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Pepperdine University
Graduate School of Education and Psychology

CRITICAL CONSIDERATIONS ON INTERPERSONAL IMPACT FOR NEXT
GENERATION PROFESSIONAL SERVICES LEADERS: A CASE STUDY

A dissertation submitted in partial satisfaction
of the requirements for the degree of
Doctor of Education in Organizational Leadership

by

John L. Evans Jr.

November, 2016

June Schmieder-Ramirez, Ph.D. – Dissertation Chairperson

This dissertation, written by

John L. Evans Jr.

under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

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DEDICATION

Dedicated to my wife and the best thing that ever happened to me, Alyson McGillicuddy Evans. She is my WOW.

VITA

John L. Evans Jr., Executive Director of Janus Labs, is a practice management expert and conducts extensive consulting and training with top financial intermediaries worldwide. John is a keynote speaker and has authored or co-authored three books on practice management for professional services companies.

John regularly contributes to the Orlando Sentinel on business and politics, and he also serves on the Board of Advisors for the James Madison Institute in Tallahassee, Florida and Elevate USA in Denver, Colorado. Prior to the financial services industry, John was Special Assistant to former U.S. Senator Connie Mack.

John is a Certified Facilitator from the Human Performance Institute and holds an MBA from the University of Miami. He is presently a doctoral candidate at Pepperdine University, where his dissertation focuses on the factors that drive deep client loyalty in the financial services industry. John resides in Winter Park, Florida, with his wife and four children.

ABSTRACT

With all the discussion surrounding the significance of culture within the realms of professional services organizations, this researcher was curious as to how to improve the quality of a culture. A higher quality culture, evidenced by a more positively energized work force, serves to improve competitive advantage for a concern, in a commoditized world. The following qualitative case study, a 35 day intervention in the months of May and June, 2016, with nine participants, that happened at Think Creative, Inc., of Orlando, Florida, intends on shedding light on how and why professional services organizational leaders should consider instituting a regimen of *Creative Gestures Beyond Self*, to clients, prospects, colleagues, suppliers, and whomever else germane to the enterprise. Several critical considerations emerged and will be discussed at length. Most notably, it is imperative for leaders to earnestly resolve to establishing an environment where ideas to delight constituents, *beyond the business at hand*, are balanced by the paradox of structure and light-heartedness. Also emerging from the data of discussion and observation, was the need for the right leader, who spearheads the meetings for *CGBSSs*, with an appropriate blend of strength and grace. Nine participants engaged in the study, and several ideas for further scientific exploration hatched, and will be discussed.

Chapter 1: Introduction to the Problem

A contemporary challenge of professional services firms, including but not limited to financial intermediaries, certified public accountants, attorneys, advertising agencies, and philanthropic executives (subsequently identified as the *focus group*) is that their offerings have become perceived as commoditized in their respective marketplaces. The consumer of any of these may think that he/she can get that product or service anywhere. Said differently, the consumers feel the vendors are indistinguishable. Regardless of the truth of this image, the perception has emerged in diverse marketplaces over time.

This emerging perception of commoditization or indistinguishability signifies no small problem for the stakeholders of the enterprises. For example, if the financial advice one requires is as common and undistinguished as the gasoline one puts in one's car, or the milk one pours on one's bowl of cereal, the price is necessarily going to come down. "You are looking at a race to the bottom in the respective marketplace," said Michael Futterman, a consultant to the financial services industry (M. Futterman, personal communication, March 16, 2015). Having no distinguishing merit in one's product or service is a sure-fire way to a diminished enterprise. Contemporary business models are being disrupted, whether or not the actors within are aware of this disruption. For example, one such Wall Street global investment management firm had reported a paltry addition of one new client per financial services manager in each of the last 5 years (F. Horowitz, personal communication, January 9, 2015).

A second problem has arisen for this focus group. Since World War II, the United States has earned and enjoyed an enviable economic state in the world. Much of that success originally stemmed from the successful mass production of goods, such as automobiles and appliances, widgets, which precipitated a number of training and consulting methodologies that focused on

growing efficiencies in the marketplace of objects. Edward Deming (2012), 20th century engineer, author, and consultant who was renowned for his opinions on quality improvement for manufacturers, famously stated, “If you can’t describe what you are doing as a process, you don’t know what you’re doing” (p. 17).

Processes matter substantially to manufacturing work. Consider the work of Peter Drucker (1974), an Austrian born American consultant, who described how manufacturers often relied too heavily on successes in the past, and were loath to innovate and move forward. Or lastly, consider the Six Sigma Processes, authored by Bill Smith while serving as an executive at Motorola. The curriculum is rooted in improving industrial processes, and was popularized by the venerable Jack Welch, CEO of General Electric in the late 20th century. All of these pioneers—Deming, Drucker, Smith, and scores of other consultants—focused their work with an underlying assumption: they were aspiring primarily for heightened efficiency in producing items more efficiently and, ergo, more profitably.

This study has no objection to the merits of these great thinkers and others, yet as the American economy transformed into more of a service orientation, the variables of production altered. No longer were a predominant number of U.S. employees building widgets; instead, they, including the focus group, are now building relationships. Herein emerges the second problem of the aforementioned financial service providers, certified public accountants (CPAs), lawyers, and philanthropic leaders, who grew in significance and prosperity in the late 20th century. Suddenly, they were being analyzed, studied, and consulted, with the antiquated inputs of an industrial economy. Once again, contemporary professional services personnel are building relationships, not widgets, and therefore inputs for productivity need adjustment.

This inquiry is curious about a half dozen ideas that address these two problems. Are positive engagement and happiness emerging as heretofore unrecognized productivity factors for these professional service actors? What actions might inspire—or precipitate an upward spiral of positivity and improvement of culture—to these actors and others? Might the actions that catalyzed positivity be centered around a theme of *creative gestures beyond self (CGBSs)*? How do great ideas of creative gestures beyond self, emerge in an earnest attempt at creativity and andragogy? Could a simple and straightforward 4-week protocol and case study of a professional services firm yield a higher quality engagement, where productivity is increased and the value being conveyed is more distinguishable? Can the quality of culture improve with the execution of the protocol, improving competitive advantage?

Purpose of Study

The purpose of this study is to inform leadership of financial advisory firms (including brokers, Registered Investment Advisors, and Certified Financial Planners), certified public accounting firms, law firms, philanthropic executives, and others in professional services the world over, on why increasing their organization’s capacity for delivering CGBSs will provide an antidote to the perception of indistinguishability (commoditization) of their services. Moreover, re-evaluation of the inputs of productivity by professional service leaders should be considered and viewed with interest on improving team culture, a potential competitive advantage. Some of the leading actors from these entities have already identified their emerging problem of atrophying cultures and are hatching plans to remedy their antiquated consulting and analysis strategies, as well as their challenge with indistinguishable, perceived commoditized products. Other actors have yet to fully recognize their diminished trajectory.

In the research, a dearth of study is noticed with respect to an emerging aspect to creativity. That is, work on how individuals may come up with compelling ideas for gestures to affect other individuals meaningfully, is scant. The purpose of this qualitative case study is to add to the body of knowledge to that end.

Significance of the Study

The significance of this study is for professional services firm leaders, the world over, to have better information with which to make decisions on matters of organizational culture improvement and competitive advantage. Going beyond the traditional assessment techniques of productivity for the focus group, perhaps these actors will adopt and habituate the rituals suggested in this paper to foster a more productive work environment and culture. Culture is gaining significant attention by scholars, business leaders, and others in this day and age. As of late, it is often said in the world of commerce that “Culture eats strategy for lunch” (Parr, 2012, para. 1). Or consider the former chief of Costco, Jim Sinegal’s timeless line from corporate culture, “Culture is not only the important main thing, it’s the only thing” (C. Brown, 2012, para. 1). Perhaps, knowledge gained from the data of this case study will inform professional services organizations, impacting the quality of cultures and serving to distinguish the companies in an otherwise crowded marketplace.

Context for the Study

As the author reflected on this event, embryonic thoughts began to take hold: can professional services teams’ capacity for delivering CGBSs be increased? What happens when capacities are increased? What impact occurs? How can interpersonal creativity be increased to execute the CGBS? If professional services organizations were earnest about distinguishing themselves and assessing themselves for different inputs of productivity, like CGBSs, what was

going to have to change for that to happen? How could creativity be fostered with adults, empowering them to arrive at great, unique ideas? To answer these questions, a serious review of the literature needs to be conducted, specifically regarding creativity for adults (andragogy), among other subjects.

The landscape for this inquiry involves industries largely composed of extraordinarily busy people. To offer a change model, where actors are encouraged to slow down, pause, and think of ideas to connect with clients, prospects, and fellow employees more meaningfully, is a formidable undertaking. Change theorists, most notably John Kotter, must be heeded, if there is an earnest desire for real impact. This study is bold and non-trivial toward that end: asking otherwise very successful people to increase their capacity for CGBSs precipitates any number of responses, not least of which is, *No thanks*. In spite of the understandable skepticism regarding this topic, the investigator has had some success in the marketplace generating these themes, and welcomes the challenge of this case study, with the participation of willing leadership.

It should be noted that it was no small task to win the heart and mind of the leader who participated in this study, Mark Freid, the owner of successful Think Creative, Inc., a 10-person advertising agency in Winter Park, Florida. However, Freid got a small taste of the merits of a CGBS regimen, and decided to partake. A transformation ensued, and he is now a devoted student of positive psychology and positive organizational scholarship (POS). He reported an emerging awareness to the possibility of new productive inputs for his staff at Think Creative. He immersed himself in to a number of books on positive psychology, including *The Happiness Advantage*, by the Harvard trained positive psychologist, Shawn Achor.

In the spirit of POS, while preparing for this study, the researcher took inspiration from a verse that serves as the overarching ballast for the project: “Whatever is true, whatever is noble, whatever is right, whatever is pure, whatever is lovely; whatever is admirable – if anything is excellent or praiseworthy, think about such things” (Philippians 4:8, King James Version). This quote from scripture might serve as a foundation of contemporary POS, and an aspiration here is to continue to expand on this transformative, timeless spiritual profundity. If this study can serve to inspire and inform more harried actors to act on behalf of creative gestures beyond self, in *noble* fashion, things will be better at the organizations being examined, not least being their competitive advantages in the marketplace. Maybe, as indicated with brilliant language by POS scholars, Kim Cameron, Jane Dutton, and Robert Quinn (2003), in their groundbreaking work, *Positive Organizational Scholarship, Foundations of a New Discipline*, “cascading vitalities” (p. 343) can emerge in a number of companies that allow its actors to exist more fully, to thrive.

The quote from Philippians will serve as the foundation for this dissertation. Curiosity about the subject of study stems from more than 15 years of observation in the marketplace with professional services people. They appear exceptionally busy, finding little time to think on things that might be construed as beautiful, like CGBSs, which appear to bring lightness and positive energy to any organization. This case study will aspire to observe and record the action of creative gestures beyond self, which might lead to something more beautiful and positive in the organization at hand. It will also begin to explore whether CGBSs can be operationalized, and reinforced by leadership, and, if so, what effect such actions might have on the trajectory of the organization.

Research Questions

This study will explore the following research questions, all of which are of the qualitative, case study methodology (instrumental; Richards & Morse, 2012):

1. What will happen to the levels of engagement for employees and principals at a professional services firm that enact a 28-day regimen of creative gestures beyond self to each other, suppliers, clients, and prospects of Think Creative, Inc., according to the Human Performance Four Dimension Energy Audit?
 - Hypothesis related to Research Question 1: Levels of engagement do not change based on enacting a regiment of creative gestures beyond self to each other.
 - Alternative hypothesis related to Research Question 1: At least three creative gestures beyond self to each other need to be used to see the levels of engagement increase.
 - Measurement: Human Performance Institute Individual and Team Energy Audit (Appendix G).
2. Will a straightforward protocol of suggested actions—including the appointment of a project leader and a weekly meeting where ideas are brainstormed—improve the quality of ideas being generated, for the purpose of creative gestures, according to results derived from interviews with 10 actors?
 - Hypothesis related to Research Question 2: Protocol of suggested actions does not improve the quality of ideas being generated for the creative gestures.
 - Alternative hypothesis related to Research Question 2: Some suggested actions improve the quality of ideas for creative gestures.

- Measurement: Researcher as the instrument (Survey Monkey survey, see Appendix H).
3. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report a better work culture, according to results derived from interviews with 10 actors?
 - Hypothesis related to Research Question 3: Employees do not report of a better work culture.
 - Alternative hypothesis related to Research Question 3: Some of the suggested actions and gestures lead to a report by employees of improved work culture.
 - Measurement: Researcher as the instrument (Survey Monkey).
 4. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report an improved competitive advantage in the marketplace, as measured by results derived from interviews with 10 actors?
 - Hypothesis related to Research Question 4: Employees do not report of an improved competitive advantage in the marketplace.
 - Alternative hypothesis related to Research Question 4: Some of the suggested actions and gestures lead to a report by employees of improved competitive advantage in the marketplace.
 - Measurement: Researcher as the instrument (Survey Monkey).

Limitations of the Study

One limitation of this study is the conundrum that best ideas for CGBSs seem to actualize when the environment created by the leader is inspired, not required, mandates for CGBSs might

hamstringing the initiative. The leader ought not require his employees to engage in CGBSs, but instead, inspire creativity for interpersonal connection and meaningfulness.

Second, there is little research on the specifics of interpersonal creativity for CGBSs. Reams of research are to be found on creativity for making things, but again, in the spirit of Deming, Smith, and Drucker, the focus group does not produce things; indeed, they produce relationships. This distinction is non trivial. Since busy professional services leaders make relationships as their output, perhaps they need to rethink the inputs (e.g., interpersonal creativity) that will yield the most fruitful spoils. Also, there are individuals in the focus group who are naturally more gifted or inclined to deliver CGBSs, and that will be reconciled for the execution of the case study.

Given that this inquiry is a qualitative case study, there are inherent limitations. First and foremost, the degree of credibility of this methodology is not firmly established (Richards & Morse, 2012). Though gaining ground with scholars worldwide, the case study method still lacks in comprehensive acknowledgement of usefulness for knowledge creation.

Careful thought and preparation will be needed in order to develop appropriate research questions to suit the case. That is, how the research questions appear in actual practice, in an actual professional services firm representing the focus group, will be challenging and of critical import. It is hoped, but certainly not known for certainty, that the advertising firm in Central Florida is an appropriate example, representative of a larger group of professional services entities. The degree of accuracy of reflection of the larger group is plainly not knowable, and that is a tangible limitation.

Also, there is room for bias given that the proprietor of the professional services firm, Mark Freid, has an outright and oversized positive view on the field of positive psychology.

This perspective is not typical of professional service firms' present day leadership, though researcher hopes that one day this will be a typical attribute.

Moreover, the population inquiry from the focus group might represent an unfair sample in that business has been uncommonly good for the enterprise. Positive spirals might already be happening at an unusual pace, and interpersonal creativity might already be abounding with the actors. It is worth mentioning that while this firm's adherence to the fundamentals of POS may represent an impure sample, a conundrum is present. That is, the aim of POS is to study outright the outstanding outliers of a population. The actors of Freid's enterprise might yield skewed data in comparison of their peers in the population, and that is precisely what this study is striving to accomplish.

In the spirit of full disclosure, it is important to emphasize in this study, that the researcher is an aspiring Positive Organizational Scholar; the theoretical framework in place is biased toward the efficacy and productivity of a positive culture, as opposed to a negative or normative frameworks. Said otherwise, the researcher has a bias for a particular outcome. Vigorous dialogue and course corrections will be required of the committee to manage the bias.

Background of Researcher

John L. Evans Jr. heads up consulting for Janus Labs, a business unit of Janus Capital, located in Denver, Colorado. He manages 10 individuals, five in-house employees and five consultants on retainer. He has coached and consulted with professional services' leaders for the better part of 15 years, has an MBA from the University of Miami, Florida, and a BA in Literature from the University of Florida. Presently, he is an EdD candidate at Pepperdine University. He has been influenced from professional teaching organizations including the

Harvard Negotiations Project, the Human Performance Institute, Fusion Presentation Giving, and has benefited from his work with the U.S. Navy SEALs, and Joseph Michelli, PhD.

The researcher's relationship with Roger Fisher, founder of the Harvard Negotiation Project, and co-author of *Getting to Yes* (Fisher, Ury, & Patton, 2011) yielded an insight of particular value that is worth sharing in this introduction. Fisher instructed on habituating the concept of looking past positions, and rooting out interests of counterpartys. For example, a financial advisor is well served to look past his clients' positions when it comes to saving for college for a child. The positions could be the utility of a savings account, and an UTMA, or a College Savings 529 Account, or even cash under the mattress. But what is the underlying motivation of the client, her animating interest? Perhaps it's the peace of mind of knowing the client's daughter has her college paid for. Likewise, for this paper, the researcher is seeking to gain understanding of the focus group through a case study, where underlying interests of his subjects are unearthed, going beyond positions.

Jim Loehr, EdD, and founder of the Human Performance Institute, also has relevance to this study. His work on individual energy management informs. Dr. Loehr suggests that executives in contemporary corporate life are experiencing an "energy management crisis" that has no small impact on abilities for creativity. There is an informative paradox in Dr. Loehr's model. When an individual invests energy with *purpose beyond self*, energy is created for emotional and mental capabilities (Loehr, Loehr, & Schwartz, 2005). This premise serves as a foundation to the study. By investing in CGBSs, will greater positive energy unfold in the actors?

A training module that had impact on the researcher's thinking was Simon Sinek's (2009) "How Great Leaders Inspire Action" TED talk, taught in class at Pepperdine University by

Vance Caesar, PhD. Sinek posits that every organization ought to aspire for awareness of *why* they are doing what they are doing. Actors should go beyond explaining *how* they do what they do and *what* they do. The operating mission, why, of this consulting unit, Janus Labs, is to help financial intermediaries and their centers of influence forge uncommonly meaningful relationships within their community. The *making meaning* reference is informed by another module that was instructed in a doctoral class. Guy Kawasaki (2015), former Chief Evangelist for Apple, Inc., teaches on the value for any organization of being intentional in making meaning for its constituents.

Lieutenant John Choate of the US Navy SEALs offered his ideas on concepts of preparation and capacity building for his branch of the military service, shedding light on the ideas and suggestions of this project. His suggestions on the structure of the interviews that will be discussed in Chapter 3 have informed the structure of the research. Specifically, Commander Choate emphasized the importance of self-awareness for any team, and identifying individuals who are “naturally competent for the task at hand” (J. Choate, personal communication, October 3, 2015). Furthermore, he counseled on the need to establish firm processes for measuring the success of any initiative, including a regimen of expanded CGBS delivery. He suggested that a team leader cannot be too focused on such measurements because that is where the opportunity for reflection and growth occur, where capacity building in adults can and will occur. According to Commander Choate, “What gets measured, improves” (J. Choate, personal communication, October 3, 2015).

Joseph Michelli, PhD, has also made vital contributions to the development of this project. The global consultant’s work on improving client service models to firms such as the Ritz Carlton, Starbucks, Zappos, Mercedes Benz, and others, has informed the thinking of this

study, not least being the choice of methodology. “My work is the case study method...I am looking to find the best practices of leading, international firms, and sharing what I learn” (J. Michelli, personal communication, June 24, 2014). His concepts about information management for any interested party in delivering CGBS are critical to the structure of this qualitative case study. More specifically, he coaches on how team leaders should form a process for gathering information to execute any plan. Also, Commander Choate identified an analogy important and helpful to CGBS execution: As location is central to the performance of real estate firms, so is information to the success of professional services firms.

Over the years, an implicit knowledge has emerged to the needs, both stated and unstated, of the actors of the focus group. These actors are being taught a general process for growing and retaining a book of business that is not yielding optimal results, and whereby indistinguishability is rampant. This study intends to inform its readers on the possibility of changing that.

Definitions of Relevant Terms

Actors: Principal and employees of Think Creative, Inc., Orlando, Florida.

Case Study Method, Qualitative: The “study of a particular social unit or system” (Richards & Morse, 2012, p. 76).

Commoditization: The process in commerce where a product or service becomes basic, not readily distinguishable from its competition (“Commoditization,” n.d.).

Creative Gesture Beyond Self (CGBS): A unique, emotionally engaging experience for the recipient that goes beyond expectations and is readily recounted.

Creativity: Artistic or intellectual inventiveness.

Emotional Intelligence: The capacity to be aware of, control, and express one's emotions, and to handle interpersonal relationships judiciously and empathetically (Bradberry & Greaves, 2009).

Interpersonal Alpha: The process of a leader of a professional services' firm connecting emotionally with his/her clients, in a way that competitors could not do.

Left Brain Activity: Where math and analytics are primarily performed in the human brain (Melina, 2011).

Positive Organizational Scholarship (POS): A discipline of scholarship focusing on resiliency and extraordinary performance in organizations (Wrzesniewski, 2003).

Organizational Ritual: An action created by an organization with the intention of becoming a habit that serves to improve the trajectory of that organization.

Focus Group: In this inquiry, professional services companies including, but not limited to, financial advisory personnel, advertising professionals, certified public accountants, and philanthropic executives.

Right Brain Activity: Where creativity primarily performs in the human brain (Melina, 2011).

Summary

The focus group under investigation has an emerging problem of indistinguishability in its marketplace. This challenge is not insignificant. Financial planners, a subset of the focus group population to which this study pertains, need to shift their focus. To continue to compete in the marketplace and pursue a competitive advantage, financial planners will have to discover and act on a new value proposition for their clients and prospective clients (Herbers, 2015). The

case study aspires to shed light on how financial planning leaders and other actors in the focus group can improve their odds for durable success going forward.

Since the advent of this inquiry, a number of new thoughts emerged for the study about the phenomenon of oxytocin, and its potential role with the actors of Mark Freid's advertising agency in Winter Park, Florida. This hormone is naturally produced in a mammal's hypothalamus when heightened intimacy has occurred (Sheng, Liu, Zhou, Zhou, & Han, 2013). Given the inherent limitations of any case study method, a detailed examination of oxytocin secretion as associated with an inspired regimen of CGBS might have merit.

Moreover, a number of ideas have begun to emerge from the marketplace about the role of teamwork in the leading actors of the focus group, and how that might relate to an expanded capacity of delivery of CGBS to the marketplace. Specifically, there are recommendations to be offered as to how to inspire a team to deliver more CGBSs. Given the slight, but not insignificant, need for leaders of the focus group to inspire, rather than require, CGBS formation and execution, this topic has substantial room for research. Inspiration of small groups of professional services organizations does not appear to have been studied, yet more study would be an important addition to the body of knowledge.

Chapter 2: Review of Literature

Any serious researcher of organizational leadership in the 21st century would come upon the work of John Kotter, PhD. Kotter attended the Massachusetts Institute of Technology, earning a Bachelor of Science in mechanical engineering in 1968 and a Master of Science in Management in 1971. He went on to earn his Doctor of Business Administration in 1972 at Harvard Business School, graduating near the top of his class. Kotter was active in one of the 20th century's preeminent fraternal organizations, Sigma Phi Epsilon, of Richmond, Virginia. His work in change theory is recognized the world over, largely due to its relative straightforward and easy to implement approach ("John Kotter," 2016).

Dr. John P. Kotter continues to lead a distinguished scholarly career, as the Konosuke Matsushita Professor of Leadership, Emeritus, at Harvard Business School. Moreover, he is a New York Times top selling author, the visionary behind Kotter International (a consulting firm in the state of Washington, focusing on managerial problem solving) and a vaunted researcher in myriad fields, including business, leadership, general counsel, and organizational change ("John Kotter," 2016).

Kotter's work will serve prominently as a central framework for an antidote for the problem this case study will highlight, with respect to professional services organizations, globally. His 1996 worldwide bestseller, "*Leading Change*," establishes an eight-step process for effecting adjustments, in any organization, from a Little League team trying to win a championship, to a collection of scientists fully focused on a cure for a complex disease. The eight-step process will be discussed in detail later in this chapter.

The Problem of Commoditization

“Remember that life is not measured by the number of breaths we take, but by the moments that take our breath away” (Corona, as cited in Quote Investigator, 2013, para. 5). This quote has power not only in the purely existential realm, but also in the practical business community, including financial and professional services. With the professional services industries becoming hyper-commoditized (Kitces, 2013) and indistinguishable in their merit, business entities need a transformation, a wholly different view on how to deliver durable value to clients. More meaning must be made, and more emotional connectivity must be established for the purpose of real competitive advantage and growth (Magids, Zorfas, & Leemon, 2015). Emotional connectivity is emerging as an important phenomenon going forward. In the November 2015 *Harvard Business Review*, Scott Magid and colleagues suggested, “Although brands may be liked or trusted, most fail to align themselves with the emotions that drive their customers’ most profitable behaviors” (p. 69). Therefore, determining how to foster more emotional connectivity in professional services companies becomes an important endeavor.

Interpersonal creativity and impact will be at the center of this transformation of emotional connectivity: great ideas to delight clientele, beyond, say, the investment products of mutual funds, annuities, college savings 520 plans, advertising marketing plan, tax filing, and others. Expanding capacity for creativity in adults is no small task. Robert Sternberg and Wendy Williams (1996) suggested,

Creativity is hard to find in older children and adults because their creative potential has been suppressed by a society that encourages intellectual conformity. We begin to suppress natural creativity when we expect them to color within the lines in their coloring books. (p. 2)

With respect to the problem of commoditized products, the concept of generating compelling ideas that precipitate delighted clientele to differentiate the business is the principal race in professional services going forward (Ackermann, 2013). Considerations for expanding capacity for outstanding interpersonal idea formation are examined herewith. This examination aims to help world business leaders expand their teams' capacity for creativity, culture improvement, and business transformation, namely in the financial services field, but not necessarily exclusively. Given the intention of capacity building, acknowledgement will be given to Malcolm Knowles, the father of andragogy. With respect to andragogy, the researcher is inquiring about how to create an environment where adult participants might be induced to retain a readiness to learn (Knowles, 1990) about the protocol for CGBSs. The intention will be to inspire, not require, them to participate.

What benefits might be conferred by actors—such as financial advisors, registered investment advisors, and brokers, lawyers, CPAs, advertising agencies, and others—who have fostered a more positive environment, instilled new habits, and found themselves in a culture that lends itself to the expansion of their ability to deliver more creative and meaningful experiences for clients, each other, and prospects? Will a heightened sense of work engagement and joy be elicited and induced by committing to a regimen that inspires CGBSs?

The Problem of Commoditization

Joseph Schumpeter (1942) wrote of the prevailing forces of creative destruction in commerce, asserting that no company is ever safe from competition and the accompanying creative forces that will inevitably set upon any business organization. A helpful example might be the horse and buggy being largely displaced by the automobile at the dawn of the 20th century (Drechsler, Kattel, & Reinert, 2011). It did not take long until the creative forces of the early

automobile designers overtook the horse and carriage industry. A more contemporary example would be Uber, displacing the conventional taxicab business: creating an innovative mechanism to transport people for a reduced fare devastates the traditional carrier.

In deference and response to Schumpeter's (1942) message, next generation professional services' leaders should understand the critical significance of teaching creativity to their adult workforces, inspiring innovation to delight clients, fellow workers, and prospects. Interpersonal creativity is an antidote to the creation/destruction spiral. The challenge is self-evident. In a hyper crowded, commoditized marketplace, how do actors (employees of firms) differentiate themselves or their firms (Siburg, n.d.)? Survival can only be assured by answering this question successfully, and inattention to this prevailing problem can lead to termination of the enterprise. A number of considerations on how to reconcile this premise will be suggested subsequently.

Schumpeter's (1942) theories loom large over every professional services industry, not least the financial services businesses of contemporary commerce. Most contemporary products have become commoditized, which means "basic and common in commerce" (Guralnik, 1984, para. 1). Financial products, such as mutual funds, annuities, and college savings 529 plans, and others, have become so indistinguishable in their merits, that executives are struggling to differentiate their offerings from those of their competitors (Quelch, 2007). The need to distinguish one's offerings must expand in scope and become favorable to the marketplace if Schumpeter's durable theories hold any continued merit. Here forward, think of an expanded offering as the *whole client experience*. If professional service leaders are earnest about succeeding in the marketplace, they must learn how to control creativity, in turn leading to greater offerings and better client and employee experiences.

A number of practitioner scholars have contributed to this emergent and continued thought process; that is, trying to find a way to reconcile the conundrum of becoming commoditized. Peter Drucker (as cited in Quelch, 2007) said, “In a commodity market, you can only be as good as your dumbest competitor” (para. 16). How can there be transformation between the businessperson and client, stultifying the otherwise ubiquitous force of commodity market (Meyer, 2006)? Theodore Kinni, from the Disney Institute, informed and inspired concepts of continually outperforming client expectations to fight the commodity conundrum in business (The Disney Institute & Kinney, 2011). Ken Blanchard teaches about the importance of “listening with a different ear” (Blanchard & Bowles, 1993, p. 7). Clearly the need exists to teach and inspire on the importance of awareness and tuning in to the possibilities of adult creativity enhancement so that clients may be delighted and the enterprise distinguished from its otherwise commoditized destiny. As Quelch (2007) has noted, “Like death and taxes, commoditization of your products is a given” (para. 1).

This literature review will suggest and examine a number of considerations for next generation professional services leaders who are committed to delivering a more comprehensive offering that includes a robust employee, client, and prospect experience. The offering starts with the mercurial force of creativity, which this paper will define twice, first borrowing from Shalley and Gilson (2004) as a complex, cognitive process that involves finding and developing solutions to novel, ill-defined problems that will enhance the organization in the form of its products, services, processes, and procedures. Said in language to support this inquiry, creativity must be engaged in order for professional services actors to counter the problem of commoditization, so that unique and meaningful experiences become a part of the employee and client offering. Furthermore, creativity is not just about being original. Instead, in order for

creativity to show its full force, it must be both original *and* useful (Waples & Friedrich, 2011). Useful, in this inquiry's context, means that the creative effort enables financial leaders to distinguish themselves in a highly crowded marketplace.

Another illuminating definition of creativity comes from Woodman, Sawyer, and Griffin (1993): "the establishment of a valuable, useful new product, service, idea, procedure, or process by individuals working together in a complex social system" (p. 293). Again, a key term here is *useful*, particularly with this dissertation's recommendation to consider the value of interpersonal creativity. Knowing how to connect with clients and other stakeholders in ways that are meaningful and memorable require this type of organizational creativity. Again, with the industry becoming so commoditized (Quelch, 2007), employees must begin in earnest to find ways and ideas to connect emotionally with their clients and prospects. Lastly, it should be emphasized that this investigation will be focusing on interpersonal creativity, taking the aforementioned definitions, and applying them to human beings, as opposed to the creation of objects. It is one thing to try and be more creative about connecting more meaningfully with another person; quite another, to try and be more creative about creating a new object or improved object, like a car.

Critical Considerations on the Present Creative State of Your Team

Loehr and Hanna (2014) put forth a number of considerations for assessing the present state of creativity in any given office team. First, does the office have a mix of people with differing opinions: that is, differing interests, experiences, levels of expertise, and thinking styles? One tool that is useful in assessing the final characteristic, thinking styles, is advanced by Kathy Kolbe (2004). Determining each individual's unique approach for dealing with business problems will offer insight into how creativity emerges in persons. Some individuals will have

creativity sparked by their initiative to get a project done; whereas others, being *fact finders* or *follow through* types, will have their best ideas emerge in more deliberative activities.

Loehr and Hanna (2014) highlighted the importance of team members having a strong sense of team purpose. Said differently, it is important to have an understanding as to why they are doing what they do, as opposed to knowing just what and how the members are doing what they do. An example is in order here. Jason Chepenik, a financial advisor known for uncommon creativity in his community of greater Central Florida, explained to the author in an interview in January of 2016 that his firm stands for bringing extraordinary meaning to its employees and clients. What the firm does is straightforward; the actors provide financial management services to retirees. How they do it is straightforward as well; the actors use software tools and interviews to assess the risk tolerances of their clients, and create solutions for financial confidence. However, knowing the *why* of what they do allows for a minor transformation in generating CGBSs that are not soon forgotten by clients (J. Chepenik, personal communication, January 23, 2016).

Retaining strong contacts outside of the office is also fundamental to a creative team. This is an interesting point for the purposes of identifying critical considerations for a professional services team's interpersonal creativity abilities. Nick Fox, a 20-year consultant to the financial services and accounting industries, told this researcher that so often actors in his focus of business get caught in an "echo chamber." The actors are simply regurgitating "tired old yarns" about what is working in the marketplace. By taking earnest time and energy to reach out to other actors, both from other industries, and outside of the industry, chances for compelling interpersonal creativity escalates (N. Fox, personal communication, December 11, 2015).

Next, Loehr and Hanna (2014) discuss the importance of having an appropriate layout of the office, where structure allows for casual interaction. This is not typical in the industries of professional services on balance, according to Fred Lopez, a 25-year veteran of the retirement services industry (F. Lopez, personal communication, January 25, 2016). So often the cubicle is the conventional mode of structure, where an actor is largely cut off, and isolated from consistent engagement with his/her fellow workers. There are signs that this norm is changing. This author's employer recently made a substantial investment in altering the layout of its call center, with the intention of creating a more convivial setting where internal sales directors can and will come in contact with colleagues from the marketing department and elsewhere.

Next, being aware of the professional and personal interests of others on the team will help facilitate a more creative atmosphere. Julio J. is a certified financial planner for a global investment management firm operating in the Southeast U.S. He explained how he is aware of this reality and routinely conducts an exercise with his clients and staff at his regular dinner seminars. Julio will have all the attendees send an email message to at least three other individuals on their respective teams, informing the recipient that an exercise was occurring, and asking if they would "be so kind" as to share three things unknown to their teammates about their interests. Julio reported that the sharing of otherwise private information about the team member's interests spurs fantastic conversations that allow for the delivery of what he calls, "actions that awe." One example occurred when Julio learned that a team member of his had always wished to take a hot air balloon ride. Not long after learning of this personal interest, Julio had observed the employee landing a big account. Armed with the information about desiring a hot air balloon ride, Julio emerged with a creative idea of sending the employee on a hot air balloon ride the following weekend. The response by the employee was one of awe, and

Julio's exercise had facilitated the event (J. Jones, personal communication, November 12, 2015).

Next, having an atmosphere of playfulness and friendliness must be at the core of the culture in order for creative gestures to emerge. It bears repeating more than once, but, on balance, the present state of cultures in the field of professional services does not lend itself to this tenet of Loehr and Hanna's (2014). The normative feel of an office is one of seriousness and restraint. Again, this observation is a generalization, but there is much room for growth for next generations' leaders to cultivate environments that evidence more playfulness and humor.

Next, it is of fundamental importance that the team members feel they can express themselves openly and authentically, without worry. Keep in mind an axiom from Stephen M. R. Covey (2006), in his book, *The Speed of Trust*, nothing drives productivity like a high trust culture. It is perhaps fair to generalize that a high trust environment will lend itself well to generating great interpersonal ideas. Once again, the professional services world does not necessarily show itself as a typically high trust culture. Work must occur with specific intentionality, about fostering a high trust environment. To that end, next generation professional services leaders may want to familiarize themselves with the work of Brenee Brown (2015), a sociologist and qualitative researcher who has conducted extensive work on building high trust in organizations. She emphasizes the important role of vulnerability in building trust. Former U.S. Navy Seal John Choate has echoed Brown's assertions on trust building, and its relationship to individual actors need to share vulnerability. In a personal communication in December 2015, Commander Choate shared the story of how basic training for the SEALs in San Diego necessitated a certain degree of vulnerability for all the actors, and that vulnerability in turn facilitated an "astronomical level of trust within our organization." Again, it is trust,

brought upon by a comfortable level of vulnerability, that allows for an environment where interpersonal creativity can flourish.

Next, Loehr and Hanna (2014) discuss the importance of how an organization handles the making of mistakes. Mistake making is as reliable as any other output of an organization. The question then defaults to: how is the quality of the process for responding to mistakes? Joseph Michelli, PhD (2008), has advised that when mistakes are made in any organization, three things must happen with the response by emissaries of the offending organization. First, the emissary must act swiftly, to right the mistake with as much haste as reasonable possible. Second, there must be an evidence-based sincerity of action to remedy the mistake. Said differently, the individual or individuals offended by the mistake must perceive authenticity of contrition by the offender or offenders. Thirdly, the offenders must show some form of tangible results of improvement for the offended party. Perhaps an example is in order to demonstrate the process of healthy and constructive dealings for mistakes in organizations. In the latter part of the 20th century, a global medical services firm made the terrible mistake of distributing medicine that had the tragic consequence of killing 10 of its customers. The CEO acted in a healthy and straightforward way; he was swift to offer apologies and attend a number of the funerals. He also was perceived to be sincere in his handling of the company crisis. Lastly, he was quick to incur a substantial new cost structure that would prevent the occurrence from happening again (U.S. Department of Defense, n.d.). Scholars have lauded the firm's excellent management of the colossal mistake;

The Tylenol crisis is without a doubt the most exemplary case ever known in the history of crisis communications. Any business executive, who has ever stumbled into a public relations ambush, ought to appreciate the way Johnson & Johnson responded to the

Tylenol poisonings. They have effectively demonstrated how major business has to handle a disaster. (Berge, 1990, p. 19)

This serves as an example of how mistakes are handled healthily, which again, according Loehr and Hanna, is a foundation for an organization to deliver higher quality creativity.

Next, discussion is aimed at whether actors on a team or at a business feel they have enough time to reflect on their work. Reflection is key for adult workers, as Malcolm Knowles (1990) has pointed out. Without time to really ponder on what has happened and is happening, the chances for interpersonal creativity will be diminished. Perhaps this is reported as being overly busy to the daily rigors of life, where achieving the obligations of a harried society are consuming energies for reflection, and hence, creativity.

Lastly, Loehr and Hanna (2014) pointed to the need for actors to have access to the professional advice they need to do their job effectively. Fisher et al. (2011) have argued that an individual's perception that he/she is not being heard, will lead to frustration, and hence, a compromised level of creativity. Having access to professional services, to seriously address a person's challenges, might act as an outlet, allowing for heightened creativity.

The State of Financial Services Cultures

An immediate problem is the nature of organizational cultures in the professional services industries; financial advisors, registered independent advisors, attorneys, CPAs, advertising agencies, and brokers operate in environments that are overwhelmingly analytical by design. The companies do not, on balance, lend themselves to creativity (Kitces, 2013). Compared to the emerging and often notorious Silicon Valley phenomenon, where creativity is nurtured relentlessly, the financial services industry offers little to no encouragement of differentiated idea formation (Ackermann, 2013). Moreover, financial work environments can be staid and

stultifying. This is antithetical to an environment that scholar Mihalyi Csikszentmihalyi (as cited in Pink, 2006) encourages for creativity; “There is no question that a playfully light attitude is characteristic of creative individuals” (p. 84). The reality is far from Csikszentmihalyi’s directive; a playfully light attitude is just about the last sense any sensible individuals would glean from walking in to a major professional services firm. This can and should be changed.

The Right Environment

In *The Creative Thinker’s Toolkit*, Professor Gerard Puccio (2013) stated that “creative thinking is a skill that can be examined, practiced, and deliberately developed” (p. 1), if conditions have been fostered to do so. The question then becomes, *What are the conditions?*

The literature is clear. Professional services leaders must express their commitment for making creativity, and the consequent robust client experience, a critical objective for the enterprise going forward. If individual actors believe their leader is committed, the probability of creativity increases substantially (Waples & Friedrich, 2011). Said another way, clarity is power, as Stephen M.R. Covey pointed (2006) out in *The Speed of Trust*. Financial advisors, attorneys, CPAs, advertising executives, registered investment advisors, and brokers must hear directly from their leaders, that creative ideas to delight clients and prospects is a critical objective for the organization. Declaring intent and newfound clarity should initiate the process of heightened creativity in the organizational environment, and the literature also asserts that adults can learn to be more creative when the right environment is established. Therefore, in order to foster creativity, next generation professional services leaders must first earnestly commit to getting the environment right (“Can Creativity Be Taught,” 2014)

However, there is a paradox to be heeded here. Again, the mission of creativity should be stated unambiguously and with zeal, yet the professional services leader should not become

too directive in how the execution of the creativity happens (Waples & Friedrich, 2011). Instead, the leader should offer the vision and expectation of creativity for his employees, then step back to an appropriate distance. If he/she becomes too embedded in the process of new idea formation to delight clients and prospects, a backlash could ensue, stifling the very process he/she desires to foster (Kelley & Kelley, 2012).

Other pitfalls that lead to upending an environment of creativity include the following, according to Dr. Heidi Hanna (2011), in her book *Sharp: Simple Strategies to Increase Your Brainpower*:

- Working under surveillance – when an individual feels as though he is being constantly monitored and examined.
- Restricting choices – if an individual has little freedom of choice.
- Working for inappropriate extrinsic rewards – money, fame, or power.
- Competing – when an individual has the sense that he or she must win, that the winning outcome is of utmost value.
- Fearing failure, judgment, or appearing foolish – not having a desire to take risks and being in the presence of excess judgment.
- Having to find the right answer – when there is a sense of pressure to get the right the answer.
- Being evaluated – when an individual has the sense that his/her performance is being assessed.
- Working under time pressure – when a person has strict time expectations for getting a task done.

Hanna (2011) went on to argue that individuals in a work environment should carry a strong sense of team chemistry, and they should retain a collection of meaningful relationships outside the office. Other questions she posed that speak to an interpersonal environment of positive creativity include:

- Are you aware of the personal struggles of others on your team?
- Do you and your team feel they can express themselves often, openly and authentically, without concern for retribution?
- If personal affronts are made, are they addressed in a positive way?
- Do you have enough time to discuss what is going on with your work?
- Do you feel you have access to the professional counselors you need to do your job effectively?

A leader committed to a creative environment should consider asking these questions of his/her team members in a place where individuals not only feel safe to respond favorably, but also retain enough trust in their leaders that they are willing to take chances on creativity that might lead to failure (Mumford, Hunter, & Bedell-Avers, 2008). Often times, professional services teams will invariably miss the mark when trying to come up with compelling ideas to delight clients and prospects. The employees should know that making mistakes is more than okay; their leaders expect it. Creativity will invariably lead to mistakes, and that should be acceptable to next generation financial services leaders.

Hiring for Creative Actors

Another consideration for professional services leaders who have resolved to make their environments more creative lies in a critical Human Resources (HR) function. A solution that may be worth considering is to examine life patterns of potential hires. Life patterns are clues as

to how creatively individuals have lived in the past. This examination and understanding of those who seem naturally creative may precipitate an advantage in the leader's enterprise (Piirto, 1998). Piirto (1998) examined characteristics of successful entrepreneurs, scientists, artists, and others, to glean a pattern of those most creative and divergent in thinking. A common refrain by leaders in financial services is *Well, I am not creative myself, but I hire those that are*. This narrative is not entirely misguided, and Piirto reinforces scholarly legitimacy. Identifying those characteristics, and hiring for them, may be at least part of the solution to any apparent shortfall of creativity in the professional services industries.

Teaching Employees to be More Creative and Comments on Andragogy

Creativity capacity refers to an individual or team's strength and ability to come up with meaningful, divergent ideas. Bateson and Martin (2013), both leading experts in animal behavior, have asserted that, this capacity can be expanded in both quality and quantity by getting out of one's ordinary rut and creating regular and routine activities of play. The implications here are profound for professional services executives who want to increase their teams' creativity. They must forge meaningful opportunities for play to happen in the organization. This will require some deft and emotional intelligence on behalf of the leader; all too often any suggestions of playfulness and frivolity are promptly dismissed and perhaps even scorned in many professional service cultures. The most successful leaders will fight that cultural pattern and allow for the emergence of regular team play with the team, inducing a state of *readiness to learn*, that the iconic grandfather of adult learning, Malcolm Knowles (1990), would espouse. The author of this inquiry knows of a certified financial planning team that stops what they are doing two times a week, steps outside of the office to a park across the street, and engages in a game of ultimate Frisbee. If the next generation of creative global leaders in the

financial services industry and beyond is going to stimulate creativity, more examples of gamesmanship must become evident. Play can signify a level of cohesion and trust among the members. Assuming that the play is genuinely enjoyed and non-coerced, the individuals can relax and allow great ideas to emerge (Puccio, 2013).

Beyond play, another activity has been shown to support creativity among adults. Dr. John Ratey (Ratey & Hagerman, 2008) stated that exercise is much more than just a vehicle to keep people fit and trim. Regular exercise also fosters a healthier brain that is much more inclined to allow for plasticity and idea formation. By generating a culture that significantly and positively reinforces routine exercises by its members, great ideas will more likely to occur. Again, in the often-frenetic world of professional services, where time is of critical import, leaders can still frown upon taking valuable time to exercise. This should change, according to Ratey and other scholars, if a desired outcome is increased capacities for interpersonal idea formation.

Kotter's Model for Change: The Creativity Initiative

In order for andragogical creativity expansion to succeed, an earnest and committed resolve to teach, train, and coach on expanding capacity for creativity must be present. After all, meaningful connection between a financial advisor and his/her client or prospect cannot happen without great, compelling ideas. This research recommends considering Kotter's Eight Step Change Model. John P. Kotter (1996) is internationally renowned for his research on change and leadership. He has put forth his eight steps for generating change, each of which will be discussed for consideration:

- Establishing a sense of urgency
- Creating the guiding coalition

- Developing a vision and strategy
- Communicating the change vision
- Empowering broad based action
- Generating short term wins
- Consolidating gains and producing more change
- Anchoring new approaches in the culture

Sense of urgency. First, the concept of establishing a sense of urgency will come as a reminder to the reader of this paper. Will the professional services leader establish clarity and bring fresh, positive energy in calling for greater creativity in his ideas? Heretofore in the professional services business, coaching on creativity has been a peculiar phenomenon, namely because no one has yet to earnestly undertake the initiative (F. Horowitz, personal communication, November 5, 2014). The industry is rife with left-brained minds, bent on creating spreadsheets for analysis, not spending time mulling on ideas to delight and connect emotionally with clients and other stakeholders of the firm (Ackermann, 2013). To undo this otherwise stagnant mindset, perhaps establishing goals and incentives for the most and best compelling idea formation would serve the leader well. For example, each month, one registered investment advisor sends the employee who had the best idea to delight a client, to dinner for two. This organizational habit sends a clear message of urgency to the entire team, calling for action.

Creating the guiding coalition. Next, the formation of a guiding coalition should be given thought. Who are the early adopters of the creativity initiative? What team members demonstrate a natural proclivity for coming up with great ideas to augment the client experience? These individuals should be identified, according to Kotter (1996), and their actions should be

celebrated, for the whole team to appreciate. An example of an early adopter comes from the team of Thomas Fross and Associates, a financial planning firm operating in the Villages, Florida. On the first week of a creativity initiative for the office, a junior employee overheard a client say how much she missed her cheesecake and champagne parties with her friends. The new client, who had just moved to Florida from Wisconsin, was delighted to experience a surprise cheesecake and champagne party organized by Fross's office. The client was so delighted to experience the party, she referred two new clients to Mr. Fross. Importantly, the creative junior employee, an early adopter of the initiative, was rewarded with dinner for two (T. Fross, personal communication, March 14, 2014).

Developing a vision and strategy. Next, a team vision and strategy must be developed in order for any manner of a creativity initiative to take firm hold in a professional services organization. "A structured process for creativity" should be laid out in the strategy ("Can Creativity Be Taught," 2014, para. 1). When enough structure and regular practice are in place, great ideas can start to burst. Dr. Joseph Michelli (2011) has recommended a weekly exercise where the team sits down to brainstorm great ideas to authentically dazzle prospects and clients. Again, there is a minor paradox here; the vision and strategy should call for some order, but not too much so that creative sparks are snuffed out. The structure must be organic and free flowing, not rigid or hierarchical (West, Tjosvold, & Smith, 2008).

Communicating the change vision. Next for consideration, leveraging the Kotter (1996) model, consistent communication of the creativity initiative must occur among all the actors on a regular basis. Is information moving freely and consistently among team members? It is through the regular, consistent, and sincere discussions about clients that the best ideas seem to emerge (Mumford, Mobley, Reiter-Palmon, Uhlman, & Doares, 1991). The setting should

promote a loose, but official, framework for the team to sit down and communicate regularly.

The financial services leader should monitor the free flow of information so that employees are engaged, bringing their best energy to the communication effort.

Empowering broad based action. Next, the leader must empower broad based action for the initiative. Here, he/she must remove any obstacles that might stymie the mission for creativity. Again, revisiting a former consideration, he/she might want to remove any overbearing aspects of the environment. Are the employees able to act in a playful, light atmosphere, or are there overarching burdens of judgment? Moreover, can the leader foster a sense of risk taking among the employees? Will employees feel safe to take chances (“Can Creativity Be Taught,” 2014)? Perhaps the celebration of a mistake would be in good order, to send a message of how risk taking is critical to relationships with clients, fellow employees, and prospects.

Generating short term wins. Next, Kotter (1996) recommended celebrating short terms wins. As the initiative unfolds, whenever there is a win, however small it may appear, the gesture of creativity should be celebrated by talking it up around the office (Puccio, 2013). Perhaps the leader should even consider starting a blog to list the success stories that creativity has fostered. The success stories should be detailed and poignant, celebrating the employee’s thoughtfulness and the outcome of his/her actions.

Consolidating gains and producing more change. Next, Kotter (1996) suggested consolidating gains and producing more change. As momentum builds, the leader should be thinking of who could be added to the team to further augment the organizational creativity. Who in the community exhibits outstanding interpersonal creativity? Those types of individuals should be added to the team going forward. Furthermore, leaders should continue to reinvigorate

the process, adding to any processes that improve the outcome of creativity and removing any processes that stifle creativity. For example, Brian Grogan, an independent financial advisor operating out of Sarasota, Florida, reported on how he keeps a close look for creative individuals who have a knack for delighting clients. His latest hire is expanding on the creativity initiative he set forth with tremendous dynamism. She dreamed up an idea of doing a Manicure and Mimosa Party for Mother's Day for a collection of executive women at a Fortune 500 company that Grogan retains as a client. "It was one of the most fruitful business building events we have ever had" (B. Grogan, personal communication, March 11, 2015).

Anchoring new approaches in the culture. Lastly from the Kotter (1996) model, the new approaches must be anchored in the organizational culture. That is, the creativity formation processes should be evolving. Can the initiative of creativity be made in the *own color* of the organization? New approaches should be added that are unique to the group. What strengths of the team can be further amplified to create meaningful connection with clients? For example, Jason Chepenik, of Orlando, Florida, has all of his employees take an inventory of how they can connect with clients more robustly. One example that came from this new approach, unique to Chepenik's enterprise, occurred when an employee realized that a close relationship with a Minor League Baseball team vice president ended up yielding a top client's chance to throw out a first pitch for a Major League Spring training game. The client was delighted has referred "at least" three new clients to Chepenik (J. Chepenik, personal communication, March 1, 2015).

Kurt Lewin – Unfreeze Theory. An applied scholar's work of the early 20th century is relevant to this research. Kurt Lewin, born into a Jewish family in modern day Poland, is renowned for his work in "group dynamics." At MIT, he posed a theory that is relevant to this inquiry. The Unfreeze Theory rests on a notion that change of a group or team rests on three

steps. First, when change is initiated – in this case, increasing the professional services firm’s capacity for interpersonal creativity and delivering CGBSs – the conventional mindset must be uprooted, unfreezed. The momentum of common thinking must be disrupted. Second, temporary confusion should be expected. Actors will temporarily abandon a sense of direction. Third, after the new mindset and behaviors have been adopted, there must be solidifying of thought and action, or freezing

Development of Right Brain Activity

Heretofore, coaching on interpersonal creativity has been received as a peculiar phenomenon, namely because so precious few have yet to do it in professional services (F. Horowitz, personal communication, November 5, 2014). Instead, the industry is populated mainly with left-brained analytical minds. Daniel Pink (2006) has argued that the future of any business hinges on the application of the right brain. That is, creativity, which hails from right brain activity, is going to continue to grow in its necessity for successful enterprises. As discussed earlier, today’s world of commerce, including professional services, is becoming hyper commoditized, and the useful differentiator between firms is the ability to connect emotionally with clients, each other, and prospects in a meaningful manner (Michelli, 2011). Again, fostering creativity is no small matter for the ongoing success of the financial services enterprise.

One idea that continues to recur in the literature and thus bears repeating here is that restrictive routines, often the hallmark of professional services organizations, will need to be relaxed in order for right brained activity to grow (Cameron et al., 2003). Moreover, as Mihalyi Csikszentmihalyi (1997) suggested, creativity needs a chance for respiration, if there is interest in execution (Blanchard & Bowles, 1993). Intense, formal atmospheres do not lend themselves

to interpersonal idea formation. Indeed, the pressing concerns of market dalliances and tending to customer queries can be highly stifling to employees' creativity.

Habit Formation

To develop this right brained orientation, proper and appropriate habits must be established to support the mission. Habits of creativity should be given greater relevance and consideration, as the financial services industry, and all professional industries, continue their push toward heightened productivity, and attempt to stave off destruction. Indeed, in the spirit of competitive advantage and creative destruction (Schumpeter, 1942), companies may want to heed the call for habits and greater execution of creativity. It might just be the defining factor, the golden differentiator in success going forward. Leaders who are able to foster creativity habits in their workforce successfully, in the pursuit of effective andragogy, can expect to transform lives and organizations (Schmieder-Ramirez & Mallette, 2007).

If indeed 95% of life is a habit, full of semi-conscious and automatic behaviors (Loehr et al., 2005), this research project encourages the consideration of creativity ritual formation for all professional services executives. As Aristotle reported from the *Nicomachean Ethics* (as cited in Durant, 1991), "We are what we repeatedly do. Excellence, then, is not an act, but a habit" (p. 76). The literature is rife with suggestions of exercises to expand the capacity for creativity (Ness, 2012; Tharp, 2009). The key is for leaders to make the exercises their own, and perhaps even make the practices better and more suitable for their particular nuanced realities.

For example, Heidi Hanna (2011), PhD, a consultant to the financial services industry, coaches on a daily gratefulness exercise, with examples including letters of acknowledgement to co-workers, meditations on thankfulness to mentors, or phone calls of appreciation to family members, to help unleash compelling idea formation. Just before the bell rings to signal the start

of trading on Wall Street, Hanna suggests taking 5 minutes and writing down five things for which the executive is grateful, every single day, without exception, ensuring the habit becomes operationalized and habituated.

For newcomers to the habit that fosters creativity, an author encourages them to “give it 30 days” (Duhigg, 2012, p. 74). By doing the action over and over for 30 days, the activity might move in to the 95% cell of regular routines. Hanna (2011) offered evidence showing unintended positive benefits of the gratefulness routine. This should excite more investigation by researchers who are attempting to discern unintended outcomes from the gratefulness exercise, beyond creativity improvement.

According to Duhigg (2012), some habits are more important than others. Duhigg described something she calls a *keystone habit*, which can generate a particularly compelling momentum for the desired behavior. The behavior catalyzes other behaviors in a cascading like fashion. This concept is germane to this research because it strives to understand which behaviors can yield the greatest positive impact.

Dr. Joseph Michelli’s (2011) work in recent years has yielded some interesting outcomes, namely, that the addition of a Creativity Czar to an organization is critical to establishing ongoing positive habits. Specifically, coaching on initiating of the habit of a weekly meeting to discuss opportunities for creative ideas to delight clients, prospects, and fellow employees is worthy of consideration. Who is going to own this content’s habituated execution? Furthermore, what are the rewards and reinforcements for the proper execution of creative moments (Bossidy & Charan, 2002)?

Another aspect of fostering fertile, creative environments is the habit of humor, which is generally, and unfortunately, unwelcome in formal business environments like financial services

(Collinson, 2002). Moreover, when it is strongly encouraged, an emergent sense of contrivance can appear. However, according Daniel Pink (2006) and others, humor is one of the highest forms of human intelligence and can contribute to the outcomes of creative, differentiated thinking. According to Fabio Sala (2003), the most effective leaders in an organization deployed humor twice as often as middle of the pack managers. The key for creative leadership is finding balance within a particular culture where humor is encouraged, but not required.

Constructs for Improving Probabilities of Great Interpersonal Creativity

Often in commerce and in life, what people say, and what they really want are different. A key consideration of this dissertation is establishing the construct of helping business leaders and employees to listen differently, and more thoroughly. In an interview in 2003, Roger Fisher (R. Fisher, personal communication, February 15, 2003), founder of the Harvard Negotiation Project, advised the author to listen past positions and get to interests. If one aspires to improve one's probability of delivering a creative, impacting gesture, then he/she must understand the other's interest. The construct of learning counterparties' interests and looking past their positions is a critical consideration for professional services leaders of the next generation.

Here is an example that Professor Fisher put forth in regard to illuminating the concept of understanding clients' and prospects' interests, which is at the core of interpersonal creativity. Imagine two individuals negotiating for an orange. One takes the position on how much of the orange each should be awarded; "I brought it from Florida, so I should get 70% of the fruit." The counterparty retorts, "I am the boss here. You work for me. I demand 70% of the orange." Each counter-party is taking a position. However, what if, as the late Professor Fisher taught, time is taken to explore each other's interests (Fisher et al., 2011)? What if one makes the creative discovery that one party needs the orange peel for a fertilizer client and the other needs

the juice for a supermarket client? Both could win 100% of their interest. This is where creativity for meaningful human connection can be born: in the discovery of human interests. Therefore, it is critical to bear in mind that “There is almost always more than one interest underlying a discussion” (Lewicki, Saunders, Minton, Roy, & Lewicki, 2011, p. 71).

Professional services executives should always keep an eye on the possibility of myriad interests, staying creative in their observations, and being ready to satisfy an interest creatively. One more example may shed light. A client of a financial advisor came into the office with aspirations of granting her granddaughter a college education, fully paid. The client could be put in any number of financial positions to achieve the goal: a Uniform Transfer to Minor Account, a College Savings 529 plan, a regular savings account, etc. Upon further evaluation, however, by discovering the true interest behind the possible positions, creative ideas can spring forth. That is to say, if the client’s real interest is resting well knowing that her granddaughter’s college is paid for, all sorts of creative ideas might emerge. It’s the knowledge of the client’s interests, not her positions per se, that can set the stage for interpersonal creative ideas. Perhaps, in this instance for example, a creative handwritten note acknowledging the client for her incredible generosity to her grandchild, would hit the mark and make interpersonal meaning.

Another construct worthy of consideration stems from a scholarly disciple of Fisher, Richard Shell (2006). Professor Shell of the Wharton School teaches about the importance of knowing one’s own bargaining style, and the bargaining style of the counterparty, or, for the purpose of this paper, the bargaining style of the client or prospect. Is the individual a competitor, compromiser, avoider, accommodator, or collaborator? Answering this question will greatly increase the likelihood of generating compelling ideas for delivering an extraordinary emotional connection.

Another construct worthy of consideration is having a clear understanding of the client's emotional dynamics. That is, by learning how the client appreciates being appreciated, possibilities emerge for creativity to allow for meaningful connection. Chapman (2007) discussed the merits of gaining greater clarity about others' emotional dynamics. By habitually paying extraordinary attention to what matters to the client, creativity has a chance to shine and hit the mark with the individual. Chapman described five different *love languages*:

- Spending time with the counterparty.
- Offering acknowledgement of the counterparty's achievements.
- Doing acts of service for the counterparty.
- Offering gifts to the counterparty.
- Offering physical affection.

Each of the five languages will be reviewed subsequently. If an attorney, advertising executive, or financial advisor notices that his/her client expresses delight when the two spend time together, it is likely the client falls into this category. By utilizing the construct and knowing this about the client, creativity can emerge. Recall that, loose fitting structures go a long way in serving creativity ("Can Creativity Be Taught," 2014). Perhaps operationalizing this structure, the advisor can heighten his chances to connect meaningfully. For example, a creative surprise visit once a quarter could hit the mark in connecting with the client. Next, if the advisor observes an outsized response of joy when he offers a word of acknowledgement to the client, a systematic handwritten note of acknowledgement may be particularly meaningful for this individual. If the advisor notices the individual reacts positively when an act of service is conducted on his/her behalf, he/she should do something important for the client. One financial planner, well versed in Chapman's work, got the idea to wash a new client's car, which was

received a tremendously positive response. By correctly identifying the client's emotional dynamic, his creative and surprising idea of the carwash was a win (C. Clayton, personal communication, March 1, 2015). The professional should also understand if the client responds well by receiving a gift; if so he/she can devise a gift to give the client that would have personal meaning. Knowledge of Chapman's *languages of love* construct can put the advisor substantially ahead of any competitor, and furnish some light structure from which his creativity can activate.

Another useful construct in the pursuit of heightened creativity is to understand the complexities of unique communication preferences. How might one individual respond to various assertions, as compared to another? Which unique communication characteristics and proclivities animate an individual (Rath, 2013)? Does the client prefer regular handwritten notes from the CPA, or does she prefer face-to-face meetings? Maybe she prefers text messages, early in the morning, before heading to work. How much information does he/she prefer to receive? Unlocking the answers to those questions goes a long way to fostering a useful and loose structure for creativity and delivery of meaningful client engagement. One example of creative application of preferred communication style comes from a registered investment advisor who wrote long, comprehensive updates about the markets to his clients. After sending one such commentary, he received a phone call from one of his top clients who was upset at him. He said, "Please stop sending me these dreadfully long letters. I don't even read them, and they make me feel stupid. Rather, I want you to come to my home, once a quarter, and be informative and brief about my financial statements. Then, I want you to be on your way." (T. Rich, personal communication, February 20, 2015)

The advisor was stunned, but the instruction on communication was clear. Now, he knows how to communicate with the client, which offers a loose guidance on how he can be most creative during his quarterly visit to the client's home.

Why Culture Matters for Competitive Advantage

Interpersonal creativity clearly offers a foundation for professional services organizations to improve their abilities to connect meaningfully and emotionally with one another, clients, and prospects; this has merit for winning and keeping market share. In other words, interpersonal creativity elevation improves culture, which elevates a professional services organization's competitive advantage (F. Horowitz, personal communication, October 9, 2015). Heightened activity of CGBSs will ultimately lend itself to this important entity called the professional services' *culture*. It is appropriate to show a working definition of culture at this point.

Culture can be defined as "a way of thinking, behaving, or working that exists in a place or organization, such as a business" ("Culture," n.d., para. 3). According to this researcher of the current study, it is fair to say that one culture can be judged as being superior to another, in that clients may choose to work with one organization over another by the quality of culture that is being demonstrated in a marketplace. Moreover, individual employees may choose to work at a place of employment based on the quality of the organizational culture (Barney, 1986).

Culture was further described by George Bradt (2013), who offered this blunt observation of the power of culture to sustain a competitive advantage:

Given enough time and money, your competitors can duplicate almost everything you've got working for you. They can hire away some of your best people. They can reverse engineer your processes. The only thing they can't duplicate is your culture. (Bradt, 2013, para. 1)

Bradt (2010) went on to suggest several mechanisms by which business and non-profit leaders can create better cultures:

- Hire away the best people.
- Reverse engineer processes.
- Establish brave cultures.
- Attitude is the pivot point.

This study will focus on Bradt's final two points. CGBSs are a result, or outcome, of an attitude. As the leader of Think Creative, Inc., and a representative of the next generation professional services focus group, it will be Freid's job to establish the right attitude as the pivot point for this study's CGBS curriculum.

BRAVE Cultural Framework

Bradt (2010) has also written on the general lack of understanding of how culture, as it applies to business organizations, can be a source of competitive advantage. To address this subject, he created the BRAVE framework, which retains various aspects of culture, including the way people behave and relate, their attitude and values, and the work environment they create.

- Behave: What to impact.
 - Focus of actions: internal vs. external.
 - Discipline or lack thereof with which people act.
 - Unit of organization ranging from individual to team.
- Relate: How to connect.
 - Identity of people ranging from sub-groups to one team.
 - Communication manner from formal to informal.

- Power control from centralized to diffused.
 - Attitude: How to win.
 - Approach to work from disciplined to flexible.
 - Posture from proactive to responsive.
 - Strategy emphasis from execution to innovation.
 - Values: What matters.
 - Approach to risk from protecting what we've got to being open to risk.
 - Learning from directed to collaborative.
 - Purpose and the degree to which people are committed to it.
 - Environment: Where to play.
 - History and the degree to which it is ignored or sought out.
 - Colleagues and the degree to which they are ignored or sought out.
 - World view and the degree to which externalities are ignored or sought out.
- (Bradt, 2010, paras. 3-7)

The research also discusses how culture is typically anemic in business, including professional services. In a 2006 global survey, only 15% of companies reported that employees experienced a positive culture (Meehan, Gadiesh, & Hori, 2006). Meehan et al.'s (2006) description of the imperative of a positive culture is as follows: "At a time when it is commonplace for enterprises to stretch around the globe, culture provides the glue that creates trust and a sense of shared purpose" (p. 55). Meehan's research offers powerful insight into a phenomenon that most business and not-for-profit workers understand. Culture acts as a form of glue, a shared sense of purpose for how, why, and where to move forward. Hopefully, an

initiative of CGBSs will help foster more shared purpose for the actors of Think Creative, Inc., and next generation professional services organizations the world over.

Meehan et al. (2006) asserted that the following questions are worth considering when assessing the quality of any business or not for profit's culture:

- How much time does the CEO spend with customers?
- How many bottom-up ideas get implemented and celebrated?
- Will the CEO waiting in line with other customers get served first?
- If he sees litter on the plant floor, will the CEO pick it up himself?

This researcher might suggest an additional question to be added to Meehan et al.'s research:

How many CGBSs has the CEO executed with employees, clients, prospects, and suppliers, in the last 30 days?

Meehan et al. (2006) also cited six attributes of a high performing culture that is increasing its competitive advantage:

1. Know What Winning Looks Like.
2. Look Out The Window.
3. Think and Act Like Owners.
4. Commit To Individuals.
5. Spread Courage To Change.
6. Build Trust Through Debate (pp. 57-59).

First, Freid and the researcher will work to define what a win for the CGBS study might look and feel like. The deliverer of the CGBS getting a positive response from the receiver of the CGBS in the form of a phone call, email, text, letter, or face-to-face acknowledgement will be considered success. All too often, professional services firms like Think Creative, Inc., suffer from an

inability to define *success*, to thoroughly understand what constitutes a win. Second, Freid will encourage the actors to look beyond themselves for the study. All actors will self-assess regarding what is going on with suppliers, actors, fellow employees, bosses, subordinates, clients, prospects, etc.

Third, the actors of the study, like any actors from the focus group, should be empowered to own this initiative. Will Freid be able to relinquish some control over his employees so a better outcome of culture can be achieved? Fourth, Freid must demonstrate a commitment to the actors and their particular plights. In what ways can he and the researcher work closely with individuals to support their creativity and execution of CGBSs? Fifth, Freid must make an effort to inspire change, encouraging his employees to be bold and make action with CGBSs. Sixth, trust will be built with the actors of the initiative via constructive dialogue, as a result of regularly scheduled meetings to discuss possibilities for CGBSs.

Culture offers a competitive advantage in many ways. Indeed, it is the force that moves employees when nobody is looking (F. Horowitz, personal communication, December 6, 2015). If CGBSs can be induced to happen—including an owner or manager of a professional services firm operating anywhere around the world—when nobody is looking, what would that serve as a proof point for the quality of the firm’s culture?

Conclusion: Considerations for Creativity for Emotionally Intelligent Next Generation Professional Services Leaders

For next generation professional services leaders who are earnest about delivering more than just a great product and who want to go farther in creating an environment of ongoing CGBSs that lead to a more enriched, positive team culture with a heightened competitive advantage, an important point stands out in the literature: get started with the creativity

initiative, and done is better than perfect. All too often, business leaders fail to initiate creativity missions because they are afraid of judgment from superiors, colleagues, and clients (Kelley & Kelley, 2012). The stakes are high, as commoditization lurches in the background of all professional services actors. Again, the deliverable must be greater than merely investment performance of products; earnest attempts must be made to activate personnel's creative abilities, so they routinely make meaningful emotional connections with clients and prospects, all the while, improving team culture.

Though this paper offered two working definitions of creativity, the literature states that there are more than 200 such definitions ("Can Creativity Be Taught," 2014). Perhaps, as a useful perspective suggests, *I cannot define it, but I sure know it when I see it*. One thing is for certain, however, as noted earlier: the creative idea must be not only novel, but also useful. To be sure, genuine creativity is paramount and useful, not only in the client service models of professional services organizations, but also in commerce at large. In an IBM survey of 1,500 CEOs from 60 countries in 33 industries released in 2010, creativity was cited as the most important organization-wide trait required for navigating the business environment (Tomasco, 2010). Hence, Schumpeter's (1942) work on *creative destruction* does indeed carry durable merit, and all in commerce should pay heed.

As discussed previously, a powerful and formidable paradox endures in the business world. In their piece, "The Bias Against Creativity: Why People Desire but Reject Creative Ideas," Mueller, Melwani, and Goncalo (2012) suggested that because of creativity's abstract nature, it is often rejected when it comes time for enactment in the business world. Next generation professional services leaders should take this paradox into serious consideration, not allowing it to manifest in their organization. Get started, hopefully with some of the ideas

discussed herewith. The business culture just might stand to benefit, for intrinsic rewards and a heightened competitive advantage, where the competitors are left perplexed as to how to better compete with the offering to the marketplace.

Again, it bears repeating, that a loose structure must be put in place for creativity to take root. This is a challenging reality for the strict, hierarchal formations in place at most professional services firms. The common perception is that creativity needs to be unleashed and, allowed to explode. The literature informs that this is not the case. Rather, there must be a strong vision, and a loose structure from which creativity can unfurl (Mueller et al., 2012). Furthermore, quite often there is a perception among leaders that *the creative types* in organizations are high maintenance and emotionally unstable. This myth must be disregarded as well.

This researcher hopes that these considerations and research prove useful to next generation professional services leaders. Joseph Schumpeter's (1942) ideas on creative disruption should prompt all leaders in the industry to take the concept of interpersonal creativity seriously and begin to form their missions on heightened creativity execution. The modest intention of this research is to bring professional services to a higher realm, operating in better cultures, where all employees and clients find themselves in a more secure state, far from destruction.

By following Puccio's (2013) advice to "lifting the emotional lid on creativity," (p. 349), the researcher is calling for an adjustment in mindset for any leaders, in any business, who are committed to their teams' ability to become more creative. Nothing will or can change for any organization without this attribute of a team mindset becoming reality. The author went on to say that mindset serves as a lid for our individual's skills, and it will need adjustment, moving

forward, in pursuit of maximizing creative powers. A key aspect of “lifting the lid on creativity” as it relates to creativity resides in the phenomenon of emotional intelligence (EI).

If IQ is traditionally defined as an individual’s ability to process information, EI is how an individual views himself, his inner thoughts, and how he/she relates to the world. The expression was popularized by Daniel Goleman and is grounded in rigorous scientific study. EI is essentially focused on understanding three aspects of any individual:

- How self aware is he or she,
- How well does he understand his emotions, and
- How well does he facilitate and work with those understood emotions (Puccio, 2013, p. 345).

For the purpose of interpersonal creativity, EI is all about how well and readily one individual can connect emotionally and make meaning with another individual. Two individuals connecting emotionally is a richly powerful process and can be at risk of being hijacked, if prudence is not maintained. When an individual becomes stressed; that is, he/she does not have emotional capacity for reconciling what the environment is serving him/her, an actor in a professional services firm with low EI may be unaware of the siege. As such, his/her ability to become interpersonally creative will subside. When emotions take control, a loss of creativity can be expected (Puccio, 2013). This is an important consideration for next generation professional services leaders; they should be interested in hiring individuals who retain a higher sense of EI, who know how to grow the resource, who can manage their emotions well, and therefore are equipped with a higher potential for delivering CGBSSs.

A brief look at the history and evolution of the brain is in order here to more fully understand how actors and individuals retain and expand EI. First in human evolution was the

emergence of the autonomic brain, which is responsible for basic physical functions that occur naturally and automatically for us, such as breathing and excreting. Next came the formation of the limbic brain, which is responsible for emotions. The limbic brain allowed humans to more readily reconcile emotions, and more appropriately discern and respond to danger, namely freeze, flight or fight. More recently, the neocortex emerged, where learning occurs. This is the part of the brain responsible for higher thought and reflection, including creativity and problem solving (Puccio, 2013).

Again, it is important to emphasize the need for next generation professional services leaders to hire for actors with higher EI, who can manage the forces of the limbic brain, which, if left unchecked, can and will stultify creativity and meaning making. Daniel Goleman (2013), the founding father of EI, coined a term for when the limbic brain overtakes the cortex and neocortex functioning of the brain: emotional hijacking.

It is important to be clear that the aim is not to eradicate the function of emotions with respect to interpersonal creativity. Indeed, emotions play a fundamental role in animating actors and individuals. Passions and love will serve the initiative of heightened interpersonal creativity well. Rather, the aim should be proper management of the forces of emotions; working well with emotions, in existential symphony, as the high aim. Only when the passions become out of control does an impediment to ideal creative conditions emerge.

Emotional hijacking occurs because emotions respond much faster than rational thinking. That is, the limbic brain responds to stimuli by orders of magnitude more quickly than our rational brain (Hanna, 2011). When under an environmental assault, emotions run the show (J. Loehr, personal communication, October 21, 2015). The rational brain will lie dormant, until events calm down. This phenomenon is not necessarily a bad thing, evolutionarily speaking.

When it is time for freeze, fight or flight, emotions retain the clout to direct an individual's conduct and action. Again, the internal process just needs to be managed well, and this comes through a well developed EI facility. Puccio (2013) makes a colorful suggestion that individuals should be committed to developing their EI practice with what he calls "emotional jujitsu" (p. 347) in order to most effectively reconcile disruptive stimuli in our environment.

One might then ask, how can individual actors in professional services firms improve their EI reservoirs? One researcher argues that doing so will start with having a good mood. An actor's creative and optimal creativity zone can be evoked by taking steps to ensure he/she is routinely in positive mindset (Achor, 2013). Getting clear on the behaviors and actions that precipitate an individual's good mood is a key habit for any person committed to increasing levels of EI and consequent interpersonal creativity stores.

John Collingwood, a senior executive of curriculum design at Johnson and Johnson's Human Performance Institute in Lake Nona, Florida, suggested taking an audit of what animates an individual for his/her precipitating of a positive mindset (J. Collingwood, personal communication, October 21, 2015). The key is that every individual is entirely unique, which is a positive phenomenon. Here is a list of suggested daily habits that he calls crucial for *oscillation*, the force of action that can transport an individual into a more positive state of mind:

- Playing a musical instrument
- Prayer and meditation
- Grateful handwritten note of acknowledgment to family member, friend, or work colleague
- Stretching every 90 minutes
- Interval exercise of high intensity – running, biking, swimming, walking

- Creative gesture beyond self – The idea and execution of a CGBS actually induces more of the same positive activity, according to Collingwood
- Phone call to an old friend
- Laughter, in response to videos or appropriate jokes or pranks on work colleagues
- Diet of non-processed foods
- Journaling of problems
- Dancing
- Engagement with a pet
- Healthy and meaningful sex
- Exposure to compelling fragrances

Frequently engaging in as many of these activities as possible will work to facilitate a better mood for an actor of a professional service firm, thereby augmenting his/her EI reserves, and allowing for a greater likelihood of interpersonal creativity. Again, the process should start with self-awareness, or what Gerard Puccio (2013) described as clarity of one's "own individual and unique internal climate for creativity" (p. 351) and setting one's own mindset with intention.

With respect to awareness of an individual's unique internal climate for creativity, Arthur Van Gundy (2013) suggested the following, as an expansion of the ideas put forward by John Collingwood:

- Openness to new ideas
- Curiosity
- Independence
- Perseverance
- Risk taking

- Discipline
- Playfulness

With openness to new ideas, Van Gundy recommended holding off judgment and condemnation of others. With curiosity, an actor should be expressing wonder as to what is happening in his/her environment. With independence, one must be willing and comfortable to express one's own opinions, regardless of one's perception of others. With perseverance, one must be willing to press on, irrespective of particular scenarios. With risk taking, one must be willing to take on situations that confer a certain degree of uncertainty. With discipline, one must be able to establish routines and structures that will support the mission. Moreover, one must keep a sense of calm about oneself. With playfulness, one must be willing and able to toy with possibilities.

Puccio goes on to add to Collingwood's and Van Gundy's (2013) lists for furnishing a deeper reservoir of individual EI for creativity formation. He discussed the importance of maintaining a sense of internal locus of control. Said otherwise, does an actor of a professional services firm retain the sense that he/she is in control of the circumstances he/she finds himself/herself, or does he/she believe he/she is operating as a consequence of circumstances? Further, Puccio (2013) added an idea about an actor's ability to become comfortable with ambiguity. When facing limitlessly novel situations, is there a degree of comfort to withstand and conform to the granular realities being posed? Will an individual be able to adapt well? With all the decisions that are continually coming at an individual, will he/she adjust and healthfully readjust, ultimately moving forward in a productive manner?

To come to a conclusion about the critical need for a build up of EI for interpersonally creative professional services actors, Achor (2013) wrote on the importance of limiting *noise* in professional life. Again, as human brains were developing evolutionarily, all data needed to be

reconciled, allowing for survival to have better chances. A primitive person simply could not afford to miss any information. In the modern age, however, discerning what the true, relevant signals are, is no small task (Foster & Kokko, 2009). Non relevant signals serve as noise, deplete EI reserves, and diminish consequent creativity functioning.

Shawn Achor (2013) suggested utilizing the following four criteria to determine if the information presenting itself to a professional services person is a useful signal, or simply noise:

- Unusable: the behavior will not be altered by the information
- Untimely: the information will not be used imminently, and it could change by the time you do use it
- Hypothetical: the information is based on what someone believes “could be” instead of “what is.”
- Distracting: the information takes you away from your goals. (pp. 156-158)

In a dawning age of ever expanding information swarms coming at professional services actors, an earnest attempt should be made to manage the onslaught well. If not, EI levels will be affected and diminished; creativity capacities will suffer; interpersonal meaning making will spiral downward; and a consequent compromised competitive advantage may ensue, for any enterprise. This predicament should have all professional services leaders engaged, if not concerned. Joseph Schumpeter’s (1942) model for creative destruction is not to be dismissed. Upward spirals of positivity in professional services organizations start with CGBSs, which hang on the availability of the tender but compelling resource of interpersonal creativity.

When ample resources of interpersonal EI are found in an organization, and interpersonal creativity begins to accelerate, a consequence that can be expected is the formation of stories by actors. Robin Cowie, a Hollywood film producer, says that stories are a natural result to any

unnatural experience in life (R. Cowie, personal communication, January 16, 2016). Next generation professional services leaders should expect, and perhaps, capture the emergence of stories that will unfold in the organization. Cowie recommended conducting video recordings of the actors, allowing them to fully express what they experienced, either delivering CGBSs, or receiving CGBSs. The recorded stories may serve to form as a foundation for the organization, allowing for a sense of what one researcher called the organization's *signature* (Eisend & Stokburger-Sauer, 2013). Cowie went on to suggest, after reading the work on signature formation, that the stories should be encouraged and even coached by the leaders of the professional services organization. By sending a clear signal to the employees of the firm, by the leadership, the chances for even more story formation may emerge. Cowie suggested three crucial components of any compelling story, so it has a chance to continue in circulation among constituents:

- The deliverer of the story is never the hero.
- There must be an emotional bridge to the audience.
- Surprise must occur.

First, whoever is telling or recounting the CGBS should never have him/her as the star of the story. This would only serve to diminish the credibility of the message. Second, the audience must retain some emotional connection, or bridge to the story. It must be relevant to the audience, and it must come alive. Lastly, there must be an element of surprise in the story, which is the emotion that serves as a *springboard* for further broadcast, according to Cowie.

As an Aside and Beyond Professional Services: Social Business and Creativity

With the narrative and instruction of social business coming to the fore in commerce, how can creativity training be applied to help others? Muhammad Yunus invited all people to

“get involved” (Yunus & Weber, 2011, p. 27). Imagine if every human being on planet Earth executed one more creative, delightful gesture per week for the rest of his/her lives? What would the world look like, feel like? Unstated needs would be satisfied en masse, *on Earth, as it is in Heaven*. Dees (2001) has stoked this author’s thinking, perhaps upended it.

For social entrepreneurs, the social mission is explicit and central. This obviously affects how entrepreneurs perceive and assess opportunities. Mission-related impact becomes the central criterion, not wealth creation. (para. 11)

Mission-related impact with adult creativity training; a compelling proposition worthy of substantially more scholarly application.

Chapter 3: Methodology

Research Questions

This study will explore the following research questions, all of which are of the qualitative, case study methodology (instrumental; Richards & Morse, 2012; see Table 1):

1. What will happen to the levels of engagement for employees and principals at a professional services firm that enact a 28-day regimen of creative gestures beyond self to each other, suppliers, clients, and prospects of Think Creative, Inc., according to the Human Performance Four Dimension Energy Audit, an existing and performing document for the Johnson and Johnson Company's, Human Performance Institute, located in Lake Nona, Florida?
 - Hypothesis related to Research Question 1: Levels of engagement do not change based on enacting a regiment of creative gestures beyond self to each other.
 - Alternative hypothesis related to Research Question 1: At least three creative gestures beyond self to each other need to be used to see the levels of engagement increase.
 - Measurement: Human Performance Institute Individual and Team Energy Audit (Appendix G).
2. Will a straightforward protocol of suggested actions—including the appointment of a project leader and a weekly meeting where ideas are brainstormed—improve the quality of ideas being generated, for the purpose of creative gestures, according to results derived from interviews with 9 actors?

- Hypothesis related to Research Question 2: Protocol of suggested actions does not improve the quality of ideas being generated for the creative gestures.
 - Alternative hypothesis related to Research Question 2: Some suggested actions improve the quality of ideas for creative gestures.
 - Measurement: Researcher as the instrument (Survey Monkey survey, see Appendix H).
3. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report a better work culture, according to results derived from interviews with 10 actors?
- Hypothesis related to Research Question 3: Employees do not report of a better work culture.
 - Alternative hypothesis related to Research Question 3: Some of the suggested actions and gestures lead to a report by employees of improved work culture.
 - Measurement: Researcher as the instrument (Survey Monkey).
4. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report an improved competitive advantage in the marketplace, as measured by results derived from interviews with 10 actors?
- Hypothesis related to Research Question 4: Employees do not report of an improved competitive advantage in the marketplace.
 - Alternative hypothesis related to Research Question 4: Some of the suggested actions and gestures lead to a report by employees of improved competitive advantage in the marketplace.

- Measurement: Researcher as the instrument (Survey Monkey).

Table 1

Research and Follow-up Questions

Research Question	Follow-up Questions
1. What will happen to the levels of engagement, for employees and principals at a professional services firm that enact a 28-day regiment of creative gestures beyond self to each other, suppliers, clients, and prospects of the firm?	<ul style="list-style-type: none"> • What is the quality and quantity of your energy levels before, during, and after the program (Human Performance Institute, Energy Audit, Lake Nona, Florida, Loehr)? • What about the team’s energy levels before, during and after the program? • How much positive energy did you experience? • Does positive energy matter? • Are you a better worker because of the program?
2. Will a straightforward protocol of suggested actions—including the appointment of a project leader and a weekly meeting where ideas are brainstormed— improve the quality of ideas being generated, for the purpose of creative gestures?	<ul style="list-style-type: none"> • How do semi-formal audit meetings help with creativity? • How was the project leader helpful in facilitating good ideas for CGBSs? • Why does there need to be a project leader in CGBS formation? • When did the best ideas for CGBSs emerge? • Did great ideas emerge specifically in the Audit Sessions? Who had the best ideas, in your opinion? • Do you feel that this was an exercise at which you and your team could get better, over time?
3. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida, report of a better work culture?	<ul style="list-style-type: none"> • How does the team see this program as fun? • How did you enjoy yourself in this process? • What was it like reflecting on yours and your team’s efforts? • Did you like going to work more or less, knowing that you were a part of this program? • Should the CBBS initiative continue? Why or why not? • Did it feel like you were required to do CGBSs? • Are positive stories, or otherwise, being generated internally around the idea formation and execution?
4. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida, report of better business opportunities and a heightened competitive advantage?	<ul style="list-style-type: none"> • Did compelling business opportunities emerge during the program? • Is Think Creative, Inc. a more competitive business because of the CGBS program?

Research Design

A qualitative case study method has been selected for the purpose of this inquiry. This author is aware of challenges related to the credibility of case study research, which will be discussed. As such, a construct will be put in to place, in effort to safeguard the following four attributes of any acceptable qualitative study:

- Credibility
- Transferability
- Dependability
- Confirmability

Credibility

First, with credibility, the following criteria will be strived for, according to Shenton (2004):

- The adoption of well-established research methods. It is very important to have the correct research methods in place. The line of questioning will mirror other case studies of comparable structure. It is imperative that the study provides a level of comfort for the actors in the study, and that they know what do. If there is confusion about what to do, they are to have a sense of safe harbor for next action(s).
- The development of a familiarity with the culture of Think Creative, Inc., Orlando, Florida. A prolonged engagement will be planned for, allowing a culture of trust to be formed to the greatest degree possible. Moreover, it is critical that the actors do not acquire a sense that their professional judgments are being assessed.
- Random sampling of actors of Think Creative, Inc., to act as informants. All actors of Think Creative, Inc. will hopefully be inspired to join the inquiry, though naturally

none will be required. The aspiration is that all actors, even those who are less cooperative and articulate, will participate.

- Triangulation, i.e., working to verify comments about experiences and judgments. Corroboration will be strived for, confirming and cross checking data and interview data.
- Tactics to ensure trust with informants, including the option to exit the study without consequence. Arrangements will be made with Mark Freid to convey the understanding that all participants are free to refrain from participating. Additionally, the team captain for the project will be briefed by the investigator and Mark Freid about the confidential nature of the data he/she will be recording, at Meeting 1, the commencement of the intervention.
- Iterative questioning. The researcher will delicately rephrase to ensure, veracity in actors' responses to the greatest degree possible.
- Frequent debriefing sessions. The investigator will conduct three visits to try to discern biases by himself and the actors.
- Negative case analysis. Experiences that are contrary to the emerging hypothesis will be examined to allow for fuller context.
- Peer scrutiny of research project. June Schmieder, Ph.D., Christie Cooper, Ed.D., and Kent Rhodes, Ph.D. will serve on the committee for this inquiry, providing guidance regarding observation about the unfolding research. Moreover, the researcher will present the results of this study at a number of conferences where fresh perspective can be established, allowing for refinement of any ongoing narratives relating to the project.

- Researcher reflective commentary. The researcher will make time and energy to reflect upon emerging constructs that come from the data generated at Think Creative, Inc.
- Background, qualifications, and experience of researcher. The investigator receives no income from Think Creative, Inc. at his place of employment, Janus Capital. Given the engagement between the investigator and the founder of Think Creative, Inc., Mark Freid, a friendship has been developed that requires full disclosure here. However, the relationship between the investigator, including the CGBS product, and Freid goes no further than a budding propinquity; neither party receives any compensation from the other, in any form.
- Member checks. Did informants, or actors, mean what they actually said? Are they entirely in alignment with what is being represented in the study? This inquiry welcomes any and all checks on the accuracy of the data, from committee members or others.
- Thick description of phenomenon under study. Actual and thorough detail will be furnished around the scenarios being studied. Does the analysis ring true to the committee and others?
- Examination of previous research findings. Previous studies will be examined to the results of this case study. Gaining insight into the comparables, including qualitative research done at the Human Performance Institute, Orlando, Florida, will lend to this study's credibility.

Transferability

With respect to transferability, the following question arises: Can these results be applied to other similar cases? Generalizability matters and it is incumbent on this researcher to provide ample context to the readers, allowing for individual judgment on the merits of how the findings might be useful in other, similar but distinct domains.

Dependability

The high aim of this study is for any future researcher to be able to repeat the inquiry of Think Creative, Inc., but not necessarily the results, given the inherent nature of the case study method. Indeed, Florio-Ruane (1991) argued eloquently how all case studies are particularly and uniquely static and frozen in an *ethnographic present*. Again, the intention here is to format a repeatable inquiry, not necessarily repeatable results.

Confirmability

The researcher will strive to develop concepts to be shared that hail from the experiences and ideas of the actual informants, with as little influence and bias possible from the researcher. A full disclosure of the predispositions of the researcher is in order here; he believes that certain criteria can be put in place that heighten the potential for actors to increase their interpersonal impact and create a more engaged work culture. Although he will work to keep his bias in check throughout the inquiry, with rigorous discussions and cross-examinations from his committee and others, complete success in that effort is unlikely.

An audit trail will be established with all engagements with Think Creative, Inc., highlighting what happened when, where, and why. Freid is fully on board with this initiative, sensing full well the need for confirmability. It should be disclosed that Freid has expressed interest in utilizing the study for his own purposes, to possibly promote his firm, and develop

ideas for a book he plans to write on positive psychology. Therefore, the heightened need for a highly confirmable process is of utmost importance in this particular investigation.

Setting

This qualitative case study will engage Think Creative, Inc., an advertising agency located at 1001 Virginia Avenue, in Orlando, Florida, operating with 10 actors. To get a sense of the team's culture, note the text from the opening page on their company website:

Besides our unique approach and killer work, there's one other thing that makes us such a great company to work with (and work for). By that, we mean more than having a cool-looking space with beers in the fridge. We mean creating an environment that cultivates happiness and success, both personally and professionally, minimizing unnecessary stress and eliminating finger pointing in favor of problem solving. Here's how it's done.

- Establish high standards and help each other reach them
- Make our community a better place
- Empower everyone
- Choose partners you can be proud of
- Put fun on the priority list. (Think Creative, Inc., n.d.b, para. 1)

The firm works in traditional advertising, branding, email and direct mail campaigns, client experience improvement, interactive community engagement, leadership training, and collateral creation. However, the firm is aware of the fierce competition in their area, and that they must work to distinguish themselves, averting the perception of *sameness* so often held by those seeking advertising services. Accordingly, their website language addresses this issue, by telling the story that, since the firm's founding in 2000, they have committed themselves to help not only big brands, but significant brands too. They claim that they do not operate as a

conventional advertising agency, which is critical for their success. All of this language is germane to the study in that it might lend itself to bias, as Think Creative, Inc., is already committed to a culture of CGBS. The website goes on to state:

Think Creative, Inc., Inspiring Greatness in People and Success in Clients ... ONCE UPON A TIME, THINK CREATIVE CALLED ITSELF AN “ADVERTISING AGENCY.” THAT IS, UNTIL WE REALIZED THAT ADVERTISING ONLY COVERS PART OF WHAT WE DO. AND THAT PART GETS SMALLER EVERY DAY.

What we really do is design and build brands from the ground up. That includes helping organizations define their promise and deliver on it. Developing comprehensive marketing strategies to connect companies with their target markets. And yes, producing multimedia advertising campaigns that compel engagement and action. (Think Creative, n.d.a, paras. 1-2)

Let’s face it. Cool web sites and sharp ad campaigns are a dime a dozen these days. And while we are proud of producing beautiful work (and have the trophy case to prove it) that’s not what makes us one of the most effective branding and marketing agencies in Florida. What people really know us for, and what clients have come to love us for, is the way we think. And we think that building a significant brand is a lot more than building a pretty logo. (Think Creative, Inc., n.d.c, para. 1)

Also, the firm speaks forthrightly on the power of culture, the critical input of happiness as an accelerant of productivity. It may be observed that this firm is a true outlier, an uncommon professional services firm, worthy of study in the spirit of POS. The company’s numerous awards are shown in Appendix A. As of October 2015, Freid, the CEO and founder, reported a

balance sheet of “outstanding financial health for the industry, with their last 2 years being exceptional.” Freid acknowledged unequivocally that the material success that his team has earned stems from an unusually positive culture.

Focusing on action will be critical to this study. Without concrete, demonstrable actions of CGBS, this intervention cannot come to life. Next, the owner, Mark Freid, and (to a lesser degree) the researcher himself, must put forth a discipline of action about executing the parameters of the initiative. Without a discipline, there is little chance for improved culture. Subsequently, having a sense of why the CGBS intervention is being conducted within the context of the team will be important. As the expression tries to convey, creative gestures *beyond self* suggest that this is an initiative bigger than any one individual in the firm or related to the study. Additionally, setting the tone for one cohesive team, not of sub-units, will be important in an effort to increase the likelihood of an improved culture. Next, the researcher will try to convey a communication pattern that moves from formal to more informal, in the interest or pursuit of a better culture. For example, a relaxed tone will be the goal for the actors of this intervention, this qualitative case study. Other research highlighted in this protocol has emphasized the importance of creating a relaxed, cordial, positive atmosphere, where great interpersonal ideas may flourish.

Next, shifting the power from centralized to diffuse will increase the chance of establishing a higher quality culture. Freid will need to relinquish some power over the direct control of this project if he is interested in fostering a more positive culture where CGBSs increase in their frequency and quality. Then, flexibility must be woven into the initiative. A tight, stringent code of conduct might prohibit cultural transformation. Subsequently, it will be critical that actors of this study respond to the opportunities at hand for CGBSs. Being able to

act, to hit the mark emotionally and meaningfully, will be fundamental to their success. Next, innovation must be central to the initiative. Can actors be innovative in discovering ways to come up with and execute CGBSs? Next, actors must strive for a certain degree of risk, for without risk, there can be no forward motion for the execution of CGBSs or toward cultural change. Additionally, collaboration will be critical in the actors developing ideas for CGBSs. A weekly meeting will be scheduled where best ideas can be shared and vetted, and where the team can determine which ideas will be executed. Also, the researcher and Freid will lead a discussion regarding the purpose of CGBS initiative, on day 1 of the intervention. *So what?* will be the question posed to the actors at this opening meeting, day 1, and the discussion will focus on the investigation regarding whether CGBSs can be improved upon. A WOW Audit will be shown to the actors at this meeting, designed to help inspire and foster quality CGBSs. The WOW Audit demonstrates the value of understanding a CGBS recipient's personality types, passions, and emotional dynamics. The actors will learn that the outcome of their execution will precipitate a higher quality workplace, with an improved chance for competitive advantage.

Also at day 1, Freid and the researcher will discuss history of the firm's client service model and team culture to spark earnest and relevant conversation about how well CGBSs have been delivered in the firm's past. Think Creative, Inc., and all next generation professional services organizations, should face the truth about how well they have generated CGBSs. Have they been effective at making meaning, creatively with their top clients and prospects, and other high value relationships? How confident do they feel their culture has improved over the history of the firm? Next, conversations should be held regarding how well employees of Think Creative have been sought out and encouraged for this initiative. This might be a sensitive discussion, so Freid and the researcher should handle it delicately. Lastly, can the actors of this

study, and actors of all next generation professional services firms, reach out to the world for ideas of to how to better execute CGBSs? Search engines like Google and others afford many opportunities for improving interpersonal connection. The Internet, however, should not be a limitation. An attitude of continual curiosity and learning must be fostered in order for better and more CGBSs to occur. All of these points will be addressed with Freid and his team at day 1, the beginning of the intervention.

Gaining Access to Site

An appointed leader of Think Creative, Inc., will operate as the principal contact for the inquiry. The researcher, acting as the primary instrument of this case study, will interface with him/her routinely before, during, and after the data collection. Ten actors will be engaging in the study, invited orally by Mark Freid, and this requires confirmation, an oral sign-off by Freid and an expressed willingness by the balance of actors. All actors will be invited; no standards of discrimination will be set forth. The researcher anticipates no reason for exclusion or termination of actors from the inquiry. The intention of the study is that all actors will be inspired to participate, and contribute to the emerging field of POS; none will be, required to participate. In his interviews and review of any relevant documents and email chains, the researcher will inquire as to whether actors felt in fact that they were required to participate. This distinction is critical and will be discussed in deep detail with all actors.

It is non trivial to comment on mitigating risk to all of the actors involved for participating in the study. Freid will emphasize at the opening meeting, on Day 1 of the intervention, that no actor is required to participate in the study, and all are free to drop out at any point, for any reason, with no penalty. Moreover, individual identities will be held confidential from management, with no actor's responses being shared with Freid (unless the

individual nominates information in a group setting). The owner will also point out that any time spent on the study is also fulfilling their job description for the firm, and as such, there is no limit on the amount of time that can be spent in the CGBS intervention. This commentary by Freid will be audio recorded by the researcher, and all present or otherwise will be reminded that his comments are audio recorded and available to every participant in perpetuity.

The researcher plans on three visits to the site during the 1-month inquiry, which is located only 10 minutes from his place of employment. The researcher will be sensitive to the amount of time and energy he is exacting from his actors, with routine communication with the project leader and Mark Freid about the appropriateness of frequency. Additionally, the researcher will gain full permission and communication guidance about phone calls and texts.

Gift cards for engagement and completion of the CGBS intervention will be utilized as an incentive for participation and will be provided as a “thank you gift.” The researcher will be covering this cost, in the form of a gift card to a popular coffee shop, and the amount shall not exceed \$100 in sum.

Benefits for participants may exceed the coffee shop gift card. Employees of Think Creative, Inc., may expect to find a more joyful place of employment, and an improved financial balance sheet for the firm, with the CGBS intervention. This assertion will be articulated by Freid and the investigator, at meeting 1, Day 1, and will be audio recorded.

Value of Case Study with Think Creative, Inc. and Instrumentation

A case study might be the most valuable line of inquiry, when the “the opportunity to learn is of primary importance” (Stake, 1995, p. 244). That is precisely the scenario with this case; there is a profound chance to glean insight into an emerging phenomenon of critical

importance to professional services' firms: their ability to generate and execute creative gestures beyond self. Yin (1989) characterized the case study method as field of empirical research:

- That investigates a contemporary phenomenon within a real world context,
- When the boundaries between phenomenon and context are not clearly evident, and
- Where multiple sources of evidence are used. (p. 23)

Yin (1989) went on to state a “distinctive need” for case study research “arises out of the desire to understand complex social phenomenon” (p. 37). Indeed, making an inquiry into what is going on with adult creativity abilities to foster positive impressions on others (i.e., CGBSs) is a complex set of activities, processes, and functions. Therefore, a case study model is warranted.

The case study allows for several mechanisms to collect data, using multiple methods for data collection and analysis. Documentary evidence, observations, and discussion will be the three mechanisms for gaining insight. Patton (1990) argued that by using several methods for data collection, the quality of the findings is likely to improve.

Yin (1989) also noted that a single case method is appropriate and warranted if the findings appear to support the value of application for the larger group. This is called *being revelatory*, in that the problems and challenges of Think Creative, Inc., are not limited to itself. This relates to the researcher's presumption that a problem of *indistinguishability* has arisen in professional services firms, and this problem is not unique to them.

Data Collection Procedures

The researcher will work with an employee from Think Creative, Inc., to create a working schedule for data production (Appendix B). The first meeting will be led by the researcher and Mark Freid, the principal and founder of the firm under inquiry. At that meeting, intended for June 2016, the researcher will explain fully the intervention that what will be

happening for the next month at their place of employment. He will indicate there will be two more visits to the office, on or about day 15, and day 30, when and where he will be collecting interpretations of their experience, using audio recording and a written log, in a group and private settings.

In the first meeting, the researcher will describe the following to the actors of the study:

- The researcher will be asking all team members to execute one CGBS per week for four clients, prospects, centers of influence to the firm, or each other, in a 4-week period. A CGBS is defined as a unique, emotionally engaging experience that goes beyond expectations and is readily recounted. A key is that the CGBS is deemed appropriate in each individual circumstance; the gesture must have appropriate context and relativism. For example, a CGBS of a bottle of wine to an individual who just gave up consuming alcohol would not be appropriate. Also, the researcher has curiosity as to the state of mind of the actors after they execute the CGBS. The researcher aspires to show that by performing the CGBSs, a positive work reflection will be induced, (Meier, Cho, & Dumani, 2015) and positive inclinations for more work will occur. The researcher characterizes and coins a new term for this output: interpersonal alpha.
- In the second visit by the investigator, on or about day 15 of the CGBS intervention, protocol will call for him to ask the questions in Table 1, Research Question 1, and record the responses with an audio instrument and in written log. In the third and final visit by the investigator, on or about day 30, protocol calls for him to ask the questions in Table 1, Research Question 1, and record the responses with an audio instrument and in written log. In this third and final visit, he will also have deployed

the questions in Table 1, Research Questions 2-4, via Survey Monkey, which will be utilized to uncover and harbor data. The URL for Survey Monkey will be deployed to the actors three days prior to the final visit.

- A weekly meeting will be required of the 10 employees, and Freid will encourage attendance. Actors will turn off all hand held devices and give their full engagement to coming up with great ideas for CGBSs. At each meeting, which will last no longer than 20 minutes, creative ideas will be discussed and recorded on a white board, and the following characteristics of the recipients of the CGBSs will be discussed: passions, interests, and pain points in life: their personality types; how they appear to appreciate being appreciated; and, lastly, their communication preference. A team leader will capture ideas and observations of the event in the CGBS log. The investigator will not be in attendance for the four weekly meetings.
- In these discussions, the researcher hypothesizes that the highest quality, most unique interpersonal ideas will emerge. The meetings will be identified as CGBS Audit Sessions. Either the designated program leader or Mark Freid or another appointed individual will act as the team captain during these Audit Sessions. Responsibilities will include calling the meeting to order; keeping the discussion and the idea generation robust and full of energy; appointing who will carry out and execute the ideas being generated for the recipients of the CGBSs, capturing the stories that emerge around the creation and execution of the CGBS; and memorializing the details surrounding each event in the CGBS log, which will act as documentary evidence. The CGBS log will be hardcover and furnished by the investigator.

- The team captain will have a modest budget, furnished in its entirety by Mark Freid, to act as a resource for the execution of the four CGBSs'. She/he will also routinely capture the essence of what he/she is experiencing in the CGBS log, as the meetings and the gestures begin to happen. She will not use audio recordings as this vehicle is too cumbersome a request for the busy enterprise; nor will she be surveyed at the conclusion of the study. Some of the questions to which he/she will be encouraged to pay attention include: What are the quality and quantity of energy levels of the team before, during, and after the Audit Sessions (Human Performance Institute, Energy Audit, Lake Nona, Florida, Loehr)? Do semi-formal audit meetings help with creativity? Are positive stories, or otherwise, being generated internally around the idea formation and execution? Does the team see this program as fun? The CGBS log will serve as important data to be analyzed by the researcher and his assistant. Moreover, a discussion will occur between the researcher and Mark Freid as to whether all actors in the inquiry should maintain a log. The researcher must be sensitive about the degree of work being placed on Mark Freid's employees.
- Dialogue Protocol: All 10 actors will be engaged with dialogue by the researcher during his three visits, and intense observation will occur, of their experience during the 28-day inquiry. The engagement with the actors will be both individual and in group setting. The investigator will record observations in his log and audio recordings; his questions in meeting two (day 15) will mirror the questions associated with RQ 1. Furthermore, he may include items used in the Survey Monkey vehicle for meeting 2. Protoled dialogue for meeting three (final meeting) will mirror the questions to be posited in the Survey Monkey and will be audio recorded and

transcribed in the log. The Survey Monkey mechanism (see Appendix H) will be utilized at or around day 27 of the program to glean candid responses from the actors with respect to Research Questions 2, 3 and 4. The researcher will offer full disclosure about the intent and the *positive bias* of the researcher and Mark Freid, their boss, including an animating quote, “Remember that life is not measured by the number of breaths we take, but by the moments that take our breath away” (Corona, as cited in Quote Investigator, 2013, para. 5). Freid and the researcher must work to show the merits and superiority over the negative. That is, of requiring business as usual, with an absence of CGBSs (Bakker & Schaufeli, 2008).

- The data manufacturing will be done with assiduous delicacy, with the intention of protecting the quality of data and responses. The researcher will aspire to be sensitive regarding issues such as gender, race, ethnicity, tone, and body language. Open-ended questions will be asked of the actors at meeting 2 and 3 of the intervention, including, but not limited to: Did you enjoy yourself in this process? How much positive energy did you experience? Does positive energy matter? Are you a better worker because of this? When did the best ideas for CGBSs’ emerge? Were the best ideas emerging in the Audit Sessions? What was it like reflecting on your and your team’s efforts? Did you like going to work more or less, knowing that you were a part of this program? Should the CBBS initiative continue? Why or why not? Did it feel like you were required to do CGBSs? Who had the best ideas, in your opinion? When and where did your best idea emerge? Do you feel that this was an exercise at which you and your team could get better, over time? The intention here is to induce meaningful, deep responses that will contribute to the narrative of the inquiry.

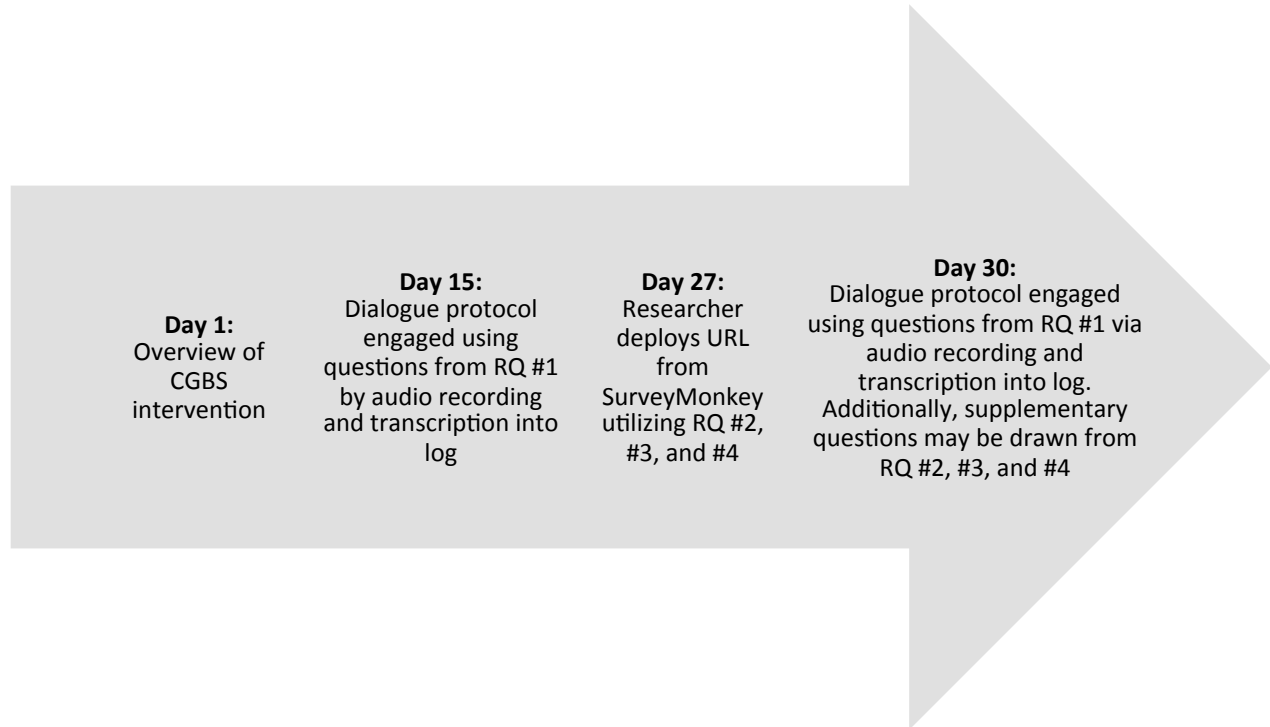


Figure 1. Specific research activities.

Data Analysis Procedures

Documentary evidence, dialogues, and observations will be audio recorded; additionally, Survey Monkey responses will be captured and assessed. Lastly, notes will be taken into the investigator’s log, serving to render clarity of analysis of the data. All observations will be done by the principal investigator, John L. Evans, Jr. The log will serve as the manufactured data’s primary location. It will store the information as long as it exists and would be available for any interested party, as agreed by Freid and the researcher. The log will reside with the researcher in perpetuity, along with audio-recorded files.

An express interest in implicit social cognition will be kept in the forefront (Butin, 2009), where the researcher will sift through responses, trying to determine accuracy. Some of the questions will include:

- What is the meaning behind the responses?

- Where are the inaccuracies?
- Are actors feeling safe in this inquiry?
- Are actors safe?
- When and where did bursts of interpersonal creativity spring forth?
- Did actors truly enjoy themselves to this process?
- Did productivity and actor engagement, including culture and joy, heighten?
- Did the former diminish?
- Who was good at generating CGBSs? Why so, in the actor's opinion?

“Response effect bias” (Butin, 2009, p. 97) will also have to be reconciled. This is in no way a suggestion that actors might be untruthful; rather, the researcher must make every attempt to safeguard against potential biases. Again, Mark Freid, the owner, has a natural inclination toward the merits of POS, and this must be reconciled for the quality of inquiry. Although a number of the questions will be posed anonymously, there will still be some face time with Mark Freid and the team captain; there, the researcher will be keen on reading body language, and other non-verbal communications, and sifting for clues on what is truly going on with the case study. The researcher is striving to actively pursue the actors' experiences, thoughts, feelings, and intuitions about the initiative. The researcher acknowledges that he will be acting as a filter for these human presentations (Butin, 2009).

The researcher will also ask Mark Freid and an appointed team captain to be making entries in an observation log, during the 30 day intervention (Appendix C). This document, along with Think Creative, Inc.'s website and brochures, will be analyzed in support of the research questions, which are centered on the inducement and elicitation of upward spirals of positivity as a consequence of interpersonal creativity. The log will remain with the researcher in

perpetuity. The log and all research information, including recorded audio files will be kept in the researcher's locked office and on a password protected computer.

Do these artifacts buttress and facilitate a culture of heightened positive engagement (Hodder, 2003)? In the spirit of full disclosure, it is important to emphasize twice in this study, that the researcher is an aspiring Positive Organizational Scholar; the theoretical framework in place is biased toward the efficacy and productivity of a positive culture, as opposed to a negative or normative frameworks. Said otherwise, the researcher has a bias for a particular outcome. Vigorous dialogue and course corrections will be required of the committee to manage the bias.

Coding the Data

After a comprehensive collection of data resulting from dialoguing with actors, review of Survey Monkey responses, log and audio analysis is generated, the researcher will conduct a thematic analysis of the results by coding the data. The responses and observations will be coded into themes. Auerbach and Silverstein (2003) noted, "A theme functions as a way to categorize a set of data into an implicit topic that organizes a group of repeating ideas" (p. 133). The goal of thematic analysis is one of sculpture: narrowing down a number of themes from the data to create one comprehensive interpretation. Theming the data is applicable when using participant-generated documents (Saldana, 2009). Initially, the researcher will color-code each similar response based on clusters that might appear to emerge. For example, similar responses indicating a higher report of personal energy levels, attributed to the CGBS intervention, will be highlighted, and made to be distinctive.

Ethical Considerations

Adherence to human subjects' considerations will be taken into account pursuant to standards established by Pepperdine University and the Institutional Review Board (IRB). This research will be conducted in a manner consistent with Title 45, Part 46 of the U.S. Code of Federal Regulations (U.S. Department of Health and Human Services, 2009), Pepperdine's IRB and ethical principles of the Belmont Report. Prior to beginning the study, written permission to conduct the study using Think Creative, Inc., employees as well as site permission will be secured from Mark Freid, owner (Appendix D). An individual consent form will be shared with and signed by each participant in the study (Appendix E) at the opening meeting of the intervention, day 1. All aspects of participation will be explained during the informed consent process; actors are consenting to participating in surveys, recorded discussions with audio device and written log, and being observed during multiple meetings.

Participation in the study will be voluntary. The study is estimated to last approximately 4 weeks and each participant can expect to spend about 2 hours in interviews and meetings due to the research, but the owner, Freid, will indicate on a recorded device that there will be no penalty for extended work on the CGBS intervention, beyond the 2 hours. Individual identifying information will be removed from any retained artifacts. Participants' rights include:

- (a) The right to be fully informed about the study's purpose and about the involvement and time required for participation, (b) the right to confidentiality and anonymity, (c) the right to ask questions to the investigator, (d) the right to refuse to participate without any negative ramifications, (e) the right to refuse to answer any questions, and (f) the right to withdraw from the study at any time. (Richards & Morse, 2012, p. 263)

Participants will be assured of the confidentiality of their responses, verbally and in writing, and informed consents will be secured (Appendix E). Beyond a written thank you and a copy of the completed research, additional remuneration will not be provided.

A number of different risks, benefits, and mitigations to participants will be considered. For one, this initiative goes beyond job descriptions. What if Freid still levels, unwittingly or otherwise, judgment on job performance? Or, what if the study significantly detracts from regular employee job execution? The most significant benefit of participating in this study will be that participants will obtain a copy of the findings, which will hopefully improve their performance in their current role, or help prepare them for future roles. By sharing common best practices and challenges in creative gestures beyond self, participants will learn how other actors practice and can compare and contrast their style, strategy, and practice. Subjects may fear that participation will have an impact with their standing at the company or their career trajectory. It needs to be explicitly stated that no negative ramifications will result from their participation. Data will be gathered, but they will be reviewed in full disclosure, open to any interested party, as agreed by the researcher and Freid. The interviewer will be responsible for these commitments, and the researcher will be accountable per the commitment to Think Creative, Inc. personnel, sites, and Pepperdine's IRB.

Researcher's Note

A debt is owed intellectually to Shawn Achor and Dr. June Schmieder-Ramirez, of Pepperdine University and the chair of this committee, for their inspiration for this inquiry. Both evoked an unrecognized passion for the field of POS, which serves as the existential fuel for the desire to create knowledge. The researcher, like the subject, Mark Freid, could entirely relate to the notion that it is high time social science took an earnest look at what was working well in an

organization, and emulate behaviors and attitudes in the spirit of appreciative inquiry, with the intention of a better, fuller outcome in group work. This researcher has done substantial consulting with small professional services organizations, with the intention of trying to improve their underperforming ways. While not disdaining the approach and protocol of remediation to a mean in the conventional approach, the POS approach, for an aspiring positive organizational scholar, is an enlivening alternative.

Chapter 4: Findings

To commence this findings chapter of the study, “Critical Considerations on Interpersonal Impact for Next Generation Professional Services Leaders: A Case Study,” a quote from William Penn that was shared with Think Creative, Inc. on visit 1 will be shared here:

I expect to pass through life but once. If therefore, there be any kindness I can show, or any good thing I can do to any fellow being, let me do it now, and not defer or neglect it, as I shall not pass this way again. (“Quotations from William Penn,” n.d., para. 1)

This profundity from Penn reinforces the thematic framework of this study. Now, the focus will move to the collection of data in the 30-day intervention.

Participants

Seven females and two males between the ages of 18 and 48 participated in this study. Eight were full time employees, and one was an intern. Mark Freid, the owner, is 48 years of age. Participants’ average duration of work for the firm was 4.8 years.

Visit 1

On May 20, 2016, at 2 PM EST, the study launched at Think Creative, Inc., at its home office in Orlando, Florida. It would not be appropriate to omit the fact that one of the worst tragedies on American soil occurred on June 12, 2016, at Pulse Nightclub of Orlando, located one mile from Think Creative, Inc., Day 24 of the 30-day qualitative case study. While the tragedy did not materially affect the structure of the research, interpersonal impact obviously occurred with the actors of the study. The researcher’s impressions related to this event will be shared in the final chapter. Research Question 1 asked,

1. What will happen to the levels of engagement for employees and principals at a professional services firm that enact a 28-day regimen of creative gestures beyond

self to each other, suppliers, clients, and prospects of Think Creative, Inc., according to the Human Performance Four Dimension Energy Audit, an existing and performing document for the Johnson and Johnson Company's, Human Performance Institute, located in Lake Nona, Florida?

- Hypothesis related to Research Question 1: Levels of engagement do not change based on enacting a regiment of creative gestures beyond self to each other.
- Alternative hypothesis related to Research Question 1: At least three creative gestures beyond self to each other need to be used to see the levels of engagement increase.
- Measurement: Human performance institute individual and team energy audit (see Appendix G).

On the launching date, Visit 1, the researcher informed the participants of the study that he would be interested in energy levels of individuals and team members, as a consequence of the enactment of CGBSs. Several of nine individuals assembled responded with curiosity. One individual asked, "Why are you interested in our energy levels?" The researcher responded, "Because one's personal energy level is the most important asset any individual will ever have." After some more extended dialogue on the significance of awareness of personal energy levels, participants appeared to develop a sense of understanding as to why the researcher would be inquiring about this subject. This exchange seemed to furnish clarity for the employees and owner of the public relations agency as to why the researcher was interested in their energy levels.

The researcher went on to share the specific questions associated with Research Question 1 that he would be asking on visits 2 and 3, on approximately Days 15 and 30 of the investigation. Here were the questions shared:

- What is the quality and quantity of your energy levels before, during, and after the program (Human Performance Institute, Energy Audit, Lake Nona, Florida, Loehr)?
- What about the team's energy levels before, during and after the program?
- How much positive energy did you experience?
- Does positive energy matter?
- Are you a better worker because of the intervention?

The researcher also shared that he would be administering a survey, via Survey Monkey, on approximately Day 28 of the investigation. He revealed what the questions would be as follows:

- How do semi-formal audit meetings help with creativity?
- How was the project leader helpful in facilitating good ideas for CGBSs?
- Why does there need to be a project leader in CGBS formation?
- When did the best ideas for CGBSs emerge?
- Did great ideas emerge specifically in the Audit Sessions? Who had the best ideas, in your opinion?
- Do you feel that this was an exercise at which you and your team could get better, over time?
- How does the team see this program as fun?
- How did you enjoy yourself in this process?
- What was it like reflecting on yours and your team's efforts?

- Did you like going to work more or less, knowing that you were a part of this program?
- Should the CBBS initiative continue? Why or why not?
- Did it feel like you were required to do CGBSs?
- Are positive stories, or otherwise, being generated internally around the idea formation and execution?
- Did compelling business opportunities emerge during the program?
- Is Think Creative, Inc. a more competitive business because of the CGBS program?

The researcher went on to explain to the assembly of participants from Think Creative, Inc., that these 15 questions were designed to support the remaining three research questions:

2. Will a straightforward protocol of suggested actions—including the appointment of a project leader and a weekly meeting where ideas are brainstormed— improve the quality of ideas being generated, for the purpose of creative gestures?
 - Hypothesis related to Research Question 2: Protocol of suggested actions does not improve the quality of ideas being generated for the creative gestures.
 - Alternative hypothesis related to Research Question 2: Some suggested actions improve the quality of ideas for creative gestures.
 - Measurement: Researcher as the instrument (Survey Monkey survey, see Appendix H).
3. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida, report of a better work culture?
 - Hypothesis related to Research Question 3: Employees do not report of a better work culture.

- Alternative hypothesis related to Research Question 3: Some of the suggested actions and gestures lead to a report by employees of improved work culture.
 - Measurement: Researcher as the instrument (Survey Monkey).
4. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida, report of better business opportunities and a heightened competitive advantage?
- Hypothesis related to Research Question 4: Employees do not report of an improved competitive advantage in the marketplace.
 - Alternative hypothesis related to Research Question 4: Some of the suggested actions and gestures lead to a report by employees of improved competitive advantage in the marketplace.
 - Measurement: Researcher as the instrument (Survey Monkey).

After discussing the four research questions and the supporting sub-questions, the group seemed to exude a sense of positivity. One participant exhorted, “This is the coolest study I have ever heard of.” Another said, “I am feeling the positive vibes starting already.” Group members laughed spontaneously; it seemed authentic, and not contrived. Both of these comments were made in view of Mark Freid, the owner. Mr. Freid has a natural bias to any merits of a regimen that would call for more CGBSs with internal employees, suppliers, clients, or prospects. It did not seem that Mr. Freid’s presence influenced the two comments, and it appeared that the remarks were genuine, but that is not knowable for certain.

Of the nine individuals assembled on Day 1 of the study, four began to inquire as to what the researcher might be planning on doing with the results of the inquiry. There was a palpable sense of intrigue by these four persons; they seemed to be glad to be part of any science

contributing to the emerging field of positive organizational scholarship. The researcher read several quotes from Cameron et al.'s (2003) seminal work, titled *Positive Organizational Scholarship*. In particular, the participants responded favorably to the concepts of building one's personal resources for delivering positivity within an organization, and how the building of those individual resources could propel "upward spirals of positivity" (p. 5) throughout the footprint of the organization. Again, this discussion at the very commencement of the study felt enlivening for the researcher. Only one individual of the group of nine showed hesitance. The researcher reinforced that no one had to participate; moreover, it was reinforced that anyone was free to drop out at any time for any reason.

Mr. Freid then shared that no employee would be required to do the study and that any person could drop out at any time. Moreover, he reinforced that no one's job performance or ranking was tied to any aspect of the study.

The individuals all showed a particular zeal for determining outstanding CGBSs. More than once, they reminded the researcher that they were a *creativity* company, and that they were naturally inspired to make the process *shine*. They pointed out that the researcher should peruse their website; when the researcher informed that he had already done so, they suggested the researcher "do it again," because they had just made enhancements, reflecting a strong ability to come up with striking gestures of interpersonal creativity. The participants were clearly showing a willingness to express emotional commitment to the study, almost in a spirit of competitive fashion.

This zeal demonstrated by the participants sparked a spontaneous idea by the researcher. He inquired, "On a scale of 1 to 4, what is your sense that the results and conclusions of this study will have merit and value for other professional services firms, the world over? One being

no value because of low energy, to 4 being high value, due to high energy”? Figure 2 presents the results from the impromptu question of the nine individuals.

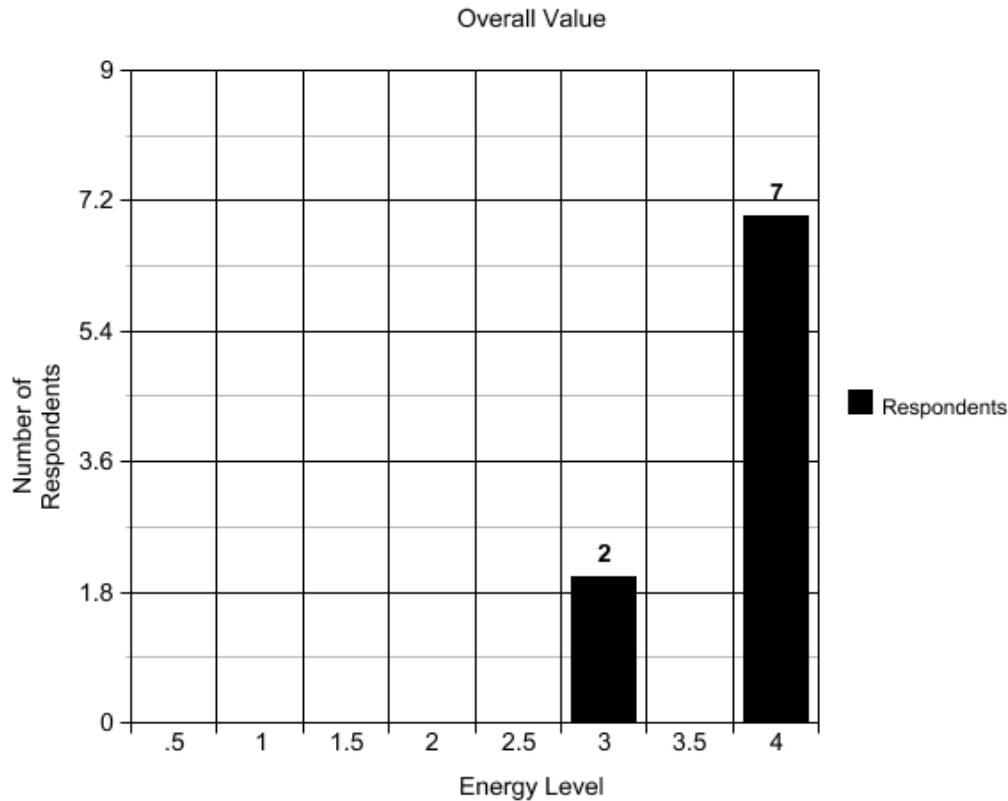


Figure 2. Projected value of intervention.

There was unmistakable engagement with the researcher when he shared the aspects of the “WOW Audit” as a guidepost for coming up with CGBSs. The researcher offered instruction about weekly meetings, replete with discussions on how to best determine compelling, creative gestures. One finding that was particularly intriguing was the response of the intern, who commented,

This whole discussion is changing my mindset about how we should be viewing engagements with clients and prospects. I don’t know how to say it, exactly, but um, I think I should be thinking differently about how I “view” my phone conversations.

Another curious finding stems from a comment made by the team leader, appointed to be the captain of the whole 30-day CGBS initiative: “I would like for this to be my full time job,” she quipped, half seriously. There was laughter from the group, and this sentiment was to continue from the team leader throughout the 30 day inquiry.

Another comment of interest started out in laughter but soon transformed into an important piece of data. An employee who has been with the firm for 3 years said to the researcher in a private discussion, “It’s too bad that your phrase ends in the letters, BS.” The researcher and the individual shared a laugh about this comment. The researcher then asked permission to share the comment with the larger group because it highlighted an important point regarding authenticity as related to the study. The employee responded yes, and discussion ensued, generating compelling data.

“CGBSs have to be done in sincerity, or else this is hokey. I don’t want be associated with a hokey company” one of the more senior employees said, resolutely. The body language of the remaining eight individuals all corroborated the sentiment, with head nods and “Yes’s,” that sincerity was an important aspect of the study. The researcher then asked how he, or some other researcher in the future, might be able to measure sincerity of execution for CGBSs. The assembly of eight individuals was silent at this point (note, one individual had to step away from the discussion, as she was on a deadline). As seen in Figure 3, all eight agreed that sincerity would be critical for the success of the program; however, none of the eight had any suggestions on how to measure sincerity.

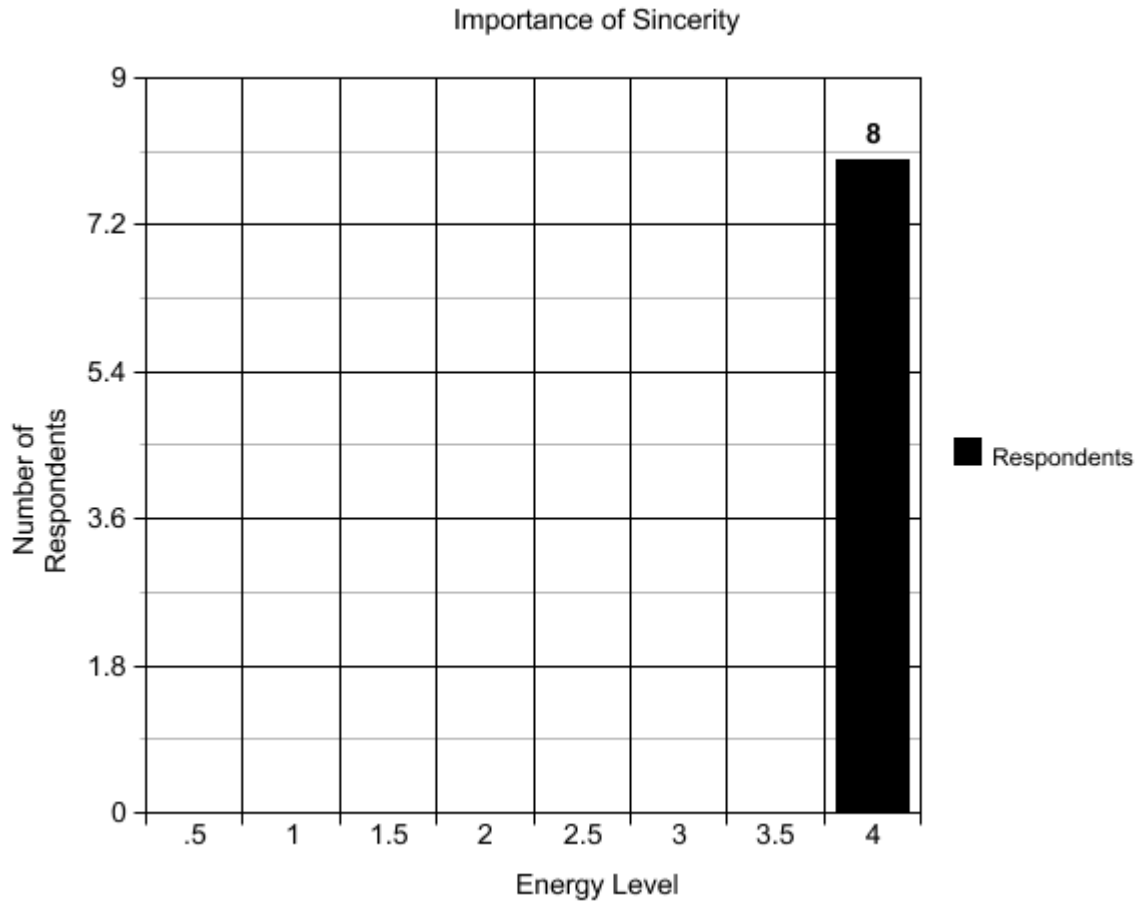


Figure 3. Sincerity and success of intervention.

Team leader. One member of the group was nominated and selected to be in charge and serve as the point person of the 30-day study. A name was put forth, and all eight other participants agreed on the individual by raising their hands. This person seemed to show a genuine zeal for the concepts and intentions of the research. Furthermore, with unanimity, she was voted to be the best at generating ideas for CGBSs. She agreed to chronicle a log of observations of how the study unfolded. Her enthusiasm lent confidence to the researcher, given Puccio’s (2013) research at Buffalo State University about how successful creative endeavors require appropriate structure if chances for success are going to improve. She showed no reservations when it came to organizing and leading the meeting during Visits 1, 2, and 3. As such, she proved vital to the success of the initiative.

On Visit 1, she promptly grabbed the log and began offering observations of what she deemed appropriate and useful to the success of the study. Her first entry in the log showed the following about how the team would go about creating CGBSs, and her enthusiasm was unmistakable. Here is some of what she wrote down in the first entry:

- What To Know – The Constructs
 - Passions, Interests, and Pain Points
 - Personality types – social, driver, analytic
 - Emotional Dynamics
 - Communications Preferences

The team leader went on to write down how a discussion about these four constructs would lead to great ideas for CGBSs. She then launched into a WOW Audit and chronicled the constructs of a certain client, MD, who is a senior executive for a major client of Think Creative, Inc. MD has a pain point of too much office politics happening at his office. He is a social by nature, with a tremendous sense of humor. He is “wildly passionate” about the success of his daughter, who is graduating from university with a medical degree. He seems to love face-to-face visits from Mark Freid, the owner of Think Creative, Inc., so it was decided that a photo of his daughter would be placed in a frame, and Mr. Freid would drop it off the day before the daughter’s graduation.

The energy in the room seemed to elevate precisely when the idea hatched about doing the CGBS of the framed picture of the graduating medical student. One employee exhorted, “Yes!” and made an effusive gesture like a professional athlete might make when scoring a touchdown or a basket. The team leader, an apparent natural for the role, kept order, but also kept the mood of the forum playful and upbeat. This reaction corroborates the research findings

of Csikzentmihalyi (1997), who argues for the essential need of structure and a playfully light atmosphere in order for ideal creativity to be spawned.

More evidence from the leader on Day 1, as chronicled in the log (see Appendix I), showed an unsuccessful initial attempt at delivering a CGBS for a client, KP: a high value relationship to the firm who suffers from Lyme's Disease and is having a hard time dealing with stress at work. She is a driver by nature. The team came to the conclusion that they "regrettably" did not have enough information about her to generate any worthwhile CGBSs. At this point, the researcher noted and recorded a feeling of discontent that came over the group. Body language changed to one of frustration, where individuals put heads in hands, sighed, and groaned. It seemed that this struggle related to generating a CGBS really took a toll on positive energy levels in the group. Though the researcher was not aware of the time, this group response would prove to be an important portent of the study. Similar themes would unfold in visits 2 and 3, leading to valuable takeaways from the study.

Sensing the responsibility of her new role, the delegated leader closed the meeting on a high note. She was extremely gracious in expressing how thankful she was that the study was happening. She expressed the opinion that the investigation "would be good for team chemistry, and for business." The intervention was under way.

Visit 2

On June 6, 2016, at 12:30 PM, visit 2 happened at Think Creative, Inc., in Orlando. Regrettably and in full disclosure, the audio recording device malfunctioned, so the researcher had to rely fully on transcription into the log for his observations and recorded dialogues. This was Day 17 of the study, 2 days past the scheduled day. Mr. Freid had had an important client meeting come up and had asked to reschedule the visit.

Data emerged around Research Question 1, which will be shared herewith. First, however, it should be pointed out that the first sentiment uttered by Mr. Freid when the meeting commenced was, “Can we extend this program, in perpetuity?” His engagement level for the work appeared high, and there was prompt agreement from the seven employees assembled. The researcher was struck by the immediacy of the response; he had not even asked the first question about engagement and energy levels. This came as quite a surprise, but any serious student of this inquiry must be reminded that Mr. Freid, a self-proclaimed advocate of positive psychology, retains a bias to any possible merits of the intervention.

The following questions were posed to the eight members assembled for Visit 2

- What is the quality and quantity of your energy levels before, during, and after the program (Human Performance Institute, Energy Audit, Lake Nona, Florida, Loehr)?
- What about the team’s energy levels before, during and after the program?
- How much positive energy did you experience?
- Does positive energy matter?
- Are you a better worker because of the program?

The first question precipitated some curious data, as the response was given that “all our energy levels are high” when team members have plenty of information available about how to deliver a CGBS to any prospective candidates. This sentiment was shared by the team leader, and again, there was palpable agreement by the other seven, including Mr. Freid. Guided by the Human Performance Institute Energy Audit, the researcher asked about the energy levels of each individual during the program was so far. The responses are seen in Figure 4, on a scale of 1 to 4, with 1 being little or no energy, and 4 being ample or high energy levels. It is important to

highlight that these first responses were given when the participants believed it was easy to access information about the person receiving the CGBS.

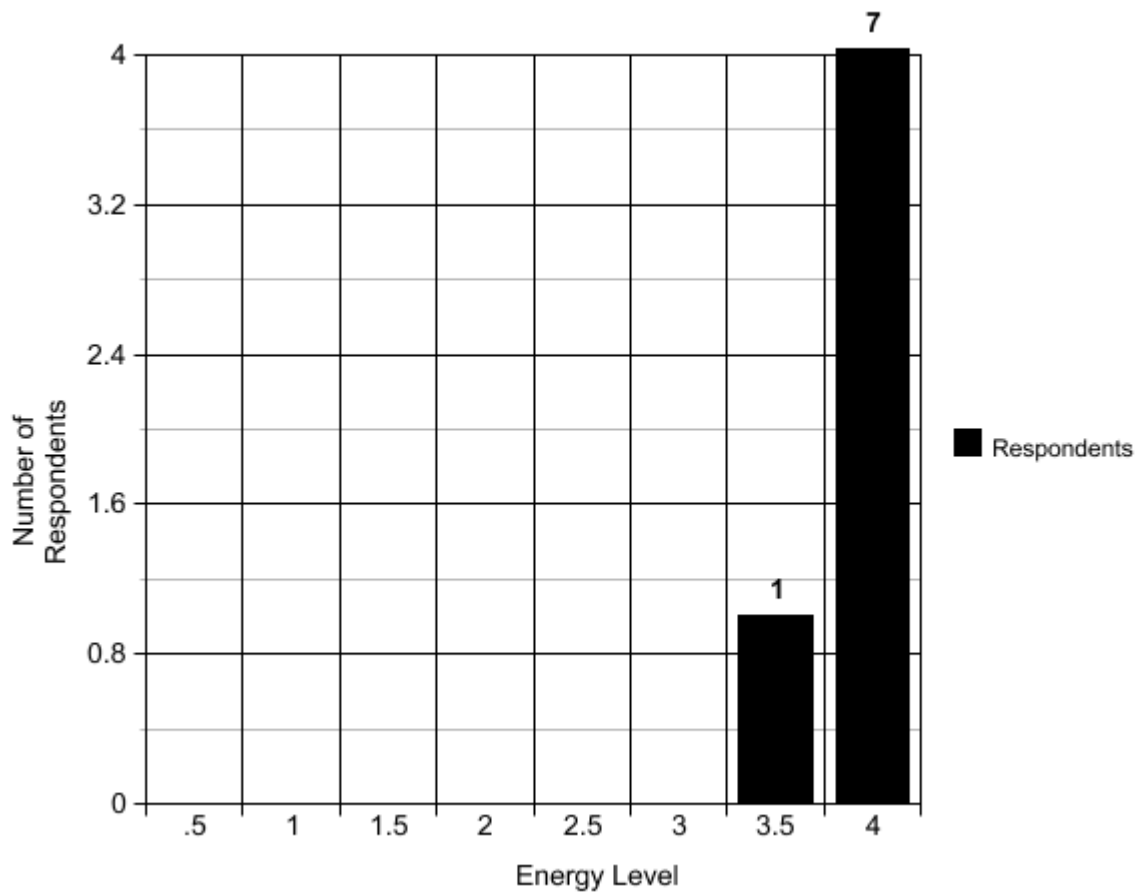


Figure 4. Individual energy levels when information readily available.

It is important to restate that these scores were predicated on the assumption that the participants found the exercise to be non-stressful, due to the ability to procure information on the intended recipient. For example, one employee suggested a high value relationship with a client to the organization who possessed the following attributes:

- Passion for teaching
- Social personality type
- Meaningful act of service
- Pain point of close friend who had been recently diagnosed with breast cancer

An idea emerged promptly that generated excellent personal energy levels and “a sense of excellent engagement and pride for what we are doing here. And this energy spread to the whole team, as we did the CGBSs.” The CGBS was a pair of pink boxing gloves for the teacher, signed by her students. When asked what the energy levels were for the team during these past 17 days, positive responses appeared. When coming up with the idea for the CGBS was simple, the following scores were given (see Figure 5).

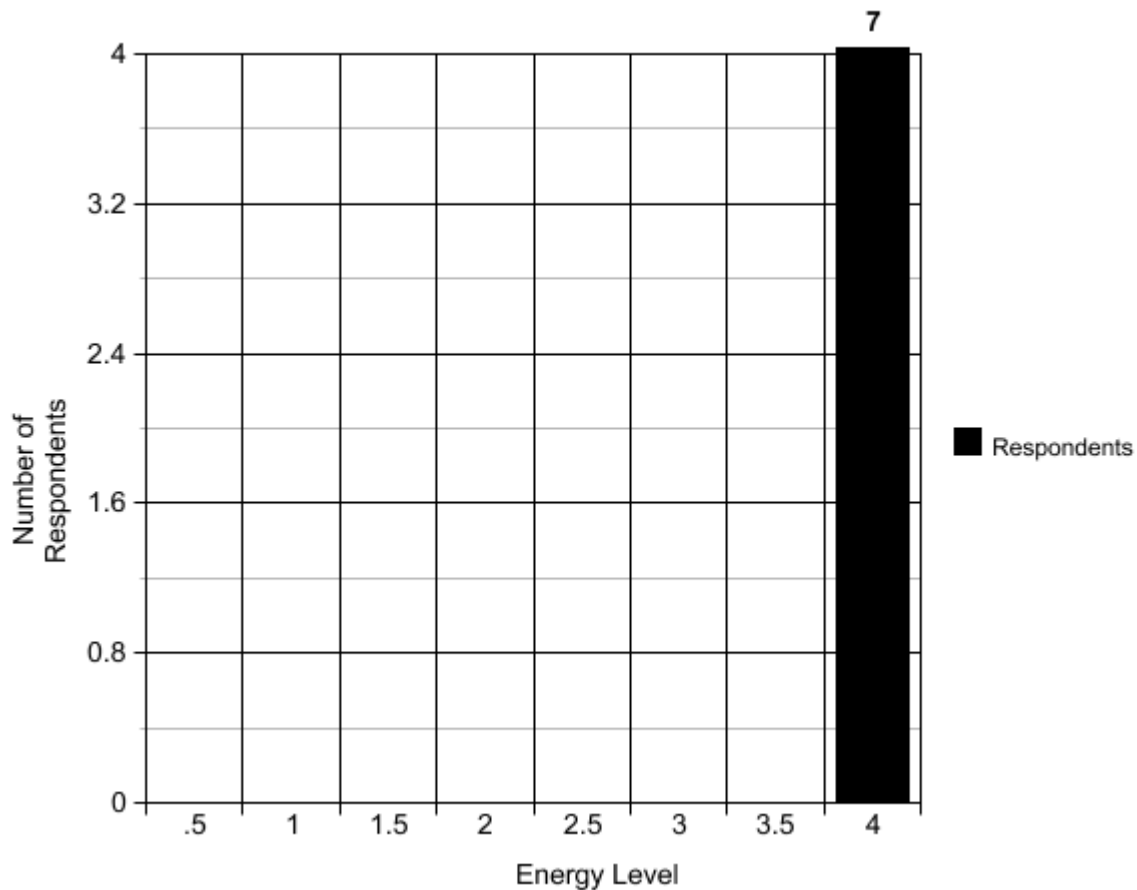


Figure 5. Team energy levels when information readily available.

Figures 6 and 7, in contrast, give the scores for the participants when there was a dearth of information to imagine a CGBS. This evidence corroborates the work by Dr. Heidi Hanna (2011), mentioned earlier in the dissertation, about the need for creativity to be happening in a team or individual state where there is no overbearing frustration to get the task accomplished.

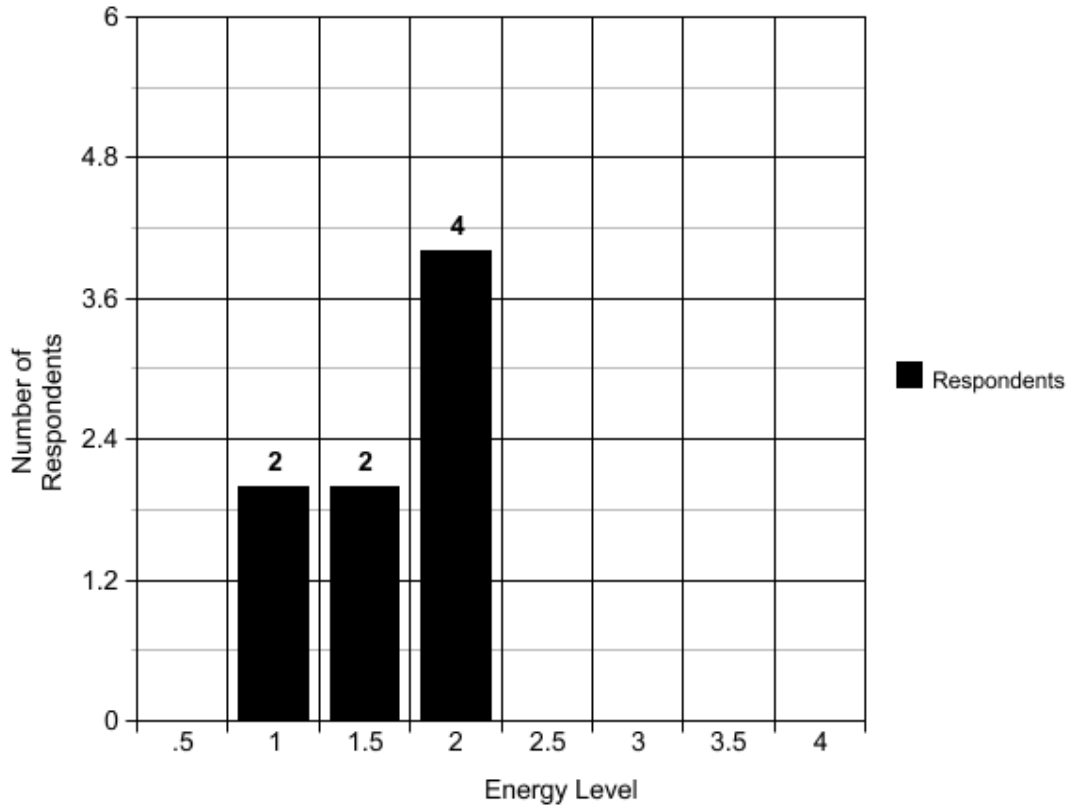


Figure 6. Energy level of individuals when little information is readily available.

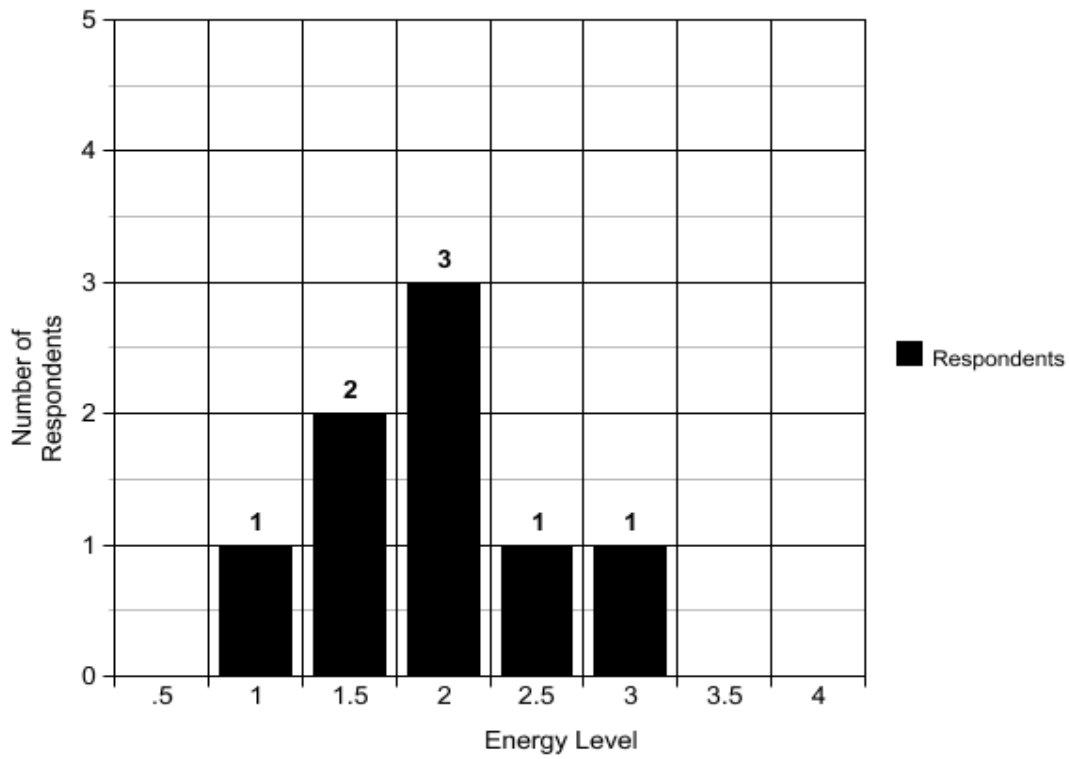


Figure 7. Energy levels of the teams when little information is readily available.

The researcher then asked questions of the seven employees, individually and in a group setting, without the presence of the owner, Mark Freid. None said they would change their scores on any of the questions. The researcher did some cross examination, including “I hear you about your scores not changing, in the presence of Mr. Freid, but do you feel other employees are telling the truth too?” All five respondents said that their colleagues’ responses were congruent.

Time was running short on visit 2, with expansive discussion revolving around the quality and quantity of energy levels during the last 2 plus weeks due to the intervention of CGBSs. The researcher was able to ask the following questions of four individuals:

- Does positivity matter?
- Are you a better worker because of the program?

All four individuals responded that positivity matters to a quality work environment. Two of the respondents gave a quizzical look to the question. They were Millennials, and their body language communicated a sense of, “Well, of course positivity matters to the quality of a culture.” Furthermore, all four responded that they believed they were better workers due to the program of CGBSs.

The researcher feels it important to share two quotes from participants in the study, both of which were made when Mr. Freid was not present. First, a fully engaged employee who claimed to love her job, suggested that the curriculum should never cease, that it should be “a habit you never turn off.” This remark carries significant weight, in the eyes of the researcher, and will beget more commentary in Chapter 5. Also, another employee made a comment of particular significance, again when Mr. Freid was absent: “Formal structure is too strict. We don’t get enough CGBSs created when we feel the atmosphere is too strict.” Again, this

comment carries weight in the eyes of the researcher and will be expanded upon in the concluding chapter. Lastly, to conclude visit 2 data findings, the team leader of the program walked the researcher to the door, and commented, “Wouldn’t it be terrific if all of us here could take this habit with us to our home lives?”

Visit 3 and Data Collection from Survey Monkey

On June 27, 2016, at 3 PM, the final researcher visit to Think Creative, Inc. occurred. Instead of a 4-week intervention, the program had to last for 5 weeks. This was in large part due to the need to push the meeting back because of the tragedy at Pulse Nightclub in Orlando, where 49 innocents were murdered. The club is approximately 1 mile from Think Creative, Inc.; the shooting happened on June 12, just 15 days prior to this final visit.

The mood and energy levels were entirely different on the final visit, with eight individuals assembled. The team leader spoke up before the researcher had a chance to pose a question about the quality and quantity of her individual, and the team’s energy levels.

Look, this program is dynamite, but there are two things going on right now. One, we are grieving about the events at the Night Club. And two, when there’s plenty of information about any candidate for CGBS, we come alive. But when we struggle for information, our individual and team energy levels come down.

She went on to add,

We have a lot of 4 moments, if you will. We call them “pockets of positivity,” but we have to find a way to keep them going. For example, we found an ice cream vendor who delivers delicious ice cream, and there’s a card where you can deliver a personalized note from the team. Clients love this. We love doing this. And frankly, it does not take a lot

of thought. That's what we need, simple, compelling solutions for CGBSs! Also, we need to find a way to habituate spontaneity.

When the researcher asked if positive energy mattered, he received a sarcastic response of, "Well of course." Six responded with a 4, and two even added a 4.5. The team added a step in their standard operating procedure, which was, considering WOW through the day. All throughout the office were post it notes saying, "Did I do my best to WOW (CGBS) today?"

Another important observation was, "We have the best energy right after the CGBS Audit concludes. We seem to jump to 4 at the end, when the formality ceases, and we can relax to think of great ideas to delight." The concluding sentiment, again as the team leader escorted the researcher from the premises, was another quote: "With WOW, done is better than perfect. . . . We cannot overthink this, or the program can actually bring the energy levels down."

Survey Monkey data. Research Questions 2, 3, and 4 were posed as follows:

2. Will a straightforward protocol of suggested actions—including the appointment of a project leader and a weekly meeting where ideas are brainstormed—improve the quality of ideas being generated, for the purpose of creative gestures, according to results derived from interviews with 9 actors?
 - Hypothesis related to Research Question 2: Protocol of suggested actions does not improve the quality of ideas being generated for the creative gestures.
 - Alternative hypothesis related to Research Question 2: Some suggested actions improve the quality of ideas for creative gestures.
 - Measurement: Researcher as the instrument (Survey Monkey survey, see Appendix H).

3. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report a better work culture, according to results derived from interviews with 9 actors?
 - Hypothesis related to Research Question 3: Employees do not report of a better work culture.
 - Alternative hypothesis related to Research Question 3: Some of the suggested actions and gestures lead to a report by employees of improved work culture.
 - Measurement: Researcher as the instrument (Survey Monkey).
4. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report an improved competitive advantage in the marketplace, as measured by results derived from interviews with 10 actors?
 - Hypothesis related to Research Question 4: Employees do not report of an improved competitive advantage in the marketplace.
 - Alternative hypothesis related to Research Question 4: Some of the suggested actions and gestures lead to a report by employees of improved competitive advantage in the marketplace.

On June 16, Day 27 of the intervention, at approximately 10:30 AM, questions from Survey Monkey were deployed. The researcher was pleased with compliance; seven participants responded, out of possible 10 from the population. The questions posed were

- How do semi-formal audit meetings help with creativity?
- How was the project leader helpful in facilitating good ideas for CGBSs?
- Why does there need to be a project leader in CGBS formation?

- When did the best ideas for CGBSs emerge?
- Did great ideas emerge specifically in the Audit Sessions? Who had the best ideas, in your opinion?
- Do you feel that this was an exercise at which you and your team could get better, over time? How does the team see this program as fun?
- How did you enjoy yourself in this process?
- What was it like reflecting on yours and your team's efforts?
- Did you like going to work more or less, knowing that you were a part of this program?
- Should the CBBS initiative continue? Why or why not?
- Did it feel like you were required to do CGBSs?
- Are positive stories, or otherwise, being generated internally around the idea formation and execution?
- Did compelling business opportunities emerge during the program?
- Is Think Creative, Inc. a more competitive business because of the CGBS program?

Noteworthy patterns in the responses are as follows.

Research Question 2 findings. Four of the seven responders viewed semi-formal audit meetings as placing too much pressure on the team to yield optimal results in creativity. One respondent said, "I feel stressed out." Another responder said that the meetings need to be "more semi-formal." Clearly, quality of ideas was compromised by "semi-formal" meetings.

The team leader for this project was apparently a good fit, in the sense that the fellow employees were pleased with her guidance. One curious response, worthy of expanded study for Chapter 5, was, "She has the discipline to set the stage, but then sits back and lets it [the creative

process] roll.” The responses all indicated either gratitude to the leader or the importance of strength in leadership.

With unanimity, the responses were in support of having a team leader for the intervention of CGBSs. Three responses in the Survey Monkey included, “We need to be kept on track,” “We need someone to hold us accountable,” and “She needs to be strong, but not forceful.”

There was no trend in the seven responses about when the best ideas for CGBSs would emerge. The only signal that could be extracted from the data was that best ideas emerged when there was positive energy in the audit session, and that there was a “way clear” on how to proceed.

Two votes came in for the team leader about having the best ideas for the program. Four comments indicated the best ideas came from the team. These responses generate no clear pattern on the subject.

All seven of the participants in the Survey Monkey acknowledged that they could get better at generating ideas for CGBSs over time. Three of the responses said that there needs to be an appropriate blend of structure and spontaneity in the process.

Research Question 3 findings. The responses from all seven participants indicated that they see this program as fun. Three said the audit sessions were stressful. One said that knowing that “you were making somebody’s life better is a whole lot of fun.” Another important comment expressed, “It’s exciting putting together ideas for clients and thinking about them on the personal level as opposed to just the professional.”

With respect to how much the participants each enjoyed themselves individually, one said “not sure,” and one did not respond. The other five all indicated a positive response, including two responses of “very much so.”

No clear signal emerged from the question on reflection regarding the process. Two times a participant commented on the gratitude that emanates from the office, and that this gratitude is a value of the organization.

When asked whether they enjoyed coming to work more because of the program, one individual said there was no change; one individual did not respond. The other five all indicated that they liked coming to work more because of the program.

When asked whether this program kept them on track with their clients, six responses indicated “Yes” or “Yes!” One said, “I think so.” The general response from the six indicated that the program keeps them in close contact and relation with their clients, and that is a good thing. Another signal was the amount of positive energy the program generated. Three said “No,” they did not feel like the program was being required. Two said “Yes,” flatly. Others said “Yes, but we agreed to do this, so it’s okay.” Five said “Yes,” that positive stories were being generated. One did not respond. One said No.

Research Question 4 findings. “Not yet” and “I am not sure” were the only two responses to the question about whether compelling business opportunities have emerged for Think Creative, Inc. With regard to the company being in a more competitive advantage as a result of the program, three said “Yes,” and three said, “We eventually will be.” One said he/she could not tell at this point.

Summary and Coding of Data

Three visits happened to Think Creative, Inc., as intended. The average duration of the visits was 1 hour and 22 minutes. Three discussions occurred with participants when the owner was absent. Those discussions averaged 26 minutes in length. The log provided the most ample source of data, followed by the audio recordings (with the exception of the malfunction on visit 2), followed by emails, and lastly, observations of office and web site by the researcher.

The researcher coded the data by perusing responses recorded in the log, assessing comments made on the audio file, and systematically arranging responses from the Survey Monkey survey. A stringent effort was made to discern differences in responses made by participants when the owner was present as opposed to when he stepped away. On visit 1, nine participants engaged; visits 2 and 3 had eight participants. Seven individuals from Think Creative, Inc., partook in the Survey Monkey survey.

Chapter 5: Discussion, Conclusion, and Implications

Well into the 21st century, organizational leaders hailing from every variety, from families to sovereign states, are interested forming strong, healthy cultures. Ponder this quote from a front page article of the *Wall Street Journal* in regard to the future of China: “As more citizens try to take money out of the country, [Chinese] officials say, regulators and censors are trying to foster an environment of what party officials have dubbed, ‘zhengnengliang,’ or ‘positive energy’” (Wei, 2016, para. 3).

This aspiration by leaders to improve culture is also evident with professional services organizations, the focus group of this study. Note the poem *What Will Matter* written by Michael Josephson in 2003, which was distributed in the Fall of 2013 to the researcher at a workshop aimed at improving team functioning for professional services’ leaders and small business owners:

Ready or not, some day it will all come to an end.

There will be no more sunrises, no minutes, hours or days.

All the things you collected, whether treasured or forgotten
will pass to someone else.

Your wealth, fame and temporal power will shrivel to irrelevance.

It will not matter what you owned or what you were owed.

Your grudges, resentments, frustrations
and jealousies will finally disappear.

So too, your hopes, ambitions, plans and to-do lists will expire.

The wins and losses that once seemed so important will fade away.

It won’t matter where you came from

or what side of the tracks you lived on at the end.
It won't matter whether you were beautiful or brilliant.
Even your gender and skin color will be irrelevant.
So what will matter?
How will the value of your days be measured?
What will matter is not what you bought
but what you built, not what you got but what you gave.
What will matter is not your success
but your significance.
What will matter is not what you learned
but what you taught.
What will matter is every act of integrity,
compassion, courage, or sacrifice
that enriched, empowered or encouraged others
to emulate your example.
What will matter is not your competence
but your character.
What will matter is not how many people you knew,
but how many will feel a lasting loss when you're gone.
What will matter is not your memories
but the memories that live in those who loved you.
What will matter is how long you will be remembered,
by whom and for what.

Living a life that matters doesn't happen by accident.

It's not a matter of circumstance but of choice.

Choose to live a life that matters.

Now, the focus of this study will move to the discussion of findings, yoked closely to the four research questions posited.

Discussion of Findings

Research Question # 1. Research Question 1 asked:

1. What happened to the levels of engagement for employees and principals at a professional services firm that enacted a 28-day regimen of creative gestures beyond self to each other, suppliers, clients, and prospects of Think Creative, Inc., according to the Human Performance Four Dimension Energy Audit, an existing and performing document for the Johnson and Johnson Company's, Human Performance Institute, located in Lake Nona, Florida?
 - Hypothesis related to Research Question 1: Levels of engagement do not change based on enacting a regiment of creative gestures beyond self to each other.
 - Alternative hypothesis related to Research Question 1: At least three creative gestures beyond self to each other need to be used to see the levels of engagement increase.
 - Measurement: Human Performance Institute Individual and Team Energy Audit (Appendix G).

There was an unmistakable impact on both individual and team energy levels as a result of the evidence provided by the ten member firm, Think Creative, Inc., of Orlando, Florida, during the 37-day intervention of CGBSS. The Human Performance Institute Individual and

Team Energy Audit provided a useful framework from which data could be procured and discussed for the benefit of professional services leaders, the world over. Figure 2, presented in Chapter 4, promptly speaks to any serious inquiry of what the group anticipated the intervention would bring for professional services firms' leadership. Out of the nine participants queried, using a scale of 1 to 4 with 1 being *no value* and 4 being *high value*, seven responded with a 4 that the regimen of CGBS would yield valuable information for any companion firms, due to heightened energy levels for the participants. Two others responded with a 3.5. These results are telling- clearly there was a tangible expectation that the intervention would yield higher positive energy levels, and that the results and conclusions would be worth perusal for other professional services firms' leadership.

Before visit 1 concluded on May 20, 2016, the participants were quick to report that the intervention "had to be done with sincerity" (see Figure 3). An employee who was bold enough to speak up said in a stage whisper, "It's too bad your program ends in the letters 'BS.'" There was laughter between the researcher and the employee. Unanimously, all participants agreed that any CGBS would be conducted with sincerity. Importantly, and worthy of consideration for any serious minded future scholar or leader of a professional services firm, none of the participants could furnish a suggestion of how sincerity might be measured in any future research.

Visit 2. Visit 1 made clear a heightened expectation for participants' energy levels to increase, but did they? Visit 2 data shed some interesting light on this question. The first comment uttered by the founder of Think Creative, Inc., on Visit 2, on June 6, 2016, at 12:30 PM, was, "Can we keep this program in perpetuity?" His energy level and engagement appeared high; his body language was open and forthcoming, with evident enthusiasm. These signs are

significant to the researcher of this qualitative case study. The enthusiastic founder and owner of the advertising agency went on to say that he expected “positive stories to happen in- the foreseeable future” due to the intervention. He proved prescient; here is an email from an employee of the firm sent to the researcher on July 5, 2016, 8 days after the official conclusion of the intervention:

Hi John! This is [name redacted] from Think Creative. I am very excited to let you know that our team is continuing to make WOW (CGBSs) a part of our culture: we did another WOW this morning, and it was completely genuine and awesome.

We had the great idea to WOW a longtime friend from our neighbor, LD, using what we know about his personality and humor. Long story short: he teases us endlessly (good-naturedly) about our Happiness Jar - he’s a fairly sassy/fussy guy. So we ordered a miniature trash can that we labeled the Nastiness Can, so he can write down things that annoy him and toss them into the can. We got him started with scraps of paper that say things like “topiaries” and “pastel colors.” And he *loved* it!

This was the perfect WOW for him and it was so much fun for us. I think I speak for our entire team when I say we’re excited about making WOW a part of our culture going forward :)

This anecdote from an employee was written without any instruction by Mr. Freid. In fact, Mr. Freid was not aware that the CGBS had happened. This is noteworthy, because the owner has an admitted bias toward the merit of the intervention. Yet, this CGBS was conceived and executed by several employees who were not under immediate requirement to execute it by their boss.

Visit 2 went on to yield what might turn out to be the most important discovery of the investigation. Note that, as shown in Figure 4, individual energy levels are reported as high *when information is readily available for the creation of CGBSs*, with seven participants reporting a 4, and one a 3.5. The team members went on to explain, in front of their boss and also with him absent, that coming up with good ideas is the most challenging aspect of the program. One participant stated:

When great ideas come up, this program is a lot of fun. . . . It just got a little stressful when we could not think of any ideas for CGBS. And remember, we are creative firm, witness our name, so we take pride in creativity.

Note the difference in scores on individual energy levels when information was not readily available (see Figure 6).

This distinction in the data is worthy of deeper exploration, with several questions emerging, including:

- Would a less creatively oriented firm, such as an accounting firm, experience the same frustration?
- If a solution for creativity were provided, such as a CGBS app, would that make a difference in energy levels?
- Was the owner or the researcher exerting too much pressure for CGBSs to occur?

The difference is similar when looking at team energy levels as well. In Figures 5 and 7, a clear distinction emerges in the data. The team energy levels all drop when information is not available to make CGBSs occur. The value of this distinction in the data should not be overlooked by any serious reviewer of this study. Moreover, the findings corroborate a number of research citations in this paper. Loehr and Hanna (2014) and Csikzentmihalyi (1997) all talk

about the importance of maintaining a non-stressful atmosphere in order to promote creativity. Removing the impediment and frustration of limited information for future professional services teams that are earnest in increasing capacity for delivering CGBSs should be a critical consideration.

Dialogue on visit 2 continued in the absence of the owner, Mark Freid. There was an observable, playful atmosphere when the boss was asked to leave the room. A number of jokes were offered, from both Mr. Freid and the seven participants assembled. “Why did I agree to this study?” asked Mr. Freid, upon exiting. “There’s no need to hurry back, boss” quipped a senior employee. Another exclaimed, “The boss is gone; now this is Wow!” Initially, there was skepticism over the need for having a discussion without Mr. Freid present, which struck the researcher as a positive attribute of the culture of Think Creative, Inc. Moreover, this “playfully light atmosphere,” that Csikzentmihalyi (1997, p. 26) and other scholars call for in any seriously creative enterprise struck the researcher as perhaps anomalous and of concern to the merits of the study. That is, was this environment too healthy and playful as to not be a fair representation of professional services organizations the world over?

Again, none of the participants said they would change their scores on any of the questions had Mr. Freid not been present. The researcher did some cross examining questioning, including “I hear you about your scores not changing in the presence of Mr. Freid, but do you feel other employees are telling the truth too?” All five respondents said that their colleagues’ responses were congruent; the researcher agreed with this assessment. This observation and interpretation of the data is critical and hopefully sound, as understanding what was really going on with the participants and any influence being imposed by the boss would materially affect the study.

Another piece of data from visit 2 requires further discussion. One participant asserted that the intervention of CGBSs “should be a habit you never turn off.” This comment was delivered with a conspicuous power by a participant, who had not been working at the company for more than 2 years, and the remaining participants all concurred with affirmative body language; heads nodded up and down and eyes widened. Moreover, the sentiment is an echo of the opening remark of visit 2, where the owner suggested, “Can we keep this program in perpetuity?”

A final bit of noteworthy evidence emerged upon the very conclusion of visit 2, when the researcher was being escorted out. At that time, the team leader said, “Wouldn’t it be terrific if all of us here could take this habit with us to our home lives?” In the researcher’s mind, this comment goes a long way toward answering Research Question 1, “What happens to the levels of engagement for employees and participants of Think Creative, Inc.?” An upward spiral of positivity seemed to have developed among the participants in the intervention, at least as observed until and through visit 2. If an employee is willing to suggest that a regimen at work be brought back to home life, than this is solid evidence of an intervention that is having a positive impact on participants’ engagement and energy levels.

The tragedy of Pulse Nightclub. History was to intervene in the study of Think Creative, Inc. In the late morning hours of June 12, 2016, a gunman struck Pulse Nightclub, located approximately 1 mile from Think Creative, Inc., murdering 49 innocent lives, and injuring 55 others. This event, the deadliest mass murder on American soil in recent history, occurred just 15 days prior to the conclusion of the intervention. It is a plainly logical suggestion that the tragedy had a substantial effect on the energy and engagement levels of all the participants of the

study. The researcher considered suspending the study. Florida's governor, Rick Scott, had this to say, immediately following the shooting:

Of course this is a time of great tragedy, and in every tragedy, there is a flood of sadness, confusion and despair. But, this is an attack on our people. An attack on Orlando. An attack on Florida. An attack on America. An attack on all of us. ("Governor Scott," 2016, para. 2)

The governor was sharing an energy that most central Floridians felt, one of overwhelming grief and depression. Nevertheless, the study proceeded.

Visit 3. The third and concluding visit to Think Creative, Inc., happened on June 27, 2016, and eight participants engaged with the investigator. The mood and energy level of the team felt different on this visit, given the event that had happened recently. Here is evidence to that observation, with a quote captured on the researcher's audio recording device.

The team leader spoke up immediately as the record button was activated, and before the researcher had a chance to pose a question about the quality and quantity of her individual, and the team's energy levels.

Look, this program is dynamite, but there are two things going on right now. One, we are grieving about the events at the Night Club. And two, when there's plenty of information about any candidate for CGBS, we come alive. But when we struggle for information, our individual and team energy levels come down.

She went on to add,

We have a lot of 4 moments, if you will. We call them "pockets of positivity," but we have to find a way to keep them going. For example, we found an ice cream vendor who delivers delicious ice cream, and there's a card where you can deliver a personalized note

from the team. Clients love this. We love doing this. And frankly, it does not take a lot of thought. That's what we need, simple, compelling solutions, for CGBSs! Also, we need to find a way to habituate spontaneity.

These succinct comments by the team leader are rich in substance for discussion related to Research Question 1. First, the researcher observed that irrespective of the horrendous event that had happened, the assembled eight participants were determined to continue with the regimen of CGBSs. The resolve of the team created a sense of inspiration in the researcher; he was entirely impressed with the group's positive spirit to continue, when it would have been perfectly plausible to discontinue the regimen.

Furthermore, this unprompted comment corroborates evidence from the prior discussion that having information readily available is fundamentally key and a critical consideration for any professional services leader going forward. A question that emerged for this discussion stems from the language, "We have a lot of 4 moments." The comment activated the investigator's curiosity, and the following questions hatched in his mind:

- How long does a "4 moment" of positive energy last?
- "Pockets of positivity" is a compelling characterization of the phenomenon being explored herewith. Should this become standard lexicon in the Positive Organizational Scholarship movement? Why not?
- What resource can be created to satisfy the leader's request for simple and compelling solutions for CGBSs?
- "Habituating spontaneity" is a curious oxymoron that perhaps ought to be introduced to the Positive Organizational Scholarship movement. Why not? How, specifically,

might an organization do just that, “habituate spontaneity?” This is grist for further study, in the researcher’s opinion.

When the researcher asked if positive energy mattered, he received a sarcastic response of, “Well, of course.” Six responded with a 4, and two even added a 4.5. This response took the researcher by surprise, and he balked, losing his conversational flow momentarily. Again, it cannot be overstated in this study that the participants retained an evident bias to the merits of positive psychology. The researcher wondered again, “Would this response be similar in a non-creatively oriented professional services firm, such as an accounting or law office?”

An important observation in visit 3 was the addition by the participants of a new standard operating procedure. All throughout the office were Post-it notes saying “Did I do my best to WOW (CGBS) today” (see photograph, Appendix J)? What was germane to this study about the notes, however, was the zeal with which the presence of the notes was shared by three of the participants. Were the participants gleaning positive energy from their new ritual, or were they merely “showing off” for the researcher and owner of the firm? The sense of the researcher was the former, but that cannot be known for certain, reflecting a limitation of the qualitative case study method.

Survey Monkey data discussion: Research Questions 2, 3, and 4. Research Questions 2, 3, and 4 asked the following:

2. Will a straightforward protocol of suggested actions—including the appointment of a project leader and a weekly meeting where ideas are brainstormed—improve the quality of ideas being generated, for the purpose of creative gestures, according to results derived from interviews with 10 actors?

- Hypothesis related to Research Question 2: Protocol of suggested actions does not improve the quality of ideas being generated for the creative gestures.
 - Alternative hypothesis related to Research Question 2: Some suggested actions improve the quality of ideas for creative gestures.
 - Measurement: Researcher as the instrument (Survey Monkey survey, see Appendix H).
3. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report a better work culture, according to results derived from interviews with 10 actors?
- Hypothesis related to Research Question 3: Employees do not report of a better work culture.
 - Alternative hypothesis related to Research Question 3: Some of the suggested actions and gestures lead to a report by employees of improved work culture.
 - Measurement: Researcher as the instrument (Survey Monkey).
4. As a consequence of these suggested actions and gestures, will employees of a professional services firm in Orlando, Florida report an improved competitive advantage in the marketplace, as measured by results derived from interviews with 9 actors?
- Hypothesis related to Research Question 4: Employees do not report of an improved competitive advantage in the marketplace.
 - Alternative hypothesis related to Research Question 4: Some of the suggested actions and gestures lead to a report by employees of improved competitive advantage in the marketplace.

Appointment of leader. The data from the Survey Monkey survey, audio recordings, transcriptions in the log, and researcher observations serve to demonstrate that the appointment of the project leader led to an identifiable improvement in quality of ideas. It is important to note that the participants in the study had been attempting to deliver thoughtful gestures to clients “since inception,” according to Mr. Freid. This intervention was simply bringing heightened structure and intensity about connecting with clients with CGBSs.

The survey results show a common trend from the seven participants who partook. One response stands out; “She has the discipline to set the stage, but then sits back and lets it [the creative process] roll.” This statement corroborates the seminal research done by Professor Gerard Puccio (2013) on environments that foster creativity. The leader, who was extolled in visit 3 as a “good fit,” “the right person for the job,” and “naturally good at this,” did a favorable job creating an environment where good ideas could emerge. However, it should be pointed out, in line with the research question, that the data in the survey and the discussion did not necessarily lend consideration that the leader was helping “quality” ideas to be generated. Ideas were being created, but there is no evidence necessarily that the ideas were of high quality.

Survey responses revealed a strong need to have a project leader for any intervention of CGBSs. Three survey responses included, “We need to be kept on track,” “We need someone to hold us accountable,” and “She needs to be strong, but not forceful. We have a good one.” This is a critical consideration for any professional services organization going forward.

Weekly meeting (audit session). Semi-formal audit meetings were seen by four of the seven responders as placing too much pressure on the team to yield optimal results in creativity. One respondent said, “I feel stressed out.” Another respondent said that the meetings need to be “more semi-formal.” Clearly, quality of ideas was compromised by “formal” meetings.

This leads to the researcher to suggest that a critical consideration for the formation of semi-formal weekly meetings, or CGBS audit sessions, which must be done with assiduousness and care. There is a balancing act here. At once, there must be structure as Professor Puccio (2013) has shown, but there must also be an easy going feel to the meetings. Too much pressure to perform and creative ideas become squelched. Too little structure, and creative ideas do not hatch. Consider this quote from a partner at a major creative advertising agency in Cleveland, Ohio.

Give a creative team the world of potato chips to explore, and they're immobilized. Give them the word "crunchy," and watch them go. People think they hate boxes, but it's in boxes that the creative process thrives. In a tight box, the will is not drained by too much decision making. You are free to find the unexpected, to focus on what matters.

(Sollisch, 2016, para. 12)

It is important to remind any reviewer of this study that these participants may not be a standard reflection of the population at large of professional services organizations. Think Creative, Inc., strives to be creative, as the name indicates. Nevertheless, the appointment of an appropriate team leader, and the formation of weekly audit meetings, are important steps in making the intervention a success.

A better work culture. The responses on all seven were that they see this program as fun. Three said the audit sessions were stressful. One participant indicated that knowing he/she was "making somebody's life better is a whole lot of fun." Another important comment from the survey stated, "It's exciting putting together ideas for clients and thinking about them on the personal level as opposed to just the professional."

With respect to how much the participants each enjoyed themselves individually, one said “not sure,” and one did not respond. The other five all indicated a positive response, including two who indicated “very much so.”

The discussion here would lend itself to the conclusion that the intervention is inspiring a more joyful work environment; this is a critical consideration. Moreover, this conclusion from the data directly reflect to the work Dr. Jim Loehr has done at the Human Performance Institute, in Orlando, Florida, where in consulting sessions to business leaders and elite athletes from all over the world he instructs that *purpose beyond self* is a key to heightened joy. The evidence from this case study buttresses Dr. Loehr’s claim, but two questions emerge:

- What is the duration of the enjoyment for individuals who created and executed CGBSs?
- Does enjoyment of CGBSs lose its potency over time?

It is worth pointing out that this study might have been remiss with respect to the size of its audience. When sharing Research Question 3 about elevating culture with a colleague of the researcher, an HR executive from Janus Capital demonstrated a real interest in the program’s conclusions and recommendations. Therefore, Research Question 3 may also be useful to HR executives, along with professional services organizational leaders.

Finally, with respect to the question of the intervention improving the quality of culture at Think Creative, Inc., a strong signal emerged from the data. Though one individual said there was no change and one individual did not respond, the other five all indicated that they liked coming to work more because of the program, according to survey responses. This finding should retain gravity, and be a critical consideration for any serious reviewer of the data. It

might be fair to say that nearly every sensible leader of a professional services firm would want to receive this response from a survey of their employees.

Competitive advantage. Regarding this data, there was no clear, instructive pattern. Two individuals said that the program needed more time to develop in order to get any sense of an improved competitive advantage. Three participants of the seven surveyed indicated “Yes,” when asked if the intervention was improving the firm’s competitive advantage, but no supporting evidence was supplied. One had no comment on the matter. There was no evidence recorded in the log of improving the business prospects of the firm. Candidly, the researcher could have done a more thorough job of investigation into this matter; time simply ran out on the final visit. Moreover, survey responses in this area were brief. The researcher has a keen interest in running a similar study for 6 months or a year and exploring a firm’s balance sheet after conducting such an intervention.

Future Research

A similar study of longer duration would be of great service in the future, especially around Research Question 4, as to whether the program or one similar, could show demonstrable material benefit for a professional services firm. When the researcher circled back with Mr. Freid to drop off coffee house gift cards as a token of gratitude for partaking in the study, the topic came up. Note that this conversation happened after the conclusion of the intervention but was still recorded in the log by the researcher and is seen as postlude. With noticeable conviction in his voice, the owner said, “I know, I just know, that this is helping with business. And we are not stopping. So call me on this in 6 months or so.”

And after counsel with the committee, this researcher has developed a strong inclination to do just that: revisit the progress of interpersonal creativity with Mr Freid, in six months, a

year, and two years. A longitudinal study that could show a direct correlation, or red line or not, to CGBS delivery and an improved balance sheet, would be extremely useful data, with implications for decision making for professional services leaders, the world over.

Another thought for future research would involve taking a greater sample of professional services firms. The qualitative case study has its limitations and benefits, with myopia inherent in the design. It would be interesting to see data on similar research questions from accounting firms, law firms, financial advisory firms, and leaders of philanthropic concerns.

A change theory emerged in the mind of the researcher when consulting with his committee on the intervention. Kurt Lewin was a German American social psychologist in the early 20th century who made a substantial contribution to change analysis by submitting his ‘freeze theory.’ In an action oriented three step process, subjects are inspired to ‘freeze’ or lock in new, desired behaviors. Lewin’s work as a back-drop to CGBS capacity building would be of interest to pertinent leaders, going forward.

Another suggestion for future research would be around the tragedy that occurred at Pulse Nightclub. How does such an emotionally wrenching experience influence the mindsets of individuals, already committed to expanding their capacity for interpersonal creativity and CGBSs? In an attitude that could best be characterized as “sweet,” by this qualitative researcher, the fervency for the execution of the regiment seemed to intensify, given the travesty. Accordingly, for further study and consideration: do tragic events induce or inspire a heightened inclination for CGBSs? If so, how should professional service leaders behave, when and if such a tragedy occurs within the scope of their professional services firm?

Lastly, it would be very helpful to be able to identify the attributes of an individual who would make an exceptional team leader. This study just nominated one, and it appears that

election process yielded a positive outcome, but again, it would be useful for professional services organizations to know who is naturally competent in the role.

Conclusion, Implications and Reflections

This research added a small bit of knowledge to the fledgling field of Positive Organizational Scholarship with implications to professional services leaders from around the globe. Importantly, the world of commerce is becoming commoditized, with products and services becoming virtually indistinguishable. Creating high and positive energy cultures will be of critical import—a competitive advantage—to professional services leaders globally. These positive cultures will retain an intentional plan for increased capacity for creating and delivering CGBSs.

A number of scholars were cited earlier in this dissertation, and the researcher would be remiss not to reemphasize one in particular, whose work seems more radiant during reflection in conclusion. Kurt Lewin, popular from his work at MIT in the early part of the last century, suggested there are three stages to any change initiative within group dynamics. First, the present mindset must be disrupted, or “unfrozen.” Next, temporary disorientation must be welcomed by the participants. Lastly, new ideas and behaviors must be “frozen” by the actors. Lewin, known for his tenacity for “applied scholarship,” and “action research,” would have been pleased at the process unfolding with this intervention at Think Creative, Inc. The ten actors had to be activated with a new mindset. Confusion then settled in, especially when little information for CGBSs were present, and then new habits were formed. This process, straightforward and relevant, ought to be a critical consideration for any professional services leader, going forward.

An implication of the intervention that jumps out stems around the need, as mentioned, for a new diagnostic tool to identify individuals uniquely adept at interpersonal creativity and

CGBS delivery. An emerging reflection shows up to the researcher as analogy. It seems, in all candor, that certain employees at Think Creative, Inc., were just naturally better than their peers at coming up with great ideas for CGBSs. Like some individuals, who can just naturally run fast, it seems to this qualitative researcher, that the ability for interpersonal impact is more inherent in some, than others. To continue the analogy, even the slowest of runners can take steps to improve his/her running speed: lose weight, stretch more, analyze form, etc. So it might be true with interpersonal impact abilities: have a mindset for the action, get in a group for discussion, gather more information on the individual to whom the CGBS will be delivered, etc. Still, if interpersonal creativity is truly a desirable attribute for professional services leaders, it would be advantageous to have an instrument to shed light on who might be naturally skilled.

Another reflection centers on the idea of “habituating spontaneity,” a paradox believed to be introduced herewith. The implications of this desired phenomenon within a professional services firm’s team dynamics are non-trivial. Remember, the probabilities of CGBSs happening declined, as the evidence indicated, when participants felt as though “we had to do it.” Too much pressure squelched desired outcomes. “This needs to be inspired, not required,” as one participant exclaimed, perhaps not fully recognizing the gravity and future usefulness of her remark. It appears there needs to be an appropriate atmosphere for regular, spontaneous CGBSs to occur. How can this be achieved? This researcher can only add that the probabilities lie in the quality and clarity of measured leadership. Mark Freid did an excellent job at establishing this heretofore unidentified mindset, and his team responded and is responding, in kind.

A client of the researcher, after the study concluded and having heard of the challenge to create an atmosphere of “spontaneity habituation,” offered a surprisingly relevant suggestion. “The leader must deliver a CGBS to his/her employee - a really meaningful one. Then, shortly

thereafter, he should circle back with the employee, and say, ‘This feeling that you are experiencing ... I want all of our clients and prospects to feel this, on a regular basis’” (C. Dolce, personal communication, September 7, 2016). This suggestion appears to have merit, was an “Aha moment” for the researcher, and worthy of further practitioner enactment.

Subsequent to the conclusion of this intervention, another client of the researcher made an insightful remark, worthy of reflection. He spoke about how important, and yet “ineffable,” the attribute of interpersonal creativity is for his business. He had adopted a similarly sounding regimen to this study for his professional services company, and as Kurt Lewin might have predicted, had a hard time initially getting the proper mindset in place for his team. But with “little wins,” as Jon Kotter would have appreciated, things started to change. “Great ideas just started to bubble up, out of nowhere, from the momentum. And you know, the best ideas came to folks out of the office - on the golf course, in the shower, while going for a walk” (B. Grogan, personal communication, September 13, 2016). An important implication might have emerged here: can professional services leaders induce or inspire her employees to always be on the hunt, even out of the office, for compelling ideas to delight meaningful partners of the enterprise?

An appropriate concluding quote comes from Supreme Court Justice Clarence Thomas, speaking to Hillsdale College, in Michigan, on May 14, 2016, on the topic CGBSs:

As the years have swiftly moved by, I have often reflected on the important citizen lessons of my life. For the most part, it was the unplanned array of small things. There was the kind gesture from the neighbor. It was my grandmother dividing dinner because another person showed up unannounced. It was the stranger stopping to help us get our crops out of the field before a big storm. There was the librarian who brought books to mass so that I would not be without reading materials on the farm. . . . Small lessons such

as these became big lessons for how to live our lives. (“Notable and Quotable: Clarence Thomas,” 2016, paras. 1-3)

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APPENDIX A

Think Creative, Inc.'s Awards

- ASAE 2014 Gold Circle Award, Convention/Meetings Marketing (NAVC Conference 2014)
- Hermes Creative Awards, Integrated Marketing/Company Branding, PLATINUM (NAVC E-newsletter, Brand Ads)
- Hermes Creative Awards, Integrated Marketing/Company Branding, GOLD Website/Overall Association, GOLD (NAVC Conference 2014 branding)
- ADDY Orlando, Marketing Collateral, GOLD (Kim Hutto executive brand book)
- ADDY 4th District, Sales Campaign, SILVER (Ding! Bikes)
- ADDY 4th District, Advertising for the Arts and Sciences, SILVER (Florida Film Festival)
- ADDY 4th District, Marketing Collateral, GOLD (Central Florida YMCA)
- ADDY 4th District, Poster Campaign, SILVER (Emory University)
- ADDY Orlando, Out-of-Home/Vehicle Graphic Advertising, BEST OF SHOW (Ding! Bikes)
- ADDY Orlando, Sales Campaign, GOLD (Ding! Bikes)
- ADDY Orlando, Point-of-Purchase, GOLD (Ding! Bikes)
- ADDY Orlando, Advertising for the Arts and Sciences, GOLD (Florida Film Festival)
- ADDY Orlando, Marketing Collateral, SILVER (Central Florida YMCA)
- ADDY Orlando, Poster Campaign, SILVER (Tampa Library System)
- ADDY Orlando, Poster Campaign, SILVER (Emory University)
- ADDY Orlando, Interactive, GOLD (TheMomentJars.com)

- ADDY Orlando, Marketing Collateral, SILVER (Central Florida YMCA)
- ADDY Orlando, Marketing Collateral Non-Profit, GOLD (Trading Hatred for Hope)
- ADDY Orlando, Advertising Industry Self-Promotion, SILVER (Think Creative, Inc.)
- University and College Design Association, Award of Excellence (Embry-Riddle
Aeronautical University Worldwide)

APPENDIX B

Agenda for Actors of Think Creative, Inc.

- Convene for overview of 4 week program
- Conduct weekly meeting where CGBS opportunities can occur
- Appoint execution by Project Leader of the CGBSs
- Debrief within the firm by email, phone, and face to face: stories of executed CGBSs
- The researcher will audio record and chronicle stories and observations in the Log

APPENDIX C

Observation Logs

Kristy Pennino - Audet-5131

Passions - Lyme Disease
Husband - triathlete
Hair
Photography
Horse

- Driver

- Pain points

- Take summers stress away?

* We don't know enough
about her! Ash

APPENDIX D

Site Permission from Mark Freid, Owner of Think Creative, Inc.

Dear Mr. Freid,

I write to you as a doctoral candidate and researcher in Organizational Leadership at Pepperdine University. I am asking for your permission, given that you are CEO and Founder, for the engagement of Think Creative, Inc., to fulfill my doctoral requirement.

Sincerely,

John L. Evans, Jr.

8/5/2016

Yes!

Mark Freid

8/5/2016

Signature: _____

A handwritten signature in black ink that reads "Mark Freid". The signature is written in a cursive style and is positioned above a horizontal line that serves as a signature line.

APPENDIX E

Individual Informed Consent Form

PEPPERDINE UNIVERSITY

INFORMED CONSENT FOR EXEMPT RESEARCH

CRITICAL CONSIDERATIONS ON INTERPERSONAL IMPACT FOR NEXT GENERATION PROFESSIONAL SERVICES LEADERS: A CASE STUDY

You are invited to participate in a research study conducted by John L. Evans, Jr., MBA, doctoral candidate in Organizational Leadership at Pepperdine University, because you are Think Creative, Inc., in Orlando, Florida. Your participation is voluntary. You should read the information below, and ask questions about anything that you do not understand, before deciding whether to participate. Please take as much time as you need to read this document. You may also decide to discuss participation with your family or friends.

PURPOSE OF THE STUDY

The purpose of this study is to inform leadership of financial advisory firms (including brokers, Registered Investment Advisors, and Certified Financial Planners), certified public accounting firms, law firms, philanthropic executives, and others in professional services the world over, on why increasing their organization's capacity for delivering *creative gestures beyond self* will provide an antidote to the perception of indistinguishability (commoditization) of their services.

PARTICIPANT INVOLVEMENT

If you agree to voluntarily take part in this study, you will be asked to complete a brief survey via Survey Monkey that is anticipated to take approximately 15 minutes. You do not have to answer any questions you do not feel comfortable answering – simply skip any such questions by moving ahead to the next question in the survey.

PARTICIPATION AND WITHDRAWAL

Your participation is voluntary. Your refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights, or remedies because of your participation in this research study.

ALTERNATIVES TO FULL PARTICIPATION

The alternative to participation in the study is not participating or completing only the items you feel comfortable completing. Your relationship with your employer will not be affected whether you participate or not in this study.

CONFIDENTIALITY

I will keep your records for this study confidential as far as permitted by law. Pepperdine’s University’s Human Subjects Protection Program (HSPP) may also access the data collected. The HSPP occasionally reviews and monitors research studies to protect the rights and welfare of research subjects.

The data will be stored on a password-protected computer in the principal investigator’s home office. The data will be stored for 10 years, after which point they will be destroyed. The data collected will be coded to render individual participants’ responses confidential. There will be no identifiable information obtained in connection with this study. Your name, address or other identifiable information will not be collected.

INVESTIGATOR’S CONTACT INFORMATION

I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described. I understand that I may contact Dr. June Schmieder-Ramirez at june.schmieder@pepperdine.edu if I have any other questions or concerns about this research. If you have questions about your rights as a research participant, contact Dr. Judy Ho, Chairperson of the Graduate & Professional School Institutional Review Board (GPS IRB) at Pepperdine University, via email at gpsirb@pepperdine.edu or at 310-568-5753.

RIGHTS OF RESEARCH PARTICIPANT – IRB CONTACT INFORMATION

If you have questions, concerns or complaints about your rights as a research participant or research in general please contact Dr. Judy Ho, Chairperson of the Graduate & Professional School Institutional Review Board at Pepperdine University 6100 Center Drive Suite 500 Los Angeles, CA 90045, 310-568-5753 or gpsirb@pepperdine.edu.

Participant’s name

Date

Participant’s signature

Researcher’s signature

APPENDIX F

Table of Examples of Creative Gestures Beyond Self (CGBSs)

Examples of creative gestures beyond self (CGBSs) from the researcher's work in his marketplace of professional services include the following:

- The owner of law firm overhears an employee comment on her son's struggles in algebra. He suggests a tutor and pays for five sessions.
- An employee of a Registered Investment Advisory firm learns of a client's passion for Philadelphia Phillies baseball team and organizes a surprise opportunity for the client to throw out the first pitch at a Phillies spring training game in Clearwater, Florida.
- The marketing director of a CPA firm learns that a client's son was accepted to college of his dreams to play football. He orders a jersey from the school with the young man's football number and has it delivered to the client.
- A philanthropic executive finds a service that will print out the *New York Times* newspaper of the year a long time benefactor was born. The paper is presented at the benefactor's 85th birthday party, in front of his family.
- A top executive for a global investment management firm writes a poem for a client's daughter who was diagnosed with a similar cancer he survived.

APPENDIX G

Johnson & Johnson - Human Performance Four Dimension Energy Audit

Four Dimension Energy Audit

Each dimension receives a score on a scale of 1-4 (from lowest to highest, scores in italics are researcher's personal results as of March 1, 2016). Total possible score can range from 1-16.

1. Quality of individual energy reserves - 3
2. Quantity of individual energy reserves – 4
3. Force of individual energy reserves - 3
4. Focus of individual energy reserves - 4

Researcher's score: *14*

From <https://www.jjhpi.com/>

APPENDIX H

Open Ended Qualitative Probe – Survey Monkey

- How do semi-formal audit meetings help with creativity?
- How was the project leader helpful in facilitating good ideas for CGBSs?
- Why does there need to be a project leader in CGBS formation?
- When did the best ideas for CGBSs emerge?
- Did great ideas emerge specifically in the Audit Sessions? Who had the best ideas, in your opinion?
- Do you feel that this was an exercise at which you and your team could get better, over time?
- How does the team see this program as fun?
- How much did you enjoy yourself in this process?
- What was it like reflecting on yours and your team's efforts?
- Did you like going to work more or less, knowing that you were a part of this program?
- Should the CBBS initiative continue? Why or why not?
- Did it feel like you were required to do CGBSs?
- Are positive stories, or otherwise, being generated internally around the idea formation and execution?
- Did compelling business opportunities emerge during the program?
- Is Think Creative, Inc. a more competitive business because of the CGBS program?

To be shared on day 1 of the intervention, the opening meeting: "You have been chosen as an employee of Think Creative to participate in a brief 15 minute survey, which will be sent to you by URL on day 27 of this intervention. You are asked to respond to the questions by day 30, and you will be sent a reminder. This survey contains 15 questions. Your responses will be anonymous and the results will be shown in aggregate form only. Some of these questions may be posed to you in a discussion setting on visit 2, on or about 15 days in to the intervention. Possible side effects of taking this survey may be boredom to

finding yourself exhilarated by participating. The survey results will be saved by the investigator in perpetuity. As the researcher, I will be the only person with access to the final results. Please complete this survey on or before xx, 2016.

Moreover, you are not required to participate in this study, including recorded discussions and surveys, and you could withdraw at any time, for no stated reason. Your job performance will not be measured based on your performance in this study, as expressed in audio recording format, by the owner, Mark Freid. You will have access to Freid's recorded assertion of the intervention being nonperformance bearing, at any time you wish.

Thank you in advance for your participation. Your participation is important as this is the final step; data collection as I near completion of my doctoral degree. John L Evans Jr"

Open Ended Qualitative Probe

• 1. How do semi-formal audit meetings help with creativity?

• 2. How was the project leader helpful in facilitating good ideas for CGBSs?

• 3. Why does there need to be a project leader in CGBS formation?

• 4. When did the best ideas for CGBSs emerge?

• 5. Did great ideas emerge specifically in the Audit Sessions? Who had the best ideas, in your opinion?

• 6. Do you feel that this was an exercise at which you and your team could get better, over time?

• 7. How does the team see this program as fun?

• 8. How much did you enjoy yourself in this process?

• 9. What was it like reflecting on yours and your team's efforts?

• 10. Did you like going to work more or less, knowing that you were a part of this program?

• 11. Should the CBBS initiative continue? Why or why not?

• 12. Did it feel like you were required to do CGBSs?

• 13. Are positive stories, or otherwise, being generated internally around the idea formation and execution?

• 14. Did compelling business opportunities emerge during the program?

• 15. Is Think Creative, Inc. a more competitive business because of the CGBS program?

Done

APPENDIX I
IRB Approval Letter



Pepperdine University
24255 Pacific Coast Highway
Malibu, CA 90263
TEL: 310-506-4000

NOTICE OF APPROVAL FOR HUMAN RESEARCH

Date: May 16, 2016

Protocol Investigator Name: John Evans

Protocol #: 16-03-228

Project Title: Critical Considerations on Interpersonal Impact for Next Generation Professional Services Leaders: A Case Study

School: Graduate School of Education and Psychology

Dear John Evans,

Thank you for submitting your application for exempt review to Pepperdine University's Institutional Review Board (IRB). We appreciate the work you have done on your proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations 45 CFR 46.101 that govern the protections of human subjects.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit an amendment to the IRB. Since your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite the best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the IRB as soon as possible. We will ask for a complete written explanation of the event and your written response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the IRB and documenting the adverse event can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* at community.pepperdine.edu/irb.

Please refer to the protocol number denoted above in all communication or correspondence related to your application and this approval. Should you have additional questions or require clarification of the contents of this letter, please contact the IRB Office. On behalf of the IRB, I wish you success in this scholarly pursuit.

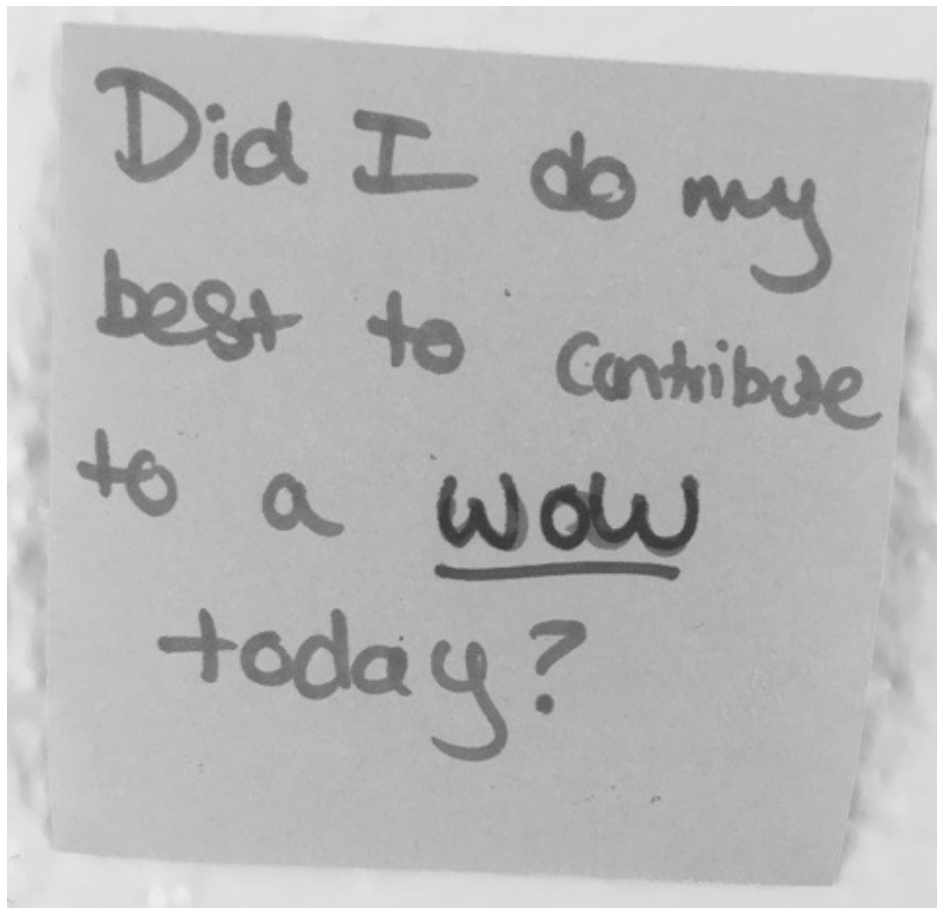
Sincerely,

Judy Ho, Ph.D., IRB Chairperson

cc: Dr. Lee Kats, Vice Provost for Research and Strategic Initiatives
Mr. Brett Leach, Regulatory Affairs Specialist

APPENDIX J

Observed Post-It Note



APPENDIX K

CITI Certification of Approval

[Main Menu](#) | [My Profiles](#) | [My CEUs](#) | [My Reports](#) | [Support](#) | [Admin](#)

[Main Menu](#) > [Manage My Institution](#) > [View/Edit Institution OR Member Information](#)

Pepperdine University - Modules Completed - John evans (4528658)		
Back		
Elective Modules	Date Completed	Score
Responsible Conduct of Research (RCR) Course Introduction	11/23/14	0%
Research Misconduct (RCR-SBE)	11/23/14	100%
Data Management (RCR-SBE)	11/23/14	60%
Authorship (RCR-SBE)	11/23/14	100%
Peer Review (RCR-SBE)	11/23/14	80%
Mentoring (RCR-Interdisciplinary)	11/23/14	100%
Using Animal Subjects in Research (RCR-Basic)	11/23/14	60%
Conflicts of Interest (RCR-SBE)	11/23/14	60%
Collaborative Research (RCR-SBE)	11/23/14	100%
Research Involving Human Subjects (RCR-Basic)	11/23/14	100%
Responsible Conduct of Research (RCR) Course Conclusion	11/23/14	0%