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### Navigating a Strategic Style Transition

by Rebecca Wilkinson

#### *Abstract*

This is a personal story of how a young woman changed from a Conservator to a Performer strategic profile. The story illustrates, in personal terms, the kinds of stresses that are endured in a transition of this type. Reading the article will help the practitioner develop a sense of the kinds of strain that might be placed on an individual who is asked to change in response to an organizational need.

# Navigating a Strategic Style Transition

By: Rebecca Wilkinson

## Introduction

Most theories in organization development claim that person's approach to life is fixed. These theories usually argue that "instincts", "talents" or "innate nature" can change only in the way they are expressed but that the basic direction that they compel is forever fixed and must be endured. (Berens, 1996)

Organizational Engineering is unique in that it teaches that people can and do change. The theory and process of this change is thoroughly outlined in the seminal books on the subject (Salton 1996, 2000). This article attempts to put "flesh on the bones" of this theory by describing a personal experience of just such a transition.

The story begins with myself as a 21-year-old young woman who had just begun to navigate life as an adult. It is a story of how my environment, social circumstances and life decisions changed, and are still changing, the

strategies I use to negotiate life. It describes my feelings and perspectives as I evolved to accommodate the new circumstances that I had created.

Organizational Engineering teaches that all strategic styles are "good" and that any vulnerabilities encountered can be offset by forming an association with someone with a compensating style. However, there may be occasions where personal changes are appropriate. This article can help the practitioner guide a client who could be considering such a transition.

## The Start of the Journey

The story begins in the winter of 1997 when, for the first time ever, I moved away from my parents, from my home and from the town in which I had grown up. I was moving to Ann Arbor to attend the University and was embarking on life as a fully mature adult. I would be on my own for the first time ever! I was brimming with excitement and anticipation.

Prior to the move a friend had recommended me to Dr. Gary Salton, the creator of Organizational Engineering and the CEO of Professional Communications Inc. During the job interview Gary asked me to take the "I Opt" Survey. The result: LP/HA—with a huge LP component.

Gary told me what it meant. He explained that LP's are precise creatures and need to know where they stand and what is expected. Of course, everything went right over my head. I think I was in shock from the turmoil surrounding the upcoming changes. At the end of the interview Gary tried to be "helpful." He gave me a huge armload of material to help me get a better idea of what I might be doing if I joined PCI.

I went home with Gary's stack and for the first few hours it seemed to sit there looking at me. I looked back—overwhelmed. After a while I decided that the stack would be happier in a moving box in the back of the closet. I felt better without the reminder of the many new things that I would soon be confronting. A few days before my scheduled move Gary called and formally offered me the position. I accepted, saying to myself, "See—I did not need to read all that stuff after all!"

## My First Months

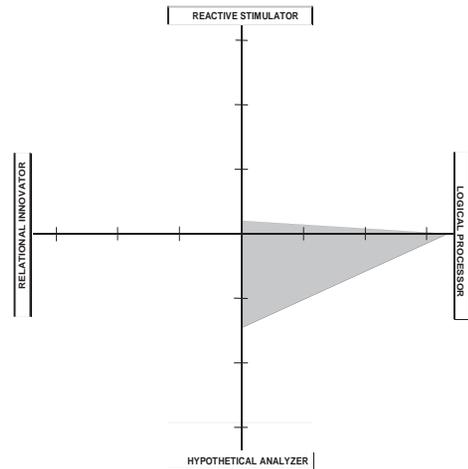
The move to Ann Arbor was the most extreme environmental change I had ever experienced. With my arrival, I had decided to move in with four of my closest friends, start classes at the University, and take a full time job—my first "real" job. Not only was I a full time student, I had instantly become a career woman. All within the course of two days!

The new "weight" I was feeling seemed to center on responsibility. Suddenly my relationships were no longer confined just to my family and myself. Overnight, I became responsible to more people than I could had ever imagined—my new roommates, my coworkers, my professors and new friends in a new city. A web of relationships and expectations had sprung up out of nowhere! I was excited, frustrated, happy, scared, proud and insecure all at the same time. In the vernacular of my generation I was "bummed out."

I now know that what was occurring was a shift in alignment between my new environment and the information processing strategy that I had, until then, been employing.

The "stuff" Gary told me that the Survey told him about me did not make any sense when he first said it. LP/HA with a huge LP component meant nothing to me. I knew I was structured; my mom had told me that enough times. And the fact that I preferred precision and exactness wasn't exactly new to me either. I had become aware of that in my science classes and in the writing I had done for my English classes. Overall, he seemed to be telling me "old news."

What I failed to understand at the time was that these postures interacted with each other and with my environment. They influenced how I behaved; how I would interact with others and how I felt about things that happened to me. For those familiar with Organizational Engineering, the degree to which I held these views can be inferred from my strategic profile. (See Graphic I)



**Graphic I**  
The Original  
Strategic Profile

## My Launch

My career as a professional began with an assignment to run the computer programs that Gary had written for TeamAnalysis and LeaderAnalysis—two of the firm's principal products. It did not take long to discover that Gary does not think things through; he just tries them out. If it works, he keeps it. If it doesn't, he throws it out.

Those familiar with Organizational Engineering will immediately recognize that Gary favors a Reactive Stimulator strategy in conducting his life. This is his strategy and it definitely works for him. But it produces computer programs that have VERY garbled interfaces. The logic—when there is any—is an afterthought. From my perspective as a person who is heavily invested in structured approaches, it was maddening. It was, to use the jargon, an LP's worst nightmare! I wanted structure, precision, clear expectations and a solid opportunity to "do" things. What I got from Gary were vague guidelines, imprecise instruction and changing expectations. From my perspective at the time, this was pure insanity!

There was another woman working at PCI when I joined. Joan was her name. Part of

her job was training me in the technology. Joan, like Gary, was an "off the charts" RS. Like Gary, she wasn't capable of staying on a subject for more than 5 minutes and she worked without any detectable pattern. With them both in the office at the same time, I felt like I was back to being a nanny, but with two grownups instead of one baby brother.

The difference was that, at home, I knew what I was supposed to do and I was in charge. At PCI, it was clear to me that my coworkers needed a lot of supervision. But I didn't know what it was or how to give it. I was frustrated but could not explain exactly why. It appeared to me that I was working with two insane people—but they were obviously successful. Was there something "wrong" with me? With them? With us? The mental structures that I had available to draw at the time could not give me an answer. The result—frustration.

The relaxed nature of the office helped take the edge off during those initial days. However, as Gary had predicted (having once seen my profile), I found myself "snowed under" about 95% of the time. Like most people employing an LP/HA style one of my primary work satisfactions was "doing" a job. This is not easy to achieve when you are "snowed under." Therefore, I developed a strategy. I would focus on a bit, learn it and then go on to the next bit. Intuitively, I had developed a method of handling what looked to me as world populated by unstable people using unintelligible systems. Who says LP's aren't adaptive?

The execution of my "bit at a time" strategy was bumpy. I occasionally encountered problems that proved too much for my skills. I needed help. But the last thing an extreme LP wants to ask is help from a couple of RS's. Sure, they want to be helpful. Too helpful to someone using a structured, "step at a time" strategy. It would have taken me three weeks to dig out of the disjointed information that Gary and Joan would dump on me.

I was confronted with a conundrum. On one side I had a problem that would not go away. On the other side I had two "helpers" whose unstructured approach only promised to magnify my problem. My response was a studied paralysis. I sat there like a deer frozen in some late-night headlights. When intractable problems arose, I stared at the monitor—sometimes for hours. Eventually someone would notice that a piece of work wasn't done and they would come over and fix it without trying to "train" me. I'd watch how they did it and learn. Not a good solution but at least it did not make things worse, and I did eventually learn.

Meetings at PCI were a harder problem to solve. A person who values logic, consistency, precision and certainty of outcome (a definition of an LP) can have a hard time contributing to a meeting whose subjects seem to randomly bounce off walls. One minute the meeting was focused on the operation of some esoteric algorithm that Gary had created and then—without a break, pause or signal—we would be talking about the nutritional merits of Crazy Jim's Blimpy Burgers (a gastronomic treasure of Ann Arbor). Insane! I liked Gary and Joan. As people they were great. They just drove me crazy. Avoiding meetings with them was a principal objective during my first few months of work.

Over time, however, my strategy began working. I gained ever-increasing command of the systems. The theories Gary talked about also began seeping in. As I mastered more "bits," more and more finished work began to pour out. I began to find and fix problems

that had escaped the attention of my less structured coworkers. Complements on the improvement in product quality began to arrive with my name attached to them. I became increasingly confident and felt good when I went home after work. This was the way the world was suppose be!

Gary was delighted. This is exactly why he had hired me. He and Joan had the fast response end of the business nailed down. What they needed was someone who could consistently and dependably perform. I was that person and I was pretty proud of myself. My "irrational" co-workers were pretty proud of me too. We had reached an accommodation and I was prepared to stay where I was and enjoy it.

Up to this point my story is one of adaptation. I had transported my well-established and preferred information processing strategy into a new environment. The adjustments were not easy and were accompanied by some frustration but it had been successfully accomplished. This accommodation demonstrates that any style, even the highly structured LP/HA, can adapt to new situations given the right conditions. At this point, all that was needed was for everything to remain stable and my continued success was at hand.

This was not to be.

## My Transition

One day, in true RS fashion, Joan decided that she was going to leave the company and go back home to New York to finish her studies. Gary had been working to take manual intervention out of our computer programs. He had also engaged a network of consultants who were handling some of the workload. When Joan announced she was leaving, Gary declared that we had become a "virtual" organization and that we need not replace Joan. My comfortable world had just changed!

In spite of Gary's declarations, when Joan left the workload doubled and pressure quadrupled. As an RS, Joan was a fast worker. Not my strength. In addition, the jobs she had been doing were things that I had never done or even attempted to understand. Unknown to me, she had been "enabling" my extreme LP. Joan handled the "little" things, thus freeing me to focus on the "big" things. Now that she was gone it was just going to be Gary and me!

The pressure was on! It became immediately clear that I was the only one to meet with Gary. My meeting avoidance strategy crumbled. Without Joan as a buffer, there was no escape! During these meetings I would last for about five minutes before I went into total shutdown. Most of the time Gary was so tangled up in his thoughts (he is also a big time RI as well as RS) that he would not even notice that I had mentally left the room. Physically I was sitting at the conference table, but my mind was at my desk plotting out what needed to be done. I began to appreciate Joan's contribution.

Other things also happened. Without Joan, someone had to answer the phone when Gary was unavailable. I initially tried to leave it to the answering machine but Gary told me that at PCI the customer gets attention when they call—period. He said that answering the phone and talking to clients was not an elective.

My LP/HA strategic style had given me a strong knowledge base and a built-in action orientation. But it was a disciplined orientation. When I did things, I did them "right."

Most of the time things went without a hitch and work poured out. When I hit bumps, I took the time I needed, regrouped myself and still did them "right." My work was often fast paced, but it was controlled and I was the person "in charge."

In the beginning I was terribly uncomfortable dealing with clients. Their needs never seemed to match my schedule. Their calls were forcing me to make adjustments with which I was uncomfortable. In addition, like many LP's, I had a fear of making mistakes. Initially I tried putting people off by playing "secretary" and deferring the questions to Gary. This did not work well. Gary became increasingly annoyed at my giving him jobs that he felt I could handle. And should handle. I, however, did not have the same feeling. I was looking at doing the "million" "little" things that Joan had done. On top of this I was now expected to handle the instant requests from people I did not know from all over the country. I was not a "happy camper"!

This part of the story describes a condition that can cause a shift in a person's strategic style. The environment had changed. The "bit by bit" strategy that I had been using began to "bend" to accommodate new conditions. The environmental change was not temporary. Rather it was a reoccurring condition that I had to confront every day. Something was going to give—me, the environment or the information processing strategy that I was using.

Again, however, the LP component of my profile served me well. The mental structures used by LP's are "purchased" at a high price and are not easily discarded. This typically results in a persistent and tenacious overall posture—an attitude that characterized my stance during this period. I was not happy but I was not going to give up. Over time, I began to notice that some doors were closing and others were opening. A transition was occurring.

## Evolving My RS Strategy

At first the changes generated by Joan leaving and Gary's new expectations were so small that I did not even notice them. About 6 months after Joan had left, I remember doing a personal "I Opt" individual analysis on myself. It showed a movement from HA to RS. I did not believe it. Neither did Gary or Joan (she had come back for a visit). No one, including me, had noticed the small alterations that had begun to creep into my behavioral repertoire.

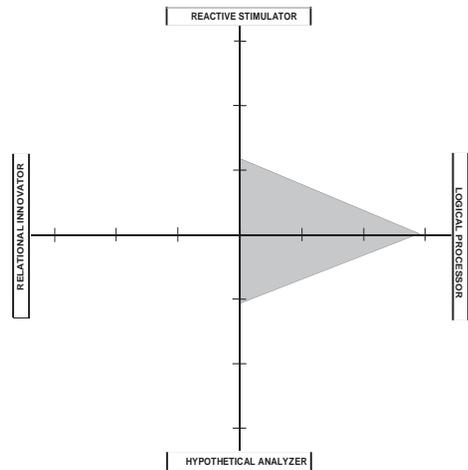
The first time that I "really" understood that my strategic style was changing happened when Gary left on a four day business trip. I liked the idea. I would get to do what I wanted to do without his constant interference (RS's can be real pests). I remember thinking, "my LP can really flower—I am complete control!"

Only that's not the way it worked.

What really happened was that people called and needed TeamAnalysis overnight. Others called and needed books shipped ASAP. Even Gary managed to get back into my hair by calling and asking to have individual analyses faxed back to him in 2 minutes. This is not what I had planned or expected during Gary's absence.

Had I insisted on maintaining the same LP/HA profile as I had when I joined the firm I would have been overwhelmed, immobilized and totally frustrated. The "bit by bit" strategy that I had employed in the earlier accommodation would not have worked. The

avalanche of demands was too large and was moving to fast for a measured accommodation strategy to be successful. Something else had to happen if I was going to survive.



**Graphic II**  
My New  
Strategic Profile

Mysteriously, I found myself actually doing all of the stuff being demanded. My LP component gave me a strong desire to complete things. However, my HA component had "built in" a need to understand things before I actually did them. But now the desire to get things done quickly overpowered the need to understand—I just "did." I seemed to be functioning like a machine gun. Every bullet (i.e., job) that left the barrel of my disjointed activity schedule seemed to load the chamber with the next bullet (i.e., job). All I had to do was keep my finger on the trigger and things got done. I remember going home and saying to myself "Wow! I REALLY did a lot today". The realization that I could actually control an "avalanche" of work was eyeopening!

Those conversant with Organizational Engineering can get a sense of the change with a glance at my new "I Opt" profile. Graphic II shows my profile as it looks today.

Looking back I can see that it was my analytical HA component that was causing me to be overwhelmed. The LP and HA had combined to give me a strong need for precision and knowing exactly what I was going to do an why. However, it was the HA element that contributed most to the paralysis. I kept seeing all of the things that might happen, all of the ways something might be done, all of the bad things that could happen if I choose this way over that way. The possibilities and permutations were infinite and my mind was not. I had a right to be overwhelmed.

What I had self-discovered during Gary's absence was that there was another way. It was possible to simply focus on "doing" without the need to fully understand every aspect of the things being done. My execution may not have been as efficient as I would have liked, but it was adequate. The resultant work product may not have been perfect, but it was satisfactory for the purpose intended. What I had discovered was that my old

LP/HA standard of perfection was not necessarily the best standard for all situations.

The transition continued after Gary returned from his business trip. The ordinary conduct of business was no longer intimidating. Huge orders that would have terrified me were now just something to be taken in stride. Before the transition I would start jobs early to be sure I would be ready when UPS stopped by for their daily pickup. Now I could start 10 minutes before UPS arrived and still be comfortable. Gary would get concerned over the change in my pattern (heh, heh). But I would be calm, collected and unpreberbed. It was a wonderful thing—the tables had turned. Now Gary was the one who was experiencing tension!

The transition also affected my personal life. For example, when I was still a deeply committed LP/HA I went out bowling with a bunch of friends. While sitting and waiting for my turn to come I tried to hand something to another girl sitting several seats away. As I extended my hand across several people, my wrist was kissed by a person who I barely knew! Trauma! I spent hours the next day calling people to get help in figuring out "what did this mean." Apparently it meant something because the person who did the kissing is now my steady beau.

The story illustrates the need that I felt as an LP/HA for the world to make perfect and complete sense. New or unexpected events threw a monkey wrench in my mental model and required immediate repair. This is probably one of the reasons that the LP/HA approach to the world tends to be a bit cautious. If the LP/HA accidentally bumps into the unexpected, they can be thrown into a complete tizzy—not a good condition for a person who values order, certainty of outcome and tangible results.

This need to know may also be one of the reasons that the LP/HA pattern is a bit resistant to change. Change is expensive if you've just GOT TO know exactly what is going to happen, when it will occur and why it is happening. Any reasonable person can be expected to resist this kind of cost if it at all can be avoided.

Since the transition began, I have noticed that my life seems to be flowing easier. I maintain a hectic schedule beginning at 8:30AM and ending at 11PM. Every minute is accounted for with work, school, social engagements and family obligations. Before the transition I would begin reviewing my plan for the day when I got up and hope that there were no disruptions. Now I can plan on the fly and disruptions, while still inconvenient, are not catastrophes.

Overall, I am comfortable with my new strategy for life and work. The environment I created when I moved out of my mother's house is much faster paced, more complicated and much more personally demanding than anything I experienced living at home. In this environment, my newfound RS enables me to get things done without a lot of hand wringing. My steady-as-a-rock LP helps to assure that they are done right. And, I seem to be able to switch between the expedient-action RS and the methodical action LP styles at will (although my RS sometimes sneaks in and gets the best of me). This stage of my life is fast-paced, a bit chaotic and filled with new things. My newly installed RS component is helping me to accommodate it—and even enjoy the journey. The strategy seems right for what is going on.

However, I sometimes miss the old HA component of my profile. There were many satisfactions involved in knowing exactly how my world worked. For example, figuring things out was often a real pleasure. I could sit back knowing that if I pushed a particular

button I would get a particular result. I wonder where the HA went?

It is worth pausing for a moment to reflect on the transition. Notice that I did not plan it. I never sat down and "figured out" that the RS strategy was the best for me at this particular time. I did not try to "plan out" how to become an RS. Rather, the RS strategy was demanded by the environment I had created. As I responded to that environment I had to use "bits" of an RS strategy to get through. As I used those "bits," I became increasingly skillful. Over time the RS simply evolved naturally. This is exactly the situation that Gary describes in his books when discussing the transition of strategic styles (Salton 1996, 2000).

## The Price I Paid

Organizational Engineering teaches that there is no such thing as a free lunch. Every move in the strategic profile means that there is a loss as well as a gain. Part of the price I paid in changing my strategic profile was enduring the transition. Most of this was not very much fun. More than once I went home both frustrated and angry—the price of my transition involved an emotional as well as physical drain. It was not cheap.

On the work front, I had to change some of my work practices to keep things on an even keel. I found that I could no longer trust myself to do things right the first time. Mistakes are creeping into my work. Most of these seem to occur when I am involved in some kind of brainless job. For example, I recently had to take apart 200 pamphlets because I had stapled one of the pages in upside down. However, when my LP is engaged, I get the same level of quality I got when I was in my LP/HA phase. The difference is that then, everything was on automatic—now I have to consciously make sure that I have myself in the right gear for the job that I am doing. There is a learning curve involved even today. It is kind of like going from a car with automatic to one with stick shift. Part of the cost of increased flexibility is the need to always remain consciously aware of the demands of the task at hand. Under my old LP/HA style this cost did not exist. I was always in perfection mode.

I also find that I have had to create some tools to help me compensate. When I maintained a strong LP/HA posture, I did not need "to do" lists. I knew exactly what had to be done and when to do it. Now I cannot be as certain. If I accidentally stray into RS territory I could easily make commitments and then promptly forget them. I once scorned "to do" lists as unnecessary wastes of time. They now help me overcome the vulnerability that accompanies my new profile. I'm also considering installing formal "check lists" for standard tasks. I have found that the shift from LP to RS is not always voluntary. Sometimes it is sneaky. The check list strategy is a bit costly but it may be worth the price if I find the "boo-boo's" happening too often.

Overall, I am happy with my new profile. I am the same "Becky" that I have always been and nothing fundamental to "who I am" has changed. Only now I am not as threatened by new things and am more comfortable with my decision making. I can analyze a situation if I want to, but I can also act without hesitation. I have adjusted to a new environment by adopting new strategies. These would have been wrong while I lived in the stable, predictable environment of my mother's house. They are right for me now. The price paid was not cheap but the benefits gained covered that price many times over.

## Where I will go next?

The knowledge I have of Organizational Engineering not only equips me accommodate change, it has also gives me the tools to make things happen. For example, I sometimes speculate whether I should consciously "build in" a bit more RI into my profile. I know how to do it. I just have to shift my environment around a bit, endure some pain and get on a new learning curve.

The real question is whether I want to. As of right now, I get a lot of satisfaction seeing the product of my labor leave my hands to benefit someone who I might not even know. I will not give that up easily and certainly not to join that chaotic RS/RI frenzy that seems to follow Gary around like Pigpen's dust ball (an illusion to Charles Shultz's "Peanuts" character for those not into Sunday comics).

Organizational Engineering has taught me that I can change anytime that I choose. Any strategic style I might want is always "on sale" and all I have to do is to be willing to pay the price to get it. It sounds kind of funny when I say it, but the "engineering" approach Gary created is really more humane than the "touchy-feely" approaches offered by the psychological theories I have been exposed to at school. I find Gary's methodology to be personally ennobling. I am the person in control and I do not have to change into a different "Becky" just to be able to navigate life. Rather, all I have to do is to recognize changes in my personal environment and adjust my strategy to accommodate them.

The insights provided by Organizational Engineering and my experience in seeing them actually work has proven personally satisfying. The changes I experienced have also proven to be an operationally effective way to conduct life—my life, under my current circumstances and with my objectives. Other people in other circumstances with other objectives may choose other equally legitimate strategies. The "constant" running through all of these variations are the principles of Organizational Engineering. A small investment in understanding these principles can pay high dividends to both the practitioner and to the clients who he or she serves.

## Author

Rebecca Wilkinson is now serving as Production Manager for Professional Communications Inc. in Ann Arbor, MI. In addition to her full time employment she is pursuing full time studies in pursuit of her undergraduate degree. Ms. Wilkinson can be reached at bekyatpci@aol.com.

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