Katherine Toll | Work Samples Winter 2019

# *1.* Change Management Survey ***Artifact***

I have done a few surveys in my career always with the painful awareness that the structure and sequence of the questions would impact the results. Intuitively I knew the handful of articles I read and Survey Monkey's "Tips for writing good survey questions" wasn't enough to make me an expert drafter of surveys. More importantly I realized the main research question(s), if flawed, also impacted the outcome. Suffice to say I avoided them. Alexis's assignment gave me the opportunity to draft a survey with a stronger understanding of what was needed in it and begin my journey toward shaping my Capstone research questions. While only a few months ago, I feel like I made big strides toward sharpening my objective for my Capstone – this survey marks the launch of the journey as well as my ability to better structure questions for surveys.

**LO4**: Apply communication-centered scholarship in order to strengthen communication effectiveness.

**LO5**: Critically analyze messages.

**D3**: Choose to communicate with ethical intention and evaluate the ethical elements of any communication situation.

**Key Words**: Change Management, Change Leadership, primary research question(s), survey, internal communications

# Change Management Survey

**Primary Research Questions:**

Parker Avery has decided to offer a Change Management (CM) service offering. While we've always integrated change management into our projects, we've typically adopted the client's CM methodology, which presented issues such as:

- The client does not have a methodology
- The client uses a methodology with which we don't agree
- The client wants us to recommend the methodology

While some within the firm argue we have a defined methodology, a growing majority of the firm has the opposite opinion. I contend we have a basic set of tools and templates that, when used in a specific order, help us guide clients through the project implementation. We've used the same approach for years without updating or adding thought leadership to the topic.

We also struggle with limited CM resources within the firm – currently we have two people with CM expertise. If they're already staffed on projects, then we plug someone else into the role (who may, or may not have CM expertise) which is a disservice to our client.

For this exercise I will focus on the two of my four research questions:

1. What value will Parker Avery realize by offering a change management* practice? to any organization
2. How do Change Management and Change Leadership differ?
3. How do we train our team to recognize when a client is struggling with issues related to change?
4. How do we onboard our team members to lead, or serve as part of a change management initiative?

My first objective is to understand how our firm members view the value of a CM practice as it pertains to our clients. I want to benchmark the current state and use it to inform the CM practice development process as well as identify potential resistance and/or differing points of view, so we can anticipate how to position the CM service offering to the team.

https://goo.gl/forms/It1u2s1R97FtM7OJ2

**Procedure:**

This survey will be administered via a Google form. We will release it on Monday January 28, 2019 and close it on Monday February 4, 2019.

- This will be administered as an anonymous survey
- No incentive will be offered – we are a boutique consulting firm with under 100 employees; it is expected we participate in firm surveys (which are few and far between).
- We love to express our opinions

- And, this topic is top of mind for the firm

**Results:**

We will use the findings of this survey to benchmark the firm's opinions on CM and use it to inform the practice development process. Additionally, we will identify potential resistance and/or differing points of view, so we can anticipate how to position the service offering to the team.

More importantly another survey will target our clients, and perspective clients, so we validate our CM value proposition prior to launching it.

# #end

# 2. Sampling

## Sampling Discussion Post ***Artifact***

The following is a discussion post I did for *Using Data to Make Informed Decisions*. I took the assignment as an opportunity to do a post-mortem on a Time and Task Analysis I did, along with a colleague, in August 2018. The results were not well received by the client; mostly because they demonstrated minimal difference between each role's tasks (among five separate levels) and how they spent their time. We knew there was significant overlap in roles depending on the department they worked (e.g., Men's, Kids, Women's Apparel, etc.), but this was not the message our client was ready to hear. We had a limited sample set, the task types lacked specificity, and we had an inconsistent level of detail from respondents. However, we knew the results were indicative of the department and its ill-defined role clarity because we'd been onsite for six months observing the numerous process inconsistencies. Unfortunately, the client viewed the data as "suspect" and it required numerous reworks of it. Had we done a better job selecting a random sample set with more participants, we would have saved ourselves a lot of time and minimized our frustration.  This assignment demonstrated my ability to use new learnings to better hindsight past work.

**LO1**: Articulate connections between the interdisciplinary field of communications and central themes and managing complexity, collaborative leadership, and elegant communication.

**LO5**: Critically analyze messages.

**D04**: Be equipped to influence change.

**Key Words**: Sample set, sample frame, post mortem, role and responsibilities

## Discussion Post: Sampling

I'm actually doing a post-mortem of research question(s) and a subsequent analysis my colleague and I did for a specific function within our client's organization (a retailer). We performed a "time and task" analysis to help us understand how each role spent their time in the 'current state', so we could map them to 'future state' activities and schedule them for the appropriate training sessions.

**We set out to answer the following questions**:

- What roles (Senior Merchant, Merchant, Assistant Merchant, etc.) should work in the new merchandising system and therefore be trained on the system's use?
- What activities will each role be responsible for performing in the new system?

**Our Sampling Frame = Approximately 80 people**

- Three *Business-to-Customer* Units: Core (online), Retail, U.K.
- One *Business-to-Business* Unit: Business Outfitters (uniforms, e.g., Delta, American, Verizon, etc.)

Within each Business Unit are five merchant roles. Each role may have two or three people serving in that capacity (e.g., Two Merchants in Women's Swim):

- Senior Merchant
- Merchant
- Associate Merchant
- Assistant Merchant
- Merchant Assistant

Within the Core *Business-to-Consumer* organization there are seven departments – in other words, seven sets of five merchant roles. Our sampling needed to ensure at least one person from each role, department, and business unit was included in the analysis. However, random samples were not pulled from each stratum; instead we asked each leader of a business unit/ department to select two people per role. In essence they "volunteered" people to participate, which made it a biased sampling (to be sure). The leaders identified people who indicated (self-selected) an interest in participating in the analysis. I now know our non-probability sampling was a blend of many. We ran the gamut of convenience, quota, purposive, snowball, and/or volunteer to achieve an end (Treadwell, p. 140-141). The end result, which will come as no surprise, was flawed. We concluded, based on the business unit and role, that no role had a consistent set of responsibilities. *"It depends"* became the anthem for our results.

In hindsight, we needed a true stratified random sample – we had the necessary information to do it, however we needed an incentive for completing the time and task survey to ensure a valid sampling. We also could (potentially) have used a systemic random sampling, but this approach would be suspect because we may have excluded a business unit in a role sampling. However, an argument could be made to separate the business units and do them individually.

# #end

## *3.* Big Data Assignment ***Artifact***

For one of our final assignments in Alexis's class we were asked to write a memo to the CEO of our company encouraging them to hire a big data analyst to either analyze key data from the company's website, or from a social networking site (e.g., Facebook, Twitter, etc.) to answer a topical research question that would benefit our firm. Because Organizational Change Management (OCM) is top of mind for my firm as well as the focus for my capstone, I decided to use this assignment as an opportunity to further the cause for a more disciplined approach to deciphering our OCM website analytics. Or, shall I saw, adopt an approach to analyzing our OCM website traffic. It gave me an ability to integrate new learnings about Big Data and apply them to a relevant, real-world business issue.

**LO2**: Demonstrate the ability to assess complex organizational environments and achieve communication goals.

**D2**: Utilize communication to embrace complexity and difference.

**D4**: Be equipped to influence change.

**Key Words:** Website analytics, Big Data, Organizational Change Management (OCM), metrics, goals

# Big Data Assignment: Letter to CEO

To: Robert Kaufman, CEO Parker Avery Group
Clay Parnell, President Parker Avery Group
From: Katherine Toll, Senior Manager
RE: Organizational Change Management (OCM) Digital Analysis
Date: February 6, 2019

As we embark on our OCM practice development, I recommend engaging a specialist skilled in website analysis. We strive to understand how our current clients digitally 'shopped' for OCM capabilities, so the first step is to review our Parker Avery Group PAG website. Currently, we have a part-time resource who updates and maintains our site, but do we regularly analyze our website activity as it pertains to OCM? Do we know where the 'visit' originated? What is the most common click and viewing pattern(s) for the site? Who is visiting us? What, or why are they interested?

I recently read an article on interpreting website analytics, which provided a few insights:

1. Google Analytics has 100+ standard reports
2. And, we can develop our own…
3. But, they all describe what happened – a click-through, time length on page, etc., but why visitors behaved as they did.

The article also called out, "[Website] data analysis can be confusing. In busy offices it is often easy to focus solely on headline data, but this can lead you to false assumptions about a website."

In other words – if anyone currently has time to analyze our website behaviors, I doubt they know how to interpret them properly. Nor, should they based on the velocity of data, hence I advocate an experienced (outside) resource be brought in to properly translate our OCM website analytics.

# #end

## 4. Using External Data Sets to Tell Stories ***Artifact***

I was terrified of this assignment – it put me front and center of a personal obstacle, which I work diligently to hid. I have dyscalculia, which is (somewhat) akin to dyslexia, but with numbers instead of letters. Among the symptoms and signs are an inability to hold numbers in one's head, inverting numbers, struggling to understand basic math symbols (e.g., +, =, <, >, etc.), and spatial relationship issues. I was not diagnosed until my 40's, so I spent much of my life thinking I was missing a magic math gene, which I guess I was! I have not experienced this level of anxiety in a long time. I was able to find, download, and "cleanse" a small data set, but I needed to visually depict it as well. I have never completed any type of charting in Excel, let alone a pivot table. I watched a few Lynda.com tutorials and slogged my way through the effort. Exasperated, I finally reached out to a friend who is a well-reputed Excel wizard, but who is also a former beau of mine, so that was awkward. In any event with his guidance, I was able to complete my first pie chart in Excel. While it may sound silly, this was a ridiculously big achievement for me. It demonstrated my resourcefulness and willingness to risk embarrassment, and most importantly, my willingness to learn.

**LO4**: Apply communication-centered scholarship in order to strengthen communication effectiveness.

**LO5**: Critically analyze messages.

**D2**: Utilize communication to embrace complexity and difference.

**Key Words**: Excel, pie chart, dyscalculia, data sets, obstacles

## Using External Data Sets to Tell Stories

I used a source file from [Kaggle.com](Kaggle.com). It was Walmart store data, which felt like a safe bet because it's familiar data to me and could scan it and know if it was (somewhat) valid or not. I started with a larger data set, but quickly realized I had too much data for an Excel neophyte, such as me. Math is not my long suit, but even I could figure out I had 45 stores, each with 99 departments, and 80 weeks of sales history by department. And, were provided the major holidays for those 80 weeks. That's approximately 357,000 data points.

I moved on to a smaller set. The next data set captured 45 stores, their volume codes (A, B, C) and their size. It was easily enough to clean up, but I did capture each change I made as I did them (which I never do). Then I started fooling around with the data. I found a few fun facts, but nothing of consequence. Most of my findings were," So what?" The data set lacked specific detail. For instance:

- There were 45 stores, but I don't know their locations or length of time open
- Three types (A, B, C) but I don't know how they define 'type'. Typically it's associated to total retail sales, but it might be profitability, or highest labor tenure. Nor, did I know the ranges for what define an A, B, and C.
- Finally, I had size (E.g., 213,000). Most would assume square footage, but who knows? And, if it is square footage, does it include only the square footage for total selling space, or does it also include non-selling space? (e.g., stockrooms, offices, etc.)

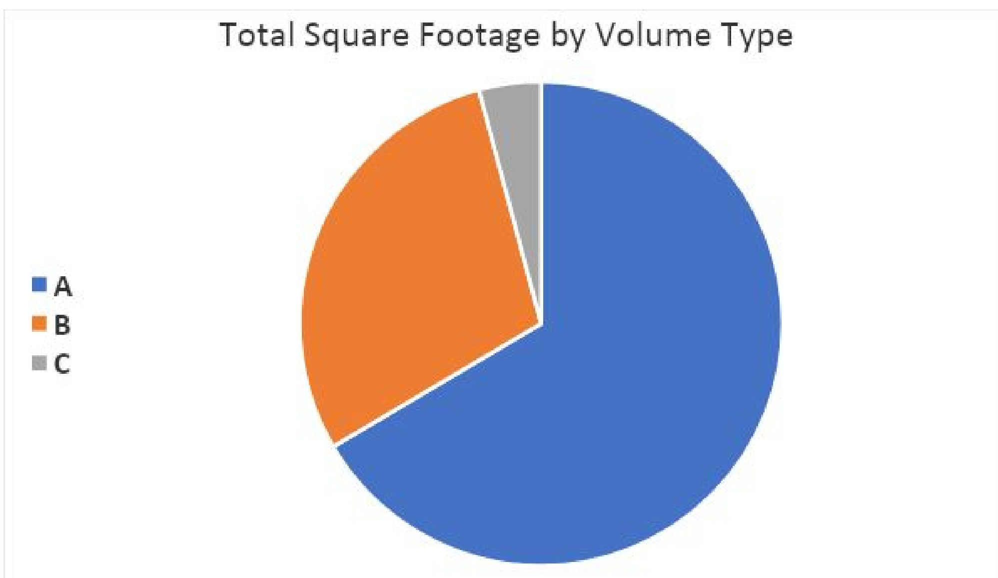
Fun Facts:

- You could fit approximately 5.5 versions of the smallest A store into the largest A store
- Or, the largest A store could hold approx. 5.5 versions of the smallest A store
- The largest store A store is approx. 4.5 times bigger than the smallest A store

So what?

***Note***: I focused on A stores, assuming A equaled sales volume because retailers strive to generate the most dollars out of the smallest possible space. There was a wild swing when I looked at the smallest A compared to the largest A. I might guess that the smallest was one of their new city format stores and the largest was in the middle of Nebraska and had been opened for 10 years +.


Number of Walmart Stores By Volume Type
A
B
C


Total Square Footage by Volume Type
A
B
C

# #end

## 5. Information Design Final Project ***Artifact***

For our final project, Eric challenged us do something that either inspired us, or something with a direct connection to our career (or industry). We needed to consider the Gestalt grouping principles, color theory, design fundamentals (contrast, alignment, proximity, etc.), typography, and overall layout.

I did an infographic to pair with a blog post I'd written and was published a few weeks ago. Because it was for my work, I used my firm's color palette, but took liberties by integrating a deep purple hue and playing with different fonts. It also ties into my capstone literature review, because I also want to repurpose it for my visual portfolio. I lean toward clean designs and wanted to use the Gestalt principles of grouping and repetition. I loved the icons and the consistent 'feel' they communicated. Overall, I was pleased with how I'd taken design fundamentals, Gestalt principles, and integrated my Capstone topic. It demonstrates my ability to combine several complex principles and theories into one clear visual important for my career and for school.

**LO4**: Apply communication-centered scholarship in order to strengthen communication effectiveness.

**LO5**: Critically analyze messages.

**LO6**: Create and deliver elegant messages appropriate to the audience, purpose, and context.

**D2**: Utilize communication to embrace complexity and difference.

# Informational Design Final Project


# #end