

Chapter 24 BOJE'S GROUP SITUATION MODEL

SITUATION LEADERSHIP IN TEAMS

The PSL2 Problem Phases, Solve & Save, & Learn & Lead method (adapted Boje, 1980).

PSL2 stands for PROCESS AND PHASES, SOLVING AND SAVING, LEARNING AND LEADING.

Professor Mark Sandberg of Rider College taught me the fundamentals of PSL2 while I was his student in early 1970s. I went on to write a book chapter in 1977 [i] and reprinted it in *Readings in Managerial Psychology* (Leavitt, Pondy & Boje, 1980). I combine research on problem solving process leadership strategies that seem contingent on situational factors such as available time, hidden conflicts in the flock, and commitment needed (Boje & Murningham, 1982; [Boje, 2000](#)). I developed the model to train buffalo herds to fly like geese (or camels to be horses) [Belasco & Stayer, 1993]. Since then PSL2 has been used by thousands of MBA students who took it into the corporate world. Every so often I run into consultants who built their practice on it.

PSL2 Problem Solving Phases (See Table One)

- Problem ID
- Solution Generation
- Evaluation
- Decision
- Implementation


PSL2 Table One presents the five problem solving phases, and highlights (in yellow) the seven questions an effective team of Geese must answer to know they are on course.

TABLE ONE:


PSL2 Problem Phases, Solve & Save, & Learn & Lead (adapted Boje, 1980)²

PSL ² PROBLEM SOLVING PHASES	PSL ² QUESTIONS and STEPS copyright D. Boje 2001
I. PROBLEM ID	<ul style="list-style-type: none"> • Q1: Is problem appropriate for Geese action? <ul style="list-style-type: none"> ○ NO – GO TO PHASE IV (Buffalo Decides) ○ YES – Q2: Is it a problem or a symptom? <ul style="list-style-type: none"> ▪ PROBLEM – Q3: Can Problem be decomposed? <ul style="list-style-type: none"> • YES – attack each subproblem separately <ul style="list-style-type: none"> ○ Convert Each Subproblem Statement to List Form ○ GO TO PHASE II (Q4) with each subproblem • NO – GO TO PHASE II (Q4) ▪ SYMPTOM – Search to find Underlying PROBLEM
II. SOLUTION GENERATION	<ul style="list-style-type: none"> • Q4: Is creativity or accuracy more relevant? <ul style="list-style-type: none"> ○ ACCURACY – Critically develop <i>viable</i> solution strategies ○ CREATIVITY – Convert problem to list form & introduce brainstorming rulesⁱ • Q5: Should team work together (as Geese) or as individuals? <ul style="list-style-type: none"> ○ AS INDIVIDUALS – Round Robin (geese) exchange after individual (silent) listings ○ AS GEESE – Q6: Is Directive or Supportive process leadership needed? <ul style="list-style-type: none"> ▪ SUPPORTIVE – Keep discussion free and open <ul style="list-style-type: none"> • Sit back or take role of a goose in the team (go to III - EVALUATION) ▪ DIRECTIVE – Control and focus the discussion like a lead Goose (go to III - EVALUATION)
III. EVALUATION	<ol style="list-style-type: none"> 1. STEP 1: LIST Main Solution Strategies & Clarify each one for understanding 2. STEP 2: DISCUSS (and list) pros & cons for each strategy
IV. DECISION	<ul style="list-style-type: none"> ○ Q7: WHICH DECISION OPTION? (See Table Two) <ul style="list-style-type: none"> ▪ Buffalo Decides ▪ Consensus ▪ Rank Order or Voting ▪ Restart the Process (Go to Reality Check Q8)
V. IMPLEMENTATION	<ul style="list-style-type: none"> ○ Do Implementation Planning ○ Make Responsibility Assignments ○ Q8: REALITY CHECK - "Will it Fly"? <ul style="list-style-type: none"> ▪ YES – STOP! But make sure goose will fly <ul style="list-style-type: none"> • Moment By Moment Virtual Reality Prediction Testⁱⁱ ▪ NO – Back to PHASE I – SYMPTOM STEP


Phase I - PROBLEM ID - To ID a problem is to explore the problem, first, to write it out in a single sentence, and insure every team member understands the problem. There are eight critical thinking questions to ask. Three first three happen in Phase One, Problem ID. In Problem ID, the first question is asked:


 Q1: "Is problem appropriate for Geese action?" Many untrained teams try to solve problems that are Buffalo business. In phase one, there is a second question,


Q2: "Is it a problem or a symptom?" Untrained geese get lost trying to resolve symptoms, instead of finding the underlying root causal problem (See [SEAM site](#)).


 Q3 "Can problem be decomposed?" Decomposing allows the team to work on one sub-problem, take it through all five phases, then come back and work on the next chunk.


Phase II - SOLUTION GENERATION - There are three critical thinking questions for flying geese in Phase II.

 Q4 "Is creativity or accuracy more relevant?" Teams get stuck in a rut, using the same solution generation process over and over without looking at the situation. Some solutions require accuracy (generate three alternatives, even split into sub-groups to work them out and come back and share). Other solution lists are creativity problems and the brainstorming rules apply (See [brainstorming rules](#))


 Q5: "Should team work together (as Geese) or as individuals?" Untrained teams allow a few squawking geese to use up all the air time. There is no sharing of ideas and solutions by the flock, and the result is a poor quality discussion, weak alternatives, and no commitment. When air time is being respected then fine, work together. Research shows that individuals working alone to generate ideas, then combining them round robin generates more and better solutions. If you must work as a flock, then decide how to lead this process.

 Q6: "Is Directive or Supportive process leadership needed?" Working as a flock, the geese sometimes need a lead goose who is supportive and other times the lead goose must be directive.

 A supportive style of leading means to move out of the lead goose role, and fly with the flock. Use active listening skills and use silence to solicit more alternatives. Throw your ideas up on the list along with everyone else's.

 For a directive style, limit evaluative comments from the flock. remind them of the rule, "save evaluation for the evaluation phase." Keep control of the wall pad or flip chart to work up the list with the flock. Manage the tempo (e.g. in brainstorming get as many ideas up on the chart as quickly as possible). Confront people who get into "hard sell" or "lend me your ear" games. Managing air time means being a directive lead goose.


Phase III - EVALUATION - There are two steps in the evaluation phase. You promised to allow the flock to get critical, real, and skeptical. Keep your promise here.

 STEP 1 - "List Main Solution Strategies and Clarify each one for understanding." If you have done the accuracy method in Phase II, then you only have two or three options that were carefully thought out. Discuss them for clarity. If you come to


Phase III from an enthusiastic brainstorming session, you may have a hundred ideas. Take time to sort them into types, collapse similar ones together. However, postpone the the selling and pros and cons till step 2. In accuracy and creative method you can lead the flock to greater heights by keeping a good record of the solutions.

STEP 2 - "Discuss (and list) pros & cons for each strategy." List on the flip chart.

Write each solution option down, and under it write "+" and list each plus. Then write "-" and list each con.

 In both steps you will need to confront "Love me, love my dog" and "Groupthink" games.

Phase IV - DECISION - Train the flock to be flexible in its flight patterns and use different decision processes for various situation contingencies (consider time, energy, conflict history, coalitions, and risk).

 Q7: "Which Decision Option" - When is it best to have the Buffalo decide, do a consensus process, just rank order (or vote) to make a decision, or recognize a "Turkey" (symptom) and start over again in Phase I.


 Buffalo Decides when:

Task is trivial to interest of the flock or Buffalo has an obvious preference.

The authority to make the decision rests outside the group; when flock has vested interest.

Issue is highly emotional and talking it out will only divide the flock.

Flock does not have requisite knowledge or background to decide or act.


 Consensus by Flock when:

It is a complex task with high rate of information to exchange and a critical discussion of the issues is needed.

A simplistic vote will only disguise conflicts and disagreements it is now time to resolve.

Flock members need to take responsibility and support the implementation decisions.


A high-quality discussion and decision needed to copy with possible risky consequences.


 Rank Order or Voting when:

Issue where tension and disagreement is likely to so divide the flock that pushing for consensus is dysfunctional; where obtaining a group sanction is preferable to a Buffalo-only decision.

There is no available time to allow for the arguments and conflict to be fully developed and resolved (there is price to pay for haste: flock will use next decision to act out any unresolved conflicts).

Phase V - IMPLEMENTATION - Implementation planning involves the flock in developing an action plan for the chosen alternative. Responsibilities get assigned to group members, schedules are made, and resources to get the job done are inventoried and requested. In short, don't leave the meeting with out an action plan and a list of which goose is going to do what when.

 Q8: "Will if Fly?" - Before you leave the meeting, reality check the solution, process, and action plan.

 If it still flies then try a process such as "moment by moment virtual reality

prediction test". This is where you lead the flock through a theatrical exercise. Imagine each scene and act out the implementation of the solution. Act out who does what, the resources you will use, time you will take, and what it will look like when it flies.

- If you can not pass a reality check, then go back to Problem ID phase One. No harm done in finding out you were working on the symptom of some hidden problem. It will save you money, time, and energy in the long run.

PSL2 Process Leader Roles

Supportive - Keep discussion free and open; Sit back or take role of goose in the team

Directive - Control and focus the content discussion; Be the lead goose for content. If you are vested in the content, you may want to let some other goose lead the process.

Recorder - Until you know what you are doing, do not delegate this role. The recorder is the one who is controlling the process on the flip chart, but this is no secretarial role. Every PSL2 team process has a recorder; someone who writes out the problem statement on flip chart, lists each and every idea (Saving Ideas is important), lists any pros and cons, lists all solutions, and list implementation action plans and notes who will do what when.

Game Playing Conflict and Confrontation - This is every goose's role in the team, but the lead goose, the one with the pen in hand, ends up doing much of the confronting, especially in untrained flocks.

Leading the problem solving phases, and knowing what phase your flock is in, is only part of the leadership task. The other issue is confronting games that groups and individuals act out in the flock meetings.

Eric Berne defines a game as "an ongoing series of complementary ulterior transactions progressing to a well-defined, predictable outcome" (p. 48). As a transaction leader, a group process leader (or facilitator) needs to be able to confront recurring games. Flocks get into scripts, like repeated scenes in a movie. The same scene gets acted out over and over, until the game gets confronted, and the issue resolved. Process leaders manage the content, problem solving phases, and the conflict management levels. It helps when all the geese are trained and know how to spot the games.

Boje, D. M. (1980) "Making a Horse Out of a Camel: A Contingency Model for Managing the Problem Solving Process in Groups." In H. Leavitt, L. Pondy & D. Boje (Eds), *Readings in Managerial Psychology*. IL: University of Chicago Press, 445-470.

Boje, D. M. & Murningham, J.K., (1982) "Group Confidence Pressures in Interactive Decisions," *Management Science*, 28, 10, pp. 1187-1196, Oct. This is a research study contrasting Nominal Group, Delphi, and Laissez faire group processes on accuracy problems. For more

http://cbae.nmsu.edu/%7Edboje/teaching/490_psl/psl2_critical_thinking_teams.htm