

February 15 - 18, 2011

# DEALER TIRE SALES SUMMIT



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***DTE<sup>3</sup>: Accelerating leadership at every level to  
drive dealer solutions which will positively shift  
the consumer experience***

Name: \_\_\_\_\_

**Participant  
Workbook**



## WELCOME TO THE DEALER TIRE SALES SUMMIT



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*DTE<sup>3</sup>: Accelerating leadership at every level to drive dealer solutions which will positively shift the consumer experience*

Welcome to the Dealer Tire Sales Summit and thank you for participating with us. It is an exciting time to be an associate and stakeholder with Dealer Tire! Throughout the past decade we have built a remarkable business and overcome innumerable challenges. We should be very proud of our accomplishments!

Together, we have built a selling organization that is aligned around the strategies of:

- Driving increased profitability for our dealer and OEM customers
- Driving customer retention and loyalty
- Transforming dealers into retailers

As we move into the future, it will be increasingly important to generate success that we create a selling organization that is **efficient**, **effective**, and can **execute** flawlessly. That will be the primary focus of our summit where we have a unique opportunity to leverage our collective strengths and co-create our future. Our steering committee, comprised of representatives from all functions within the selling organization, articulated our complex and strategically important task as follows: **DTE<sup>3</sup>: Accelerating leadership at every level to drive dealer solutions which will positively shift the consumer experience.**

We have over 400 people participating in this summit, including customers from dealerships, dealer groups, OEM regions, and OEM corporate. We have participants from every level and every function at Dealer Tire. We recognize that we need the various perspectives, experiences, ideas, and best thinking from all of our stakeholders. In addition, we need ambassadors for action across the company. Our goal is to leave this summit with specific actions that become the business plan for our selling organization. We know that what we are working on here is too important to the future to just have a nice conversation and generate momentum. We need you to **execute** the agreed upon actions **efficiently** and **effectively** when we leave here!

At Dealer Tire, we are committed to transforming the dealer channel. We will do that by following the lessons we have learned and the values and guiding principles that have made us successful. Chief among them is creating solutions that help others – finding a way to develop and execute solutions that enhance people's lives. We know that ideas without execution are just dreams. At Dealer Tire, we play to win and we are accountable. That's the spirit I know we will see at this summit.

Thank you in advance for your best thinking and full engagement. This is an opportunity for everyone to lead, and I look forward to the amazing outcomes we will create!

Sincerely,

Cindy Frick, Partner  
Chief Sales & Marketing Officer



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## PURPOSE STATEMENT

Our Purpose Statement describes why we exist, how we are different and who we help.

## CORE VALUES

The Dealer Tire Core Values define the lines in the sand that we would rather go out of business than to cross. Our core values help us refine our tactics, guide us organizationally to make the right decisions and keep everyone focused on what is important.

## GUIDING PRINCIPLES

Our Guiding Principles provide a framework how we do business day to day, minute by minute. They define and give context to our culture. Our Guiding Principles describe who we are and how we operate within our high performance environment.



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## Our Purpose

Make it easy and profitable for automotive dealers and OEMs to sell tires, service and parts to drive loyalty and retention.

## Our Core Values



### Fairness

**Do unto others. Create win-win solutions. Make long-term not short-term decisions.**

Honors others' viewpoints and their contributions to the team and to Dealer Tire. Constructs creative solutions with those who are impacted in mind. Considers the long-term business goals when choosing actions.



### Playing to Win

**Teamwork. Passion. Energy. Desire to win, lead and grow.**

Works cross-functionally to achieve common goals. Positively initiates personal leadership in situations where personal skills, knowledge and competencies are necessary. Transfers personal expertise/knowledge to better others and the organization.



### Personal and Team Accountability

**Clear measures that are shared and tied to performance. Authority to match personal accountability. Open Book Culture where winners know the rules of the game and the score.**

Utilizes the authority provided to achieve identified goals. Acts as a good steward of Dealer Tire finances. Takes responsibility for both successes and missed goals by translating learning from both into positive action. Articulates and directs activities to achieve personal, team and organizational measures. Help others to be successful -- Has others' back. Goes above and beyond.



### Innovation

**Thought leadership and the willingness to take risks and embrace change.**

Identifies, introduces, enhances and/or implements new processes, builds skills or competencies that improve performance. Adapts to changes by adopting, utilizing and becoming proficient in new processes/procedures, skills or competencies that are required for measurable success. Appropriately challenges the status-quo and provides new insights as to how we can be doing our business better.



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# Our Guiding Principles



## Entrepreneurial Spirit

We are a catalyst for change and are committed to the success of our customers, our suppliers and ourselves. We are:

- Focused on what the future can be, unconstrained by the past
- Led by those who search with an appreciative eye for undiscovered opportunities and solutions
- A company where ideas triumph over bureaucracy
- A culture that ignites the passion for action in our team members and those with whom we do business
- A place where team members are not limited by title or job description
- A place where vigorous debate doesn't kill ideas; it makes them stronger
- A company that takes strategic risks to be wildly successful



## A View from Everywhere

Open Book, Open Door, Open Minds

We are open-minded - no business discussion is out of bounds. We entrust our business results, company strategy and direction to every team member.

We encourage and expect our team members to think and act like owners who know the score, and are responsible, accountable and ethical.



## Customer Experience

Create Extraordinary Value

We drive our customers' success each and every day through genuine partnerships, services and innovative solutions that tangibly benefit their business.



## Thrive

We Work Hard. We Win Big. We Laugh Together. We Win Together.

We are committed to creating an exciting and high-performing environment that provides opportunities for personal and career growth, a sense of belonging, and an avenue for celebration of accomplishment.



## Curiosity

Learn or Die

There is no limit to our learning. We are an agile and evolving community that is committed to investing in continuous improvement, innovation and capability building. We learn from our experiences, one another and our customers.





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# Our Guiding Principles



## Collaborative DNA

Leverage the Strength of the Whole

We are a company that embraces diverse thought. We encourage healthy debate and cooperation throughout the organization while incorporating the ease of informality and humor.

We create great solutions because of our capacity for candid discussion in the spirit of openness and honesty.



## Share the Gain

Know Your Line of Sight

Profitability creates opportunity and is essential to our future. Every team member has an impact on our success. In turn, success is celebrated and shared with every team member.



## Decision Making

Passion for Agility

We are a company that expects and enables proactive, effective and informed decisions based upon facts, intuition and experience. All decisions are guided by our unique business model. We recognize that the best decisions involve all relevant affected parties, and are choices made at the most local level possible.



## People - Community - Planet

Doing Good and Doing Well Go Hand in Hand

We remain resolute in our unwavering commitment to safety, community and sustainability.

We actively pursue socially and environmentally positive solutions that help build a better and safer world.



## Leadership at Every Level

Leadership is a Passion, not a Position

Leaders inspire through positive influence. Each leader embodies accountability and initiative, while building upon the strengths and talents of themselves and those around them.

Leadership is an opportunity that emerges at every level.



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## Our Summit Task

**DTE<sup>3</sup>:** Accelerating leadership at every level to drive dealer solutions which will positively shift the consumer experience

### Objectives:

**Discovery:** Focus our energy on our strengths and assets to create our vision of the future.

**Design:** Respond as a whole community to drive dealer solutions which will positively shift the consumer experience; we will empower people to take action towards the objectives, projects and initiatives created as a community.

**Deployment:** We will leave this summit with concrete action plans and systems to start the transformation today.





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# Agenda

## Day 1 - DISCOVERY: Mapping the Positive Core of Our Strengths and Unexpected Opportunities

Tuesday, February 15, 2010

### Welcome

- Why we are here
- State of the business

### Overview of Appreciative Inquiry

### Discovery Phase

- Appreciative Inquiry Interviews - high point experiences, strengths and future visioning
- Partner stories
- Roundtable discussion
- Report outs

### Lunch Break

### Stakeholder Groups

- Group discussions
- Report outs

### Future of the Industry

### Pit Stop



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# Agenda

## Day 2 - DREAM 2014: Moving to World Class with Efficiency, Effectiveness and Execution

Wednesday, February 16, 2010

### Welcome

- Warm up lap
- Hopes for today

### Educational Sessions for Internal Groups

- Session 1: 8:30 - 10:00
- Session 2: 10:15 - 11:45

### Appreciative Inquiry Session for External Groups

- Introduction to Appreciative Inquiry with Dr. David Cooperrider

### Lunch Break

### Key Learning Points

### Positive Image / Positive Action

### Dream Phase

- Introduction to dream phase
- Group discussion and skit creation
- Report outs

### Pit Stop



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# Agenda

## Day 3 - DESIGN: Co-creating the Future

Thursday, February 17, 2010

### Welcome

- Warm up lap
- Hopes for today

### Design Phase

- Introduction to design phase
- Small group brainstorming
- Introduction to prototyping
- Small group prototyping

### Lunch Break

### Report Outs

### Second Round of Prototyping

### Pit Stop



DEPLOYMENT

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DEPLOYMENT

## Agenda

### Day 4 - DEPLOYMENT & EXECUTION: Set in Motion Our Priorities

*Friday, February 18, 2010*

#### Welcome

- Warm up lap
- Hopes for today

#### Deployment and Action Planning

- Introduction to deployment and action planning
- Small group discussions
- Reports outs

#### Summit Observations

#### Closing

Insert tab page here

**Tuesday**

Insert tab page here

**Tuesday**



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# What is an Appreciative Inquiry Summit?

The **WHOLE SYSTEM** participates—a cross-section of stakeholders — people and groups that have a stake in Dealer Tire's future. This means more diversity and less hierarchy than is usual in a working meeting, and a chance for each person and stakeholder group to be heard and to learn other ways of looking at the task at hand.

**TASK FOCUSED** — A summit is task-focused, not simply an educational event or a conference. We are here to leverage all the strengths and talents that exist within our organization in order to build our vision and plan of action for accomplishing our summit task—Accelerating leadership at every level to drive dealer solutions which will positively shift the consumer experience

People **SELF-MANAGE** their work, and use **DIALOGUE** and **INQUIRY**—not “problem-solving”—as the main tool. That means helping each other do the tasks and taking responsibility for our perceptions and actions.

**COMMON GROUND** rather than “conflict management” is the frame of reference. That means honoring our differences and then discovering areas for action where we have strong common ground.

**COMMITMENT TO ACTION** — Because the “whole system” is involved, it is easier to make rapid decisions, and to make commitments to action in an open way that everyone can support.

**APPRECIATIVE INQUIRY (“AI”)** - To **appreciate** means to value, to understand those things worth valuing. To **inquire** means to study, to ask questions, to search. AI is, therefore, a collaborative search to identify and understand an organization's strengths, the greatest opportunities, and people's aspirations and hopes for the future.





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## Appreciative Inquiry

Instructions: Use this page to capture notes on the Appreciative Inquiry process



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# The Appreciative Inquiry 4-D Cycle





DISCOVERY

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## Discovery

### Mapping the Positive Core of our Strengths and Unexpected Opportunities

#### CONVERSATIONS IN PAIRS

**Purpose:**

To appreciate and welcome each other, and to learn about the special experiences, commitments, capabilities and resources we each bring. To discover the best of "what is" in order to co-create the future that we envision.

**Activity:**

Interview the person next to you using the questions on the following pages.

A interviews B - 20 minutes  
B interviews A - 20 minutes





## QUESTION 1: HIGH-POINT EXPERIENCE

Think about a time that stands out to you as a high point – a time when you felt most energized and passionate about your work, when you were really proud to be a part of the Dealer Tire selling organization or proud to work with the Dealer Tire selling organization.

- What made it a high-point experience?
- Who was involved?
- What actions did you and others take?
- What were the “root causes” and drivers of the success? What specific personal and organizational strengths were leveraged?
- In what ways were you empowered to impact the actions and success?



Please take brief notes, and use your skills as an interviewer as you listen to and go deeper into your partner's experiences, visions and stories.

### YOUR NOTES

### INTERVIEW NOTES



## QUESTION 2: STRENGTHS / ASSETS

To be the Preferred Partner, Expert, Trusted Advisor, Thought Leader, Most Effective and Efficient Resource and One Stop Provider it will be important to change, evolve and transform along our journey. Great organizations are skilled at preserving what they do best while they stretch and reinvent through entrepreneurial spirit, agility, responsiveness and innovation.

### PART A

From your perspective share your success stories about the Dealer Tire selling organization's efficiency, effectiveness and execution.

- Share a story about when our selling organization has radically improved **efficiency**.
- Share a story that illustrates when the **effectiveness** of our sales organization was at its best
- Share a story that illustrates when our sales organization demonstrated flawless **execution**.

#### YOUR NOTES

#### INTERVIEW NOTES

### PART B

When our selling organization is at its best, what are its strongest strengths - things we should keep and magnify, even as we move into a new and challenging future?

- Things we should keep with our customer responsiveness?
- Things we should keep with our administrative or management methods - things that help keep our organization running effectively, and most efficiently?
- Things we should keep about our culture and people?
- Processes we should keep?

#### YOUR NOTES

#### INTERVIEW NOTES



### QUESTION 3: A LOOK INTO THE FUTURE

Let's take a trip in a time machine that transports us into the future to 2014. Many positive and innovative changes happened within the Dealer Tire selling organization, with our customers and with the consumer experience. You are excited about what you see and you are proud of what Dealer Tire has accomplished for OEMs, dealerships and consumers.

- Describe what you see. What's happening that is new, different and better than today?
- Can you describe some of the more compelling, exciting innovations?
- How have these innovations impacted and changed the marketplace?
- Finish this sentence...."I will be most proud of the Dealer Tire selling organization in the future when..."



Please take brief notes, and use your skills as an interviewer as you listen to and go deeper into your partner's experiences, visions and stories.

#### YOUR NOTES

#### INTERVIEW NOTES

**QUESTION 4: DESIGNING OUR SUSTAINABLE FUTURE**

Consider the future you envisioned in question 3 to identify how we can build a sustainable future together.

**PART A**

What are three of the smallest things that could come out of the summit that might have the largest impact on our aim of accelerating leadership at every level to drive dealer solutions which positively shift the consumer experience?

**YOUR NOTES**

- 1.
- 2.
- 3.

**INTERVIEW NOTES**

- 1.
- 2.
- 3.

**PART B**

What are three bolder projects that could come out of the summit - things that could be game changers for us and for the consumers?

**YOUR NOTES**

- 1.
- 2.
- 3.

**INTERVIEW NOTES**

- 1.
- 2.
- 3.



**QUESTION 4 (CONTINUED)**

Consider the future you envisioned in question 3 to identify how we can build a sustainable future together.

**PART C**

What makes the Dealer Tire selling organization unique? What are our or key strategic assets or strengths? What can we leverage to drive efficiency, effectiveness and execution to the next level?

**YOUR NOTES****INTERVIEW NOTES**



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## A History of Efficiency, Effectiveness and Execution

Instructions: Use the space below to note key themes.

## Table Share

1. Introduce your interview partner to your table team. Share a couple of highlights from your interview - things from your partner's stories or visions that stood out most for you.
2. Next, go deeper into one of the interview questions assigned to your table. Everyone shares their stories and observations. As a group, listen for patterns and themes that emerge.
  - Group 1: focus on Question 1
  - Group 2: focus on Question 2
  - Group 3: focus on Question 3
  - Group 4: focus on Question 4
3. Recorder should take notes on the designated worksheet (see next pages) and prepare a flip chart summary of the responses
4. Reporter should prepare to give a report-out, being sure to include **one or two of the most powerful stories/examples** that came from your group.

### SELF-MANAGEMENT AND LEADERSHIP ROLES

Each small group manages its own discussion, data, time and reports. Here are useful roles for self-managing this work. **Leadership roles can be rotated.** Divide the work as you wish.

**Discussion Leader:** Assures that each person who wants to speak is heard within the time available. Keeps group on track to finish on time.

**Timekeeper:** Keeps group aware of time left. Monitors report.

**Recorder:** Writes group's output on flip chart.

**Reporter:** Delivers a report to large group.



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## Question 1

# High Point Experiences Worksheet

## Group 1

### HIGH POINT EXPERIENCE STORIES

List stories from each member of the group:

### ROOT CAUSES OF SUCCESS

Choose one or two of your group's best stories to share in the report out to the large group



## Question 2

# Strengths / Asset Worksheet

### Group 2

#### THINGS TO KEEP

Customer responsiveness

Administrative / management methods

Culture and people

#### GROUP CONSENSUS

As a group decide on the top three strengths, qualities or values that the Dealer Tire selling organization should keep and magnify.

1.

2.

3.

#### GROUP REPORT

Create a metaphor, picture or image that represents the top three strengths identified by your group.



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## Question 3

# Look Into the Future Worksheet

## Group 3

### FUTURE SUCCESS STORIES

List stories from each member of the group:

### 2014 NEWS HEADLINE

As a group, create a headline for a new story that reflects Dealer Tire selling organization's success in the year 2014. Create an exciting headline and list some of the key elements of the story



## Question 4

# Future Design Worksheet

### Group 4

### **SMALLEST THINGS WITH LARGEST IMPACT**

List the top 3 small things with largest impact from the group

1.

2.

3.

### **BOLD PROJECTS**

List the top 3 bold projects from the group

1.

2.

3.





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## Stakeholder Groups

### Internal Stakeholders

In relationship to building our sales organization to be world class in terms of efficiency, effectiveness and execution, what is your group doing right now that is advancing these three dimensions of success for both Dealer Tire and our customers?

Make a list of all the assets/strengths that your group brings that advances the efficiency, effectiveness and execution for Dealer Tire's selling organization.

Finish this sentence..."These are the things that we are most proud of that we bring to the customer:"



# Stakeholder Groups

## Internal Stakeholders

Choose your group's top three strongest strengths and be ready to share one or two stories that illustrate this.

1.

2.

3.

## Internal Stakeholder Reports

Instructions: As other groups are presenting, use the space below to note key themes.



DISCOVERY

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## Stakeholder Groups

### External Stakeholders

Tell us about a time when Dealer Tire has exceeded your expectations.

What do we want to keep in our relationship as we move forward? List five things to keep - the strongest strengths that contribute to success.

- 1.
- 2.
- 3.
- 4.
- 5.

What are the future trends in your business, with your customers, with your competition? What is it going to take to be successful given these future trends?



# Stakeholder Groups

## External Stakeholders

What challenges will you face in the future - consumer, economic, industry? In what ways could Dealer Tire help you to overcome those challenges?

## External Stakeholder Reports

Instructions: As other groups are presenting, use the space below to note key themes.



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# Key Trends and Events That Shape Our Future

Instructions: Use the space below to note key themes.

Insert tab page here

**Wednesday**

Insert tab page here

**Wednesday**





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## **Educational Elements**

Instructions: Use the space below to note key learnings from each module and how they contribute to efficiency, effectiveness and execution.

### **BUILDING AND APPLYING DEALER ANALYSIS**

### **DRIVING BUSINESS RESULTS THROUGH DEALER PLANNING AND ANALYSIS**

### **INVENTORY SOLUTIONS, PRODUCT SCREEN/MERCHANDISING**

### **SALES DASHBOARD - BUILDING MASTERY**

### **PLANNING YOUR CAREER ROAD MAP**



DREAM

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## Positive Image / Positive Action

Instructions: Use the space below to note key themes.



# Dream 2014

## Moving to World Class with Efficiency, Effectiveness and Execution

### GROUP DISCUSSION

Review your notes on the big topics and vision of the future from yesterday and discuss the following with your group.

Visualize the Dealer Tire selling organization in 2014 and its impact on our OEMs, regions, dealers and the Dealer Tire selling organization. Efficiency, effectiveness and execution are world class. What does the Dealer Tire selling organization look like? As you create your image of the future, here are some things you may want to consider:

- How have we accelerated leadership at every level with the Dealer Tire selling organization?
- How are we driving dealer solutions that positively shift the consumer experience?
- Where have we found breakthroughs with efficiency?
- How have we advanced beyond top-down and bottom-up management to create whole system alignment and agility? How have we leveraged the strength of the whole system?
- What are the business opportunities or new business models that have come to life?
- What do the relationships look like with the OEMs, regions and dealers?
- What is Dealer Tire's competitive advantage?
- What does leadership at every level look like?
- What does the organizational structure and culture look like?
- How are we attracting new business and maintaining existing business?

Spend enough time to imagine concretely the efficiency, effectiveness and execution that your group wants for the Dealer Tire selling organization in the future. Be bold. This is an exercise in dreaming and imagination. Co-create the kind of Dealer Tire you want to work toward.

### CREATIVE PRESENTATIONS

Choose a creative way to present the envisioned future of Dealer Tire. Create an innovative way to present the Dealer Tire selling organization at its absolute best – purest and highest form! Prepare a three-minute “portrayal” as if it existed now – all team members of your group must have a role in the presentation. Below are some examples of creative presentation formats:

- |                                 |                      |
|---------------------------------|----------------------|
| • Skit                          | • Day in the life    |
| • TV or radio commercial        | • Work of art        |
| • TV or radio special           | • Poem               |
| • Magazine cover story          | • Song               |
| • Exclusive live news interview | • Panel presentation |



DREAM

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## Things I Like in the Image of the Future

Use this space to take notes during the skit presentations

### WHAT

Elements of the Vision I Find Most Important or Exciting

### How

Opportunities and Possibilities for Action

Insert tab page here

**Thursday**

Insert tab page here

**Thursday**



# Design

## Co-creating the Future

### STEP 1: BRAINSTORM

Brainstorm as many ideas as possible related to your group's opportunity area—ideas that can move the Dealer Tire selling organization in the direction of our future visions and dreams. The key question:

*Assuming anything imaginable is possible in relation to your opportunity area....  
"How might we...." ?*

#### Brainstorming rules:

- Defer judgment—don't dismiss any ideas
- Encourage wild ideas—be radical
- Build on the ideas of others—no "buts" only "ands"
- Stay focused on the topic
- Hold one conversation at a time
- Be visual
- Go for quantity

### STEP 2: THEME & VOTE

Do a quick read of the promising ideas or combination of ideas from the brainstorming session. Think about ideas that can be designed into something that is tangible—a value creation initiative.

For the sake of building at least one prototype, narrow and prioritize the brainstormed list. Group similar ideas together into common themes.

Have each group member take five dots and place them on the items they most want to work on (someone could put all five dots on one item, or they could vote for five different items).

### STEP 3: DOCUMENT

Your team will only have time to prototype the idea that you selected. In order to retain the other ideas from your group, select a recorder to document all of your ideas on the worksheet. The recorder should include clear notes to fully explain the ideas in the documentation.

### SELF-MANAGEMENT AND LEADERSHIP ROLES

Each breakout group manages its own discussion, data, time, and reports. Here are useful roles for self-managing this work. Leadership roles can be rotated. Divide up the work as you wish:

**Brainstormer Radical:** Assures that the group is challenged to contribute bold, wild ideas.

**Timekeeper:** Keeps group aware of time left.

**Brainstormer Facilitator:** Facilitates the brainstorming session by upholding the brainstorming rules and raises questions to keep the brainstorming moving. Challenges the group to go for quantity—try to get as many ideas and "post its" as possible on the board.

**Recorder:** Records the themed ideas on the worksheet



## Design Part 2

### Rapid Prototyping

The purpose of rapid prototyping is to focus in and take the most promising areas from the brainstorming session and build and design a “prototype” or model of it that can be brought into Dealer Tire to help us realize our visions. The goal is to begin prototyping an initiative that has strategic value for the company.

Build the prototype and make it visual, for example:

- A drawing
- A storyboard
- A three dimensional model
- A role play
- A mock up/draft
- A business proposal format

If the prototype has several discrete elements you might want to form subgroups to work on different pieces

Be prepared to do a 3-5 minute presentation of the prototype to the whole group. After your demonstration, we'll ask you to name the discrete design elements or big ideas you included. Be ready to make the case—the empowerment and business case for the initiative you are prototyping.

### SELF-MANAGEMENT AND LEADERSHIP ROLES

Each small group manages its own discussion, data, time and reports. Here are useful roles for self-managing this work. Divide the work as you wish.

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**Reporter:** Delivers a report to large group.



Insert tab page here

**Friday**

DEPLOYMENT

Insert tab page here

**Friday**



# Deployment & Execution

## Set in Motion Our Priorities

Instructions: Use the space below to note key themes.



## Building the Case for Change Action Plans

Refer back to your refined prototype from yesterday. Assume you are making a business case for the board of directors to consider. Using the questions below as the minimum requirements for your proposal, prepare a PowerPoint presentation to deliver your business case. Please expand on this as appropriate for your topic area - the more complete, the better.

1. What was the "How might we" question used during your brainstorming session?
2. List the names of the project team
3. Name the initiative
4. Describe the initiative
5. What are the internal benefits of this initiative? What are the external benefits? How will it improve efficiency, increase effectiveness and drive execution for the Dealer Tire selling organization?
6. What are the steps required to execute this initiative?
7. What role are you committing to in order to make this initiative successful?
8. How do we ensure flawless execution across the entire organization?
9. How are we going to measure success?
10. What is the action plan to execute this initiative? What can we do tomorrow? What can we do in the short-term, medium-term and long-term?



# Building the Business Case

## Action Plans



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## David Cooperrider, PhD

Fairmount Minerals Professor  
Weatherhead School of Management  
Case Western Reserve University



David L. Cooperrider is the Fairmount Minerals Professor of Entrepreneurship at the Weatherhead School of Management, Case Western Reserve University. Professor Cooperrider is past President of the National Academy of Management's OD Division and has lectured and taught at Harvard, Stanford, University of Chicago, and Katholieke University in Belgium, MIT, University of Michigan, Cambridge and the Drucker School of Management. David is Faculty Chair of the Fowler Center for Sustainable Value.

David has served as an advisor to senior executives in business and societal leadership roles, including projects with five Presidents and Nobel Laureates. David's ideas have supported the success of a wide variety of organizations including the Boeing Corporation, Fairmount Minerals, Green Mountain Coffee Roasters, PWC, Parker Hannifin, Sherwin Williams, Dealer Tire, Wal-Mart as well as American Red Cross, American Hospital Association, Cleveland Clinic, and World Vision. Most of the work has been inspired by the Appreciative Inquiry (AI) methodology for which Professor Cooperrider is best known. His founding theoretical work in this area has created a positive revolution in the field of change; it is helping institutions all over the world discover the power of the strength-based approaches to multi-stakeholder innovation and sustainable design. Admiral Clark, the CNO of the Navy, for example brought AI into the Navy for a multiyear project on "Bold and Enlightened Naval Leadership." In a like manner, Cooperrider was asked by the United Nations to design a historic Summit and meeting between Kofi Annan and 500 CEOs to "unite the strengths of markets with the authority of universal ideals to make globalization work for everyone."

Cooperrider's work—focusing on the question of change at the scale of the whole-- is especially unique because of its ability to enable positive change, innovation, and sustainable design in systems of large and complex scale. At the recent international conference on Appreciative Inquiry hundreds of organizations such as Hewlett-Packard, IDEO, Yahoo! and US Cellular shared the breakthrough results they are experiencing as a result of becoming "strengths-based organizations."



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David's often serves as meeting speaker and leader of large group, interactive summit events. His dynamic ideas have been published in journals such as Administrative Science Quarterly, Organization and Environment, Human Relations, Journal of Applied Behavioral Science, Management Inquiry, The OD Practitioner, and in research series such as Advances in Strategic Management. More popularly, Professor Cooperrider's work has been covered by The New York Times; Forbes; NPR; Science, Fast Company, Fortune, Christian Science Monitor, Washington Post, Biz Ed and others. He has been recipient of Best Paper of the Year Awards at the Academy of Management and was named top researcher of the year at Case Western Reserve University in 2005.

Among his highest honors, David was invited to design a series of dialogues with the world's top religious leaders, initiated by His Holiness the Dalai Lama who said, "If only the world's religious leaders could just know each other, the world will be a better place." Using AI, the group held meetings in Jerusalem and at the Carter Center with President Jimmy Carter.

David was recognized in 2000 as among "the top ten visionaries" in the field by Training Magazine and in 2004 received ASTD's highest award for "distinguished contribution to the field" of organizational learning. David also received the 2004 Porter Award for best writing from the OD Network, and was named 2007 Faculty Pioneer for his impact in the field of sustainability by the Aspen Institute.

In 2010 David was awarded the Peter F. Drucker Distinguished Fellow by the Drucker School of Management—a designation recognizing his contribution to management thought.

David has published 15 books and authored over 50 articles. Cooperrider's volumes include Handbook of Transformative Cooperation (with Sandy Piderit and Ron Fry); a series of books and handbooks on Appreciative Inquiry including Appreciative Inquiry: A Positive Revolution in Change (with Diana Whitney); The Organization Dimensions of Global Change (with Jane Dutton); Organizational Courage and Executive Wisdom (with Suresh Srivastva). David is editor of the research book series Advances in Appreciative Inquiry (with Michel Avital) published by Emerald, which is currently going to press with its fourth volume.

David's wife Nancy is an artist. His son Daniel just graduated from University of Chicago graduate school where he studied the world's religions; Hannah is a design student at Miami University of Ohio and Matt is doing his graduate work at Yale in environmental management and business.

Key websites:

<http://appreciativeinquiry.case.edu/>

<http://worldbenefit.cwru.edu/>

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