



Intentional change theory at the organizational level: a case study

Change theory at
organizational
level

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Abstract

Purpose – The purpose of this paper is to examine the application of intentional change theory (ICT) at the organizational level through the lens of a case study.

Design/methodology/approach – This paper is a case study of Roadway Express, a leading transportation provider of industrial and commercial goods throughout North America, which embarked on a journey of cultural transformation in 1999, using a popular change process known as appreciative inquiry (AI). The Roadway case study illustrates both the theory of intentional change and the method of AI in use and provides a platform upon which to observe change at the organizational level.

Findings – Roadway Express serves as a solid benchmark for organizations considering how to succeed in cultural transformation. The implementation of the philosophy and methodology of appreciative inquiry, played a key role in that success. Analysis shows the link between ICT and AI. From this observation, ICT emerges as a stand-alone theory upon which to interpret the success of Roadway's organizational change efforts.

Practical implications – Drawing insight from the Roadway case study, ICT provides us with a comprehensive model for understanding how to approach and sustain change at the organizational level.

Originality/value – For the past three decades, most of the work using intentional change theory has focused on individual change. This paper presents a different view of the same theory, this time at the organizational level. This insight may be of interest to leaders, managers and change agents.

Keywords Change management, Organizational change, Organizational restructuring

Paper type Case study

Change is constant. It's an age-old adage that applies to individuals and organizations. People and systems can change in desired ways, but change is not sustainable without intention (Boyatzis article earlier in this issue (Boyatzis, 2006)). It's the intention or direction that leaders, managers and change agents employ that puts them in the driver's seat of change in their lives and in their organizations. Intentional change theory (ICT) provides them with a platform to understand and deliver just that. ICT, as described by Boyatzis earlier in this issue, but also by him as early as 1970, applies to all levels of human or social organizations. Most of the work using ICT in the last three decades has focused on individual change. This article focuses on the application of ICT in organizational change. A case study of Roadway Express, an organization which has embarked on a journey of cultural transformation since 1999, illustrates a view of ICT at the organizational level. In Roadway's case, the company approached the goal of organizational change through a process called appreciative inquiry (AI). AI is a methodology for achieving positive, sustainable change to facilitate a cultural transformation (Boyatzis *et al.*, 2003; Boyatzis and Van Oosten, 2003). The Roadway story provides us with a persuasive example of how and why change occurred and was sustained through observing the characteristics of ICT at the organizational level. And it offers us perspective as to why the change method, known as AI, was so successful.



Intentional change theory

Intentional change theory presents a window to view and interpret how individuals and organizations achieve desired, sustainable change (Boyatzis, earlier article in this issue (Boyatzis, 2006)). ICT outlines both the process and the phases of the process that are central for sustainable change to occur. The process is shown graphically on p. 610 in the first article of this journal. The model includes five phases or aspects of learning, called “discoveries” (Kolb and Boyatzis, 1970; Boyatzis, 1999, 2001; Goleman *et al.*, 2002).

In considering ICT at the individual level, the discoveries represent various stages that a person cycles through in his/her journey toward desirable, sustainable change. “The ‘change’ may be in a person’s actions, habits or competencies . . . their dreams or aspirations . . . how they look at events at work or life. It is ‘desired’ in that the person wishes it so or would like it to occur. It is ‘sustainable in that it endures.” (Boyatzis, earlier article in this issue) (Boyatzis, 2006). The stages of the model are summarized below (Boyatzis, 2006; Goleman *et al.*, 2002):

- (1) *First discovery.* My ideal self – who do I want to be?
- (2) *Second discovery.* My real self – who am I? What are my strengths and gaps?
- (3) *Third discovery.* My learning agenda – how can I build on my strengths while reducing my gaps?
- (4) *Fourth discovery.* Experimentation and practice – experimenting with and practicing new behaviors, thoughts and feelings to the point of mastery.
- (5) *Fifth discovery.* Developing supportive and trusting relationships that make change possible.

These discoveries all apply when considering ICT at the organizational level as well. The difference lies in the outward manifestation of each discovery, as shown in Table I. For example, in the first discovery – the ideal self – individuals consider their desired future. A result of that exercise might include development of a personal vision. The first discovery in the organizational context, is a shared vision. Similarly, in discovery 2 – the real self – the individual reviews strengths and gaps and synthesizes those into

Discoveries	Manifestation of ICT at individual level	Manifestation of ICT at organizational level
Ideal self	Personal vision	Shared vision
Real self	Personal balance sheet Strengths Gaps	Performance and climate indicators Organizational competencies as compared to competitors Organizational gaps as compared to competitors
Learning agenda Experimentation and practice	Learning plan Action plan	Organizational strategic plan Organizational action plans
Resonant relationships	Trusting, supportive, resonant relationships with the person	Social capital Web of stakeholders, sharing a common fate: employees, suppliers, customers, investors

Table I.
Applying ICT at the individual and organizational levels

a personal balance sheet. At the organizational level, strengths and gaps are those that stand out when compared to the organization's competitors or marketplace. Performance and climate measures paint the picture of the organization's real self, in terms of its distinctive core competences, norms and values embedded within the culture, and other symbols of their organizational dispositions (i.e. strengths and weaknesses vis a vis others in the same industry and performance).

In the third discovery – the learning agenda – individuals create a learning plan and organizations create strategic plans. The fourth discovery, experimentation and practice, includes action planning for either the individual or the organization, including experiments and innovations in any unit within the organization. Finally, the fifth discovery – resonant relationships – involves the network of trusting people that support an individual's change. At the organizational level, those relationships get manifested into the web of stakeholders (i.e. employees, managers, customers, suppliers, etc.) who share a common fate in the success of the organization. This is referred to as social capital (Smith, earlier article in this issue).

The Roadway Express story

Roadway Express is a case study of organizational transformation. Roadway Express, founded in 1930, is a leading transporter of industrial, commercial and retail goods specializing in solutions for businesses across North America. The company operates approximately 380 terminals and employs over 26,000 employees in the USA, Mexico and Canada. Roadway Express is a subsidiary of Yellow Roadway Corporation, one of the largest transportation companies in the world. Existing in the highly competitive transportation industry, company executives recognized that they needed an enduring strategy to energize their employees around the country and outpace competition in the long run. In 1999, the company partnered with the Weatherhead School of Management at Case Western Reserve University to begin a journey of transformation. A customized leadership development program, known as Developing Breakthrough Leadership at Roadway, was launched.

The program produced direct and measurable results in the following three years. An example of the program's impact occurred with the implementation of a company-wide safety initiative started in 1999. The rollout was so successful that:

- Roadway saved \$6 million since inception;
- the number of injuries decreased by 43 percent annually; and
- the number of accidents decreased by 41 percent annually.

This is their story. In 1999, company leaders recognized that culturally, Roadway needed to change. The company's culture originated and evolved during decades when management practice was typically more traditional. It was characterized by hierarchy, a command and control style and in recent years, average financial performance. Top executives identified that what they needed was breakthroughs – breakthroughs in performance, leadership and management. A vision emerged as “everyone is fully engaged in the success of the company and committed to the success of each other.” The leadership program became the launch pad for attuning key leaders to the vision and enhancing their capabilities to achieve it. The overall objectives were to help managers develop new knowledge, competencies and motivation to pursue their vision and succeed together. Specific goals included:

- increasing leaders' self-awareness and emotional intelligence;
- positioning leaders to develop leaders at every level;
- developing the capabilities of the leadership team to achieve breakthrough performance; and
- broadening the participants' understanding of issues that are crucial for long-term economic performance.

In the first year, a nine-day leadership development program was designed and delivered over six months and the top 50 executives participated. In subsequent years, the program was cascaded to senior managers in the next two levels until everyone representing the top three levels in the organization, approximately 150 leaders, received the same leadership education. The approach included a multidisciplinary curriculum, centering on emotional intelligence, strategy, system thinking, marketing, finance and appreciative inquiry, a process for leading change. Since that first year, participants have returned to Weatherhead annually for week-long workshops in which the curriculum builds on the previous year's content. And each year, the same 150 key leaders throughout Roadway participate, including the president and CEO.

To address the development of individual leaders throughout the organization, the Breakthrough Leadership program leveraged a design used successfully in numerous degree programs at The Weatherhead School of Management. The core model was anchored in ICT and it focused on helping Roadway leaders to increase their emotional intelligence, identify areas for behavior change and practice new habits real-time. The overall design enabled participants to receive 360-degree feedback and work with executive coaches, who guided them through the process of intentional change, using the emotional competency inventory (Boyatzis and Sala, 2004). The first step in the process was discovering one's ideal self – the first discovery in ICT. This referred to what the leader wanted out of life and work and his/her dreams and aspirations. This helped each person discover or rediscover his or her passion at work. This energy drove motivation for making changes in behavior. After a number of exercises, each person developed a personal vision statement describing their ideal self.

In the next phase, each participant worked toward the second discovery – awareness of his or her real self. After receiving feedback from a 360 assessment of emotional intelligence competencies, participants analyzed the results with help from their executive coach. Combined with their ideal self, this view of their real self positioned them well to develop a personal balance sheet. The personal balance sheet provided a view of their distinctive strengths and gaps.

With the help of executive coaches, each participant converted their personal vision and balance sheet into a learning plan for their development as a leader – this was the third discovery in the process. The plan provided a focus for their future efforts. It provoked them to think of how to use their everyday experiences as the basis for learning. In this sense, the plan helped each person convert their life and work activities into a learning laboratory. In compiling the plan, each leader was encouraged to integrate their preferred planning and learning style. Experimentation and practice, which comprise the fourth discovery, then occurred on the job.

The fifth discovery – the development of trusting relationships to support each person in their development – was a continuous discovery throughout the entire

process. Executive coaches played a critical role here. The coaches helped the Roadway leader reflect upon their dreams and aspirations, consider ways others perceived them, identify strengths and weaknesses and overcome blind spots in their leadership style. The coach helped the person “reality test” their learning plan. This included finding ways to integrate their development plan with work and life experiences, anticipate obstacles and consider ways to overcome them. During the experimentation and practice stage, coaches served as a sounding board and cheerleader.

ICT, as applied in the context of individual development, had a demonstrated track record for success prior to the Roadway program (Boyatzis *et al.*, 2003; Boyatzis and Van Oosten, 2003). For example, in Weatherhead’s MBA program, where the model was integrated into the core curriculum, the results were impressive. Participants showed a 70 percent improvement in emotional intelligence competencies one to two years after the program. The changes were sustained at 50 percent improvement five to seven years later (Boyatzis *et al.*, 2002; Goleman *et al.*, 2002). These results are in contrast with the typical impact shown by above average MBA programs of 2 percent improvement one to two years after a program, and the typical impact of management training showing only 10 percent improvement three to 18 months after training in industry (Goleman *et al.*, 2002).

Cultural transformation

The ultimate goal of the Breakthrough Leadership initiative was cultural transformation. Starting with the top leaders, Roadway executives wanted all employees to “understand both the big picture (i.e. how Roadway would be successful) and their personal role in the big picture (i.e. the effect they had on customers and financial results). This was referred to as “line of sight.” Ultimately, each employee must be able to link his/her actions to the financial results of the organization.

To equip the leaders with tools for culture change, Roadway and Weatherhead introduced the appreciative inquiry methodology into the curriculum. The top 150 executives were originally introduced to the AI 4-D model (described fully in a later section) as a concept in the classroom. Beginning in this first session, Roadway leaders went to work to identify organizational priorities where AI might be useful.

Working with David Cooperrider, co-founder of appreciative inquiry, Roadway convened large group meetings where people were brought together to create images of their desired future using appreciative inquiry. This took place outside the scope of the Breakthrough Leadership Program. The meetings were called summits. Each summit was organized around a significant business topic, such as “Delivering unsurpassed speed,” or “Developing a team sell approach.” They invited people from each of the stakeholder groups involved in this topic – dock workers, truck drivers, customer service representatives, managers, customers, and suppliers – to collaborate on creating their organizational “Ideal” for the topic. Summits typically included groups of 200-300 people and lasted two to three consecutive days. A typical Roadway summit outline, designed in accordance with the AI 4-D model is shown in Table II.

Though Roadway’s journey of organizational transformation began in 1999 with the beginning of the Developing Breakthrough Leadership program, it gained significant momentum in 2000 when appreciative inquiry was introduced. In the period between 2000-2004, Roadway completed over 70 summits involving over 8,000 people. Concurrently, each year Roadway executives continued to acquire new knowledge and

Day one: (emphasis on discovery phase)	Day two: (emphasis on dream phase)	Day three: (emphasis on design and delivery phases)
<p><i>Discovery</i></p> <p>1:1 appreciative interviews</p> <p>Mixed groups of pairs search for themes and factors which “give life” to our TOPIC</p> <p>Possible customer panel</p> <p>Creating our shared history</p>	<p><i>Dreaming</i></p> <p>Mixed groups: imagining possibilities for our TOPIC</p> <p>Mapping highest impact opportunities</p> <p>Images of our future around opportunities of most interest (in new, self-selected groups)</p> <p>Lunch</p>	<p><i>Design</i></p> <p>Work on 1 yr targets and action steps</p> <p>Prepare presentation of “yes-able proposals for action”</p> <p>Community Forum</p> <p>Presentations from 3-4 opportunity groups</p>
<p>Stakeholder groups: identifying “proudest prouds” and what we want to keep</p> <p>Input: Where does positive change come from?</p>	<p>Presentations of images</p> <p>Declaring aspirations for the future: 5 yr goal and 1 yr steps</p>	<p><i>Delivery</i></p> <p>Team formation: opportunity groups convene to establish principles for working together after the summit and agree on immediate next steps they will take</p>

Table II.
Roadway summit design

skills through the Breakthrough Leadership Program. A timeline showing integration of these activities is shown in Table III.

Summits became a powerful vehicle for Roadway as an organization to educate employees all over the country on key business challenges and goals. They also served as the spark that ignited system-wide collaboration and action in support of the objectives. This happened near the end of each summit when participants broke into small groups to develop actions plans. The last segment of each summit was an invitation to the entire community for comments and reflections and was conducted in an “open microphone” format. People publicly pledged their commitment to each other to see the changes embodied in the action plans through to completion. Appreciative inquiry in general, and the summits, in particular, provided a platform for the company to achieve its ultimate objective – engaging every leader in the success of the organization and one another.

Appreciative inquiry

Appreciative inquiry (AI) is a philosophy and methodology for facilitating large-scale, positive, sustainable change. AI is a collaborative exploration for the best in individuals, organizations and the environment surrounding them. It includes a comprehensive and systemic discovery of what gives “life” to a system when it is “most alive, most effective and most constructively capable in economic, ecological and human terms” (Cooperrider *et al.*, 2000). It is intentional in searching for the positive core in people and organizations. It assumes that the positive core is largely untapped and beholds endless inspirational stories of the person or the system or both operating at its peak.

As a concept, AI fundamentally advocates that human systems move in the direction of the questions they most consistently ask themselves. In that context, AI focuses on the art and science of asking questions that serve to illuminate a system’s

Date	Activity	Change theory at organizational level
2000 Feb 2000	4 summits held with approximately 390 people attending AI introduced to top 50 Roadway leaders during Case/Weatherhead leadership development program – Developing Breakthrough Leadership at Roadway Express	713
May 2000	AI Training conducted at Roadway for Roadway Organization Development Group	
Summer 2000	First Roadway AI summit at Akron Ohio General Office; 70 people attended	
August 2000	First field summit at Chicago Heights, IL (largest terminal; 125 people attended)	
December 2000	1-day follow-up summit in Chicago Heights focused on question: “How have we done since August?”; 95 people attended	
2001 January 2001	16 summits held in 2001 with approximately 1,900 people attending AI summit at Akron	
Feb 2001	Top 50 Roadway leaders attend Case/Weatherhead program Learning theme “Fostering Engagement Throughout the Organization”; addressed through a focus on accelerating the learning of “everyone as leaders throughout the organization”; increasing leaders’ financial acumen and ability to think and act like owners of the business	
May-June 2001	Learning on AI cascaded to next level of managers in field and headquarters through executive programs at Case/Weatherhead (approx 100 people)	
2002 February 2002	20 summits held in 2002 with approximately 2,900 people attending Top 150 Roadway leaders attend Case/Weatherhead leadership development program	
2003 February 2003	19 summits held in 2003 with approximately 3,300 people attending Top 150 Roadway leaders attend Case/Weatherhead program; learning focus: leading change; introduction of benchmarking stories to “learn from the best”, both internal and external stories introduced	
2004 Feb-June 2004	15 summits (attendee numbers not reported) Top 150 Roadway leaders attend Case/Weatherhead program; learning focus: “Accelerating Development of High-Engagement Organization”; addressed through focus on taking principles of Good to Great book and debating if Roadway can move from Good to Great (more work on shared vision?); external benchmarking	

Table III.
Roadway timeline

strengths and positive potential (Cooperrider *et al.*, 2000). A change process rooted in AI begins by spotlighting the organization’s core strengths, then linking to them as a way to magnify vision, creativity and energy for change. AI searches for the life-giving forces or the best of “what is” to inspire the collective vision of “what might be.” The ultimate goal is to create a desired image of the future.

AI can be employed in numerous applications of organizational life and is commonly compared to problem solving methods. However, it distinguishes itself from traditional problem-solving methods through the basic assumption upon which it rests. AI considers an organization as a “solution to be embraced” as opposed to “a problem to be solved” (Cooperrider *et al.*, 2003). As an approach to organizational learning and development, its purpose is for uncovering and fostering innovations in social systems. The AI methodology includes four cycles, known as the appreciative

inquiry “4-D” Cycle, as shown in Figure 1. These are: discovery, dream, design and destiny.

The first phase is called the Discovery phase. It focuses attention on appreciating and valuing the best of the person or organization and addresses the question of “What gives life?” The second phase is the Dream phase. Imagining a desired future is the core focus and questions such as “What might be possible?” are considered. The next D stands for Design. It’s in this phase that attention is paid to “What should be?” and how to go about co-constructing the imagined future. The last stage is referred to as Destiny. The focus at this point is on sustaining the change through exploration of “how can we empower, learn and improvise?” (Cooperrider *et al.*, 2003).

While AI is often referred to as a methodology, there are five principles of AI, deeply grounded in research, which form the basis for the model and aid us in comprehending the 4-D cycle. A brief explanation of each principle follows (for full review, see Cooperrider *et al.*, 2003):

- (1) *The constructionist principle.* To address the challenge of organizational change, leaders, managers and change agents must be skilled at reading, knowing and understanding the organization as an evolving construction. Constructionists advocate that the first questions asked in a change intervention create the future.
- (2) *The principle of simultaneity.* By its very nature, inquiry becomes an intervention. The two events – inquiry and change – are simultaneous, not separate.
- (3) *The poetic principle.* This principle suggests that organizations are like an open book, with unending potential for learning, interpretation and sense making, similar to a good work of poetry. An organization’s story is constantly evolving and is always co-authored.
- (4) *The anticipatory principle.* A reality of organizational life is that leaders and managers are continually anticipating or planning their future. Those moments

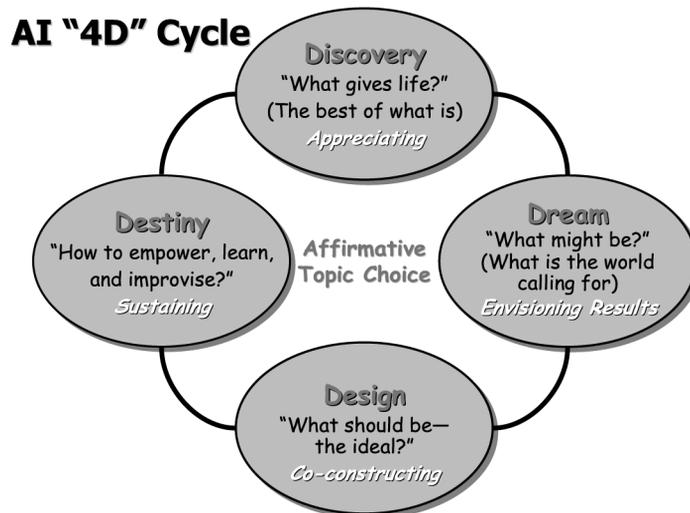


Figure 1.
Appreciative inquiry 4-D
model

provide an opportunity for people to collectively discuss, explore and imagine their desired future.

- (5) *The positive principle.* The core premise of this principle is that the energy for change requires significant positive affect. Hope and inspiration are just two examples. The more positive the intervention, with respect to inspiring positive thoughts and feelings, the more sustainable and effective the change effort will be.

These five principles form a theoretical basis upon which AI operates. When synthesized together, these principles fundamentally suggest that positive imagery generates positive action. This is a central tenet of appreciative inquiry.

Linking ICT and appreciative inquiry

Roadway Express serves as a solid benchmark for organizations considering how to succeed in transforming culture. The implementation of the AI philosophy and methodology played a key role in that success. Understanding how AI theory supported the success of the Roadway’s organizational change intervention though is not as readily obvious. The guiding principles of AI are compelling in their comprehensiveness, however, the very nature of their interdependence creates an inherent complexity, i.e. in considering what theory is at play in an AI intervention, one needs to integrate the essence of all five principles. The Roadway case study illustrates the method of appreciative inquiry as well as the theory of intentional change in use. Further analysis shows similarities and synergies existing between AI and ICT (as shown in Table IV). From this observation, ICT emerges as a different and straightforward theory upon which to interpret the success of Roadway’s organizational change efforts.

As illustrated, the fundamental sources for momentum in the change process are the same in both AI and ICT – discovering new knowledge and dreaming about the future. Furthermore, the nature of new knowledge being discovered is similar. Both AI and ICT explore when the individual or the organization is at its best. In the case of AI, it is described as a search for the positive core or life-giving forces. In ICT, the second discovery – the real self – facilitates a heightened self-awareness through an examination of strengths and gaps. ICT suggests that to engage and sustain change, a

Intentional change theory		Appreciative inquiry method
Ideal self: shared vision	↔	Dream stage: envisioning what might be?
Real self: performance and organizational climate: corporate competencies (strengths) and gaps	↔	Discovery stage: appreciating and valuing the best of what is
Learning agenda how can I build on my strengths and reduce my gaps?	↔	Design stage: co-constructing and planning the future
Experimentation and practice; learning new behaviors toward the goal of mastery	↔	Design stage: learning, empowering, and improvising to sustain the future
Resonant relationships – social capital	↔	Process results in dialogue and stronger relationships

Table IV.
Linking intentional
change theory and
appreciative inquiry

balanced understanding of strengths and gaps is important and goes on to further advocate that strengths can best be leveraged to close gaps. The AI process is not explicit in locating and highlighting deficits in the system. But during the search to appreciate and value the best of what is inherent within the organization, the process uncovers gaps implicitly. This is one point where AI and ICT differ significantly.

A significant linking pin between ICT and AI is the shared importance of the dream or image of the ideal future. In ICT, dreaming occurs in the first discovery – the ideal self – when a person is encouraged to imagine their ideal future. This might include their ideal life, their ideal job, their ideal location, the ideal set of people in their life. When applying ICT to organizations, the dreaming exercise is shared among key stakeholders, and is manifested in the emergence of a shared vision. This might include a discussion of the ideal way to serve customers, to manufacture products, or to develop talent in the organization. In both the individual and organizational context, dreaming becomes the key to unlocking energy and motivation for change.

In AI, dreaming occurs after the organization has discovered its strengths and the best of what it has to offer. It happens when a group of stakeholders collectively imagine and aspire to create a new future for themselves, a future of new opportunities, new realities, new ways of interacting. The outcome is a shared vision, identical to ICT. Furthermore, there's a power that's inherent in the collective aspect of this stage. When a group of individuals, who are connected to a shared destiny, begin to imagine a new future together, shared confidence, energy and hope emerge. A bond is formed. It's through the shared experience, that seeds of new relationships are planted or existing relationships are nurtured. Relationships become the glue that hold the change process together.

Through the Roadway story, we can see one example of how the broader AI model can be applied in discrete steps. Table II shows how the AI 4-D cycle gets implemented in a typical summit at Roadway. During the AI process, people collaborate around different intended organizational changes, such as product innovations, customer service, or internal process improvements. The collaboration is in service of the shared dream or vision. The process followed in an AI summit enables groups of people to work together, develop project plans and identify desired system changes required to turn their dream into reality. After a summit, the project team members enact the plans for change. In doing so, they leverage the close relationships with others as a source of strength and support. The design and delivery phases in the Roadway summit design, in particular, match the third through fifth discoveries of the intentional change theory.

Conclusion

AI is a powerful organizational change methodology that continues to grow in popularity. AI is theoretically anchored in the synthesis of five guiding principles, which serve as the foundation for the AI 4-D model. However, the application of the guiding principles as theory can be complex and confusing. Drawing insight from the Roadway case study, intentional change theory presents a different lens to explain why the particular change method – in this case, AI – was so successful. ICT serves as a straightforward, stand-alone theory providing insight as to how and why change occurred at the organizational level. Clearly, a significant limitation is that this observation arises from one organization's experiences and as such, is based on only one data point. Future studies are clearly needed to further explore this assertion.

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