

The Road to Value Based Innovation: Part 1

By
Russ Ward

This is the first of a two-part article on my company's journey on the road to innovation in product development. The content of this article describes the evolution of our journey, while the second explores the outcome of this effort.

Setting out on a new journey can create great excitement and expectations but often requires a significant amount of preparation for those involved. Logically, we need to decide upon the destination before our departure. We also know we need to contend with environmental issues that we will encounter along the way. To understand these issues, we need to research topics like routes, weather, accommodations, budgets, and security.

In today's healthcare environment, companies that set out on the road of product development contend with multitudes of forces from inside their business, competition, and the market. Prevailing forces can dramatically effect the products that companies develop. Some of these forces include the amount of development funds, availability of

engineering resources to develop products, and time to market pressure based on the competitive environment. Other forces include industry standards or regulations and ROI (Return on Investment).



Naturally, when we travel we usually do so within our means, expending resources based on our budget and time. In the same way, companies pursue new product development within their means to grow or sustain revenues and profits. Further, there can be an objective to maintain their reputation and equity in

**“I do not
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I find
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**Aldous
Huxley**

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a given market, therefore these companies must carefully weigh the ROI that comes from the risk associated with the development efforts. As any company travels toward the decision to invest in and develop a new product, it is imperative that they firm up the potential success of the product through research within the market. Better still, it is desirable to find innovative product concepts that the community of the target market embraces. By achieving this, the product's market share and profitability are almost ensured. However, doing this in the risk adverse healthcare industry is a well documented hurdle few companies successfully overcome (Christensen, Bohmer, & Kenagy, 2000).

Many companies today link product development to their particular corporate vision, values, objectives, and core competencies as a strategic intent of this journey. Generally these vision and value factors define the scope of the type of product development initiatives companies undertake. In this article I'd like to provide a summary of how I used CPS, the CPS-B system, and a minor portion of the CPS-B Discovery process to link product development and market research to corporate vision and the strategy of VBI (Value Based Innovation).

Datex-Ohmeda, Inc.

D-O (Datex-Ohmeda, Inc.), headquartered in Helsinki, Finland, is a leading supplier of Anesthesia and Critical Care equipment for the health care industry throughout the world. The roots of the company go back 100 years, and the company is still thriving as we enter the new millennium. Part of D-O's successful journey has been its "devotion to caring for life." D-O is committed to the development and supply of medical products based on corporate values that focus on the patient, the caregiver, the integration of products and services, the care process, and affordability. Traditionally, D-O's Anesthesia Systems has traveled a path leveraging incremental innovation and what would seem to the lay person as "minor modifications" of an existing product that is marketed as a new product.

Today D-O still maintains its values but now has embarked on a new destination in providing

technology for people who care. D-O focuses its product development on these values, and that of VBI. Any investment in product development must meet criteria that ensures the delivery of real value to the patient, customer, and to D-O. Developing innovative products that deliver tangible customer and business value, in turn ensures that the investment of valuable funds and human resources returns a positive outcome for all. This means that our journey must be deliberate and well planned to ensure we arrive at our desired destination.

Defining Travel Plans!

In order for a company to really know what makes products innovative and compelling to customers, it is imperative to intimately understand the problems confronting customers. Further, as a distinction, it is important to understand the difference between what a customer *needs* versus what a customer *wants*! Customers may be able to elicit what they perceive as *wants*, but are usually unable to articulate their unmet or unidentified *needs*. The task of finding these needs is difficult enough, but to then turn these insights into marketable products or services is perhaps the biggest hurdle. Overcoming this hurdle and "walking the talk" is a large part of recent developments in D-O and our efforts to make a dynamic contribution as a leader in global medical technology while keeping in mind our customers, "the people who care."

Developing the Vehicle

A recent mission of the D-O Madison facility, at which I am headquartered, is caring for the people and the climate within the organization. Initiated in the late 1990's, this initiative has many critical components, three of which have particular interest for this article. The first was the support of Christopher Goodrich's involvement in the Innovation University (www.thinksmart.com) by D-O. Sponsored directly by the facilities General Manager, Lori Cross, this dedicated and energetic Design Engineer was able to survey what other companies were doing to stimulate innovation and communicate this information back to the facility through an employee group known as "the sky blue sparks".

A key insight Christopher shared was that the cornerstone of innovation was the development of a climate and culture that fosters and facilitates creativity. This leads to the second component, our first contact with CPS-B, when Christopher was assigned the task of finding a way to assess and develop the climate in the facility.

Christopher examined a number of climate measures and chose the CPS-B assessment called SOQ (Situational Outlook Questionnaire) because of its theoretical, scientific grounding, and the ability of the team at CPS-B to help interpret the results and facilitate change. In June 1999 the SOQ was administered to 625 employees in the Madison facilities. Scott Isaksen then debriefed the results to the facilities' upper management team in July 1999. The results helped nail the Jell-O® to the wall by providing the management team with a clear view of the organization. This provided a base for the management team to determine where D-O needed to be and helped them develop plans to implement programs to facilitate change and creativity in the facilities.

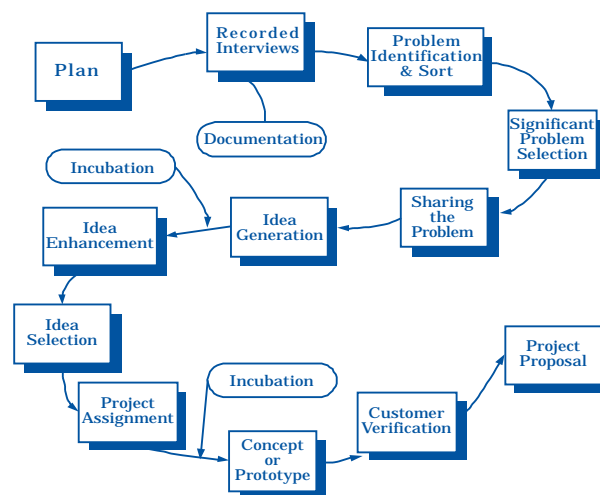
The third critical incident was Christopher's and my attendance at CPS-B's *Igniting Creative Potential Course™* in October 1999. This was a unique experience for me and I learned a great deal about CPS, facilitation, and group process. However, it was not until the last day of the course that something really clicked for me. On that day, Brian Dorval discussed CPS applications and the diverse types of work that CPS-B does well beyond training CPS. One of these stories was about the work done in the area of consumer inquiry and new product development. It was then that it all *clicked* for me.

I found the power of CPS, the CPS-B system, and CPS-B's Discovery process as the route needed to arrive at our VBI destination. By understanding customer's problems and unarticulated needs, by going to the domain

where the customers use the product, we could find VBI. These insights, along with our traditional R&D idea generation method, gave us a much wider choice of options from which to develop new products.

Understanding Customer Needs

From Brian's story, I realized that CPS can empower individuals and organizations to truly understand customer problems and needs. In turn CPS can support the development of creative and innovative solutions. Combining this insight with the corporate value of development based on VBI I planned a four-month project to understand the true needs and problems of D-O customers. With the assistance of Christopher and many other members of the D-O staff, we designed a Discovery project. CPS played an especially important role in designing the project that allowed us to navigate to our destination.



Once we outlined the project (figure to the left), we developed a structure for the customer interviews. This encompassed a repeatable script that included a questioning strategy that utilized the CPS-B system and CPS tools, notably the Ladder of Abstraction. Going into the interviews we defined the objectives

and outcomes we wanted to obtain, one of which was the ability to transfer this work to other D-O research initiatives, and BA's (business areas). The structure that we developed also included a procedure for documenting and cataloging the interviewers' notes, video tapes, and photographs we obtained. This meant these materials would be easy for individuals to use now and in the future as a source of rich reference.

We conducted 15 interviews ranging from 1 to 2 hours in length. The team reviewed these with other members of the R&D and Marketing staff. In these review sessions we developed problem statements. At the end of this review process we had 463 problem statements. We then reviewed,

grouped, and voted on them to find those that were most significant. We then listed the top 25 problems deemed to be significant, and through the application of Criteria, Evaluation Matrix, and PCA (Paired Comparison Analysis) CPS tools we were able to determine the company's priority of these problems.

To determine the accuracy of the priority of what we found, we cross-referenced our internal company results by conducting a session with clinicians from the anesthesia domain. The results were educational to say the least. We found that the criteria that we had used, compared to those that the customer group had used, were quite different and this had a significant impact on the outcome. The problems chosen by the customer group, were similar yet diverse from the set the company staff had chosen. The diversity of this result indicated that, despite our extensive experience in this market with these products over generations, we should not assume that we know what our customers are thinking and we should not second guess their opinions or needs.

Summary

Having an extensive list of problems available enabled us to reconsider which solutions to what problems would have the greatest benefit to our customers. In turn, this knowledge has facilitated our product development teams to incorporate innovative solutions aimed at the real issues of our customers. Ultimately, this knowledge and process will provide viable product sales, market share, and increased growth and profit for D-O.

As a new product project manager, I believe that understanding the customer's problem(s) is an imperative in the product creation process. I also believe that the integration of the knowledge of problems themselves into the process is vital.

As I step back and reflect on our progress thus far, our work with CPS has helped us realize that:

- Focusing our attention on the real customer problems and the environment in which they live is pivotal to

finding innovative solutions that add real value for the customer

- Addressing these consumer problems reduces the corporate risks and increases return on investment in the new product development process
- Company staff members develop greater ownership of problems and their solutions when educated on the broader set of issues truly affecting consumers

We also learned that the CPS process and tools:

- Provide a repeatable structured (yet flexible) approach to discovering and managing the complexity of large (and small) volumes of consumer data
- Provide a stimulus that releases and channels the creativity of people and groups, which can be focused on business and organizational issues
- Support the integration of cultural change across the organization by exposing people to forums where understanding, learning, generating ideas, and the support and development of the ideas of others occur without being stifled or killed by preconceptions

And so the journey began. We used CPS and Discovery to manage research and planning activities. As I have tried to demonstrate, they are core parts of the process we are using to travel on the road to "Value Based Innovation". We have selected specific problems to address and will share the exciting results we are having in a future issue of the Communiqué.

Reference

Christensen, C. M., Bohmer, R., & Kenagy, J. (2000). Will disruptive innovations cure health care? *Harvard Business Review*. pp. 102-112.

Russ Ward is R&D Program Manager for Datex-Ohmeda, Inc. in Madison, Wisconsin. Russ is a certified CPS Facilitator and is completing the CPS Trainer program. Russ is working on the integration of "Discovery", "CPS", "CPAM" and "SOQ" methodologies as part of climate change initiatives within Datex-Ohmeda. Russ can be reached at email: russ.ward@us.datex-ohmeda.com or phone: (608) 221-1551 ext. 3352. A company profile is available at <http://www.datex-ohmeda.com/>

WHAT'S HAPPENED...

Congratulations to Samantha Stead of International Masters Publishers who is the first to complete her qualifications as a CPS Foundations™ trainer in her organization. Great Job Samantha!

Congratulations go out to Priscilla Wolfe and Jackie Pittman of the Blumberg Center at Indiana State University. Priscilla completed her CPS Facilitator Development™ qualification and Jackie completed her Foundations of CPS trainer qualification. They are the latest in a comprehensive effort by the Blumberg Center to bring creativity and problem solving skills to those who help families and children with special needs.

Congratulations also go to Russ Ward of Datex-Ohmeda, who completed his CPS Facilitator certification. Russ' certification activities took place as part of his work in new product development within Datex-Ohmeda. Congratulations on a job well done mate!

CPS-B congratulates Alfred Wilson, of Camber Corporation for completing his CPS Facilitator certification. He is the first to complete the certification process as part of an initiative by the Army Materials Command to support their efforts in Continuous Change Management.

CPS-B would also like to congratulate Archie Attarain, Judi Croes, David Dudley, Dianne Duggan, Dennis Fawson, Melody Holley, Connie Short, Joe Stormer and Rod Tozzi who completed the Advanced Trainer Preparation Workshops in September (2000) and January (2001). The workshop is designed to reduce the time needed to gain the skills required to be certified by CPS-B to deliver CPS 6.0 courses and workshops.

John Gaulin, Scott Isaksen, and Brian Dorval designed and delivered the European Foundation for Management Development (efmd) corporate members' conference on innovation this past November, in London. The event was attended by 50 middle to senior executive from around Europe.

Erik J. Isaksen received his blue cord as a US Army Infantryman on January 18. Erik also graduated from One Station Unit Training at Ft. Benning on January 19. Erik will be stationed at Ft. Drum after completing his recruitment duty in the Buffalo, NY area. We wish you all the best Erik!

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Book Review

By Glenn Wilson

Torrance, E. P. (Ed.). (2000). *On the edge and keeping on the edge*. Westport, CT: Ablex Publishing. ISBN: 1-56750-499-X Amazon.com at \$24.95

“‘Come to the edge he said.’ They did not come. ‘Come to the edge he said.’ They did not come. ‘Come to the edge he said.’ They came, he pushed them, and they flew.” This poem written by one of the founders of Cubism, Guillaume Appolinaire (1888-1918), captures the essence of E. Paul Torrance’s most recent book. This edited collection is representative of papers presented at the University of Georgia’s Torrance Center for Creative Studies by some of the best creativity educators in the world. Each author has provided the “how” of “keeping on the edge” along with updates on “how” and “where” they personally stay on the edge.

An interweaving theme of “creative education,” with tributes to Torrance and how he has affected the authors’ direction and inquiry into creativity are reported. Although **all** the articles are excellent, and provide a firm foundation to creative education, I do have my “equal” favorites in the bunch.

Torrance’s article on “Creative Teaching,” reminds us of the importance and

value global and interdisciplinary “networking” and “creative relationship” bring to one’s productive life. Don Treffinger’s “10 issues in teaching thinking” are such important guidelines from a professional teaching perspective that a copy of them should be hanging in every teacher’s office for *daily* review (this article alone is worth the cost of the book!). Garnet Millar’s three stage information model, his explanation of questioning techniques and skills, and insights into the measurement of these skills is wonderful! One question I have for Garnet is, “Where can we buy the books listed in your article?” Joseph Hester’s article on research in school programs provides the reader with some excellent charts and models that summarize the results in K-12 programs.

As I reflect on this book, I find that it did challenge me to stretch my teaching and training paradigms. My reflections also bring me back to my hope that someday a widely accepted definition of critical and creative thinking skills is agreed upon. Until that time comes, I would like to suggest, that once you read this book, you share it with others who help individuals (young and old) to think in productive ways. Enjoy!

Clarifying our CPS Vocabulary

Scott Isaksen, Don Treffinger, and
K. Brian Dorval

Each time the three of us work together and synthesize our unique experiences with research findings, we benefit greatly from taking the time to examine our use of language in writing about CPS (Creative Problem Solving). This was particularly the case in writing our most recent book, *Creative Approaches to Problem Solving (CAPS - Isaksen, Dorval, Treffinger, 2000)* in which we present our current approach to CPS. We call it CPS 6.0; using a computer software analogy, the book describes version 6.0 of the CPS system. As three authors collaborating on the same book, we re-learned the importance of being precise, concise, and consistent in our use of language – particularly since we were seldom in the same place at the same time when we were writing.

In this article, we will outline a few of the key words that we found challenging and share the results of our dialogue about their meaning and definition. We hope this will help you to be productive in your own dialogue about CPS and your use of CPS.

Creativity and Innovation

Many people have attempted to define creativity, with no universally accepted result (Aleinikov, Kackmeister, & Koenig, 2000; Treffinger, 1995). We have offered a few definitions of our own, and we, like many others, usually end up with something that reflects the complexity and multi-dimensionality of the concept. Frequently, these efforts result in an overview of the conceptions of creativity that synthesize the characteristics of creative people, the operations of the creative process, the nature of the context that supports creativity, and the dimensions of creative outcomes or products.

One practical and useful definition developed by our colleagues at the Center for Creative Leadership holds that creativity is *novel associations that are useful*. This compressed conflict reflects the tension inherent in the concept of creativity, but also makes sense to people from varying walks of life and in many organizational settings.

When we use the word creativity to mean novelty that is useful, we assert that creativity includes the generation of alternatives and the development of something valuable from them. Those who limit the word creativity to only mean generating ideas need to use other words, like innovation, in order to include the concept of transforming ideas into something valuable or useful.

Innovation has widespread popularity, and is easily accepted among professionals within organizations. Typically, *innovation is used to emphasize the commercialization of new ideas*. Those who prefer to use the word innovation instead of creativity usually focus on implementing ideas in the form of concrete products and services. This word choice may occur because they see creativity as more concerned with freedom, imagination, and the process of generating novel ideas. On the surface, this may suffice, but looking deeper reveals a few challenges.

CREATIVITY VERSUS INNOVATION

Imagination	○	Implementation
Process	○	Product
Generating	○	Developing
Novelty	○	Usefulness
Soft	○	Hard

When people use the word *innovation*, they run the risk of over-emphasizing creating results, outcomes, or products. This creates at least two important practical implications. First, over-emphasizing product may lead to forgetting about other important factors necessary for innovation (i.e., the people, the process, or the place). In fact, most organizational change efforts fail because of a lack of attention on the people, the processes and operations to be followed, or managing the climate in which they happen (Isaksen, Dorval, & Treffinger, 2000).

Second, over-emphasizing product may also limit people's thinking and behavior to the term useful in the definition, *novelty that is useful*. It may imply that creativity is nothing more than coming up with novelty or generating ideas. This can reinforce some of the more non-productive creativity mythology (i.e., creativity is only about having fun and less concerned with implementation, contribution, or solving real problems).

To help alleviate some of the unnecessary tension in the language, we developed the following definitions: *Creativity is making and communicating meaningful new connections*. Our use of the word *creativity* includes an emphasis on product, along with people, process, and place. *Innovation is the product or result-focused perspective on creativity that emphasizes the commercialization of new ideas*. We see innovation as a subset of creativity.

Creativity Methods, Models, Processes, and Frameworks

When we first started working in the creativity field, everyone was using the words *method*, *model*, and *process* interchangeably. Instead, we propose differentiating them in order to be more clear and concise about what is meant. We also believe it is important to distinguish these three from the word *framework*.

We use the word *process* to refer to a natural phenomenon marked by gradual change that leads toward a particular result. *It is usually defined as a series of actions or operations leading to an end*. A process implies moving from one place to the next using specific activities.

A method is a specific manner or systematic way of doing something. The word *method* implies something that is regular, orderly, and logical. Methods usually contain processes, organized sets of tools, and procedures for dealing with tasks.

We see innovation as a subset of creativity.

A model is a representation designed to illustrate something that is complex, abstract, very large and extensive, or not directly observable. Models help us view the form or structure of what they represent. Common kinds of models include graphical, mathematical, or physical representations. Our presentation of the components and stages of CPS in graphic form, or as a structured set of terms, would be examples of models that illustrate the change method we call CPS.

A framework is a basic structure holding the parts of something together. It is a structure, like a skeleton or rack for hanging coats. The CPS framework includes components, stages, and tools and is used to organize and arrange such things as language, tools, and procedures in ways that they can be used in any order or sequence. The pictures people see of the CPS framework in books or during training courses are visual representations or models of a complete creative process. (The model illustrates the elements of the framework that combine to make the CPS method work.)

We believe that having a more precise understanding of *method*, *model*, *process*, and *framework*, will help you talk more productively with others about your approach to the creative process, and avoid unnecessary confusion - particularly when talking about different methods, models, and frameworks of the creative process.

Technique, Tool, and Strategy

One of the most common sources of confusion in the creativity field is the use of language around tools and techniques – us included. Often lumped into this group are also words like methods and strategies. We addressed the definition of method above. Let's turn our attention to pulling apart technique, tool, and strategy.

The confusion about technique versus tool became particularly clear before updating CAPS when we were conducting a literature review in preparation for writing a book on creativity tools (Isaksen, Dorval, Treffinger, 1998). We had difficulty understanding what authors meant when they used terms like technique or tool. Some techniques seemed to describe the actual device (i.e., the form, handout, card, etc.) while others described how the devices were used. Some techniques seemed to be slight modifications of tools with new titles. Before we could go further, we found it necessary to distinguish between the device itself, and how it is used.

We now see *tool* as a specific device or implement that aids in accomplishing an operation or task. Literally, a tool is an instrument or implement used in performing an operation. Tools are usually applied in the practice of a vocation or profession and are designed to serve a specific purpose or function. Problem solvers also have many different tools at their disposal. CPS includes a suite of thinking tools - some designed to help people generate alternatives and others to help them screen, select, and develop options.

Technique refers to the way someone uses a tool. It is the mode or manner of implementing a tool. Technique refers more to the characteristic fashion, style, or way someone approaches or "customizes" the use of a tool to accomplish a task. Many tools can be modified for use under varied circumstances such as the personal preferences of the users, the particular needs to be met, the

conditions within the situation, and the nature of the tool itself. For example, we often use an excursion-like tool called Forced Fitting – using objects to stimulate new thinking. Some groups respond by taking a short walk outside the meeting room to find their own object, rather than all responding to the same object.

A strategy is different from a technique or a tool. *A strategy is the overall plan for using a tool.* This includes how different techniques will be used to meet the demands of the given task. A strategy may contain a single or multiple techniques to be used for getting the best results from a tool.

Distinguishing among these terms can help you clarify what you mean. If you are considering different devices to aid your

thinking, you mean tool. If you are thinking about how to modify a tool to make it work better in your particular situation, you are talking about technique. If you are considering a plan to get the best use from your tool(s) and techniques, you're thinking about strategy.

CPS includes a suite of thinking tools - some designed to help people generate alternatives and others to help them screen, select, and develop options.

Brainstorming

By far, Brainstorming is the most overused and least understood word in our vocabulary. The popular meaning of the word provided by most dictionaries is as a noun – Brainstorm is a sudden fit of inspiration (or insanity, as some think of it!), the occurrence of a surprisingly bright idea, or any harebrained idea. We have heard the word Brainstorming used to mean a discussion with others, time for personal reflection, an argument among group members, a chance to sell a particular idea, or even a formal presentation. These definitions and perspectives are very different than what the originator of Brainstorming said about the tool.

Alex Osborn is often credited for being the first to introduce the word Brainstorm and Brainstorming

for use in the field of advertising, Osborn introduced *Brainstorming as a thinking tool to help people working in groups better apply their imaginations when generating many, varied, and unusual ideas to solve a specific problem*. As the first participants of Brainstorming sessions described it, brainstorming “was using the brain to storm a creative problem – and to do so in commando fashion, with each stormer audaciously attacking the same objective” (Osborn, 1953, p.297). Osborn introduced Brainstorming in response to the many unproductive meetings he experienced during which people were judging ideas while they were attempting to generate them.

Brainstorming, as Osborn described it, includes four specific guidelines (see figure above) to help create the appropriate conditions, specific procedures to prepare the problem under consideration, and suggestions to prepare the group of participants before, during, and after its use. However, we recognize that the four guidelines Osborn introduced are equally important and useful whenever groups need to generate alternatives. As a result, we refer to them as guidelines for generating options. (Options might be ideas, but can also include opportunity statements, problem statements, data of all kinds, criteria, or actions for implementation.)

Brainstorming has been the subject of many variations in technique. Some facilitators have participants take turns following a particular sequence in order to even out or distribute participation. Others ask all participants to write down their ideas on little blue slips or Post-it® notes to get everyone’s ideas considered and to encourage people to remember their ideas. When we ask groups if they are familiar with

Brainstorming, most people say they are, and that they use Brainstorming frequently. When asked to state the four guidelines, however, they often have difficulty identifying them.

Conclusion

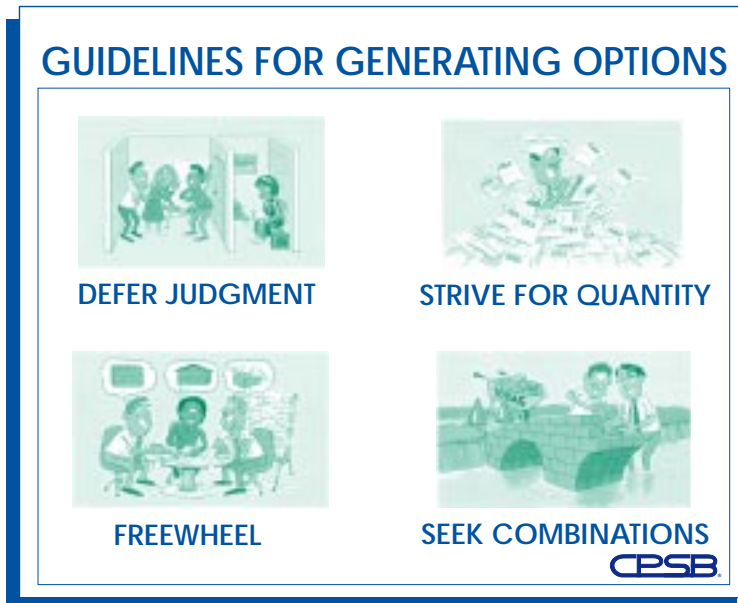
We hope that our experiences in writing about CPS, and the resulting dialogue about clarity of thought and language, will help you to keep your CPS language aimed at “possibility thinking”. The type of thinking where you’re generating or focusing in on a compelling image of the future, key problems to address in unlocking a challenging situation, or identifying specific steps to take in transforming your solutions into reality. We also hope that being precise, concise, and consistent in your use of CPS language will enhance your efforts to understand

and apply CPS effectively. For your information, we have identified some additional readings and references below that might help explain further the updated CPS language.

References and Further Reading

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Scott Isaksen is the President of the Creative Problem Solving Group – Buffalo and Senior Fellow of its Creativity Research Unit. Scott has published over 120 articles or chapters in a variety of academic journals, popular publications, and books. Since 1984, Scott has conducted more than 900 programs, courses, and workshops and worked with over 200 organizations and groups in more than twenty-five states and fifteen different countries.

Donald Treffinger is the President of the Center for Creative Learning, Inc. Don has published over 250 articles or chapters in a variety of academic journals, popular publications, books, and monographs. He also serves as Editor-on-Chief of Parenting for High Potential magazine. Since 1968, Don has conducted workshops and programs in forty-nine states, seven Canadian provinces, and seven countries outside North America.

Brian Dorval is the Director of Programs for CPS-B. As part of his role, he manages CPS-B's client relationships, and designs courses and workshops. Contact Brian for further information about CPS-B's work in product and service development, establishing the climate for creativity and change, and developing inclusive leadership.

A Summary of Definitions

Creativity

Making and communicating meaningful new connections.

Innovation

The product or result-focused perspective on creativity that emphasizes the commercialization of new ideas.

Process

A series of actions or operations leading to an end.

Method

A specific manner or systematic way of doing something.

Model

A representation designed to illustrate something that is complex, abstract, very large and extensive, or not directly observable.

Framework

A basic structure holding the parts of something together.

Tool

A specific device or implement that aids in accomplishing an operation or task.

Technique

The way someone uses a tool. It is the mode or manner of implementing a tool.

Strategy

The overall plan for using a tool.

WHAT'S COMING UP...

The Occupational Research Centre has announced the schedule of KAI courses and workshops for 2001. If you are interested in becoming certified in the KAI or advancing your skills you might want to consider one of the following:

Date	Location	Event Name
Feb. 23-24, 2001	Indiana State University	Advanced Workshop
Feb. 25- Mar. 1, 2001	Indiana State University	Certification Course
Mar. 4-8, 2001	USA (t.b.a.)	Certification Course
May 3-4, 2001	Indiana State University	Advanced Workshop
May 6-10, 2001	Indiana State University	Certification Course
May 11-12, 2001	Indiana State University	Advanced Workshop
May 14-18, 2001	USA (t.b.a.)	Certification Course
June 24-28, 2001	UK (t.b.a.)	Certification Course
Oct 4-5, 2001	Washington Area	Advanced Workshop
Oct 7-11, 2001	Washington Area	Certification Course
Oct 12-13, 2001	Washington Area	Advanced Workshop
Oct 14-19, 2001	USA (t.b.a.)	Certification Course
Nov. 4-8, 2001	UK (t.b.a.)	Certification Course

Contacts for the courses are:

UK-Shirley Clark, tel: 1 442 871200, email m.j.kirton@herts.ac.uk

USA-Blumberg Center, email aafosmo@amber.indstate.edu

The Creative Education Foundation (CEF) has announced the dates for CPSI 2001 (Creative Problem Solving Institute®). The dates are June 16 - 21 and it will be held at the Adams Mark Hotel, Buffalo, New York, USA. For more information please contact CEF at 1-800 447 2774 or go to the web site www.cef.cpsi.org/CPSI.HTM.

The Greenleaf Center's annual international conference on Servant-Leadership will be held on June 7-9, 2001 in Indianapolis, IN. For more information please contact The Robert K. Greenleaf Center for Servant-Leadership, 921 East 86th Street, Suite 200, Indianapolis, IN 46240 U.S.A.: Phone (317) 259-1241; Fax (317) 259-0560; <http://www.greenleaf.org/>.

Indiana State University is hosting a *Technology of Participation: Group Facilitation Methods* course in Terre Haute, Indiana on March 15-16, 2001. Hosted by the Blumberg Center this course is designed to give you the opportunity to increase your facilitation skills by learning a group of methods that compliment CPS. For further information, please contact Laura Orth at (812) 237-2830; email soeorth@befac.indstate.edu.

WHAT'S COMING UP...

The Alden B. Dow Creativity Center Press is publishing a book of 101 creativity definitions to help support the mission of the Center. The book, *Creating Creativity: 101 Definitions* is available from the Center at Northwood University, 4000 Whiting Drive, Midland, MI 48640: Phone (517) 837-4478; email creativity@northwood.edu.

The American Institute of Medical Education is presenting a conference titled *Creativity and Madness: Psychological Studies of Art and Artists in Sante Fe, New Mexico* on July 31 to Aug. 4, 2001. For further information, please contact the American Institute of Medical Education, Sherman Oaks, California: Phone (800) 348-8441; email barryp15@aol.com.

The Alden B. Dow Creativity Center is presenting the 12th International Conference on Creativity in Colleges and Universities in Midland Michigan on July 12-15, 2001. The title of this year's conference is *The Kaleidoscope of Creativity: Exploring the Many Colors of Change*. For further information, please contact the Center at: Phone (517) 837-4478; email creativity@northwood.edu.

Indiana State University is hosting the Foundations of CPS course on Nov. 15 - 16, 2001. The Facilitator Development course is scheduled to be held on June 10 - 14, 2001. All these courses are licensed through CPS-B. For further information, please contact Priscilla Wolfe at soewolf@befac.indstate.edu.

If you have information on an upcoming event, conference, or course that you think would be of interest to your fellow readers, please submit it to: Upcoming Events, Attn: Communiqué Editor, 1325 North Forest Road, Suite 340, Williamsville, NY 14221. The email address is cpsb@cpsb.com.

CPS Continues to Make Headlines!

By K. Brian Dorval and Keith Kaminski

The Blumberg Center for Interdisciplinary Special Education provides an excellent model for how organizations can develop and maintain a network of CPS practitioners. As part of its ongoing commitment to its network, the Blumberg Center conducted a research project on the impact people are having using CPS in Indiana. For further information about Blumberg Center activities, see the "What's Coming Up..." section of this Communiqué.

As a thank you for participating in the research, a one-day workshop was provided to update people on changes to the CPS framework and language, otherwise known as CPS 6.0. During the workshop, participants were asked to share stories about their use of CPS and its impact. The activity was designed to help the group "state the business case" for learning and using CPS. It also helped people better understand the impact others were having with CPS.

To make the story-telling process more interesting and valuable, we asked the participants to listen to each story and assign it a suitable headline. This headline would be the title of a newspaper article if they were writing one on the impact of CPS.

We thought you might be interested in seeing some of the headlines they created. There are multiple headlines for each story. We share all of them with you because each has a different perspective on the actual impact the storyteller had with CPS.

"CPS: An international language for Special Olympics athletes"

"Cultures united by CPS"

"CPS empowers the handicapped"

"Special Olympics athletes on fast track with CPS"

"CPS wins gold at Special Olympics"

"Parents use CPS to generate ideas in Spanish and English"

"CPS as a common tongue: CPS is bilingual"

"CPS functions as second language"

"CPS points way for deaf-blind"

"CPS saves hours of meeting time"

"ALUo helps revamp organizational processes"

"CPS facilitator receives praise for magic in meeting"

"CPS helps open people up to share important issues. CPS makes the pieces fit as a mosaic"

"CPS becomes second nature in managing meetings"

"CPS provides hidden benefits in everyday life, productivity, and problem solving"

"CPS provides technology for people with disabilities"

"CPS marries PATH: Positive Alternatives for Tomorrow with Hope"

"CPS helps people come together and set aside feuding"

"CPS launches GATE technology grant"

"CPS opens GATE"

"CPS gives power to workforce"

"CPS helps people get through GATE"

"CPS helps people get thoughts together in initiating major grant"

"CPS gives voice to large groups of people"

"CPS helps people move from disorganization to organization"

"CPS brings people's voices to the table"

"CPS makes excitement spread"

If you would like to learn more about the Creative Problem Solving system used by these facilitators, see pages 16-18 for information about CPS-B's courses and workshops.

Article and Tip Submission Request

Have you had an exciting or beneficial experience in creativity that you would like to share? Do you know of an upcoming event which could be of interest to fellow Communiqué readers? Do you have some key insights, or tips into some aspect of creativity, leadership, facilitation, or innovation that you would like to pass along?

If you answered yes to any of the above questions, we are looking for you! If you would like to submit an article or short write up; information on an upcoming event; or share a couple of tips, please contact Ken or Marves by Email at cpsb@cpsb.com, by fax at (716) 689-6441, or by phone at (716) 689-2176. We would be happy to send you a copy of the Communiqué submission guidelines. We look forward to hearing from you.

Igniting Creative Potential™ –

This five-day course combines our Foundations of CPS™ and CPS Facilitator Development™ with change – including easy-to-use tools, a flexible framework, and powerful language. You will practice solving problems and receive coaching from our world-class team of trainers. You leave ready to ignite the creative process.

"We were able to take our customer retention from 3% to 68% in four months using the facilitative leadership skills provided by CPS-B."

**Samantha Stead, Editorial Director
International Masters Publishers, Inc.**

Foundations of CPS™ - A System for Change

Do YOU want to...

- Become significantly more productive at home or work?
- Know how the creative process works?
- Improve your approach to decision making and problem solving?
- Learn why you respond to change the way you do?
- Expand your toolbox?

This intensive two-day workshop provides you a comprehensive look into the CPS system of tools, framework, and language. It explains the process for change, your personal approach to managing it, and reasons why people may APPEAR to resist it.

Day One

- Exploring Your Personal Creative Process
- Introduction to CPS
- Styles of Creativity and Change
- The Heartbeat of CPS
- Understanding the Challenge

Day Two

- Tools for Generating Ideas
- Managing Reactions to Novelty
- Preparing for Action
- Tools for Focusing Ideas

Walk away with skills to:

- Use 15 tools for creative thinking & problem solving.
- Shift from impossibility thinking to possibility thinking.
- Construct opportunities out of your biggest challenges and opportunities to pursue.
- Generate new & targeted ideas for your problems.
- Develop clarity about your priorities & evaluate the potential of your solutions.
- Build buy-in & acceptance for your ideas.

"CPS-B's process turns the art of creativity into the science of creativity."

**Al Wilson, Systems Analyst
Camber Corporation**

*"I looked at
practical experience
I saw"*

Focusing the Power to Change

workshops. As a result of completing the Igniting Creative Potential™ course, you learn a system for getting the most from the CPS system. You will actually facilitate groups in creatively solving real creative potential within your colleagues, project teams, and other workgroups within your organization.

"Last week was a phenomenal experience. One of the best learning experiences of my life. In a discussion during our return travels, we agreed that this learning experience far exceeded our expectations (which were very high). Please extend our thanks to all those involved in making last week possible!"

**Christopher Goodrich, Industrial Designer
Datex-Ohmeda**

CPS Facilitator Development™ - Releasing Group Power

Do YOU want to...

- Double the productivity of your project team?
- Cut your meeting time in half while doubling productivity?
- Reduce the time and cost of your new product and service development while increasing quality?
- Coordinate your use of different change methods?

This intensive three-day workshop prepares you for using the CPS system to ignite the creative potential of individuals, groups, and teams. It builds on the prerequisite Foundations of CPS™ workshop. You receive feedback and coaching while learning and practicing seven core facilitation skills.

Walk away with skills to:

- Scope the magnitude of change needed.
- Design a targeted and flexible process for making change happen successfully.
- Plan sessions that accomplish extraordinary results.
- Use a powerful framework and tools to increase the speed of decision making and problem solving.
- More effectively manage group dynamics.

Day Three

- Qualities of Effective Facilitators
- Understanding Clientship
- Managing Resource Groups
- CPS Teachback Activity
- Planning Your Approach to CPS

Day Four

- Practice CPS Facilitation
- Coaching & Feedback Sessions

Day Five

- Practice CPS Facilitation
- Coaching & Feedback Sessions
- Planning to Use Your Skills

...d around for a creativity group and found that some had experience and others had theories. CPS-B was the best group that ... that was able to effectively weave the two together."

**Bruce Esposito, Senior Faculty Member
Executive Consulting Group IBM**

"Thanks again for an amazing week. In all of the jillions of seminars and classes I've attended throughout my career, nobody comes close to you for effectiveness, thoroughness, professionalism, and of course, entertainment!"

**Michelle Taufman
Doyle Research Associates**

Yes! I am serious about enhancing my creativity and would like to attend *Igniting Creative Potential™* or one of the workshops.

To Register

Call the CPS-B office, 9:30 a.m. to 5:00 p.m. Eastern Standard Time, Monday through Friday, at (716) 689-2176, or fax the completed form below to (716) 689-6441. Registrations will also be taken via Email at cpsb@cpsb.com.

The course is held at the Holiday Inn at the Buffalo Niagara International Airport. The hotel is just 5 minutes from the Airport. Please make your own reservations by calling (716) 634-6969. The address of the hotel is 4600 Genessee Street, Cheektowaga, NY 14225. Mention Creative Problem Solving Group to get our special rate.

Name: _____

Title: _____ Phone: _____

Organization: _____

Address: _____

City, State, Zip: _____ Country: _____

E-mail: _____ Fax: _____

I would like to reserve a space on the following course (please check one or more):

Igniting Creative Potential \$1,850.00

- April 23 - 27, 2001
- October 22 - 26, 2001

Foundations of CPS™ \$950.00

- April 23 - 24, 2001
- October 22 - 23, 2001

CPS Facilitator Development™ \$1,250.00

- April 25 - 27, 2001
- October 24 - 26, 2001

Payment Policies

Fees are due no later than 15 days before the course. Registration is confirmed upon receipt of payment. Fees are fully refundable if cancellation is made at least 7 days prior to the course. Thereafter, 75% is refundable. Transfers and substitutions may be made up to 5 days prior to the course.

Method of Payment

- Registration fee enclosed Invoice my organization Invoice me
- Charge my: Visa MasterCard

Card Number: _____ Exp. Date: _____

Signature: _____

Enrollment is limited. Register today! Questions? Call (716) 689-2176. Send the completed form along with your payment to: CPS-B; 1325 N. Forest Road; Suite 340; Williamsville, NY 14221

Creativity Research Unit

The Creativity Research Unit (CRU) is the component of CPS-B which creates new knowledge, information and insights by conducting investigations and studies of creativity and change with individuals, groups, and organizations. Our studies are done on both a national and international level. The function of CRU is to maintain CPS-B's product leadership in it's existing services, fuel the development of new services, and provide new knowledge to the academic study of creativity and change. We thought the following information involving the CRU would be of interest to you.

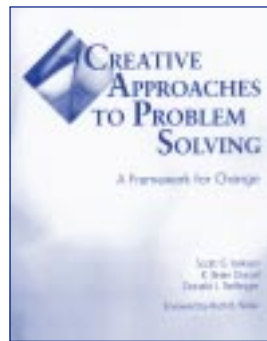
- The Norwegian School of Management approved the formation of an International Doctoral Program in Innovation and Entrepreneurship. For information, contact:
Dr. Geir Kaufmann, Professor,
Norwegian School of Management &
Fellow, Creativity Research Unit of the
Creative Problem Solving Group - Buffalo
e-mail: geir.kaufmann@bi.no or
geir.kaufmann@psych.uib.no
- Scott and Brian are tentatively slated to provide a follow-up presentation at the Greenleaf Center's annual international conference on Servant-Leadership to be held on June 7-9, 2001 in Indianapolis, IN.
- Ken McCluskey and his associates have completed a CRU Monograph summarizing their collected work with students and young adults in Manitoba, Canada. The results show strong evidence that educators using CPS can make a difference. Copies of this monograph, *Creative Problem Solving in the Trenches: Interventions with At-Risk Populations*, are available from CPS-B.
- Mark Runco has announced that his latest book *Critical Creative Processes* (Hampton Press) will be published this Spring. This edited collection will include works by Dean Simonton, Hans Eysenck, and Morris Stein. The book focuses on recent theory and research that addresses the role critical thinking and processes play in personal and interpersonal creativity.
- In October, Scott presented an invited paper for the *Conference on the Future of Creativity: Need for Research Information about Creativity and Training* hosted by the Torrance Center for Creative Studies, University of Georgia, Athens. Other professionals with interests in creative education and research also presented papers and a collected edition is planned for the future.
- Scott and Ken have completed work on two papers focused on the Situational Outlook Questionnaire. The works have been accepted and should be published this Spring. The works are:
Isaksen, S. G., Lauer, K. J., & Winsemius, A. C. (in press). Convergent validity of the situational outlook questionnaire: Discriminating levels of perceived support for creativity. *North American Journal of Psychology*.
Isaksen, S. G., & Lauer, K. J., Ekvall, G., & Britz, A. (in press). Perceptions of the best and worst climates for creativity: Preliminary validation evidence for the situational outlook questionnaire. *Creativity Research Journal*.
- M. K. Raina recently published the results of his research using 'cases study method' on the life work of E. Paul Torrance. The book is titled *The Creative Passion: E. Paul Torrance's Voyages of Discovering Creativity* (Ablex Publishing).

BEST SELLERS

Creative Approaches to Problem Solving: A Framework for Change

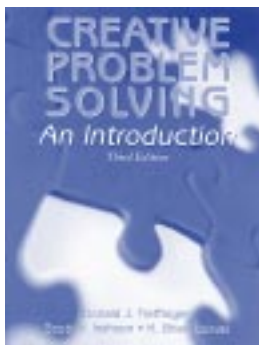
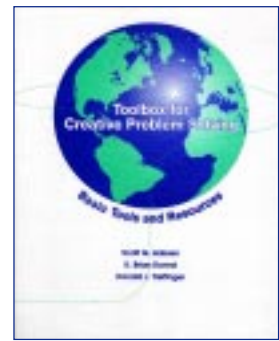
NEW

Looking for a creative way to approach problem solving and decision making? One that will unleash your personal creativity yet provide enough structure that it can be applied to almost any situation? *Creative Approaches to Problem Solving* is the book you need. The new edition has been completely revised and updated.



Toolbox for Creative Problem Solving

Looking for a practical field guide that helps you get the most out of using powerful thinking tools? This resource is your "pre-flight checklist" for 17 of the most commonly used CPS tools. Each tool comes with its own booklet that provides step-by-step instructions, tips, and worksheets. Additionally, you'll receive five information-packed chapters that help you understand creativity at a systems level, utilize productive thinking guidelines, and choose tools for the most appropriate situation among many others.



Creative Problem Solving: An Introduction

NEW

Completely revised and updated, this book provides you with a concise overview that is consistent with the comprehensive text, *Creative Approaches to Problem Solving: A Framework for Change*.

VIR Photograph Gallery 1.0

NEW

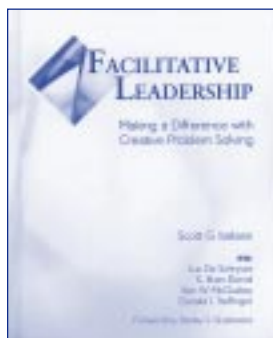


VIR (Visually Identifying Relationships) is one of the many powerful tools contained within the *Toolbox for Creative Problem Solving*. It is a tool that uses photographs to help people incubate or reflect on a topic in order to create entirely different perspectives on the task being addressed. Its purpose is to provide facilitators with a wide variety of high-quality, royalty free images that can be used without concern of copyright infringement or potential litigation. It contains 30 electronic images within a 20Mb PowerPoint Presentation that comes on a Zip disk (for Mac or PC).

Guidelines Posters

NEW

Enhance the productivity of your CPS applications by displaying this two poster set. Each 22x17 inch, full color poster contains words and graphics that reinforce the meaning of the guidelines.



Facilitative Leadership: Making a Difference with Creative Problem Solving

Facilitative leadership is the kind of leadership that focuses on service: helping, developing, and strengthening others in ways that inspire motivation and commitment.

Filled with practical recommendations and resources, this book pulls together everything we know about facilitative leadership and what it takes to unleash the creative talent of others. Everyone who needs to lead and enable others to make a real difference in organizations will find this book invaluable.



Creativity Around the World

Are you a looking for an attractive way to remind yourself and visitors to your office of the importance of creativity? "The Creativity as a Fundamental Human Resource" poster is a full color, 21" by 26" poster which conveys creativity as part of our world. The word creativity is written in thirteen different languages and adorns a likeness of the globe on a black background. The poster is completed by a caption at the bottom: "The Fundamental Human Resource."

PRODUCT ORDER FORM

	Price	QTY	TOTAL
Toolbox for Creative Problem Solving	\$79.95		
NEW Creative Problem Solving: An Introduction	\$19.95		
Facilitative Leadership Book	\$69.95		
NEW Creative Approaches to Problem Solving 2nd edition	\$69.95		
Facilitative Leadership/Creative Approaches to Problem Solving Bundle (Save \$19.90)	\$120.00		
NEW Guidelines Posters	\$9.95		
NEW VIR Photograph Gallery 1.0	\$59.95		
Creativity Poster	\$4.95		

Shipping & Handling
\$4.00 Minimum shipping charge on all orders
U.S. & Canadian Orders – Add 15%
International Orders – Add 30%

Subtotal	
Shipping & Handling	
NYS Residents add 8%	
Total	

All orders shipped via U.S. Postal Service. For faster delivery, please call us at (716) 689-2176.

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Organization: _____

Address: _____

City, State, Zip: _____ Country: _____

E-mail: _____ Fax: _____

Method of Payment

- Check enclosed (make payable to CPS-B) Charge my: Visa MasterCard

Card Number: _____ Exp. Date: _____

Signature: _____

Send or fax the completed form along with your payment to: CPS-B; 1325 N. Forest Road; Suite 340; Williamsville, NY 14221 Phone: (716) 689-2176 Fax: (716) 689-6441



Special Book Review:

Creative Approaches to Problem Solving

Reviewed By Glenn Wilson

Isaksen, S. G., Dorval, K. B., & Treffinger, D. J. (2000). *Creative approaches to problem solving: A framework for change*. Dubuque, IA: Kendall-Hunt. (ISBN: 0-7872-7145-4 \$69.95)

OK, I was wrong, very wrong! When I first heard that a new edition of *Creative Approaches to Problem Solving (CAPS)* was in the works, I anticipated that the changes would be contextually minimal with a new cover. Did I say how wrong I was? Well folks, it's been seven years since the first edition of CAPS, and I am elated to report that Isaksen, Dorval, and Treffinger have again struck platinum by presenting their applied, action learnings into a book - a book that you can use to help manage change in your personal and professional lives. I like to think it was written for all us change agents out there trying to make a difference; as I am sure it will put us all in a better position to contract for success!

This book presents the latest model of CPS - 6.0 (Creative Problem Solving - Version 6.0). In this model you will find that the language is more natural and user friendly-the kind of language you hear being used in the workplace. You will also find in CPS - 6.0 a fourth component. This component is designed to help you decide if CPS is an appropriate method and if so, how to approach the task and manage the process. Another valuable addition to this new book is that real life case studies are presented in each chapter. These stories help provide insights into how CPS can be used effectively within organizations for a variety of purposes.

I have mentioned a few of the major changes in this book and yet there are many more! Below is a brief synopsis of each chapter.

Chapter 1: Creative Approaches to Problem Solving. In this chapter the authors provide the foundations of creativity and problem solving by providing definitions of some basic terms and concepts. Although

there are not many changes from the previous work in this chapter, the authors have now stressed the importance of taking a systemic approach when helping people manage change. This "productive approach" weaves itself throughout the rest of the book and I suggest you reflect on how each chapter interrelates with this big picture view.

Chapter 2: Creative Problem Solving. Ever conduct a session that didn't end up the way you had hoped or planned? Have you ever used CPS when it wasn't appropriate? In this chapter, a refined model of CPS is presented. This model is fundamentally different in language and activity from the previous model. It includes the four components of Understanding the Challenge, Generating Ideas, Preparing for Action, and the most important component of all, Planning Your Approach. ***If you're not familiar with this component, it is worth the cost of the book alone!***

Chapters 3: Understanding the Challenge, 4: Generating Ideas, and 5: Preparing for Action. Each chapter begins with an introduction using an example from the authors' experiences along with an input-process-outputs model for each of the components. Thirteen additional tools are presented using examples of how each could be used in a real world situation. For further elaboration on using the tools, tips, and worksheets see Isaksen, S. G., Dorval, K. B., & Treffinger, D. J. (1998). *Toolbox for Creative Problem Solving*. Williamsville, NY: CPS-B.

Chapter 6: Planning Your Approach to CPS. The authors present a component that helps its user answer two basic questions, "Is CPS an appropriate method for the task at hand?" and if it is, "How can I manage the process for maximum effectiveness?" Although these two questions are fundamental for use with any method or process, this new component (Planning Your Approach) helps to provide an explicit structure for which to appraise tasks and plan and design process for your activities.

Chapter 7: People as Creative Problem Solvers. In this chapter the authors address issues around ownership and provide a three point check list of conditions necessary to qualify CPS as an appropriate method. This chapter covers such issues as Kirton's A-I theory of cognitive style and presents a valuable section on the effects and implications of style preferences on the CPS - 6.0 process. Do you think these kinds of issues might be important and have some effect on how you and those you lead manage change? From experience, I assure you they get to the heart of getting the best of the creative talent in your organization!

Chapter 8: The Context for CPS. This chapter focuses on the "Press" (context, environment, climate) surrounding the task. Important issues when understanding the situation surrounding the task and their impact on creativity are presented. The chapter also reviews the nine dimensions of creative climate and a model for organizational change. Please note there is one issue that I find of major importance that has but a brief mention - and that is the "Situational Outlook Questionnaire (SOQ)." The SOQ is the only measure that I know of that focuses exclusively on assessing an organization's psychological climate for creativity and change using both quantitative and qualitative analysis. (For information contact Ken Lauer, Director of Research at CPS-B). I predict it will be one of the five most useful assessments in the world within the next five years!

Chapter 9: The Role of Content. What you need to accomplish and want as an end product are the focus of this chapter. In it you will find a chart that looks at the benefits of using a systems view when you need to get the best result from your efforts. Issues that you will need to address when Planning Your Approach (e.g., level of novelty desired, depth, and breath of impact) are presented along with sample questions you can use to appraise the task situation.

Chapter 10: CPS as a Change Method. As the previous chapter was about "what" you want, this chapter is about "how" you can/will act on your needs. It opens up

important issues when thinking and making decisions about using CPS as a method for change. By the end of this chapter you will be in a better position to answer the question, "Is CPS an appropriate method for the task I have selected?"

Chapter 11: Designing your Way Through CPS. Now that you have qualified CPS as an appropriate method, you can use the information you have gained to guide you through the CPS - 6.0 process. The authors give us plenty to think about to help make good decisions on such issues as: What will the scale of the application be?; What level of the organization will be involved in the application?; and Where to enter into the CPS process? A model for CPS facilitation is presented followed by recommended characteristics you can follow when selecting members to be part of a resource group.

Chapter 12: Applying CPS. This chapter is an applied synthesis of the entire book. In it you will find real-life examples of the impact people, content, and context have when applying CPS and how CPS (including some tool usage) has been used. Suggestions on how to get started with CPS are also presented. The chapter ends with additional resources including books and contact information for each of the authors. An excellent section of references and readings follow this chapter.

In conclusion, if you have read this book before, or if you have been trained in CPS in the past and aren't familiar with the new CPS - 6.0, its language and processes, then this book is for you! If you are looking for an introduction to creative problem solving and want to read more about the subject, this book is for you! If you're looking to gain knowledge only accessible through years and years of applied work and research and only have a couple hours to invest, this book is for you! If you just want to sit around and talk about change, and aren't looking to actually do anything, this book isn't for you-but you could give it to someone who would put the information into action!

‘MASTER BLASTER’

The Power of the Evaluation Matrix

By Samantha Stead and K. Brian Dorval

Can you imagine using a single tool for an entire three days? Or that a single tool could have a fundamental impact on the way a company makes decisions about its new product concepts? Well, let us tell you a story about the Evaluation Matrix.

Background

In the last *Communiqué* (Volume X, Fall 2000) we told you how the use and improvement of deliberate process made a huge difference to the time, cost, and quality of our new product development work at IMP. This time, we want to dive deeper and explain how, as part of the process, we used the evaluation matrix to help us make the decisions that produced such significant results.

Global Product Development

You will recall from our last article that the IMP Family Education product development initiative was structured around a series of international meetings with ongoing work in between. The international meetings began with a forum where, based on trend and other data, we identified global market opportunities, explored possible customer needs in the target groups we intended to go after, and generated initial product ideas based on those needs. We left this meeting with the charge to work together across functions and cultures to develop nine of these ideas into concepts over the next four months. After that we came together again in a second international meeting, the purpose of which was to make decisions on which concepts to take forward to test.

The evaluation matrix provided the overall framework for that meeting.

Preparing to Use the Matrix

To make the most effective use of an evaluation matrix, it is critical to be clear about the options and to ensure that the criteria are well developed and clearly defined. The following gives you some indication of the energy that went into our preparation.

Developing Concepts and Business Cases

Central to our new product development initiative was the philosophy that we should be working globally to create products that would meet the needs of customers in all four of our main markets. During the four months between meetings the Editorial Directors in those markets coordinated and led international, cross-functional teams. The mission of these teams was to conduct research with our potential customers, thoroughly develop the concepts based on the findings, and develop business cases to determine the potential success of the products in the market-place. The business cases were extremely detailed – each around 70 pages long. They were focused primarily on our customers and how the concepts might meet their needs in each of our different market places. We took a thorough look at our competition and how we might position ourselves uniquely. The business cases also aimed to predict in some detail the likely market performance, cost of development, and return on investment. Never before had we analyzed product concepts so thoroughly in the initial stages of development.

To represent the products visually we used standard-format, one-page visual concepts (or ‘viscons’). There is a challenge in creating truly good viscons: the concepts must be thoroughly worked through to be conveyed effectively in such a way. In past development processes, we had developed printed prototypes and glitzy presentations. That approach had been costly and had often led to the focus being on the presentations rather than the innate strength of the concepts. So this time, we leveled the playing field.

The business cases and viscons were to form the cornerstones of our international decision-making meeting. They were distributed in advance of the meeting so all participants could prepare.

The product concepts, represented by their working titles, were our 'options' on the evaluation matrix.

Developing Criteria

While development work was taking place, criteria by which to evaluate the business cases needed to be developed. This was the role of the Business Unit Leaders in the main markets – the sponsors. The criteria development was facilitated by CPS-B in a day-long sponsor meeting, and several follow-up discussions between the sponsors and the Editorial Directors. Twelve criteria were eventually developed and used. The criteria were both stop/go and developmental in nature, and were aimed up against the customer experience as well as business performance measures. Despite all the preparation some criteria still needed refining during the meeting itself, showing us just how critical it is to have complete clarity in the criteria used for decision-making.

The Decision-making Meeting

Our product development process was anchored throughout on the principles of inclusive leadership. This cross-cultural, cross-functional meeting was a prime example. Its purpose was to have everyone engage and to add value through the multitude of experiences and perspectives they could bring; to have the whole team make recommendations on which concepts to move forward; but not to replace the key decision-making

responsibility of the sponsors. Rather, inclusive leadership significantly enriched the data the sponsors had to make those decisions. Key players in the meeting were:

- The sponsors and final decision-makers: the Business Unit Leaders from each of our four main development markets and their global President
- The clients: the Editorial Directors from the same four markets, responsible for new product development
- The resource group: various other Editorial, Marketing, Operational and Customer Service staff from a range of markets, bringing a valuable diversity of perspective
- The facilitators: a mix of CPS-B and internally trained facilitators

Using the Matrix

So, to the matrix. You will all be familiar with the 11 x 7 inch Evaluation Matrix worksheets designed for individual use, and we made very good use of them. However, we needed to combine our individual evaluations into a format that could be used by all 20 people in the meeting. The result was no small Evaluation Matrix. At something like 12 x 20 feet, it covered almost an entire wall of the conference room (see image to the left)! So powerful was it as a visual tool, apart from everything else, one of the sponsors christened it the 'Master Blaster'. We used the Evaluation Matrix for an entire 3 days.

The Evaluation Matrix: Day 1

The aim of the first day was to ensure we all had a shared understanding of the product concepts and their business cases. We reviewed the business cases through round-table discussions of the key information, facilitated question and answer sessions, and the use of an ALUo. The product concepts were aimed up against the different customer target groups we had identified at the first meeting – 2 or 3 in each group. Once



we had reviewed all the business cases that fell within a target group, we individually completed an evaluation matrix.

The scale used for the matrix ranged from 1 to 5 according to how closely the concept met each of the twelve criteria. When the individual matrices were complete, the facilitation support team took them away to transfer the individual scores on to the Master Blaster matrix, which was kept hidden until it was complete. The participants went on to review the next set of business cases.

The Evaluation Matrix: Day 2

The purpose of Day 2 was to come to a shared understanding of the evaluations we had made and to determine which concepts warranted further strengthening and development. When the 'Master Blaster' matrix was finally unveiled to the group it revealed all our individual scores. The facilitators had highlighted those areas where there was obviously very close agreement amongst the participants or where there was a wide range of difference. As you know, the evaluation matrix is a developmental tool. So the next step was *not* to add up the numbers – despite every attempt possible by one of the sponsors! Instead we had a facilitated dialogue amongst all the participants, concept by concept, to ensure all points of view were shared and understood, even if people were not in complete agreement.

After this, the sponsors had separate meetings to work out strategies, timeframes, and budgets for the months of upcoming development and testing. Meanwhile, the rest of the participants, with the Editorial Directors as the clients and decision-makers, had further facilitated dialogue using the matrix as a basis to determine the key limitations of the concepts. From that we decided which three concepts would benefit most from some time spent developing and strengthening them using the global resources in the meeting.

The Evaluation Matrix: Day 3

The purpose of Day 3 was to develop and strengthen the promising concepts, re-evaluate them, and finally to make recommendations and decisions about which of the 9 concepts should move forward to testing and launch. The facilitated

workshops, encompassing both generating ideas and developing solutions, lasted one to two hours, and significant progress was made during that time – so much so, in fact, that there were some important changes to scores on the Matrix.

At last it seemed (using the Matrix took a lot of energy!), we came to making decisions. The sponsors had clarified that there were three categories into which products could be placed: 1) Go ahead to testing and possible launch; 2) Explore and develop the concept further; and 3) Hold for future consideration. We were each given green, yellow, and red dots to correspond to these categories, and, concept by concept, were asked to place the color that represented our recommendation next to that concept on the matrix. Once all the hits were placed, there was another facilitated dialogue that enabled us to share the reasons for our recommendations. As a result of that dialogue and the understanding we gained of people's different perspectives, some participants changed the color of their hits.

Finally, one more hit was allowed. There had been some discussion early in the meeting about the tendency of the criteria to seem very rational and objective, and some question about where intuition and gut feeling for the likely success of a concept might come into play. So, at the end of all the discussions, everyone was given one gold star to place next to the concept he or she thought had the most 'magic'. A decision on one of the concepts – which subsequently went on to test successfully – was certainly influenced by this exercise.

So, after three days of working with the 'Master Blaster' Evaluation Matrix, we made our recommendations about which concepts to move forward, as well as which should be the lead and test markets, and which key issues needed addressing. The sponsors had a further meeting, and concurred with all the recommendations except one, where they had even more confidence in moving forward than the rest of the group. Of the nine concepts we had evaluated, five were given the go-ahead to test, with a target launch-date 11 months later. One was placed in the 'Explore' category and three put on hold. Two of

these will be revisited when the external marketplace is a little more ready for them.

The Power of the Evaluation Matrix

Of course, many factors contributed to the success of our decision-making meeting. But key to that success was our Master Blaster Matrix and how well it was prepared for, facilitated, and used. The matrix enabled us to create shared understanding all the way through the meeting, which gave us a basis for sensible, positive, co-operative, energetic, and productive dialogue. Ultimately, this meant we could make decisions right at the meeting, decisions in which everyone had confidence and for which they felt a degree of ownership. The development of the criteria ensured our decisions were aimed at customer and business needs; while the use of the 'magic factor' star ensured we didn't lose the all-important emotional and intuitive

"The spirit of cooperation made the big difference."

appeal of a concept amongst the very rationally-based discussions. Visually, the matrix enabled us to track our discussions quickly and effectively throughout the meeting. Globally, it provided us a common framework, language, and platform for decision making. It promoted quality thinking and focused thinking. From a leadership perspective, the matrix enabled, indeed demanded, everyone's involvement in making recommendations. Such collaboration in the preparation and the meeting itself inspired highly cooperative efforts in the follow-up development work, which led to very high quality results. The preparation work for the decision-making meeting also put us in a position that enabled a vastly accelerated time to market once the decisions were made. Everyone, not least the facilitation team, was thoroughly exhausted by the end!

Our new approach to product development led to reductions of 88% in idea development costs, over 50% in development time to launch, and an improvement of over 401% in our success rate.

Our decisions were clearly good ones. And the Evaluation Matrix helped us make them.

It's amazing what a single tool can do!

Footnote: More Than Just Process

The PricewaterhouseCoopers Innovation and Growth study by Trevor Davis in 2000 clearly demonstrates the importance of paying attention to all three key capabilities of deliberate process, creative climate, and inclusive leadership if you want to be successful in your innovation efforts. Our two *Communiqué* articles have emphasized the power of deliberate process in impacting time, cost, and quality. Indeed, the specific need we addressed for the business unit was helping with deliberate process. But it is important to note that our initiative was also aimed up against developing the climate necessary for high-level creative performance and ensuring that leadership was shared right from the creation of strategy through to decision making and implementation. The use of the Master Blaster Matrix is just one example of how we operationalized the three capabilities. Ultimately, it was paying attention to the whole system of deliberate process, inclusive leadership, and creative climate combined that led to such remarkable success in Family Education's new product development.

With thanks to Robert Botta, Senior Vice President, Family Education, International Masters Publishers, Inc., for the title 'Master Blaster'.

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WHAT WE'VE LEARNED...

The following tips come from insights Samantha Stead and Brian Dorval gleaned from their use of the evaluation matrix in "The Master Blaster" article. In putting these insights forward Samantha and Brian stated, *"We were working with very sizeable concepts, so the first two tips in particular are aimed up against the unique challenges this application brought us. Other tips will apply to any use of the matrix. We hope they are helpful."* If you would like to submit tips, please forward them to: "Tips Column Submission", Attn: Communiqué Editor.

- *If options are large and complex, and there are several of them, be sure to provide time for people to remember what is inside each option. We had given people ten days to read and become familiar with the options before the meeting took place. At the meeting we took 30 minutes to present each option and answer questions. We also facilitated an ALU on each option to ensure participants were thoroughly familiar with the options before they evaluated them.*
- *When dealing with several large options, evaluate them two or three at a time. It can be difficult to hold all the information on many large options in your head at once, so it is worth breaking them down into manageable groups to do each option justice. If possible, group options under a common frame of reference. (We organized the options so that each group of two or three was aimed at the same target market.) Always cover more than one option at a time so that you can work down the matrix and avoid any chance of creating a halo effect.*
- *Ensure everyone understands and agrees on the meaning of the criteria. It is important that everyone is on the same page at the outset. People need to be clear about the specific meaning of each measure to ensure evaluations are made using a consistent frame of reference. This will help avoid unnecessary debate or confusion. Take time to go over the criteria because what is seemingly clear-cut to one person may not be to someone else. Do as much of this in advance as possible – as well as a quick review at the start of the meeting.*
- *Remind people of the purpose of the numbers. This is especially important when people are not familiar with CPS. Ensure people understand that the purpose of the matrix is developmental, and that the numbers highlight areas of strength and potential improvement. Show people how, by adding the numbers to get an overall sum, it is possible to hide where the options may be individually weak or strong.*
- *Look for places where you see people have markedly similar or different perspectives to focus the dialogue. When you look at each individual evaluation (one option against one criterion) you will be able to see whether people are making very similar or very different evaluations. First look for places where everyone is scoring consistently. These provide opportunities to open the dialogue positively, by anchoring the points where there is agreement. Where the numbers show apparent disagreement, be sure to ask everyone for their perspectives. The differences can be the drivers of understanding and productive dialogue.*
- *Remember the importance of implicit criteria. It is possible that in evaluating options against very explicit criteria you forget the value of gut feeling and intuition. Go after this deliberately: once the options have been evaluated, have each participant make one hit on the option that to them has the most 'magic'. Take a look at the option that has the most sections and see how it compares to the evaluation of that option on the overall matrix. This can also be the basis for some interesting dialogue.*

The Perfect Client: Using the SOQ and KAI for Organizational Transformation

By Barbara Babij with Ken Lauer

It is seldom that we encounter a situation where the client is ready, willing, and able to fundamentally change their entire organization. In the last year I found such a client. Here is the story of what has been a very rewarding experience. Although space will not permit me to provide all the details, I will share some of the highlights with you.

In order to preserve confidentiality, let's call this organization Wecan Corp. Wecan is a distribution company. The Buffalo office incorporated approximately twelve years ago, and employs eleven people. The general manager (GM) is intelligent and extremely progressive. He desires to move from a top-down pyramidal form of operation to distributed decision-making, allowing employees to become more autonomous. The organization is considering expansion in the near future and would like to leverage the current staff in that process.

I became involved in Wecan through a close association with one of the employees and had performed financial and operations work for Wecan in the past. In December of 1999, the GM asked if I could help him transform Wecan by enhancing employee commitment and involvement. I agreed and began to appraise the task. It soon became apparent that this was a perfect opportunity to both assess the climate and incorporate the notion of cognitive style as the foundation for this change.

I drafted a proposal, including specific actions and timelines. (Over time and in consultation with CPS-B, the original proposal was modified to better meet the needs of the client.) The general manager and I agreed to proceed with caution because retention was a key issue. The loss of even one employee would have a detrimental impact on the company. Heavy travel schedules and 100% employee participation resulted in a series of one-

to four-hour meetings, mapped over a period of one year, and included developing a vision as well as some introductory CPS training.

First, we decided to use the SOQ (Situational Outlook Questionnaire) to gauge the readiness of Wecan for change (with the assistance of Ken Lauer at CPS-B). I was also able to obtain Wecan's commitment to administer the SOQ at a later time to help monitor changes in the environment due to subsequent interventions. I administered the questionnaire to the employees as part of a three-hour session conducted in April. I designed, and with Ken's help, refined a new warm-up activity called Edgar's Story for this session. (It is now called Lee's Story to provide gender neutrality.) It was designed to invite employees to begin thinking about their work environment and how they contribute to it or detract from it by their behavior. During this session, they also began to work together in small groups for the first time.

In May, the results of the SOQ in individual and group format were shared with the GM, first in a private session and then with the rest of the employees. Upon reviewing the results and how they compared with innovative and stagnated company norms (see Chart 1), the general manager was quick to target the dimensions of freedom and risk-taking for improvement. We also discussed the implication of a high debate score coupled with relatively low freedom and risk-taking – too much of a focus on consensus could lead to indecision and implementation paralysis, and lack of employee decision-making. We decided to use the LPI (Leadership Practices Inventory) at a later date to target areas for understanding and change in leadership style.

Chart 1: Wecan SOQ Results – Fall 2000

DIMENSION	INNOVATIVE	WECAN AVG.	STAGNATING
Challenge	238	214	163
Freedom	210	158	153
Trust/Openness	178	150	128
Idea Time	148	138	97
Playfulness	230	193	140
Conflict	78	98	140
Idea Support	183	142	108
Debate	158	160	105
Risk-taking	195	90	53
	10 Companies	11 Employees	5 Companies

The debrief of the qualitative portion of the SOQ took place in early June during the first hour of a two-hour session. These results revealed interpersonal relations as an area for improvement, thus confirming the original diagnosis during task appraisal. The second hour was spent facilitating next steps. One of these steps was to develop an employee appreciation system that was formalized through the participation of the entire staff in late June.

We chose to use the KAI (Kirton Adaption-Innovation Inventory) to address the area of interpersonal relations in a simple yet powerful way. The KAI was administered in July. The debrief session was held in September due to vacations and heavy travel schedules. (One of the cornerstones of this entire process was to include all employees.) During the three - hour session, I specifically focused on the group development process as a means to further solidify the concept of empowerment and shared leadership.

The KAI scores ranged from 74-111, and the mean was 93.8. The means for the subscales were: SO-43; E-18.5; R-32.3. As quite a lot of information was provided during the debrief, we decided to give everyone time to reflect on their scores. A follow-up session was held about a month later to answer questions and administer the SOQ for the second time. A one-hour session was planned.

During this follow-up session we discussed how climate and style interact and used a real problem to demonstrate the interaction. The problem we chose to explore was the inventory process. Wecan had recently counted their inventory and it was still not complete at the time we conducted this session. In prior years, the inventory process was completed smoothly in one day. So, what went awry? Very simply, the warehouse had been reorganized for greater efficiency, yet the process for inventory remained the same. The decision about how to conduct the inventory was made by the operations supervisor together with the accounting manager; the warehouse manager had not been involved. Through a facilitated dialogue and modified ALUo, taking into consideration the climate and

KAI scores, we explored who should have been involved in the process, the decisions that were made, and how they might have been made differently by those who knew the system best. The one-hour session was extended to two hours.

The results of the second SOQ administration are provided in Chart 2. This chart represents the results for nine of the eleven employees, those who completed the SOQ in both the spring and the fall. Two of the current eleven employees were not with the company when the SOQ was administered the first time.

CHART 2: Wecan SOQ Results - Spring/Fall Comparison (N=9)

DIMENSION	WECAN SPRING 2000 Avg.	WECAN FALL 2000 Avg.
Challenge	214	230
Freedom	167	154
Trust/Openness	153	167
Idea Time	144	152
Playfulness	185	235
Conflict	104	67
Idea Support	153	167
Debate	167	185
Risk-taking	93	129

As you can see from Chart 2 there were some definite changes in the environment. Eight of the nine dimensions moved in the expected direction. There is one apparent anomaly: the average for the freedom dimension went down. During the debrief we discussed possible reasons, such as: the GM has the final word; there's too much consensus-taking; we can't make decisions. These reasons are supported by the increase in the Debate dimension which seems to be a common occurrence in an organization that is in the early stages of empowering its employees. The increases in other dimensions were attributed to "a lot of people are involved"; "we pitch in when shipping volumes are high"; "we work more as a team"; "we feel more comfortable with each other"; "the (employee appreciation) meetings help"; and "sometimes the risk is not as big as we think".

Two other events conspired to assist in improving the work environment at Wecan. The company participated in the Corporate Challenge. As a result of their experience, those who entered

secured the commitment for 100% participation next year. The enthusiasm and bonding that occurred was unbelievable. This feeling of camaraderie was reinforced during Buffalo's pre-winter snow storm when five employees were stranded at the office overnight and they were able to learn more about each other.

It is evident that we have made progress toward our original goal of enhancing employee commitment and involvement. We began the visioning process on December 4, 2000 as the second half of the SOQ debrief meeting. We began by identifying the milestones and changes in operations at Wecan during the past twelve years. This shared understanding of history will provide the foundation for the next step – developing personal values and vision and translating them into organizational values and vision.

With the commitment of the GM and the motivation of the organization's employees aligned, this is indeed the perfect client!

*Thus ends my saga of progress to date,
As we continue to journey, more I'll relate.*

*Much has occurred since I first intervened,
And I'd like to share some thoughts that I've gleaned.*

This plan was ambitious, but that's quite ok,

I set expectations at the start of the fray.

*As you know by now, Wecan is quite small,
With 11 employees we included them all.*

*If even one sole departed, it would cause quite a stir,
All of this project, we then could inter.*

*We considered each person from each different angle,
In the hopes that this muddle we could untangle.*

*Through all of this process, patience was key,
We elicited feedback at every tee.*

*The GM is quite pleased with the progress he sees,
Though he'd like to go faster, with the pace he agrees.*

*Our next steps include charting a course,
A plan for the future, employees can endorse.*

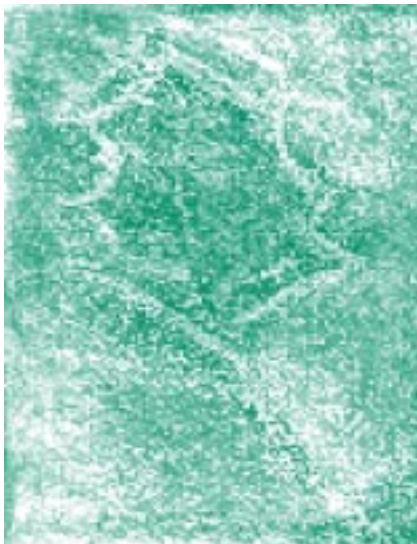
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Creativity Course Awakens Artist

Helena Gil da Costa

"I can't draw, I can't paint" - for too many years I had convinced myself that there was nothing to do about this. I was simply not given the gift of art and there was no need to try. In August of 1996, I decided to look at this "problem" again and take the risk to face my own results - whatever they could be. The main idea was not to think, to just sit down and do it, letting my hands create the shape and my eyes choose the color. There was no need to be an artist. The only commitment was to my personal pleasure for doing it without judgment.



In November of the same year, I traveled for the very first time to Buffalo and Grand Island to attend a Facilitating CPS Training Program with CPS-B. When I got there, I was very impressed with the colors of the trees - so strong and so different from those I was used to seeing. After the program (also very strong and different), we visited Niagara Falls. At the end of the day, snow was falling - once again a new and exciting experience for me. Inspired by the events of the day, in my room that evening, I painted this leaf.

About the Communiqué

The Communiqué is an informal newsletter published by CPS-B. It is designed to highlight and share key information about our current developments, research, and program activities.

If anyone is interested in submitting a short article, headline, or calendar item, please contact the Communiqué Editor at:

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