured a well-used cappuccino machine. *Dilbert*, a cynical high technology comic describing the foibles of tech (and tech management in particular), ruled the windows of offices. Photos, banners, flowers and balloons--all the daily earmarks of personal relationships and friendships earned in an organization--were sprinkled throughout the facility.

The first round of interviews with training participants was conducted in May (see Appendix F: Field Log) in the private offices of respondents. In each case I noticed that the office doors had been locked during the respondent's trip down the stairs to retrieve me from the lobby and escort me into the secure areas of the company. The locked doors, even within an already secure area, provided a testament to the strong sense of privacy and even secrecy prevalent in this group's work. It also reminded me of the limits and responsibilities I had regarding the amount and type of data appropriate for use in this description.

Pre-training Expectations and Attitudes

A learning organization embraces and even necessitates a culture of change. Respondents at Apple painted a vivid picture of a changing organization and industry, conveyed their mixed reactions to their changing roles and evolving organizational culture, and voiced their general skepticism of training as part of the change process.

While descriptors such as "wonderful," "relaxed," "casual" and "fun" were initially provided in talk about the culture at Apple, these positive comments were consistently balanced with the caveat of change. For example:

I think [Apple is] wonderful. There are exciting things going on. I think there are wonderful people working on it. It's a great community and we have an opportunity to make a difference in the lives of many people.

was balanced with

It's a lot less wonderful than it was a few years ago. . . . [The administration] of the company seem to switch direction every five minutes.

When asked about the nature of change at the organization, there was additional consensus regarding how roles were affected by the rapid change within the computer industry:

From what they tell me, from what other people here tell me, it hasn't always been like this. They were like, more focused toward sort of pushing the envelope, looking at things that are off, you know, in the future.

We're supposed to be thinking longer term. And I think we haven't been allowed to in the last couple of years as much as we like. On the other hand there's a benefit of that which is that I think we have more influence [in the new model].

[We] develop products and stuff. The next products. A year or two out. That's changed dramatically from when I first started.

The constant organizational changes described by participants called for a corresponding role change:

There's a lot more scrutiny over whether you're doing the right thing.

It's sort of new where we're part of the development process.

I spent 6-9 months looking to figure [my role] out.

We used to have ideas, then it gradually graduated into a demo that crystallized the idea and now they need a shrink-wrapped product.

While these responses demonstrated change, they also provided me with the first indication of tensions existing in the organization. Chief among them seemed to be the tensions between an organizational charter calling for long-range vision and the short-term practicality called for in the industry: the intellectual pursuit of pure research and the need to perform the role of active advocate in the organization. The ambivalence demonstrated by participants regarding change also spoke of tensions between Research & Development's function as an organization's central change agent, a role in which change is embraced, and participants' hesitancy in accepting change initiated by others.

The organizational environment was often described in political terms by participants:

Sometimes it's tough. You have to deal with all these people and their personalities and you just sort of have to stay level. I try basically not to lean too much to any side so I can effectively communicate with people.

I mean maybe I'm just not used to seeing all the office politics going on.

There's also a lot of spin control done by people in the middle.

The managers were lobbying as to where they'd end up. I think [our relationship with other groups] is a political issue. The solution to this problem lies almost completely in the political communication realm.

The word *politic* can be defined as either "judicious" or "cunning," with deeply differing connotations. In my interpretation words like "spin control" and "lobbying" have come to signify the negative aspects of politics, with crafty spin doctors and special interest lobbies representing the darker, often unseen machinations of the political industry. But references to office politics and political communication are much more neutral, and may simply refer to the selection of judicious action within the organizational structure. Tension is implicit in the widely differing manner that the content area was presented by individual participants.

Advocacy, the training topic, was discussed by participants as a point of convergence for change and politics:

I tend to be very quiet, some would say shy, and that's something that doesn't match well with going into a big meeting and telling everybody that they should look at me and do as I say.

He [the manager] believes that the people who work for him are working on some great things and nobody knows about it. So, I think his goal is to improve our skill at telling the world what the stuff we do is.

Our job is to go and inform them of what we're doing and inform them of the new technologies that are available and try to work together with them.

There are some things we've been very, very successful at in terms of technology and the product. But there are some questions in terms of interacting with other parts of the company. On an interpersonal level we have some significant challenges.

You know, various engineers in [division] have been using our product but the management chain between us and them is relatively unaware. And I think that often we're, I think that people just don't know that this is going on. That's a mistake and a problem and we needed to be in front of people all along and gathering excitement.

Indeed, advocacy as role change, tempered with the hope for "positive politics" (Block, 1987), is at the root of the training (See Appendix B: Training Design). But in spite of organizational members' awareness of the changing

needs of the organization, a certain reluctance to take part in the advocacy training was evident, providing yet another organizational tension. Part of the hesitancy in adopting advocacy behaviors was expressed in the organizational metaphor commonly used by technical professionals describing advocacy as evangelism:

The other part [of the job] that I haven't exactly conquered yet, but I'm building up to is the evangelizing. You know, I have to go around to people who don't know about our work and say, 'look this is what we're doing and this is what it could do for you'.

I guess we intend to do some evangelizing, and getting practice is always valuable.

It looks like we're going to have to do our own evangelizing.

Evangelism can imply a zealous, if not militant style of advocacy, and did not appeal to these self-described "thinkers," who thought of themselves as "quiet" and even "shy." However the reluctance was deeper than their revulsion to advocacy behaviors. There was a general dismissal of the benefits of training:

I'm very pessimistic about [the training] at this point because we've had no contact with the other group. . . . I sort of had this vision of them being really bored and all of us wondering why we're there.

So we're probably paying a lot of money for this training and if what it turns out to be is, um, an opportunity to practice well, then we probably could have just sat down and said we're going to do a trial run to [our manager] and get his feedback.

The only problem about the advocacy training for the group and myself is that we are only a small fraction of our overall effort and that higher level people also need to be a part of this training, in order for it to be effective.

It seems like a significant time commitment, and I hope that it does leave people with a set of skills that address some of these [advocacy] areas.

It's sort of like, I really haven't heard much about it. I'm sort of lost as to what this is all about. My manager is sort of like, 'Here, we have to do this'. I'm kind of like, 'OK, if we have to do it.'

It's something that I sort of have to go to.

Once again there appears to be an undercurrent of tension between the participants' consensus that advocacy skills were needed and would further their work with their reluctance at actually learning the necessary skills.

The skepticism of training participants could also be traced to historical experiences with traditional training:

We had a series of four classes which was supposed to be sort of general training, before we got into specific things, and they created sort of a negative aura. Most of them began with some kind of personality inventory which seemed to be not relative to our work and the jobs we do. The things that were most valuable in there was the role playing and when someone brought in a real situation. That was very enlightening, but that was twenty minutes out of a four hour session.

Well, I had trouble with the courses before this, justifying them. I felt like I had other things to do that day and they had greater priority. I didn't go to many of them. I left after the first one. I found myself sitting in this room and all I was thinking about was what I wanted to be doing--not paying attention to what was going on and not being drawn into it at all.

You get someone's conception of an area and then maybe you can draw something from that. But for the most part, it didn't do it.

Reaction has been almost totally negative about [the traditional training].

Trainers Lois Pryor of Pryor Communications and John Baird of ExecutivEdge were aware of this largely negative reaction. They saw the reaction as stemming from a general resistance by higher level technical professionals to being told what to do. This had implications in the design of the training. While similar embedded training could potentially have greater structure, this training was designed as an organized facilitation that allowed participants to explore their own organizational challenges and find their own learning, as opposed to providing pre-designated templates or rote answers for the unique business situations being addressed.

The obvious reluctance of the participants and the trainers' decision to act as facilitators led to yet another tension in the training group. Though complaints regarding traditional classroom models were at the forefront of comments regarding training, the expectations set up by these traditional experiences led participants to expect and even hope for the trainers "giving" them something. In other words, they waited for some external provision of knowledge that would serve to improve their situation:

I would certainly like it if [improved skill] happened to our group.

We could be improved.

I hope that it does leave people with a set of skills.

Embedded Training

I've already referred to a general map of the training, provided in Appendix B. In summary, it involved the selection and guided approach to an advocacy challenge that was currently being faced by training participants. In other words, it was real-time. Real-time refers to the fact that it did not address hypothetical scenarios. Instead it centered on an organizational situation that was actively being experienced by participants. This called for the immediate application of new problem solving and communication behaviors. Trainers Baird and Pryor, therefore, designed the training to focus not on classroom models for problem solving, but on a process which, when embedded in this organizational challenge, allowed participants to apply new problem-solving knowledge and skills for real-time solutions. These skills were not given as formulas, but instead were generated by and from participants, contextualized in situations based on input from management.

Critical to the process then, and a necessary first step in embedding training, was management support and involvement--a condition labeled by

the trainers as "management as accomplice." In this case, interviews conducted with management by the trainers revealed a series of ongoing concerns, chief among them the need for employees to advocate their technologies throughout the organization. Secondary goals included the building of project teams. It was determined by trainers that team building would be a side benefit of an advocacy training program requiring group brainstorming and consensus, thus building a second-level goal into the primary training focus. Further refinement of management's goals was enabled by the deduction of organizational issues following a 1994 pilot program (See Appendix A: Summary of Trainer Observations).

Executing Embedded Training

Session one.

The first of five training sessions was kicked off by a male executive in his late thirties who managed both of the project teams undergoing the training. He was late, and much fidgeting took place, with little small talk between the seven participants (all male) or the two trainers. It was somewhat telling that participants brought along other work in some cases and kept busy with this. Upon arriving, the manager began with no preamble. He reviewed issues that he perceived as being important to each group, and asked participants to think about the impact of their respective technologies on the organization's business. He encouraged them to utilize the training to go outside of their own group for resources and relationship- and alliance-building in order to advocate their technology paths. After becoming very specific with each team, the manager reminded both groups that it was easy for others to become lost in technological jargon, and that learning to advocate technology more effectively would benefit them and the organization

by ensuring that organizational decisions regarding technology paths were being made by the right people for the right reasons.

As the floor opened for discussion, there was agreement and even excitement:

It comes down to what do we want Apple to say to the world, and what do we want to say to Apple?

It's about creating excitement and momentum.

Otherwise you [and your technology] can go right down a rathole.

We need to balance technology with public relations

There is a path. . .there is a way to get there from here.

Well, we have to sell the story. . . .We're working on a vision here.

The participants clearly understood the relationship between their communicative behavior and the culture of the company:

Our accomplishments might be significant, but not attached to a larger vision. The way that we talk helps to set a direction to change the culture of the company.

They also understood that they were considered by other departments as detached and that they lacked an understanding of how to effectively communicate their ideas to others in the organization:

It's a very different world out there.

We need to understand the world from others' points of view.

We need to step back and ask, Why invest resources? What's the value?

We're so deeply entrenched.

The trainers stepped in to facilitate the first step in effective advocacy by asking each of the two project groups undergoing the training to identify the program that they most needed to advocate, and to set realistic goals for the advocacy of that program. In other words, the communication training began

by embedding the process into a problem that was real and pressing to the participants; by becoming real-time and critical to the success of participants' current, ongoing organizational goals. A series of worksheets was provided in order to help the teams organize their thoughts (See Appendix C: Training Materials). The last task of session one was that participants spend time thinking about their team's message and attempt to express it in fifty words or fewer. According to the trainers this has in the past been a difficult but enlightening exercise in defining directions for teams. In this case though, consensus among participants in each group was reached fairly quickly. The first session was over.

Session two.

A mix-up in room scheduling lent confusion to session two, as did the necessity for some participants to leave early due to overseas visitors. Once settled, however, excitement was evident in the group at the prospect of presenting the advocacy training results to a very senior organizational member. Exclaimed one participant, "That makes this real."

This session was kicked off with a task assigning participants to identify who might be their top audiences for the message they had developed in the previous session. "I guess you *would* use different messages for each group," observed one participant, as assenting murmurs echoed around the table. It was at this point, entering the fourth hour of training, that theory was introduced for the first time. Although the training design minimized formalized training, the low key manner of the trainers helped to overcome straying attention.

I liked their style. I mean we'd be going along, seemingly off the cuff. And I would realize it wasn't that casual. It was planned. Twenty minutes in, I would finally realize that it was a lecture!

This was echoed by other participants who were appreciative of the facilitative style employed by the trainers. That style was important in keeping these analytical problem-solvers engaged.

Active tasking was again called for as the teams were asked to rank their potential audiences and strategize messages to each. Now the struggle centered around translating what these technical professionals knew to be important to the organization's future into lay language. They found themselves thinking, perhaps for the first time, how well they would be understood, and how others would receive what they were saying:

The people at [that division] and the people at [our division] just think differently.

Remember, we're outsiders. . . .if we were in their fold

The strategy is to sell him the big picture. How is this technology important to Apple?

In a discussion that centered around the development of strategy, teams shared their lists and concerns with each other. The trainers added a caveat that practical considerations also needed to be made in presentation planning. For example, who would present first? Would they run through their presentations to management using the same message as they would for the senior organizational member? Would they use graphics or demos of any kind? Then, in preparation for session three, they role-played a presentation geared towards their second priority audience. It was then that the use of two interacting teams really proved valuable, as the "audience" team grilled presenters about the status, relative importance, "bugs" and personnel issues

related to their proposals. The clarity achieved through a second group's objectivity seemed valuable.

After role play, the audience group was asked by trainers to define what they thought the presenting group's central message was. The presenting group then read their actual message, worked out in the previous session. Gaps in meaning were noted and discussed. Then the entire process was reversed and groups switched presenter and audience roles.

After both groups went through this process, videotape was used to analyze the presentations. The trainers facilitated the learning in this exercise by asking the teams to identify what they did well and what areas could benefit from improvement. The critique included comments on posture, defensiveness, clarity and style. It also opened discussions about using language to build alliances and strategies to cope with difficult audiences. As the end of the session drew near, the trainers reviewed concepts like presell, visual contact, vocal variety and language.

The group was interested, but struggled in the discussion, as they lacked the vocabulary to discuss the presentation on a meta level. This created a need for more trainer intervention in this session than in the previous meeting.

The session concluded with the trainers requesting that a brainstorming session be held independently by each group to work out the details of the next, primary audience, presentation.

Session three.

So, what did you advocate since the last session?

This question, posed by one of the trainers, was initially met by a surprised silence, followed by:

Nothing.

Absolutely nothing.

Well, that's not really true. You [to other team member] did a dandy demo.

If that's advocacy, then everything we do is advocacy.

Thus started the process of changing the way that the teams thought and talked about advocacy. Suddenly, participants began throwing out comments about memos, voice-mails, meetings and casual conversations that they had relating to their goals in the organization.

It should be noted that one group had difficulties in making the training session, and that for the third week in a row had only partial participation. This session they were represented by a single member of the team for a majority of the time. He arrived late. While this freedom is consistent with Apple's culture of autonomy for their technical professionals, it was disruptive to the training, and was later the focus of comments by both groups.

Once the number of participants who would be in attendance was confirmed, the groups began to prepare for their dress rehearsal (session four) by working through a group of questions (See Appendix C: Training Materials) meant to focus their efforts. Discussion revolved around the nature of the expected audience, team goals and compromise positions (minimum settling point), key points, anticipated reactions and support requirements. Additionally, presentation logistics were now discussed. Encouraging brevity, one team member related the story of the senior manager (primary audience for both groups) at a similar presentation:

There's a story of [the senior manager] being at a similar presentation. They go on and on and give him all these great details. Lots of

information. And he's kinda looking out the window. At the end of the presentation there's kind of a long silence. Everyone waits, thinking he's pondering the presentation. Then he says "Boy, there's a lot of squirrels out there."

Brevity agreed upon, the team moved on to talk of tone, question and answer sessions and the manner in which organizational goals would be best met with their technology path. The group was working hard, and thinking about their technology from a much different perspective than they had three weeks before. New vocabulary was being routinely used by the participants as they discussed the needs and reactions of their audience, including terms like supporters, resisters, fence-sitters, objections, persuasion, influence and alliance. Interestingly, participants also discussed giving senior management a way to discuss the technology after the session.

Session four.

This session was the dress rehearsal for the advocacy issue the groups had been discussing. An air of excitement prevailed, as I arrived early and found the first group of presenters already in place, testing their equipment. The room was larger than the conference rooms used in the past, with a U-shaped series of tables centered around a large wall mounted screen and ceiling mounted projection unit. The group presenting first was speaking softly and quickly in proximity to each other, with alert postures and a new intensity. The second group, once again, had only partial attendance, and the trainers were informed that they were busy completing their slides for their presentation.

The first hour passed with the teams discussing their selected strategies. Now, advocacy language had become routine. During their discussion, their manager swept into the room. He made a joking comment, and then took a seat,

relaxing back into his chair. But once the presentations began, the manager proved to be a tough, critical audience. Pretending to be the senior manager, he shot questions and comments at the first presenting team in rapid fire. But ultimately, his chief criticism was that they had sold themselves and the impact of their technology short:

It's worth reminding [the senior manager] that a whole industry can be built on this. Your presentation seems narrow. This is a big opportunity.

This is a good presentation. Fire him up. I suspect that you've been too modest.

Your presentation is nuts and bolts rather than visionary. Come back to [the vision] at the end.

More talk followed, with an air of excitement, relief and satisfaction on the part of the first group.

The next group presented, initially with similar reaction from the manager. But as the presentation proceeded, the situation deteriorated for this group, which had such difficulty in attending earlier training sessions. The manager could not understand what they "wanted," and the group became defensive under his criticism:

["Raspberry" sound and a thumbs down from the manager] This is the wrong place to start. You're a bunch of technonerds who want to get their stuff out. [The senior manager] doesn't care about this stuff. . . . That's way below the level that he's working at.

And later:

Maybe you didn't hear me.

The manager questioned their judgments regarding audience concerns and even their audience selection. He felt that they didn't consider

organizational goals in their presentation. He wondered why there was no demo. The presentation crawled forward. Here is a sample of his final comments:

These facts are motherhood and apple pie, but it's shocking how little money would actually be brought in. Market segmentation, market size, business opps, can't you come up with some hard numbers to quantify those? Once you've sold him on [the business opportunity] you can address the details.

Participants from both teams were grim. The risks of embedded training are becoming a reality, and the debriefing planned for the following session will be critical to fine-tuning presentations prior to an appointment with the senior manager.

Session five.

This was a small room, much more intimate than the presentation room of last week's session. Participants crowded around a screen to view and discuss videotapes of the practice presentation. As Pryor and Baird moved the first team into a discussion of their strengths and weaknesses, sirens began to wail and a light began flashing. All Apple buildings in the area were evacuated. There had been a bomb scare.

Reviewing Embedded Training

A rescheduling for the group debriefing was attempted several times, as was individual appointment time with the key presenters of each group. Unfortunately, the moment was lost, and the training was to remain incomplete. Although the last session was interrupted, five weeks of training observation led to the following impressions about embedded training:

1. Even if the purpose of the training is general, such as advocacy training, participants can define the specific area they would

like to work on. By selecting a pressing, real-time problem, and proposing potential audiences to work on, each group made the situation "real."

2. The importance of the specific problem to the group will determine their level of engagement. The group that was fully engaged, prepared and involved had selected a more pressing advocacy problem.
3. The level of engagement, in this case, has an effect on the outcome of the training. The fully engaged group had great success. The group that had spotty attendance, a lower advocacy priority and other pressing business had a much more negative outcome. This may be due to the process nature of the training, where "bits and pieces" cannot provide learning.
4. The adoption of an appropriate vocabulary and a process orientation worked together to help participants reconstruct what advocacy, and their roles as advocates, were. As participants learned to think about advocacy in a different way, they redefined many of the formal and casual relationships they had within the organization.
5. Embedded training can take place at differing levels. The goal of increasing advocacy in turn embedded a need for teams to act in concert, and thus acted as a team-building exercise.
6. Embedded training has its risks. When problems are real so are consequences.

7. Because embedded training takes place within real organizational situations, it is fluid and self-correcting. In other words, the training is part of the change and change is part of the training.

The Language of Training

In addition to my general impressions about embedded training, a later review of the language choices made by participants led to additional observations. All three of Marshak's (1993) categories of organizational metaphors are evident in the naturally occurring language used in the training situation. Developmental (building) metaphors coexisted and mixed with transitional (moving) and transformational (rebirth) metaphors.

Developmental metaphors are evident in the way that managers and participants talk about change, both organizational and personal. They are building towards a vision, building credibility and building alliances:

It's important to build understanding across many different levels

Industries can be built on this technology

Next you'll start the process of building

Transitional metaphors described the paths, trajectories and steps that their vision required:

We must promote a different technology path.

Finding new directions

Career trajectories

Do we have [to make] a discontinuous step?

There is a path we can take to transition. There is a way to get there from here.

Interestingly, transformational metaphors were less prevalent, even though the participants' mission was to create new opportunities for the respective groups through advocating the birth of new technologies.

to create a culture where decisions are made in the right places.

create excitement and momentum.

While the mixed root metaphors evident in the training and interviews seem to fulfill expectations of a fragmented, changing culture, they do not exclude a common understanding of the culture as postulated by Marshak (1993), since many of the metaphors, albeit mixed, were used similarly across participants. Instead, a strong cultural identity could be found in the discourse emerging during the training in three additional types of root metaphors culled from the data: separationism, personification and adversity.

By separationism, I refer to this group separating themselves from the organization at large. For example:

It's a very different world out [in the organization].

We need to understand the world from [the organizations'] point of view.

Remember, we're outsiders.

The group's manager acknowledged this way participants had of constructing their relationship with the company when he listed linking themselves to the rest of the world as a priority (See Appendix A: Summary of Trainer Observations).

Personification becomes important as a metaphor because it marks the way that participants think about their work and the place that technology holds in their organizational lives:

What we're about to do is to let the technology speak for itself.

We need to think of [the technology] as an organic thing.

That technology is barely alive, and it will need support.

We have to find a way in for the technology.

We're willing to devote a person to it until [the technology] gets all settled in.

And as this group of self-proclaimed "organizational oddballs" tend to their technology, they acknowledge the adversity they expected to face in the organization with the language that they used:

We're struggling against ten years of user experience.

That's like sticking a square programmer into a round hole.

Failure, of course, means death.

I tried to break you. . . .glad you were on my side going in for the kill.
jump into the fray.

The adversarial "us against them" talk exhibited by this group is not an anomaly. One can find it across many departments and levels in many organizations. It does suggest, however, that we should heed Morgan's (1990) advice to be open to the unexpected in the way that we examine and categorize metaphors for diagnostic purposes. For example, perhaps mixed metaphor (as described by Marshak, 1993) is not always indicative of a lack of understanding and unity, particularly if the groups generally use their metaphors in a like manner, as training participants have in this case. In other words, the groups have used language ranging across several root types in description of their roles and the organizational culture, but there was no sense of participants being at odds with each other because they used the different metaphors in a similar manner.

The types of naturally occurring metaphors can reveal much about the way organizational members think about change (Czarniawska-Joerges, 1994;

Marshak, 1993). In this case, the prevalent use of separationism, the central place of personified technology and the references to adversity or violence described vividly the way that participants viewed themselves and their work within a picture of organizational flux. They appeared to band together in the midst of a fragmented culture focusing on the birth and nurture of new technologies that they believed would not be readily understood or accepted.

Reaction and Reflection

Though reaction to the training varied, disappointment with the abrupt ending and lack of closure was universal among participants. In fact, thirty days after the training had been completed, the bomb scare that forced the abandonment of the debrief remained the most vivid memory reported by participants.

The last session of embedded training was designed to be an important one, and its omission affected the outcome and reaction of the training to a large extent. In this last session the trainers were to have reviewed videotape with the group, using the participants' experience (the presentation to their manager) to strategize future business applications (the presentation with the senior manager). It was also an opportunity for trainers to review and generalize the process to help participants in capturing and applying the learning to other situations.

It is not surprising, then, that feedback was mixed. The areas most often touched upon in post-training interviews included the unique nature of the training and its embeddedness in their work, the value (or lack of value) that they perceived and various aspects of the training process.

Regardless of their final opinions on the training, the embedded nature of the training was commented upon positively by nearly all of the

participants, including one participant who felt that the nature of the training forced an improvement in the overall productivity of the team:

I didn't expect it to be as interesting as it was. I was amazed at how it brought out the incomplete thinking in the group. . . .identified the unclear thinking of me and my colleagues. You know, we would meet before the training to discuss our specific message or audience and we would find out that we had no specifics. People would get depressed. The [training] forced us to address specifics. I mean, we all assumed we knew [the direction we were going in] but we didn't. It was absolutely striking.

Generally, participants were relieved to find that they would be able to focus on a situation that was relevant:

I liked the idea that we could pick a real problem, a real advocacy issue that we had. . . .We would talk it over and pick one and work on it. And I think that's a great way to do something like this.

I think it's good to bring in a real situation. I mean, the worst thing is when they do these hypotheticals that bear no relationship to your jobs. And we see that all the time. I mean, some of these classes, they seem to be focused on. . .the whole approach seems based on the notion that everyone who's taking it must be a sales person, and their goal is to maximize sales. And then you do all these exercises, that sort of have the goal of making money, I mean I'm only exaggerating slightly. The assumption is that's the kind of work you do, and its only measured by the volume of output. Um, research just isn't like that. So I was glad to see it actually tailored towards our concerns.

Others commented that they had a hard time evaluating the training because of the focus on their work issues. This in itself serves as testimony to the success that the training program had in embedding itself into the work:

[Finding out that it was a real-life situation] made us focus more on the problem instead of the workshop.

It's hard for me to evaluate the training objectively, because I was never thinking about it objectively, but rather subjectively in terms of the problem we had.

It is evident from interviews that the lack of formal structure was effective in immersing participants in the program. But old habits die hard, and there was a tension evident between their approval of the nature of this

training and the traditional structure that the participants were accustomed to:

I can do without the standardized test and so on [participant is referring to intelligence and aptitude testing frequently administered prior to traditional training models]. I think the sort of thing where people are sharing their experiences and giving each other advice is very helpful. So, perhaps this started out a little too unstructured, I know that they would pass out those sheets, and sometimes it was supposed to be homework and sometimes it was things we were supposed to write down, and the instructions were sometimes very vague, and perhaps if the sessions where we were together had been a little more structured or maybe coordinated a little better, that would have helped.

I guess we were trying to apply [the training] to our specific problems, but, um, I guess I could have used more structure.

Final presentation plans were waylaid by a massive reorganization at Apple, one which is continuing through the writing of this study. But in spite of the changing situation, most participants still saw value in the training and its key points:

It helped us to position our message and develop goals for it. To plot the social and management landscape and then to chart a path through people instead of technology. To prepare ourselves for objections and build support. That was my favorite part, the interpersonal stuff. I guess it's plotting and strategizing how to get commitments from people, but in a positive way. In engineering school it's different. You learn that politics are bad, and technology is good. But this was the good side of politics. I think that [the training] will be a new feature set for the group. They'll be able to leverage it in with the technical skills they have to make themselves more effective.

We were concentrating on getting the technology down and getting it delivered, and we weren't really thinking about how important it was that other people know this is happening. We were working on a project that I cared about. In doing so, we got to learn about a process. The most valuable? I think it was just having someone say this should be a priority and we will help you and we will pay attention...giving us a structure and a system to go through this process and um, otherwise we were caught up in so many other things that I don't think we would have done it or spent so much time on it or been so organized about it. I'm trying to think of where we would be if we hadn't done this Project Advocacy. We may have come to the same [technical] elevation, but we wouldn't have spent as much time dealing with or having as good understanding of why we were having [organizational] problems and what to do about them.

Other participants saw the value of the program as being limited, or at least untested:

When it came time to do the actual presentation, everyone thought that was a useful exercise. I mean we got our stuff together and we put our demos together. I mean totally independent of whether that improved our advocacy from some external point of view, it was just, I mean, never mind even the practicing aspect, the fact that we got our demos together was a useful thing. So the fact that that process caused us to do something that we probably should have done anyway was valuable, and I think everyone would probably agree it was valuable.

It's hard to know what you learned. We'll see that next time we go to do our presentation.

It was a waste of time.

Given the analytical nature of the participants, it is not surprising that many had recommendations to offer regarding the training, even when they considered it positive or valuable. Topically, critical input clustered around the selection of training "partners," the absence of closure in this particular group, the amount of structure and style of the training and the amount of time required by the program.

The interaction between the two project teams participating in the training was commented on both positively and negatively by both sides.

Comments such as:

Learning about the other group and their experiences, that was interesting. It gave us some analogies to work with, and gave us some verification that the things we were working on were real. When they heard about the issues we had they would tell us what they thought, so that was a useful sort of peer thing, I liked that. I learned a lot about, I mean they're ahead of us in a similar process, getting their technology out. So that was useful.

[There was value in] the other people who were there. Just discussing what was going on., issues that we were having, the stuff they wanted to do this for. That was more valuable than being told how to do this stuff. It was not only interesting but it helped us understand what they were doing better.

Were consistently balanced with comments like:

I can imagine groups that would have been much more effective. We didn't get to pick the group. I mean, this is almost the last group I would have chose [sic]. Again, I think they're nice people, it's just that the overlap of technology and common interest is so low.

I felt that the other group's participation was almost nothing, and that despite what they said at one point, um, they really weren't interested in being there ever. And that, I thought, put a damper on the whole experience. It made it seem like we were imposing on them, you know? I don't know why I should feel guilty; they made it clear that they would rather be doing something else most of the time.

I would have liked them to come.

There was a consensus that the bomb scare and rescheduling problems that eliminated the last training session had a damaging effect:

We put all this effort into the presentation and never got to follow it up. I'm frustrated because I don't think we ever got the closure, and now I feel like a lot of that is just lost. It would have been nice to have some recap. I mean we never even got to do that, not just end with going over the video and the debriefing, but putting this all back together in the context of advocacy and thinking about what your motivations are and the person you're trying to influence, and so on.

Too many things went wrong for us to really get full benefit from the training.

The debrief may have been difficult for the trainers to reschedule because of what some of the participants described as the excessive amount of time that they had already put into the program:

The whole thing was dragged out over much longer than it was supposed to.

It could be condensed, that's for sure.

Training and Change

Learning organizations are, by design, constantly changing. By definition then, so are the roles and cultures constructed in those environments. Change becomes a constant. Between the time of the last

training session in late July and the post-training interviews in August, the first of several major reorganizations took place in the company, shifting the focus of these busy professionals away from the advocacy training as the latest or most invasive force for change. It does not come as a surprise, then, that the new role requirements facilitated by the advocacy training did not impress participants as having a deep or lasting effect on the culture at Apple. In fact, one respondent predicted that the training and even the reorganization would probably just lead to "more of the same."

This participant may not have foreseen the drastic changes that would begin occurring at Apple in early 1996. Record losses, even when set against high sales, generated a failure of confidence in the strategy and leadership at Apple. Daily newspaper reports followed the rumors of buyouts. Apple fought to stem "brain-drain" as technical professionals were wooed away from the organization in the face of drastic R&D cuts (O'Conner, 1996). In a classic model of change in the face of catastrophe (Hennecke, 1991), CEO Michael Spindler was replaced by Gilbert Amelio, an executive experienced in engineering cultural transformation in organizations (Gomes & Langberg, 1996).

Change in an organization, even when lacking the drama and scope described by Hennecke (1991) and experienced by Apple, is often the sum of many factors, and the participants in this training program were cooperative in describing how they have seen the organization evolve. There was little tension in the early descriptions of Apple's culture. It is recalled as an ivory tower, where researchers were free to explore their mind's eye in a relaxed and casual atmosphere. In stark contrast Apple in late 1995 was described as busy, fragmented, decentralized and feisty. Elicited metaphor (at least those

that were provided over the protests of participants who found them too "single-dimensional," "simplistic" or "less than provocative") ranged from an "octopus with many arms" to "hydra," the many-headed monster of mythology. Although these types of chaotic descriptions were prevalent, other descriptions concerned an equally disturbing but organized chaos with terms like "Mafia" or "dysfunctional family." Clearly, the environment had already shifted in pace and character to meet the demands of a competitive industry, and would continue to shift ever-more drastically in the near future.

The advocacy training, while not a great force for change in itself, will through its embedded nature help to equip participants to thrive in the new environment. In other words, changing companies require the adaptation of their organizational members in order to facilitate personal and organizational success. Quickly changing organizations may require quick changes by organizational members, even within the time span of a given training program. This ability of embedded training to react immediately to the changes in a real organizational situation may be its greatest strength.

Research Questions

As discussed in the development of the research questions (see p. 19) the goals of this study required both a description of the process and also an interpretation of the talk of the training. In other words, this study sought to establish not only what embedded training "looked like," but also to explore what may be significant to those studying organizational communication. This case study provided a detailed description of the real-time, embedded training process for professional level employees in a learning organization. The data also yielded the following answers to the research questions:

RQ1: How do theoretical guidelines for formal training in learning organizations translate to applied training at apple Computer?

While training guidelines for learning organizations have generally been vague, this case study yielded a detailed chronological description that stressed the following practical caveats to existing theoretical guidelines:

1. Training in learning organizations must pertain to specific, real-time and pressing issues that will be compelling to busy professionals. Compelling issues will ensure a higher level of engagement and more positive outcomes from professionals.
2. Structure, even in facilitated, embedded training, is important. It helps to generate an understanding and adoption of the processes utilized.
3. The goals in real-time training can have multiple levels, but must have a singular focus.
4. Vocabulary changes and the talk about the training subject can sign-post general behavioral changes in process. Other forms of evaluation will be difficult at best.
5. The potential risks and rewards of real-time embedded training are much higher than traditional training, largely due to the central place of the training in the real business and outcomes of the organization.

As illustrated in Figure 3.1, I conceptualize embedded advocacy training as being at the center of a business situation, in this case, the need for R&D professionals to actively advocate their technologies. The figure indicates that advocacy training could potentially generalize to new communicative

practices by participants. For example, the exercise that participants underwent to identify and clarify their team's mission could generalize to the conscious development of messages in many diverse situations. The understanding and development of strategy for one specific audience and the subsequent role play could generalize to a careful audience and benefit analysis as part of their communication behavior in the organization. The single advocacy event that they attended could become a model for strategic advocacy processes. The model is presented as circular because the solutions would ideally become a constant, integrated behavior resting on the foundation of the training.

Figure 3.1: Researcher's conceptualization of embedded advocacy training at Apple

RQ2: Were there distinctive content areas, topics or tensions in the accounts and metaphors that emerged during the course of the training or interview process?

Upon the analysis of the interview and field note transcripts, content areas, topics and tensions were evident in the expectations, processes and reactions to the training. Content areas are general categories of participant discourse. Topics are sub-categories; specific types of answers within a content area. Tensions occurred when topics were juxtaposed and gaps were found in the beliefs or perceptions across respondents, or in one case, across time. The content areas, topics and tensions in this case may be helpful in further understanding the challenges of real-time training, and were of two types: content areas and tensions that were elicited by the researcher through the interview process (See Appendix D: Interview Schedules), and content areas and tensions that emerged independent of the questions.

Elicited Content Areas, Topics and Tensions

Elicited content areas, topics and tensions were those that became evident in response to questions on the interview schedules (See Appendix D: Interview Schedules). For example, in the content area "training," all comments about the structure of the training would be considered a topic, and a tension would occur when there was contradictory statements about the structure made by the same or other respondents. Even though the interview schedule did not directly question the respondent about structure, it did ask for a comparison of this training with other, more traditional training. Thus, the response was elicited.

Elicited content areas, topics and tensions were found in response to questions linked to organizational culture, the research and development function within the organization (role), and the training (change).

Organizational culture.

Talk about organizational culture was the only content area in the interviews that displayed tension not between accounts, but over time. Interview questions about the nature of the organization and the work elicited responses that ranged from "relaxed," "fun" and "unified" prior to the training and subsequent reorganization to "busy," "chaotic" and "fragmented" by the end of 1995. This tension is not surprising, given the magnitude of change that the organization was experiencing. It is, nonetheless a dramatic reminder of how quickly change in organizations, communication and the resultant culture can be, even for very large and established companies. In spite of the tensions over time, the overall perception of the culture of the company was quite unified at each stage. The unified manner in which participants viewed the changes suggests that even fragmented or decentralized cultures can be strong. It appears that at Apple, fragmented and strong are not mutually exclusive conditions.

Research and Development (R&D)

As discussed in this study's introduction, the role of R&D is central to the success of companies within the computer industry. R&D is one of the few departments in any organization that is not a profit center in a direct sense, and for this reason is both master and slave to the market. Topically, responses to questions regarding participants' roles in the organization fell into two areas. First, nearly all of the respondents talked about the changing role of the department, from long-range thinkers to short-term, profit-driven

producers. The tension was felt as respondents discussed how the success of R&D could not be measured through sales or other tangible figures, and also when they talked about the visionary aspects of their work. In light of the changing aspect of their work and the related demands this tension was a central feature for the trainers to consider.

The second topic within the R&D content area concerned the department's relationship to the organization. Respondents regularly spoke of Apple in the third person, as an entity separate from themselves. They did so both in response to questions, and in casual conversation. In spite of this common "us against them" vocabulary, tension was created when respondents would attempt to qualify themselves as part of the Apple team, or as integrated into the mainstream of organizational effort. These tensions may have general implications for organizations that are undergoing change or adopting team environments. In the case of changing organizational directions or missions, it appears that the corresponding mission of individual departments should be made clear. In adopting team environments, a real effort at inclusiveness should be made from an organization-wide stance.

Training

As might be expected in an interview related to training, responses to questions in that content area yielded a number of topics and tensions. Among the topics covered were the value of the training, the amount of structure optimal in the training, the role for trainers in embedded training, the benefits of working with other teams and the ultimate effectiveness of the training.

The value of the training was discussed by participants in a full range of ways, with both positive and negative extremes represented. Since learning

styles, the level of engagement, the experiences of the participants and the organizational goals of the participants were so different, this range was to be expected. In fact, it would be surprising to find a training of any type that elicited a uniform response, for the very reasons listed above.

It was quite natural that topics within the discussion of training would include comments about the structure, since the training was so different structurally from the traditional training that the respondents had experienced. The tensions existed between the universal appreciation of embedding the training and participants' pre-formed expectations about what training would be like. In other words, though they did not like the structure in classroom models of training, they seemed to be uncomfortable with the exclusion of that structure and to some extent expected to be led. This may suggest that trainers should consider the insecurity fostered by embedded training as being potentially confusing to participants, and should reflect individual participants' experiences in training when designing the program.

A closely related topic was about the role of trainers in the training process. The facilitative style of the trainers elicited overwhelmingly positive comments, but at the same time, participants yearned for a stronger leadership role to lend structure to the work that they were doing. It is quite possible that as this type of training becomes more common, so will the acceptance of less intrusive, more highly skilled trainer roles.

The talk about training also led to comments about the use of two project teams to act as foils for each other. While the value of using two teams was largely agreed upon, the participation level and very different types of work that the teams were engaged in led to some issues during and after the training, and may have reduced the full effect of the program for both teams.

In particular, the participation level by one group furnished messages contradictory to the value of the training and contributed to the perceived lack of structure. Later, I found that the teams in this module were less effectively matched than others in the past because of scheduling problems.

Emergent Content Areas. Topics and Tensions

Politics

There was no question in the interview schedule that related to the political structure of the organization, however every respondent, without exception made explicit reference to politics during the interview process. The existence of a strong political network, the nature of politics and the relationship of politics to the training subject, advocacy, emerged as topics within this content area. Tensions were evident in talk about the importance of politics versus technology as being central to individual success in the organization, the positive or negative nature of politics and the role of advocate as political evangelist versus information agent. Participants resented the necessity for politics, but understood the reality of the organization, displaying the same ambivalence about the political network that they revealed about the training itself. After the training, positive (or less negative) comments about politics were much more evident. Indeed, the connection that participants made between politics and advocacy was strong testimony to the success of the training design, since it was founded to a great extent on Peter Block's (1987) writing on positive politics (See Appendix B: Training Design). It was this connection and the process of training that may have contributed to participants' thinking about politics in a positive way for the first time, even though politics was never explicitly mentioned in the training process.

In some ways, the power of the emergent content area is inherent in all of the elicited content areas. The strong identification of organizational politics was a part of the organizational culture, an important factor in the relationship between research and development and the rest of the organization and one of the goals of the training experience.

In summary, the content areas, topics and tensions that were elicited or emerged in the training or interview process were as follows:

Figure 3.2: Summary of elicited and emergent content areas, topics and tensions in interviews at Apple Computer.

RQ3: What is the reaction of the participants to the training model?

As discussed, the reaction of participants to this training model varied, though there was a strong consensus that previous traditional training had generally not been useful. Conceptually, the embedded training appealed to all participants, but their expectations for training remained based on traditional classroom models. This may suggest the need for more "set-up" for innovative training or at least a careful consideration of the participants' training experiences in designing the training.

The participants offered a variety of comments relating to the following areas:

1. Training should be well defined and have clear, attainable goals. Participants were impressed with the immediate relevance of the material, the steps designed into the training process (though not the amount of time it took), the trainers' grasp of their organizational goals and the synchrony of the training with those goals.
2. At least minimal structure must be incorporated. Perhaps due to the newness of this type of model, or expectations built on past training models, participants seem to want a higher level of involvement from trainers. Ironically, that higher level of involvement may, in this type of training, reduce the ultimate success of the program by making less experiential and requiring a lower level of overall engagement by participants. For that reason designers should consider the experiences of

- the participants and perhaps experiment with different levels of involvement.
3. Training should concern immediately pressing issues. It is natural that problems that are of greater importance will receive more attention and effort. At Apple, this was a factor in the ultimate success level of the participants in their practice event to management.
 4. Training should be condensed into the shortest amount of time that is reasonable. In consideration of the pace of industry, this intensification of the training would have two effects. First, it would solve problems faster and meet organizational deadlines more effectively. Second, it would suit the schedules of people working in that type of environment. Of course, the timing and length of training must remain highly dependent on the subject matter and individual organizational situations.
 5. Attendance should be strongly encouraged. This suggestion is paradoxical in some ways. Although a higher attendance would have greatly enhanced both the learning and the general experience of the participants in our case, required attendance goes directly against the cultural grain at Apple. Once attendance is required, the similarity to classroom models greatly increases, and the embeddedness of the training into daily organizational life is in question. Encouragement to attend may be best accomplished through a participant "buy-in" based on the relevance and urgency of issues, rather than corporate dictates.

6. Training should be reviewed and wrapped up to effect generalized learning. Every participant who was interviewed subsequent to the training was disappointed in the lack of closure due to the bomb scare. The groups were unable to take the final step in embedded training, which is the transition from a learning experience to an organizational living experience. Although the groups did have the benefit of the bulk of training materials, they never dissected and refined the utilization of new skills, or discussed the general applicability of the learning into other facets of their organizational roles. There is little doubt that a completed program could have led to much different reactions to the training in general. The lack of this final step should be considered when thinking about this type of training on a broader basis than the single case discussed here.

RQ:4 Will the training change the way that participants talk about (construct) their role at Apple?

It is difficult to make causal statements even in the most carefully controlled experiments. A study of this nature, set in a period of turbulent organizational change makes attributions impossible. What we do know is that in this case, and in spite of pessimism (and even denial) on the part of participants, there was a distinct change in communication behaviors. This is particularly evident in the participants' vocabulary and the more positive way that they refer to advocacy over time. Participants showed an increasing ease of use in advocacy language through the course of the training and, in at least one group, applied that new knowledge quite effectively. Although few incidents of naturally occurring advocacy language by participants is in

evidence in the first training session, by session two phrases like "Is he an S or an R" (supporter or resistor), "tactics" and "alliances" were used with little guidance from the trainers. By session three, no trainer intervention was evident in their discussion of "pre-sell," "buy-in," "tone," "delivery," "roles," "goals," "benefits," "support" and "negotiation." In spite of the encouraging change in language use and the related implication that role (and cultural) change may have indeed occurred, the lack of closure in the training and the massive reorganization experienced at the end of 1995 pushed the training into the background of the organizational scenery and made its impact much more difficult to assess. Potentially, training of this nature could have an effect on the way that organizational members constructed their roles, but the amount and depth of change would be determined by individual participants, the relevance of the training, and how it related to existing organizational culture and events. Certainly, the embedded nature of the training made this model more likely to affect the daily roles of participants than traditional classroom models, which are often far removed from the realities of organizational life. A study at a more stable time in organizational life, along with a longer timeframe for assessment, would be helpful in answering this question more completely.

CHAPTER IV

DISCUSSION

This unique, applied training in a learning organization closely paralleled many of the theoretical precepts described in my review of the literature. It met Kofman & Senge's (1993) criteria of constant, applied and generative learning. Beginning with management support, as advised by Braun (1979) and Wick & Stanton Leon (1993), it was facilitated as a change vehicle through judicious involvement by trainers (Wooten & White, 1989). The training was objective-linked (Berry, 1990) and was centered in immediate, integrated organizational problem-solving (Block, 1994).

These theoretical training precepts are quite general, and this case suggests that practitioners may benefit from more specific guidelines:

1. Although training materials used in real-time embedded training are by necessity very specific, programs should ideally be generalizable to other organizational situations. In this case, the specific advocacy challenges faced by participants and the necessity for them to engage in active team work could be generalized to other organizational situations. Assuming advocacy as an organizational role led to higher productivity as a by-product of better team communication.
2. While embedded training should be free form and adaptable to the rapid change around it, some structure will organize the experience and make it more comfortable for participants. As was discussed, too little structure seemed to make professionals uncomfortable, possibly because of their experience with classroom training models. But too much structure would

serve to separate the training from being embedded in the daily lives of the participants and eliminate the experiential quality that is one of the keys to its effectiveness. Trainers must be able to assess and integrate organizational members' training experiences and use the information in developing the most effective design for each individual situation.

3. Participants should expect to self-direct the training experience, but remain open to the immediate, objective feedback from well prepared trainers. In this case, self-learning was balanced with facilitation through worksheets and hand-outs that served as tools to guide the discussions of participants. Participants could potentially benefit from a more extensive orientation to the training prior to beginning the work. This would also serve to add non-intrusive structure to the training process.
4. Participants should be well prepared for the training task. Management involvement can serve to set expectations and define achievable goals for the sessions. At Apple, management prepared presentations specific to each group, and encouraged them to select issues that would further their team goals. It is critical that management and trainers have clear, unified goals for the training. Due to the embedded nature of the training, this will require an open, trusting relationship between the trainer and the organization, with trainers translating management goals into training goals and procedures.
5. Closure is important to help the participants trap the learning and generalize the new skill sets to their organizational roles.

Unfortunately, closure was interrupted in the case observed. The frustrating effect of this interruption was clear in the interviews with respondents, and may have led to a more mixed reaction to the training than a full session. Closure could have provided the final "leap" from what I've called learning in an organization to living in an organization with new communicative skills and a new role.

6. The level of intensity and frequency in the training schedule appeared to have an effect on the training. Many participants enjoyed the training but asked for condensed timing. This would help by fully engaging participants and bringing more immediate solutions to the organization. In this case, scheduling became a real difficulty. One of the two groups in particular had a great deal of difficulty in committing the required time to the sessions. Many sessions were canceled and rescheduled (See Appendix F: Field Notes). But although it may have been difficult, voluntary participation and the ability to work around and with employee schedules was part of the real-time, embedded nature of the training. Requiring attendance may have had an adverse effect on the experiential nature of the training. This attendance versus embeddedness is a paradox that should be addressed by trainers on a case by case basis.
7. The ability to evaluate and measure the results of this type of training may be limited. The ultimate goal of embedded learning is not only the resolution of immediate issues, but in the long-term ability of participants to generalize the learning and

problem-solving process. To exacerbate the problems in measurement, the objectivity of participants seems severely limited by the nature of the training and its integration into their daily work. This difficulty may be troublesome for organizations and scholars to accept, since program evaluation often helps to justify funding and validate support for the model. But only long-term results and the careful study of communication behaviors will yield clues as to the effectiveness of the training.

How can we measure or evaluate the ongoing application of learning accomplished through this model? Companies know that deeper levels of evaluation are called for, but struggle to quantify the new behaviors and more intangible results of embedded training (Geber, 1995). Could the key be in a stronger partnership between academic study and training practitioners? The study of language and its relationship to culture may be better suited to scholarship than commerce, particularly in exploring new evaluative tools for training of this sort. Certainly, the traditional means of measuring training effectiveness are not applicable to embedded training of this type. More work must be done to develop evaluative tools that can operate on a deeper level. Consider, for example, Marshak's recommendation of using organizational root metaphor in the talk of organizational members as a diagnostic tool. Marshak posited that mixed root metaphors may indicate a lack of cultural unity or direction, and that trainers should be concerned with the uniformity of metaphor in organizational discourse. But in this case, all three of Marshak's root types (developmental, transitional and transformational) were found mixed in the dialogue of many of the respondents, with all respondents using

them similarly and in a very unified manner. For example, participants spoke of building industry (developmental), finding the right technology paths (transitional) and creating visions (transformational). Ultimately, Marshak's categories were not very useful in this study, except to identify the cultural fragmentation that may be found in quickly changing organizations. As a diagnostic tool the categories of metaphors were somewhat limiting, and the implications regarding the organizational unity in culture were minimal. But Marshak did encourage employing other naturally occurring metaphor clusters (separationism, personification of technology and adversity in the organization) that were very useful, validating metaphor as a window to organizational reality and a potentially powerful diagnostic tool. Tools of this sort, as was clearly illustrated in the review of scholarly and popular literature, often fall into the realm and interest of scholars, as opposed to training professionals. The focus that this training has on learning, synthesizing that learning to other organizational situations and change could be viewed as an opportunity for a new partnership between organizations, trainers and scholars.

Despite the admirable job of the trainers in designing the program to reflect theoretical criteria in this specific case application, the tensions inherent in each interview content area indicated that participants' expectations, participation and reaction to this real-time training was mixed. When discussing expectations, the participants in this case study acknowledged the need for training to deal with the changes in the organization, but their experiences with traditional forms of training led them to be highly skeptical of the need for an extensive time investment. Participation levels varied widely, and affected the attitudes of all of the

professionals involved, as did the interruption of training. Most striking, however, in the topics and tensions elicited and emerging in the interview process was the reaction: a professed lack of learning in contrast with the new language and behaviors that became evident in the course of training and the subsequent interviews. As discussed, the use of naturally occurring advocacy language increased throughout the training, and indicated 1) a higher comfort level with advocacy language, 2) a different way of thinking and talking about advocacy and 3) a potential role (and cultural) change. The participants' denial led to the belief that participants were not completely aware themselves of the change in their approach to their roles or the long-term effect that the learning would have for them and the organizational culture, and supports the exploration of new types of measurement and evaluation.

At Apple, the effect of training on organizational culture becomes an important issue, as the culture of the company has been closely tied to early successes and later problems experienced by the organization. In fact, incoming CEO Amelio is acknowledged as a manager of cultural transformation (Gomes & Langburg, 1996). This study does support ties between talk, role and culture, even in a well-established company like Apple; the skepticism and individualism expressed so frequently in these interviews would lead one to believe that a relationship between negative talk and negative organizational outlook could be possible. This may be a heuristic line of inquiry for communication scholars.

The training and trainers were dedicated to understanding not only the nature of the organization and its issues, but also the natures and roles of the participants. These factors weighed heavily in the most positively received

parts of the training design, suggesting that the most effective embedded training in learning organizations must be fully researched and customized by trainers who are qualified to apply a broad repertoire of skills and knowledge to an unpredictable, constantly changing training scenario. This leads to questions regarding how trainers are preparing to facilitate this type of training. Where are their practical, applied resources? What kind of training should they have prior to undertaking this work? In this case, both Lois Pryor and John Baird bring academic and organizational experience to the task. Their new training model was grounded in over thirty years of scholarly and practical experience, as well as current training movements and literature. Pilot programs helped to refine and power later versions of the program. This type of preparation by trainers is not to be assumed. In fact, it should be of grave concern in light of the trend away from professional trainers, to non-trainers conducting training in the organization (Trends, 1994). Further projections cite a high probability that in-context, real-time training of this type will continue to increase (Trends, 1994).

How does embedded training look in other cases where professionals are solving real-time problems? The sensitive nature of this training makes case study difficult, but the reports of assembly, manufacturing, retail and industrial cases are limited in usefulness to those who are pioneering this type of executive development. Longer-range studies of different professional levels and types would be helpful in analyzing this type of training for its short- and long-term effects on the roles of organizational members and the culture of organizations.

Other questions include those regarding the participants expectations of training and the effects that may have on the process, how different levels of

structure in the training may affect the ability to embed real-time learning into organizational life and how the organization's general situation may affect the impact of the training.

Limitations

Some lessons of this case may prove useful. The primary problem in gathering and analyzing data for this case, and perhaps other cases when busy professionals are involved, was the availability of the professionals for interviews, since the company, and this division in particular, was at the heart of critical company activity. The logistical difficulty in meeting reduced the sample size considerably. Once meetings were arranged, the literal nature of the engineering population made figurative language or even extended dialogue difficult to generate in the interviews, and required a looser dialogic approach by the researcher. The accuracy of the sample data presented should be viewed in light of the difficulties of working with the rules of transcription (Waitzkin, 1993), particularly under those circumstances. Also, aside from accuracy in transcription, Jacobs (1985) also cautions that meaning in discourse is not always evident in the spoken word (p. 314). In other words, best efforts at conveying meaning may have fallen short due to the lack of context, spoken language and the accompanying nonverbal cues.

Subjectivity in data selection was a necessity, and although not all subjectivity is a bad thing, the same closeness that marks the "magic" of fieldwork can also taint data (Eastland, 1993, p. 124). Muto (1993) also addressed the "competition of interests" the qualitative researcher faces: organizational management, professors, access agent, etc. (p. 27). In this case, the enculturating agent was a professor involved in the thesis committee.

Anonymity for the case organizations can be problematic as well (see Appendix E: Letter of Agreement). It can be challenging to present a company and participants honestly while protecting their identities (Muto, 1993). It became a challenge at every turn to check and recheck the identifying markers used in the thesis.

Of course, the detail and depth of a single case study limit the generalizability of the information. But as Stake (1994) reminds us, generalizability can often be a collective by-product of case studies that are each intrinsically interesting in their ability to demonstrate how theory can manifest.

Finally, one must be cautious in attributing relationships to data and outcomes in the organization; they may be skewed by the manner in which we chose to view them (Faules, 1982, VanMaanen, 1988). In this case, the selection of metaphors and accounts as a lens to view data may have eliminated other interesting alternatives.

In spite of all of these caveats, I believe that this case study will help scholars and trainers to explore the impact of communication centered training on the construction of organizational reality.

Conclusion

Organizations, culture and roles are integrated, communicatively created facets of our daily reality. Individual values, as revealed communicatively, "embody and display" the collective values of organizational culture (Goodall, 1987, p. 77). So, although one case is hardly enough to make decisions or draw conclusions about this training model, we can hope to achieve a better understanding about how theoretical models for embedded

training translate to applied programs, and what happens in the course of training from the perspective of the participants' organizational reality.

One Apple participant stated it well:

I would hate to have anyone come away from this and say 'this kind of training works well in this industry,' or 'it doesn't work well,' because I feel like it's just so different for every group, every division, that it's really hard to generalize."

In conclusion, a great deal more can be done to describe and analyze this budding relationship between culture and training, scholarship and practice, communication behaviors and organizational change. Global industry is poised for a millennial leap in practices of all kinds, and there is a real opportunity for communication training practitioners and scholars to become a part of the future with its exciting focus on learning as the center of organizational success.

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Appendix A: Summary of Trainer Observations

COMMUNICATIONS

October 11, 1994

Apple [REDACTED] Project Advocacy Issues

This is the #1 issue

1. Lack of customer/business focus in "messages" and positioning
2. Dismissive attitude toward non-[REDACTED] peers and contacts ("bozos")
3. Lack of initiative in developing contacts and resources ("no time" litany)
4. Reliance on single strategy for advocating (no parallel/supporting efforts pre/post standards forum ([REDACTED]))
5. Reacting rather than anticipating/planning steps and responses and options
6. Fear/avoidance of (re-) engaging resisters ([REDACTED] joking about "keeping his switchblade in his pocket" after disagreement with key contact)
7. Erratic communication about what people are doing (afraid to ask/forget to tell/lack of follow-up/closing the loop with team and managers and allies)
8. Misperceptions/varying degrees of self-awareness in how they come across (nonverbals like eye contact, body position, and gestures, as well as tone, "monologuing," interrupting, rebutting, sarcasm, etc.) (our videos!)
9. Unresponsive to opportunities to inquire/advocate with uncommitted/resistant ([REDACTED] walking away from post-meeting in hall)
10. Personalizing resistance/objections/questions (inverse "bozo" problem) ("now I'm a bozo")
11. Project myopia resulting from isolation within specialties ([REDACTED] literally next to each other, but not up to speed on their projects and how they relate)
12. Preference(?) for individual efforts rather than team approach
13. "Politics" not seen as their responsibility/cup of tea. Raises larger questions about leadership and general [REDACTED] climate ([REDACTED] point of view/"agenda" is not everyone else's)

Appendix B: Training Design

Appendix B: Description of Training

Apple Training

The roots of the training at Apple are in the writing of Peter Block (1987). Block advocates empowerment and commitment to the superordinate goals of the organization as keys to success. Each professional should be expected to take ownership in an active manner and develop assertive behaviors as necessary to achieve a shared vision for the group or company. Training can drive this empowerment process by supporting the adoption of entrepreneurial attitudes and personal growth (pp. 38-39). This training, then, helps to develop the short-term, aggressive communicative behaviors needed for short-term success.

But the training at Apple is focused not only on advocacy, but also on relationship building. Young (1979) refers to the ability to advocate while building relationships as a "relationship viewing frame meta-level conceptual context model" (p. 47). He postulates that we use our left brain hemisphere to interface with our reality in a logical/analytical fashion (think) while our right brain functions to grasp the intuitive, holistic aspects of the communication event taking place. (These concepts are developed from Watzlawick's 1978 work entitled *The Language of Change*.) Only by blending our right and left brain functions can we properly frame our conceptual context. For example, a technical professional is working to get his/her idea accepted by another department, but the other department is resisting. The technical professional can understand the appearance of the resistance, or can try to understand the resistance at a deeper, emotive level. This has

implications for communication training, forcing us to consider the balancing act between advocacy and empathy.

Empathy and understanding can be greatly enhanced through the development of inquiry skills. Senge (1990) discusses the importance of balancing advocacy and inquiry skills (p. 198). He demonstrates the escalation of hostility that can take place when advocacy happens without inquiry. Everyone wants to win. Conversely, inquiry alone sometimes hides alternatives. One may understand another person's position, but they cannot fully understand yours. A balance of advocacy with reciprocal inquiry can lessen hostility and increase options for mutual consideration by fully exploring all ideas. Some of these behaviors are counter-intuitive, and training can be invaluable. Senge (1990, p. 201) describes three steps to balancing advocacy and inquiry: 1) Advocate one's goals clearly, and invite inquiry from others, feeling free to question their views and data in the process 2) Make any assumptions about the other party's views known to them, present the data that has led to an opinion and invite others to ask for clarification or expansion of opposing views about their position 3) Meet impasses with inquiries about alternatives or explorations of the difficulties in the discussion (meta-talk).

Although the content of a "whole brain" training program in advocacy and inquiry is quite specific, the goals of the program at Apple are more ambitious. Project Advocacy helps to develop these long-term, whole brain advocacy and inquiry skills, and so works to establish long-term relational outcomes to the training while addressing immediate organizational needs. So, in the short term, this training will help R&D professionals at Apple learn the skills necessary to assume new responsibilities in the organization, and in the

long term the program will, if successful, help professionals to construct their identities differently in the organization.

Wick & Stanton Leon (1993) refer to the process of effective organizational learning as being self-driven, and broken out into five stages:

- 1) Select learning goals. In the case of the training at Apple, this goal is being selected by the organization and will consist of an upcoming advocacy event that is important to the organization's goals.
- 2) Map out a plan to accomplish your learning goal. At Apple, this step will be accomplished in the design of an advocacy message and role play to establish advocacy and relationship building skills.
- 3) Act on your plan. Apple professionals will implement their learning in a real event that has been embedded in the course of the training program.
- 4) Review and evaluate your learning and how the learning occurred. Event debriefing is an important facet of the training at Apple.

Finally, 5) Make an action plan for the future. Planning the next step is an integral part of the Apple training. As professionals move through the stages of learning, the trainer as facilitator steps in with structure and information as needed.

Project Advocacy at Apple.

Phase I: Putting Project Advocacy into a business context

A session led by management to introduce the training and its place in the overall strategy of the company.

Phase II: Introductory Apple in-house training

Approximately 12-16 hours of training modules in subjects related to advocacy. These modules include working styles, influencing, conflict and meeting management.

Phase III: Advocacy training

Session 1: Creating and positioning advocacy messages

Session 2: Building relationships & overcoming resistance

Session 3: Refining strategy and preparing for advocacy event

Session 4: Application: Advocacy event

Session 5: Event debriefing and plan development

Phase III was the training module where communication behaviors were reconstructed, and was the focus of this study.

All training took place at an Apple facility, and channeled 40 Research & Development professionals through the program in teams of five. The initial training will take approximately 6 months, with 4-6 weeks of training (12 hours) per team.

Appendix C: Training Materials

Appendix C: Training Materials

Creating A Message:

Exercise designed to establish uniform mission statement among group members.

Keys to Successful Influence:

Discussion guide designed to highlight key features of influence process.

Advocacy/Influence Principles:

Discussion guide designed to step participants through influence process.

Critical Questions for Advocating Your Program:

Specific guide to help match message with organizational goals.

Positioning the Message:

Exercise designed to establish priorities and strategies for message delivery.

Event Strategy Planning Sheet:

Exercise designed to expedite message acceptance and support.

Preliminary Action Plan:

Exercise designed to facilitate presentation planning.

Appendix D: Interview Schedules

Pre-training Interview Guide

Describe what it is like to work at Apple.

What do you consider to be the purpose of your group?

What is it like to work in this group?

Describe your role in the organization.

What skills do you currently have that help you perform your job effectively?

What skills do you need to develop that will help you be more effective?

What are your expectations of this training?

How will you use this training?

What does the organization want to achieve with this training?

What do you personally want to achieve with this training?

Have you been involved in other types of communication training before?

Post-training Interview Guide

(Free metaphor) What is Apple like? What was Apple like ten years ago?

(Forced metaphor) If Apple were an animal, then and now...

If Apple were a car then, and now...

If Apple were a dance, then and now...

Describe your role in the organization before the training. Did the way you see yourself at Apple change as a result of the training? (How is it different now?)

Were your expectations of the training met? Were there any surprises?

What was the primary purpose of the training?

What did you learn?

What was most valuable in the training?

Do you recall any particular moments of enlightenment in the training?

Do you have any incidental memories that stand out about the training?
(When you think about the training, what do you remember the most vividly?)

Have you had a chance to use advocacy skills since the training?

Did you notice anything different about the times you used advocacy skills since the training?

What do you personally hope to achieve with this training?

Have you had other communication training?

How does this compare?

What was your reaction to the material?

What was your reaction to the trainer?

Have you heard reaction from others? If so, describe.

Appendix E: Letter of Agreement

May 25, 1995

Human Subjects-Institutional Review Board
Walquist Hall
San Jose State University
San Jose, CA 95192

To Whom it may concern:

Susan Burrowes has been granted permission to conduct research, gather, analyze and report data collected during a training evaluation at Apple Computer, Inc. This data will consist of pre- and post-training interviews with training participants as well as the observation of four training sessions.

Ms. Burrows has signed an agreement of confidentiality protecting proprietary technical and operational information. Additionally, she has ensured us that the confidentiality of the training participants will be protected, and their identities not connected to specific data in any way.

Apple Computer, Inc. reserves the right to pre-publication review and approval of final documents for adherence to the above guidelines.

Sincerely,

A handwritten signature in black ink, appearing to read "R. W. Hon", is positioned below the word "Sincerely,".

Robert W. Hon
Director, ATG Integrated Systems
Apple Computer, Inc.

Prof. Christopher
Walquist
San Jose State University
San Jose, CA 95192

Appendix F: Field Log

Field Log

Date: March 15, 1995
Time: 7:30-8:00 am
Place: San Jose State University, University Room
Purpose: Enculturation meeting with trainer

Date: March 23, 1995
Time: 2:15-2:45 pm
Place: Apple Computer
Purpose: Enculturation meeting with manager

Date: May 1, 1995
Time: 1:30-2:00 pm
Place: Business Tower, San Jose State University
Purpose: Review training design

Date: May 8, 1995
Time: 8:30-9:00 am
Place: Business Tower, San Jose State University
Purpose: Review interview schedule

Date: May 15, 1995
Time: 10:00-10:35 am
Place: Apple Computer
Purpose: Interview with participant

Date: May 15, 1995
Time: 2:15-3:00 pm
Place: Apple Computer
Purpose: Interview with participant

Date: May 16, 1995
Time: 9:00-9:20 am
Place: Apple Computer
Purpose: Interview with participant

Date: May 16, 1995
Time: 2:00-5:00 pm
Place: Apple Computer
Purpose: Training session #1

Date: May 23, 1995
Time: 9:00 am -12:00 pm
Place: Apple Computer
Purpose: Training session #2

Date: May 30, 1995
Time: 3:00-5:00 pm
Place: Apple Computer
Purpose: Training session #3

Date: June 6, 1995
Time: 3:30-5:00 pm
Place: Apple Computer
Purpose: Training session #4

*Note: Appointments for training session #5 canceled twice (June 14, June 21).

Date: June 30, 1995
Time: 2:00-4:00 pm
Place: Apple Computer
Purpose: Training session #5

*Note: Session #5 interrupted by bomb scare and evacuation.
Appointment for interview session on July 7 canceled.

Date: August 1, 1995
Time: 10:00-10:30 am
Place: Apple Computer
Purpose: Interview with participant

Date: August 1, 1995
Time: 10:45-11:30
Place: Apple Computer
Purpose: Interview with participant

Date: August 1, 1995
Time: 1:00-1:45 pm
Place: Apple Computer
Purpose: Interview with participant

*Note: Interview sessions for August 10 canceled.

Date: August 18, 1995
Time: 1:00-1:45 pm
Place: Apple Computer
Purpose: Interview with participant

Date: August 18, 1995
Time: 1:45-2:15 pm
Place: Apple Computer
Purpose: Interview with participant

Date: August 18, 1995
Time: 2:40-3:00 pm
Place: Apple Computer
Purpose: Interview with participant

Date: September 15, 1995
Time: 2:30-4:00 pm
Place: Peppermill Restaurant, Santa Clara, CA
Purpose: Interview with trainer

Appendix G: Informed Consent

College of Social Sciences • Department of Communication Studies
One Washington Square • San José, California 95192-0112 • 408/924-5360

August 18, 1995

Dear Participant:

Thank you for participating in an evaluation of Project Advocacy. In order to evaluate the training program, you will be asked to answer questions ranging across several functional areas of your work here.

You should be aware that your participation in this evaluation is voluntary. No known risks or benefits are associated with your participation in the study. Choosing not to participate in this study, or in any part of this study will not affect your relationship with your employer or with the training organization.

Your answers will be kept completely confidential. The results of this evaluation may be published, but any information that could result in your identification will remain confidential.

With your permission, all interviews will be taped. You may request that taping be suspended, or stopped entirely at any time during the interview. Tapes will be kept secure, and will be destroyed upon completion of the study, which is anticipated to be December of 1995. Interviews are expected to last about thirty minutes, and will take place at your organization.

Information regarding sensitive technical or operational aspects of the organization is not central to the evaluation, and if mentioned during the course of the interview will not be published, and will remain completely confidential.

If you have any questions about this study, I will be happy to discuss them with you. I can be reached at (408) 924- 5394. If you have questions or complaints please contact Judith Barnes, Ph.D., at (408) 924-5511, or Serena Stanford, Ph.D., Associate Academic Vice President for Graduate Studies and Research, at (408) 924-2480.

Sincerely,

Susan Burrowes
San Jose State University