

# Problem Solving & Decision Making Leader Development Institute

One of the most effective methods for embedding Problem Solving & Decision Making skills in an organization is the Leader Development Institute. Commonly referred to as an "LDI," this experience prepares select employees to assume a Program Leader role in their organizations.

## THE KEPNER-TREGOE® APPROACH TO INSTALLING RATIONAL PROCESS THINKING IN AN ORGANIZATION

The Kepner-Tregoe (KT) Problem Solving & Decision Making methodology is the foundation on which the company works with clients worldwide. It is a step-by-step, rational process for organizing and analyzing information in order to make effective decisions, solve tough problems, handle complex situations, and plan for the future. Developed by Drs. Charles Kepner and Benjamin Tregoe after extensive research, Problem Solving & Decision Making is a critical ingredient for achieving rapid operational and strategic objectives and creating lasting value.

One of the most effective methods for embedding Problem Solving & Decision Making skills in an organization is the Leader Development Institute. Commonly referred to as an "LDI," this experience prepares select employees to assume a Program Leader role in their organizations. This leadership role allows them to serve as process coaches, consultants, instructors, and facilitators of Problem Solving & Decision Making.

The Kepner-Tregoe Problem Solving & Decision Making LDI is a critical element in a carefully designed approach to organizational improvement that includes these four distinct phases:

- Preparation:** Carefully structuring the Problem Solving & Decision Making program by identifying and analyzing organizational concerns; developing clear, visible objectives; and securing top management commitment.
- Installation:** Selecting and developing qualified candidates for the LDI; customizing the workshop based on client objectives; and planning and delivering training to employees.
- Application:** Appropriately modifying the organization's procedures; measuring program results; and providing consulting support.
- Maintenance:** Providing our clients with ongoing service to ensure program objectives and long-term results are achieved.





# Kepner-Tregoe Leader Development Institute

## WHAT IS AN LDI?

An LDI is an intensive experience that provides participants with in-depth concept knowledge, instructor training capabilities, and facilitation skills. It is a key part of a larger Program Leader development process that begins with the identification of qualified candidates and ends with a successful “first teach.”

Based on research and thoroughly tested educational principles, the LDI design will change depending on the needs of the individual learners. In fact, no two Problem Solving & Decision Making LDIs are exactly alike. But the goal of each is the same—to develop individuals who will assume a primary role in changing the way people behave and how the organization addresses concerns.

These individuals, once certified, are referred to as Program Leaders.

During an LDI, participants learn how to serve as effective Program Leaders and process consultants, applying the concepts to their organizational issues, and developing the skills to conduct the Problem Solving & Decision Making workshop in-house. Our Systematic Teaching approach helps us create capable instructors, even if candidates have little or no prior teaching experience.

Although the LDI is a challenging experience, most Program Leaders report that it brings additional value to their organizations and develops thinking processes and leadership abilities that result in a powerful—and often life- and career-enhancing—experience.



# Organizational Benefits

## IN-HOUSE EXPERTISE

With management support, Kepner-Tregoe Program Leaders are in-house “consultants” who help resolve organizational concerns, solve problems, make decisions, and plan for the future.

Program Leaders are internal training resources who can tailor the workshop for different audiences, provide authentic examples and experiences related to the participants’ own environment, and update the workshop structure to meet the needs of the organization.

## AGENTS FOR CHANGE

Program Leaders ensure that the cultural environment within the organization encourages the use of a systematic process for resolving key issues. In this capacity, they serve as change agents lobbying for the acceptance of a standard problem solving and decision making approach at every level within the organization.

## STRATEGIC AND OPERATIONAL RESULTS

Merging content knowledge with process expertise, Program Leaders promote, support, and coach the use of process across all divisions and levels. Organizations commit a substantial amount of time and resources to the development of Program Leaders, who then capitalize on their organization’s investment to achieve tangible results. In essence, they become leaders of the organization’s rational process “community of practice.”



# Program Leader Selection Criteria

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When choosing who will attend an LDI, KT professionals interview candidates based on the organization's objectives—as well as basic selection criteria that are indicative of success. Criteria include:

- Credibility within the organization as a knowledgeable and capable individual
- Willingness to acquire or already in possession of sound presentation and teaching skills
- Ability to critique others objectively
- Willingness to create and sustain change
- Experience working with management and/or other senior people in the organization
- Ability to work under time and performance pressure
- Understanding of the roles and responsibilities of a Program Leader, and a willingness to fulfill them
- Ability to decline the opportunity to be a Program Leader without negative consequences

# Steps to Becoming a Program Leader

## STEP

1

### KT PROBLEM SOLVING & DECISION MAKING WORKSHOP

The first step to becoming a Program Leader is attendance at a Problem Solving & Decision Making workshop taught by a KT professional. Program Leader candidates become familiar with the individual KT processes, apply them to work-related issues, and observe the roles and responsibilities of the instructor.

## STEP

2

### CANDIDATE INTERVIEW

Candidates are interviewed by a KT professional and selected to attend the LDI by KT and the organization's key decision makers. Selections are based on pre-set criteria. (See Program Leader Selection Criteria.)

## STEP

3

### THE LDI

The LDI is usually a 12-day commitment, depending on the needs of the group. Participants spend eight or more hours a day in classroom training and teaching practice, and, on average, an additional four hours are spent preparing in the evening. The LDI is an intense but rewarding experience that establishes a deeper conceptual understanding of the Problem Solving & Decision Making processes and an ability to facilitate their use. Participants develop and refine their skills as classroom instructors and process facilitators.

## STEP

4

### THE FIRST TEACH

Program Leader candidates spend extensive time (usually 40 or more hours) preparing for their first in-house workshop. A KT professional is present during this first "teach" for guidance, assistance, and to ensure that the workshop is properly conducted. A successful first teach allows the candidate to become certified as a KT Problem Solving & Decision Making Program Leader.



# LDI Participant Learning Objectives

## ***Demonstrate Problem Solving & Decision Making Process Knowledge***

Program Leaders are able to explain each Problem Solving & Decision Making process in-depth and give specific guidelines for its use.

## ***Demonstrate Application Capability***

Program Leaders take a results-oriented focus and act as process consultants in their organizations. They can apply each rational process to real company concerns and facilitate, coach and critique the use of rational process in a team or group environment.

## ***Demonstrate Teaching Capability***

Program Leaders leave the LDI with the ability to transfer rational process knowledge and skills using Systematic Teaching, a proven method for transferring concept knowledge. They know how to motivate participants to learn, provide examples to clarify the concepts, test understanding of the concepts, and make the workshop relevant. Program Leaders help participants work collaboratively, coach them toward success, and debrief the key learning points. Program Leaders critique in a positive manner, respond to different learning styles, gauge participants' progress, and make adjustments to accommodate their learning speed.

## ***Demonstrate Presentation Skills***

Program Leaders have an organized presentation style. They use concise language, explain concepts clearly with relevant examples, reduce distracting speech mannerisms, and involve participants in the presentation. In addition, they are comfortable using instructional media.

## ***Demonstrate Knowledge of Workshop Materials and Program Administration***

Program Leaders are comfortable using the workshop materials, adjusting the workshop teaching outline to meet participants' needs, and advising participants on appropriate application issues to bring to the workshop. They can administer pre-work, case studies, exercises, and handouts, evaluate participant progress, and track results. During the LDI, Program Leaders develop a final teaching outline for the workshop.



# Kepner-Tregoe Problem Solving & Decision Making

KT Problem Solving & Decision Making consists of four distinct processes, each designed for a specific type of situation.

## KT PROBLEM SOLVING & DECISION MAKING PROCESS

### *Situation Appraisal*

*Clarifies and keeps visible the issues that matter*

Concerns are broken into manageable issues and prioritized. A plan is developed for the effective resolution of the issues including what analysis is required and who needs to be involved.

### *Problem Analysis*

*Promotes rapid and accurate issue resolution*

Possible causes are identified and then tested against the "problem definition." Verify the true cause of a problem before taking expensive corrective action. The process complements and enhances use of statistical quality tools and data.

### *Decision Analysis*

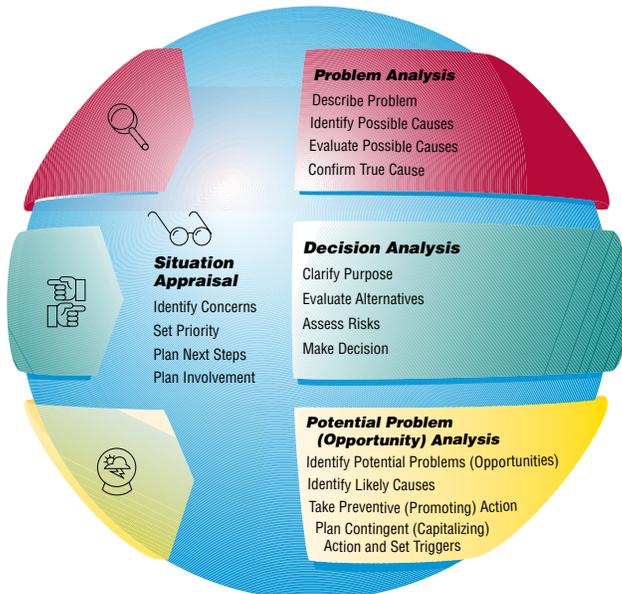
*Marries logic, expertise, creativity, and factual information*

Clarify the purpose of a decision and form clear objectives. Evaluate possible courses of action and assess risks prior to making a decision. Provides a common language for promoting effective decision making throughout an organization.

### *Potential Problem and Opportunity Analysis*

*Directs experience and creativity to prepare for the future*

Participants develop preventive or promoting actions to protect or enhance a plan, and implement the appropriate contingent or capitalizing actions.





# Workshop Overview

The Problem Solving & Decision Making LDI prepares candidates to deliver the KT Problem Solving & Decision Making workshop.

The KT Problem Solving & Decision Making workshop experience begins when the instructor provides pre-work that orients participants to the requirements for actively learning and applying the rational process concepts. Prior to the workshop, the instructor contacts participants to discuss their objectives and the issues they plan to work on in the workshop.

The instructor begins the workshop by clarifying participants' objectives, establishing the agenda and other logistics, and setting ground rules. Participants work on a "discovery exercise" which helps participants identify their current questioning skills and methods for handling complex situations. This is followed by a brief overview of the entire Problem Solving & Decision Making process.

The instructor uses Systematic Teaching techniques to present each of the Problem Solving & Decision Making concepts. The definition, purpose, and method of each process are discussed briefly. The instructor then demonstrates the process through the use of examples or video case studies. Following this, the instructor tests the participants' conceptual understanding through the use of questions. Finally, the instructor motivates the participants to use the processes by applying them to their work-related concerns.

During application, the instructor observes how participants use the processes and gives them feedback.

The instructor spends about 60 percent of workshop time monitoring, coaching, and providing feedback during case practice and application work.

After each process has been presented, practiced, and applied, the instructor wraps up the workshop by asking participants how they will apply the processes at work and to identify any barriers they might face to using the processes. The instructor also informs participants that they will be contacted several weeks after the workshop to determine how they are progressing in their use of rational process. The workshop ends with participants evaluating the workshop.

The workshop experience continues with follow up that varies according to organizational needs. For example, roughly five weeks after the workshop, the instructor contacts the participants to offer assistance, monitor progress, and track results. The instructor follows up again after about four months.



# Problem Solving & Decision Making Leader Development Institute Outline

## Week One

|     | SUNDAY               | MONDAY   | TUESDAY   | WEDNESDAY  | THURSDAY  | FRIDAY                           |
|-----|----------------------|--|---|--|---|----------------------------------|
| 0.0 |                      | Review Prior Evening Work                                    | Review  | Review   | Review  | Review                           |
| 1.0 |                      | Situation Appraisal Teach                                    | Presentations   | Systematic Learning Module                                     | Presentations   | Presentations                    |
| 2.0 |                      | Application  | Problem Analysis Teach - Distinctions and Changes             | Assign Problem Analysis Presentations to Prepare for Afternoon | Debrief   | Debrief                          |
| 3.0 |                      | Debrief  |   |  | Introduce Instructor Materials  |                                  |
| 4.0 | Welcome              | Problem Analysis Teach - Introduction                        | Problem Analysis Distinctions and Changes Case in Small Teams | Problem Analysis Presentations                                 | Outline Walkthrough Introduction, Situation Appraisal, Problem Analysis | Coaching and Critiquing Module   |
| 5.0 | Objectives           | Problem Analysis Specification and Test Possible Causes Case | Debrief   | Debrief  | Assign Presentation Segments to Prepare for Afternoon                   | Coaching and Critiquing Exercise |
| 6.0 | Schedule             | Evening Opportunity  | Problem Analysis Teach - Techniques                           | Problem Analysis Questioning Drill                             | Debrief   | Mid-LDI Interviews               |
| 7.0 | Introductions        |  | Problem Analysis Application                                  | Evening Opportunity  | Presentation Skills Module  |                                  |
| 8.0 | Two-week Overview    |  | Evening Opportunity   |  | Evening Opportunity   |                                  |
|     | LDI Leader Roles     |  |   |  |   |                                  |
|     | Program Leader Roles |  |   |  |   |                                  |
|     | Evening Opportunity  |  |   |  |   |                                  |

# Week Two

| SATURDAY                 | MONDAY                                   | TUESDAY   | WEDNESDAY  | THURSDAY   | FRIDAY                             |
|--------------------------|--|---|--|--|------------------------------------|
| 0.0 (Optional)           | 0.0 Review                               | 0.0 Review  | 0.0 Review   | 0.0 Review   | 0.0 Final Q & A                    |
| 1.0 Review Presentations | 1.0 Presentations                        | 1.0 Presentations                                     | 1.0 Presentations                                  | 1.0 Debrief  | 1.0 Program Close                  |
| 2.0 Debrief              | 2.0 Debrief                              | 2.0 Debrief   | 2.0 Debrief  | 2.0 Situation Appraisal Review                       | 2.0 Program Leader Exit Interviews |
| 3.0                      | 3.0 Decision Analysis Teach              | 3.0 Decision Analysis Outline Walkthrough             | 3.0  | 3.0 Situation Appraisal Exercise                     | 3.0                                |
| 4.0                      | 4.0 Decision Analysis Teach Continued    | 4.0 Presentation Assignments to Prepare for Afternoon | 4.0 Decision Analysis Outline Presentations        | 4.0 Planning for Continued Use of Process on the Job | 4.0                                |
| 5.0                      | 5.0 Decision Analysis Practice Case      | 5.0 Debrief   | 5.0 Potential Problem Analysis Teach               | 5.0 Final Outline Walkthrough                        | 5.0                                |
| 6.0                      | 6.0 Decision Analysis Teach - Techniques | 6.0 Decision Analysis Questioning Drill               | 6.0 Application                                    | 6.0 Program Leader Concerns                          | 6.0                                |
| 7.0                      | 7.0 Decision Analysis Application        | 7.0 Debrief   | 7.0 Debrief  | 7.0 Maximizing Program Results Module                | 7.0                                |
| 8.0                      | 8.0 Evening Opportunity                  | 8.0 Evening Opportunity                               | 8.0 Potential Problem Analysis Teach - Techniques  | 8.0 Role of KT Check-out Person                      | 8.0                                |
|                          |  |   | 8.0 Potential Problem Analysis Outline Walkthrough | 8.0 Evening Opportunity                              |                                    |
|                          |  |   | 8.0 Evening Opportunity                            |  |                                    |

The LDI can be conducted on-site and can be tailored to meet the needs of the organization.



## About Kepner-Tregoe

Kepner-Tregoe provides consulting and training services to organizations throughout the world. We build competitive advantage using powerful, systematic processes for resolving business issues and achieving targeted performance improvements.

Since 1958, KT has studied how effective business leaders manage difficult business challenges. We incorporated their habits into logical, repeatable methods for rapidly resolving problems, making decisions, planning ahead, and managing people and projects. This world-renowned, rational-process approach helps maximize the critical thinking skills, knowledge, and expertise of individuals and organizations.

KT collaborates with many of the largest and most successful companies in the world to improve the way work is done and facilitate new approaches to quality, competitiveness, cost, cycle time, business strategy, and other issues. Many organizations integrate our systematic methods into their business processes, embedding a common language approach for identifying objectives, resolving issues, and integrating change.

At a time when organizations face multiple challenges—intense global competition, crushing growth and cost pressures, rapid technological advances—KT plays a vital role in helping them improve the clarity of their strategic thinking and the effectiveness of their operations.

## Kepner-Tregoe Locations

Headquarters  
United States

Australia

Canada

France  
*(serving Spain)*

Germany

Hong Kong

Ireland

Japan

Malaysia

Netherlands

Singapore

Switzerland  
*(serving Belgium)*

Taiwan

Thailand

United Kingdom

### **Also serving:**

Africa, China, India,  
and throughout Europe and  
Southeast Asia

### **Affiliates**

Brazil

Chile *(serving Argentina)*

Finland

Italy

Korea

Mexico *(serving Costa Rica,  
El Salvador, Guatemala,  
Honduras, Nicaragua, and  
Panama)*

Peru *(serving Colombia)*

Philippines

Poland

Romania

Venezuela