GROUP FACILITATION TRAINING FOR MANAGERS IN THE HOSPITALITY INDUSTRY

Fernando Cardoso Sousa, Associate Professor, APGICO
(Portuguese Association For Creativity And Innovation)
Cardoso_Sousa@Hotmail.Com

Ileana Pardal Monteiro, APGICO
Ileanamonteiro@Hotmail.Com

Carla Machado, Adjunct Professor, University Of The Algarve / APGICO
Carla.Machado@Apgico.Pt

Abstract

This paper aims at demonstrating that an acceptable level of performance as a facilitator can be achieved by managers in a 35-hour course, using the effect of demonstration, modeling and observation to improve performance. Facing the need to prepare managers of a hotel corporation as coaches for organizational innovation, the authors prepared a training program based on a six-step model for organizational intervention (Diagnosis, Training the Facilitators, Company Forum, Project Implementation, Evaluation, and Process Appropriation). From the Company Forum resulted three innovation projects that were well received by the CEO. The participants rated the course as Good and Very Good, except the Introduction, considered "too theoretical". Therefore, the course proved to be adequate for the preparation of coaches for organizational innovation. As to future developments, they will have to do mostly with the functioning of a matrix structure in the hospitality industry, so that the whole approach may have a full impact on the company. Its integration with human resources management in matrix structures will develop conditions to present an organizational behavior course syllabus for managers and management students.

Keywords: Organizational innovation; Organizational change, Matrix organizations; Management training; Organizational intervention; Group facilitation

Within the scope of a European-funded international project (Flourish project, Ref. 2018-1-BG01-KA202-048014, co-funded by the Erasmus + Programme) – and facing the need to prepare managers of a hotel corporation as coaches for organizational innovation, the authors prepared a training program for organizational intervention (Sousa & Monteiro, 2021). The company had already collaborated with the university in providing objectives for the students to transform in projects, during a semester, joining several subjects in the same projects. This project-based curriculum was important for the students, the university, and even the company, providing opportunities for creative expression and the use of facilitation techniques in teaching, using large-group methods (Sousa, Monteiro & Pellissier, 2016).

After this experience, the hotel company became interested in a facilitation training programme for its managers, and we offered to prepare such programme, adapted to its needs and time constraints. This is how we came to prepare and deliver a training program, based on the four-step creative problem-solving (CPS) group technique. Therefore, this paper aims at demonstrating that an acceptable level of performance as a facilitator can be achieved by managers in a 35-hour course, using the effect of demonstration, modeling and observation to improve performance.

The Organizational Intervention Model

Notwithstanding the importance we attach to the technological and financial aspects of innovation, our objective focuses on the features related to organisational design, business model, external relations, work and employee organisation, which defines what we call *organisational innovation* or, in other words, how to mobilize, organise and control material, knowledge and human resources to generate new products and services (Steiber & Alänge, 2015). This type of innovation is better understood when considering the so-called "innovative potential", which consists in the involvement of co-worker teams, with diverse knowledge and responsibilities, in projects defined to solve problems, while maintaining routine tasks (Cebon, Newton & Noble, 1999). To carry on this process a matrix structure can be developed to ensure the balance between the functional and the project-based structures. The functional structure is responsible for maintaining the company's routines and generating automatic forms of problem solving; the project structure refers to the organisation's ability to generate innovation and change (Sousa & Monteiro, 2020).

When we speak of organisational intervention, we are dealing with the execution of the various steps of a model for making a planned change (Mento, Jones & Dirndorfer, 2002). As organisational interventions aim at improving employee health and well-being (Nielsen & Abildgaard, 2014), they require an elaborate evaluation framework due to the complexity of organizational structures. Following the process-oriented theory (Weick, 1979), which views organizations as a continuous collective of processes that connects various players, interventions can be evaluated in terms of change in attitudes, values, knowledge, organizational procedures, working conditions, productivity, and many other factors. This process perspective involves a shift from the fixed state (pre-intervention) to another state (post-intervention), following Kurt Lewin's rationale of unfreeze-change-refreeze (Bartunek & Woodman, 2014). And as change takes place before, during and after the change episodes, we have to address organizations as self-organizing complex adaptive systems (Stacey, 1966), especially their organizational dynamics of power and political processes (Bushe & Marshak, 2014).

This approach to change requires the understanding of complex organisational factors, which go far beyond the scope of the training course we are dealing with. In this project, change analysis is limited to the outcomes of the planning and execution of innovation projects derived from a management-defined objective. From diagnosis to process appropriation, through a large group forum involving all relevant stakeholders, this intervention model is strictly operational in its outcomes (Sousa & Monteiro, 2019). Using a comprehensive model (Figure 1), we address the aspects related to the defined management objective.

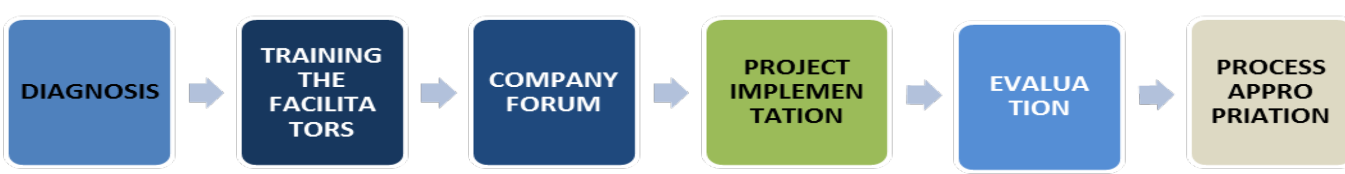

Figure 1. The six steps of the organizational intervention model

Diagnosis

The organisational diagnosis we carry out intends to reveal the distance between the management's vision about a certain intention of change and the employees' practices and interests regarding the hindrance of that intention. Management must have ownership over the objective defined for change, meaning some control of possible outcomes. Therefore, the first question to ask a manager is whether he or she has sufficient control over the possible outputs, in order to ensure that intentions can be successful. The diagnosis we developed is designated to foster a context of positive change, in line with the will of management and co-workers, where problems are transformed into challenges and dysfunctions are overcome by courses of action designed to improve organisational efficiency. In this sense, the purpose of diagnosis is to clarify the strengths of the organisational culture favourable to the desired situation defined in management's change objective. The diagnosis consists of six steps (Figure 2). The resulting report will be presented to management and can give way to changes in the intervention objective.

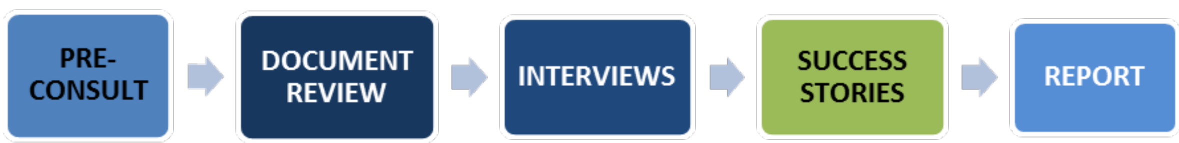

Figure 2. Diagnosis steps

Pre-consult

It aims to make a preliminary definition, together with management, of the aspects related with the "consultation" or organisational diagnosis. It begins with the elaboration of management's mind map (Basadur, Potworowski, Pollice & Fedorowicz, 2000), in order to allow the choice of the intervention's objective. It is also an opportunity to make a preliminary list of stakeholders to be invited to the business forum, to determine the composition of the steering committee, the facilitators to train, the possible dates for the forum and other logistics.

Diagnosis Report

It is advisable to start the document review to get a deeper knowledge of the "official" perspective related with the defined objective, in order to help sustain the dialogue in the interviews. This knowledge can be obtained through official documents and presentations that have been made about the company. As a rule, it is acceptable to hold 12 to 25 interviews, which can be made by the steering team members.

These interviews should include the request for success stories, i.e. examples of moments that made the interviewee feel proud of working in the company. The focus on positive experiences and positive emotions is central to the change process (Bushe & Marshak, 2014). The construction of the culture is made of events translated into stories that are seldom published but orally transmitted, person to person, and maintained or altered according to the present tendencies and the transformations of human memory. As any intended change must consider the current corporate culture, it is important to identify what stories translate the way of being in the company and connect each one to the business community. Later, a selection will be published in the forum or internal newsletter.

Having finished the interviews, a report should be prepared to be presented to management, reflecting the main constraints likely to maintain or motivate a change of the intervention objective.

The Training Of Making An Organizational Diagnosis

There was no specific strategy adopted for this kind of training, besides leading trainees to make a real diagnosis. Practicing interview techniques, needed to maintain a conversation for 20-40 minutes, around the objective defined by management, allows a group of three or four people to produce a report and collect a dozen success stories so that a meaningful selection may be done. From our experience we knew that only a short percentage had experience of doing interviews, especially when using only one introductory question, according to the semi-structured technique (Ghiglione & Matalon, 1977). Therefore, we made time for training, during the session, using verbal and nonverbal techniques, while taking notes. The integration of the interviews and the presentation of the report was also made in class.

Another difficulty that we knew could happen had to do with mind maps, where making the one-to-one objective correspondence requires some skills that not everyone possesses. A solution might be to give up the one-to-one correspondence, after a first attempt, and just draw the map according to the answers.

The Construction of the Four-Step, Small and Large-Group Methods

We started working with creativity and innovation in groups using the creative problem-solving (CPS) method. Since Alex Osborn introduced the brainstorming method to produce ideas, several methods were developed. Back in the 1960s, Sidney Parnes and Ruth Noller, for example, completed a series of investigations that would turn CPS into one of the most used and investigated methods for creative work in organizations, as reported by Isaksen (2020).

A primary motivation for our research was the need for a CPS protocol that did not require more than a half-an-hour break between sessions, while maintaining its effectiveness, thus avoiding frequently experienced problems regarding team stability.

We began our work by using a reduced two-day (16 hours) version of Basadur's CPS *Simplex* model (Basadur, 1987), a cyclic process in three distinct phases and eight steps (*problem finding, fact finding and problem definition; solution finding and decision making; action planning, acceptance planning and decision implementation*). In each step there is a moment for active divergence, in which judgment is deferred to allow the perception of new relationships between facts, and active convergence, to select one or more options to carry on to the next step. Vertical deferral of judgment helps participants to differentiate unclear situations, from well-defined problems to defining a problem and solving a problem.

We reduced the Simplex method duration to twelve hours, then to eight hours, and finally to four hours, as explained in Sousa, Monteiro, Walton and Pissarra (2014). After several corporate trials, the time taken for the intervention was set to just one four-hour session, within a four-step model: *Objective-Finding, Problem-Definition, Action-Planning* and the *Action* itself. Even though the model is very simple to use, the facilitator's effectiveness depends a lot on details, which make it difficult to achieve an acceptable level of performance.

With regard to large-group methods, intended to bring innovation and change to organizations and communities, through the involvement of many people in the decision-making process, research is well documented (Bunker & Alban, 2006). Large-group methods are tailored to suit group interventions having between 30 and 150 participants or more (ideally 70-80), and meeting in sessions ranging from two to four days.

In general, sessions begin by asking the groups of eight for an analysis of the past and present, followed by a vision of the desirable future, in order to understand the history of the organization and create the necessary tension in attaining the ideal future. The definition of strategic directions, required actions and timelines, together with follow-up procedures, generally close the sessions. Given the involvement of all stakeholders in the same location at the same time, large-group methods allow a change to occur at a much quicker than normal pace. They also allow opportunities for conflict management, by focusing on common ground, as well as promoting a flat hierarchy (Garcia, 2007). *Future Search* was adopted as a reference methodology due to its suitability for group decision making, its extensive description in the literature (Weisbord & Janoff, 2010), and the authors' previous experience. The other method taken as a reference was *Appreciative Inquiry* (Cooperrider & Whitney, 2005).

The previously designed four-hour, small-group problem-solving method, was adapted to work with large groups in a study with higher education students, described in Sousa, et al. (2016), aiming at bringing 62 participants to solve a challenge consisting in the preparation of a single common essay involving all students.

The design methodology used was adapted to work as a small-group four-step model. The four-hour session revealed to be too short, in a company environment, thus it was later expanded to six hours (Sousa & Monteiro, 2019). The training of CPS and other group methods, produces effects on individuals' attitudes and behaviours, as well as effects on groups (Puccio, Firestien, Coyle & Masucci, 2006). Normally it includes aspects of facilitator training, where participants take turns as facilitators and learn by watching others facilitate. Nevertheless, this kind of training has other requirements besides observation, and is complex in its nature, as described by Isaksen (2020), in his three-level model for learning and applying CPS.

In general, large-group methods do not consider the need for previous training of small-group facilitators, which are designated by different groups in different periods of a meeting that lasts for several days. Nevertheless, the possibility of training small-group facilitators to act within large-group sessions revealed to be very important when the duration of these meetings is shortened.

Facilitation Training

Group facilitation, having its roots in Carl Rogers' approach to T-Groups, and used to stimulate person growth, aims at making things easier for the group (Cilliers, 2000). It enables group members to reach their goals by opening up communication and helping them to assume responsibilities in group results (Shaw, 1981). Group facilitation is making the complex simple, so that group members may learn to find answers to complex problems.

Professional facilitation education and training is extensively described in the literature (Arnold, 2005; Wardale, 2008) and considered to be a life-long process of improvement, with the need to master different methods and tools in order to face diverse group situations. Group facilitation requires not only time to learn and practice with real-world teams, but also continuous education and refreshment training to master important competencies (Thomas, 2005). Therefore, training company managers as group facilitators presents a considerable challenge for scholars and practitioners and is a subject difficult to find in the literature (Sasha, 2013). When facilitators are not professional, but only middle or upper-level managers who have to facilitate meetings, little has been done regarding their preparation, especially in what concerns small group coordination in large group meetings. In fact, large-group methods do not even consider the need for training small group facilitators, as groups change during meetings and members take turns acting as a team spokesperson. Since the meetings last for several days, this reduces the need for effectiveness in small-group facilitation. Nevertheless, as all the work done in large groups is dependent upon small group contributions, its adequate facilitation becomes important, especially if the duration of the meeting is substantially reduced.

Given the little time available for the course (35 hours), we eliminated theoretical and warm-up issues that did not contribute directly to the desired outcome, suggesting further readings for those who would like to go deeper into the process. From Bandura's social learning theory (Bandura, 1986), we elected demonstration, modelling and observation as the main sources of learning. The theory indicates that the cognitive structure of mental representations has two basic functions: the first related to the production of a response, serving as an internal model of action; the second related to the formation of a reference standard for the detection and correction of mistakes in executing the skill. Using this reasoning we made an adaptation from motor skills training (Tani, Bruzi, Bastos & Chiviacowsky, 2011) using role models whose proficiency is not very far from the trainee's possibilities, and started immediately by asking course participants to perform, following our instructions. This reduces participant frustration for not being able to attain professional standards and enhances their attention to the colleagues' performance. This strategy is in agreement with major learning theories, from Kurt Lewin experiential learning theory to John Dewey's (Kearns & Sheehan, 1995). Kolb's learning model (Kolb, 1984) also posits the immediate experience as the act that precedes observation and reflection, followed by the formation of abstract concepts that are tested in new situations. These abstractions, or "theories", are the basis for the definition of behaviour and attitudes, as explained by Kelly in his personal construct theory (Kelly, 1963). Kelly states that people perceive and interpret differently the outside reality and this interpretation is guided by the way they anticipate events and the behaviour of others.

Another option was to use real life facilitation exercises, drawn out of participants' life work, only after using abstract exercises, easy to understand by everyone. As the former concentrates people in the content, it may put the process in second priority, which is not convenient for initial training. From football training, for example Ali (2000), it is clear that abstract or laboratory situations do not favour training effectiveness.

Even though we had doubts about our procedure, we did not have the option of going from simple to complex situations, as it is advisable in training (Garganta, Guilherme, Barreira, Brito & Rebelo, 2013), because it is difficult to control complexity in group problem-solving, except by providing an easy abstract situation, so that participants can concentrate more on the process, instead of the content. The course was prepared to have at least 13 participants, so that a large group could be simulated with three small groups and one facilitator, with two trainers available, but no more than 16 participants, to allow each one to go over the two steps of the protocol - problem definition and action planning. Following each performance, an after-action-review (Boss, 2016) was made, so that proper feedback was provided twice for each trainee. Afterwards, participants split in three groups and received the task of preparing a scene picturing a facilitation mistake, followed by another scene with the correct behaviour. These scenes were filmed and commented by the whole group, thus serving as a video modelling training tool (Reed, Blackman, Erath, Brand & Novak, 2018).

The three-group design was also used for the training of the large-group facilitation. One session was run by two participants, each one running one of the steps (problem definition and action planning), under the trainers' guidance. Here, as well as during the making of the videos, role play and structured experiences were used extensively, in order to support skill development, as suggested by Kearns & Sheehan (1995).

Testing Facilitation Training

The strategy for the training of facilitation was submitted to previous tests, first with students, then with managers, again with students, and finally with our international partners.

The first attempt, involving the participation of twelve university students, had the purpose of testing if facilitation performance would improve with observation and practice. Two hypotheses were formulated: (1) during two three-hour sessions of group facilitation practice, students would be able to learn by observation, as each one performed the facilitation steps; (2) each second performance would score better than the first. Using a Likert-type scale with ten points, we concluded that neither hypothesis was supported, as the performance was dependent on several factors, the most important being the student's experience with team work in companies.

Then, two twelve-hour courses were prepared for two groups of twelve managers, designated by the company as small-group facilitators in a large-group meeting, to be held two months afterwards. The first program included a presentation and a demonstration of the whole CPS process (over an artificial situation), divergent thinking group exercises and a walking through the CPS process, in groups of two, where each participant would take turns as a facilitator. Each facilitator's role-playing was followed by a debriefing and evaluation. Training was rated with an average score of 8.5, out of 10 possible points, and participants suggested a better connection between the training and their role in the large-group meeting. Furthermore, they pointed out the need to have some support to reflect upon their performance. This led to the idea of producing videos, which addressed facilitation critical situations. The second training course included most of the suggested improvements, but participants gave a lower rating to the trainers (7.5 out of 10) because, as the structure of the large-group meeting was kept present, and as they could see the details of the situation they had to face, their anxiety rose. As to the large-group meeting, trainers agreed that much of its success was due to the performance of the trained facilitators. Another experiment was done with 18 university students to see if participants could improve by reflecting upon group facilitation. They took part in two three-hour CPS training sessions, plus an extra one in which they would make the videos, corresponding to 21 critical group facilitation situations, selected from our practice. The students gave a considerable amount of suggestions for improving the course and rated it ten out of ten points.

The last test occurred during the Flourish project, which sponsors the investigation behind this article, when the authors delivered a two-day course to sixteen international partners, experienced as trainers, from five countries, appointed to carry out similar courses. The 35-hour course curriculum was contracted to 14 hours at the expense of the individual training approach. Every output was produced as if it were a real course and the final evaluation was very positive (average nine out of ten points).

The course allowed to test how to include participants from diverse proveniences into the same project (providing knowledge transfer in a virtual European-projects' company), and how to simulate the execution of projects derived from the company forum in just two hours. Even though the course success was based mainly in the participants' high ability and experience, it ended up by supporting the main strategies adopted.

The Matrix Organization

The last step of the model has to do with process appropriation by the company, so that a system for continuous production of projects might be part of the company's organization, thus contributing to its innovation. Once a successful project cycle is completed, time has come to generate more objectives, problems and solution projects, using this methodology. This stresses the need to build an organisation by projects coexisting with the current functional organisation, i. e., a matrix organisation. However, this may create some problems related to the functioning of the structure that are worth examining.
The matrix organisation, theorized by renowned economists (Galbraith, 2009) and developed by leading companies, such as Procter & Gamble, Unilever, IBM, Boeing, Intel or General Electric, diverges from the classical mechanistic model. It was born from the need of the American aerospace industry in the 1960s to meet several projects simultaneously (Moon landing, Vietnam War, and supersonic flights) with scarce resources. In these matrixes, the engineers in charge of budgets and deadlines worked with those responsible for technical development, both reporting to their functional and project managers simultaneously. As with other processes becoming management trends, this one also peaked in the 1980s and declined in popularity due to poor utilization (Dunn, 2001). This was mainly due to the human resources management process not being appropriately aligned to the matrix structure.

At present, it is difficult to find a company that does not have projects underway (Page, Rahnema, Murphy & Mcdowell, 2016), mostly as a response to clients' demands. However, many cases are limited to occasional projects, gathering just a few co-workers, or restricted to the research and development area. Even so, it is possible to have a way of functioning that enhances the benefits of both functional organizations and the temporary structure of projects, thus ensuring the interaction between the different levels and the organisational units (Bazigos & Harter, 2016). The idea is to establish a matrix organisation, allowing the creation of collaborative projects, thus maintaining the balance between the need for innovation and the maintenance of the fundamental company routines.

The matrix configuration requires managerial skills that include a focus on the entire company, the acceptance of uncertain environments, and the willingness to consider complicated tradeoffs and negotiate conflicts between both structures. Moreover, it will involve changes as to how projects should be triggered and about team members management, namely in terms of performance appraisal, awards and career management (Bredin & Söderlund, 2011).

Considering that the decision to implement a matrix organisation depends on the initial projects' success, the procedure can focus on the generation of a new series of projects, using the methodology we presented. This new series should come from strategic objectives defined by management, segmenting the company's areas of innovation through objectives based on market analysis (Doyle, 1994). There will be no need to repeat the complete cycle, from diagnosis to results evaluation, as the procedure will certainly be simplified and automated, as the system develops.

As to the areas of human resource management, it is important that the work carried out in projects receives at least the same degree of importance as the work developed in the functional structure. However, the existence of two performance appraisal systems would be an unnecessary complication, as well as a source for conflict between managers. The responsibility should remain in the functional management, who will be kept abreast (by team leaders) of the performance evaluation related to the projects (Dunn, 2001). If a good performance in the functional structure is important for the allocation of productivity bonuses, for example, good performance in the project structure is equally important for the attribution of new responsibilities and training opportunities (Appelbaum, Nadeau & Cyr, 2008). The processes for turning projects into profitable innovations are slow and difficult to assign to individual merit. Thus, it is possible to use project performance evaluation to manage and develop careers, since good results should fundamentally be ascribed to teamwork, while the result of functional work may easily be restrained to an individualized evaluation (Zobal, 1999).

Evaluating the individual within the team produces better results, especially if a 360º process is used (Hurley, 1994; Zingheim & Schuster, 1995). This process is flexible enough to balance an individual within team evaluation (Garbers & Konradt, 2014), when considering the model suggested here. The multirater system is adequate, as recommended by Appelbaum, et al. (2008), as it shares the responsibility held by the functional manager with project managers, co-workers, and even clients and suppliers. Nevertheless, translating performance evaluations into salary benefits, in this type of matrix organizations, should be carefully addressed and adapted to the particular company situation.

The Training Of A Matrix Structure

Implementation

As we are dealing with a case where the company does not have a matrix structure, there is no need of a specific approach to training concerning matrix appropriation, besides discussing aspects related with its implementation and management. The first issue is to provide objectives related with costumer needs and market demands. Furthermore, aspects of project management, structure coordination, performance evaluation, rewards, training needs, and career management should be subjected to discussion.

A final exercise in sub-groups can be the preparation and dramatization of potential conflict situations, so that learning the proper behaviours and attitudes may take place. The preparation of memos related with the discussion may provide tips for the company manager.

Procedure during the course made with Hotels AP

A hotel company became interested in a facilitation training programme for its managers that could provide hints for innovation and change through project development, so we offered to prepare such programme, adapted to its needs and time constraints. This is how we came to deliver a 35-hour facilitation training program that prepared middle managers to act as coaches for organizational innovation.

The Company

The Group AP Hotels & Resorts Group was created in 2015 as part of the MADRE Group, held by Antonio Parente, a well-known business entrepreneur in Portugal. The group has six hotels in the Algarve, in the South of Portugal, all standing out for being truly diverse, with each unit boasting its own personality. Eva Senses Hotel is a four-star unit in the city of Faro, close to the city's marina, defined as a city and business hotel; Adriana Beach Club Hotel is a four-star resort, located in the city of Albufeira, near the beach, with 438 rooms, spread over several blocks, dedicated to the all-inclusive segment, and operating from February to November; Victoria Sport and Beach is also in Albufeira, surrounded by pine forest and sea, dedicated to athletes, with sports facilities and 121 apartments; the four-star Oriental Hotel is in the city of Portimao, boasts a unique view to the Atlantic Ocean and has a distinctive exotic oriental style architecture, with 90 rooms rented by German nationals who have become friends with the staff that has been welcoming them for over 20 years. In the city of Tavira, the group has another two hotels: Maria Nova Lounge Hotel, opened throughout the year, with 144 rooms decorated in a modern style; and Cabanas Park Resort, a superior four-star resort, located near a beach, a national park and a river, with 96 modern bedrooms. The Group MADRE is now on its way to create common management standards and company spirit. A total of 14 managers from the AP Group participated in the training; four hotel managers, two deputy managers, four reception managers, one public relations manager, one house-keeping manager, the human resources director, and the management secretary.

The Course

The course took place in one of the hotel units, closed for the season. Once the list of participants was set, a course syllabus, registering forms, initial slide presentation, and the course manual, were sent to the trainees.

Following previous evolutions in small and large-group methods, just described, a fast-track training program was designed, focusing on practice and repetition as essential aspects of facilitation training, while removing every activity that did not contribute directly to improving behaviours, including theoretical information, concept discussion, and exercises. For training purposes, a manual helping to prepare coaches for organizational innovation was written and the working course objective was defined by the CEO.

The course was comprised of three modules over five days (35 hours).

Module I – Organisational Diagnosis – included the preparation of the organisational diagnosis, concerning the objective of bringing the hotel units closer to the corporate group, the collecting of success stories as anchors for future organisational culture, and presenting the report to the CEO.

Module II – Team Facilitation – was dedicated to the individual preparation of participants as team facilitators in creative problem-solving: each trainee had the opportunity of going over the whole problem-solving protocol, acting as a facilitator. A short debriefing followed each presentation, where the trainees had to prepare videos reporting critical incidents in facilitation.

Module III – Organisational Forum – included the preparation of the handout for stakeholders, the facilitation of an organisational forum (large groups), the follow up of the resulting projects, presentation of the final results, and the evaluation debriefing. Finally, the last step of the model – appropriation of the process by the company – together with the final debriefing and course evaluation.

Due to the CEO's agenda, the presentation of the diagnosis and project results took place in the last session, limiting the time available for discussion of process appropriation. That discussion, however, made it clear that the absence of experience with matrix structures would made it difficult for the participants to picture how the company could ever adopt such an organization. A questionnaire assessing five main areas tested the participants' attitudes towards the course. The first two questions addressed the familiarity with organizational innovation, before and after the workshop. The third question measured the satisfaction with the learning content (with each module and overall satisfaction); the fourth area addressed the organisation of the course in fourteen items (e.g. information before training, practice orientation or competence of the trainers); the next four items asked if the course met the participants' expectations and needs and if they acquired enough knowledge to apply its contents. The overall satisfaction with the curriculum, course manual and the web platform were assessed. All these items provided a five-point scale for the answers (1 - poor; 2 - fair; 3 - average; 4 - good; 5 - very good), and a sixth level for "Not applicable". Also, a qualitative question asked what was the most important learning outcomes related to the course.

Results and Discussion

Taking into consideration the evaluation by questionnaire, results show that the participants considered that the training contributed to their knowledge of organizational innovation, a subject that they were not at all familiar with before the course. There was a high level of global satisfaction with the course (all participants rated it "Good" and "Very Good"), although when questioned about each module, the first one received lower, although positive rates. Some participants commented that they found the first module more theoretical and without application, either professionally or in their private life. Altogether satisfaction with the selection of topics was rated 4,2, with a low standard deviation (σ = 0,4). The questions about the course organization received a good evaluation ($\overline{x}$ = 4,2; σ = 0,4), although the item addressing the information received before the course was rated more negatively by six participants (four rated "Average", one "Fair" and one "Poor"). Asked if the course met their expectations and needs, and if it is applicable to their profession, all participants answered positively ($\overline{x}$ = 4,3; σ = 0,3). The last three questions about the learning materials also received the participants' approval.

As for the qualitative answers expressed in the questionnaire and during the final debriefing, participants mentioned that the beginning of the course was not easy, as they found it "too theoretical". But, when entering the second module, they understood it was a "practical training", "useful in daily life", and eight stated the will to try to apply it with their teams. Focusing on the method, they pointed out its novelty (four participants) and value to achieve an effective teamwork ("I was surprised to work by consensus in a team"; "We were able to think like a team").

Focusing on the skills, they learned "to listen" (3); "to promote everyone's participation" (5); "involve everyone in decision making" (3); "to lose the fear of speaking freely" (1). They focus on the importance of the method to identify and solve problems and of learning to facilitate their teams (6) and a forum (1). Some also emphasized the importance of the method for their private life (4). Another issue was the benefit of having worked on a real problem in their hotels. The acquisition of the mind mapping skills proved to be difficult, so we simplified it. Nevertheless, we maintained the mind maps as part of the course and kept an initial demonstration in class to have a list of objectives to work with during small group facilitation training.

Participants were organized in groups to later present a full report about each hotel's unit history, perspectives about the objective, and success stories. The reports were an extra class assignment, but the motivation to prepare a final report for the CEO helped to make a high-quality presentation. The delivery of the final report was scheduled to a session where the projects' results could also be presented. Another skill requiring training was the interview technique. Even if the full preparation, according to the principles of the semi-structured interview (Ghiglione & Matalon, 1977), was outside the scope of the course, the time dedicated to its practice proved to be fruitful, given the importance that managers attribute to these skills for their daily work. These skills also have to do with effective listening, which has a direct link with group facilitation.

As to small-group facilitation, everything went as planned. Every participant had the opportunity of making a group facilitation in problem definition and action planning, but the performance level spectrum was quite large. Higher ranking line managers, more used to teamwork and direct leadership, performed better than staff managers and middle-level managers. This was also evident when the manager was a foreigner, used to a more collaborative approach than the Portuguese managers.

Large-group facilitation was made by two participants, selected by their colleagues, after a ballot that included the trainers. Participants were split in three groups (random), simulating 60 stakeholders that had been designated during the preparation of the real forum. Starting with the objective of bringing the hotel units closer to the company group, a list of problems was made, and the CEO's representative chose some that gave rise to a series of possible projects. From that list the representative chose three: organize cross-training between units; create an institutional presentation for the employee welcome program; and define the benefits of the co-worker card. These projects were executed inside and outside class and, again, the fact that they were to be presented before the CEO led to a high-quality presentation, together with the promise that at least one of the projects would be put into practice. Large-group facilitation proved to be easier to do than small-group, and so it is possible to anticipate that the majority of participants would do a good performance. Large-group facilitation is more a matter of time-keeping, in order to comply with the agenda, and of interface with management, as described in Sousa and Monteiro (2019), which cannot take place in training, unless the manager decides to step in.

Another high important skill is the ability to lead large groups in low structured situations but, as we could not have a large group in class, it was not possible to simulate the situation. Nevertheless, when we are dealing with managers used to manage difficult situations, we assume that large-group problem solving does not need extra skills from normal leadership under stress.

The making of the videos, with scenes filmed and commented by the whole group, provided a modeling training tool, as described by Reed et. al. (2018). Role play and structured experiences were also used extensively in order to support skill development (Kearns, 1995), of which the results proved to be important.

As to limitations, the main one was that it was not possible to include a real intervention in the course. If participants could have organized a real company forum, with real stakeholders executing the projects, results could have been much more fruitful. Another limitation was due to a poor course introduction during the two first sessions. On our side we assumed that concepts could be easily understood, and so we did not plan for a more thorough explanation (e.g. mind mapping). On the company side, there was an initial turbulence as to the group composition that should attend the course. Only in the third session (out of nine) the group remained stable. The fact that participants were led to read the course materials, especially the manual, was mandatory to provide a better integration of the concepts. In the words of the participants, they had never been subjected to this type of course, where theoretical concepts and long explanations were discarded, so the reading of the course materials was fundamental to its understanding.

As to the training of matrix structure implementation, there was little time to address it, as it coincided with the session where the CEO would be present, and the priority should be given to the presentation of the diagnosis and projects report. Nevertheless, the distance between the organizational structure of the Hotel Group AP, and the one that would be needed for the matrix, is too long, thus the discussion would have very little sustainability. In future courses, this issue cannot be addressed effectively unless participants have some experience in working in these types of organizations.

Conclusions

Overall, the training model, based on Bandura's social learning theory (Bandura, 1986), and expressed by demonstration, modeling and observation, as the main sources of learning, proved to be effective. Also, the adaptation we made from motor skills training by using participants as role models, and Kolb's learning model (Kolb, 1984), as to the value of immediate experience as the act that precedes observation, produced good results. As participants initiate the training with related skills and knowledge, the abstractions they make out of the training, or "theories", are the basis for the definition of further behaviors and attitudes, as explained by Kelly in his personal construct theory (Kelly, 1963). These managers may be competent in team leadership (push approach) but not necessarily in using a facilitative style of group coordination (pull approach), either with small-groups or large-group facilitation. But challenging their previous experience contributed to the course's good results.

A particular added value of the course turned out to be the innovation projects that came out of the forum. Even if not planned to have a material output, the course served to demonstrate a methodology that provided innovative outputs and, we may assume, participants will use some of it in their daily work. If not in large group meetings (managers complained that it is not possible to assemble workers for hours, given the labor-intensive regime in the hotel industry), at least with smaller project teams it is expected that some kind of matrix structure, made out of innovation projects, may arise. This prevision, also supported by participants' evaluations, was not possible to verify, as the hotel industry had to shut down because of the Corona virus. Let us hope that, in the near future, the industry may regain its place also by providing the required innovation to complete new conditions. If this is so, the course will have played its role.

As a final conclusion, we can say that the course model we provided for the preparation of managers as coaches for organizational innovation, proved to be adequate. Although it requires changes in the introduction, and the elimination of abstract examples, its structure proved to be adequate. As to future developments, they will have to do mostly with the functioning of a matrix structure so that the whole approach may have a full impact on the company. That is why this course should take place in companies that already have some initiatives in project development. If we succeed in bringing in the necessary expertise in human resource management, in matrix structures, we will have developed conditions to present an organizational behavior course syllabus, for managers and management students, which has proved to be effective.

As to the hotel industry, the reduction of its limitations to expand project development, due to its labor-intensive nature, will continue to dictate its ability to produce innovations that are not adopted from elsewhere. In the post-COVID 19 era, where collaboration will dictate much of the changes (Chesbrough, 2020), this cannot help but take place.

References

Ali, A. (2011). Measuring soccer skill performance: A review. Scandinavian. *Journal of Medicine & Science in Sports*, *21(2),* 170–183.

Appelbaum, S., Nadeau, D., & Cyr, M. (2008). Performance evaluation in a matrix organization: a case study (Part One). *Industrial and Commercial Training,* 40(5), 236-241.

Arnold, K. (2005). How to build your expertise in group facilitation. In S. Schuman (Ed.), *The IAF handbook of group facilitation (*pp.*525-541)*. San Francisco, CA: Jossey-Bass.

Bandura, A. (1986). *Social foundations of thought and action: A social cognitive theory.* Englewood Cliffs: Prentice-Hall.

Bartunek, J., & Woodman, R. (2015). Beyond Lewin: Toward a temporal approximation of organization development and change. *Annual Review of Organizational Psychology and Organizational Behavior*, 2, 157–82.

Basadur, M. (1987). Needed research in creativity for business and industrial applications. In S. G. Isaksen (Ed.), *Frontiers of creativity research: Beyond the basics*. Buffalo, NY: Bearly Limited.

Basadur, M., Potworowski, J., Pollice, N., & Fedorowicz, J. (2000). Increasing understanding of technology management through challenge mapping. *Understanding Technology Management, 9* (4), 245-258.

Bazigos, M & Harter, J. (2016). Revisiting the matrix organization. *McKinsey Quarterly,* January. Retrieved from https://www.mckinsey.com/business-functions/organization/our-insights/revisiting-the-matrix-organization.

Boss, J. (2016). Don't skimp on the after-action review: 6 ways an AAR will catapult your situational awareness. *Forbes*, 1 Dec. Retrieved from https://www.forbes.com/sites/jeffboss/2016/12/01/dont-skimp-on-the-after-action-review-6-reasons-why/#125194beba3d.

Bredin, K., & Söderlund, J. (2011). The HR quadriad: A framework for the analysis of HRM in project-based organizations. *The International Journal of Human Resource Management*, 22 (10), 2202-2221. DOI: 10.1080/09585192.2011.580189.

Bunker, B., & Alban, B. (2006). *The handbook of large group methods: Creating systematic change in organizations and communities*. San Francisco: Jossey-Bass.

Bushe, G., & Robert J. (2014). The dialogic mindset in Organization development. *Research in Organizational Change and Development, 22*, 55-97.

Chesbrough, H. (2020). To recover faster from Covid-19, open up: Managerial implications from an open innovation perspective. *Industrial Marketing Management.* Retrieved from https://doi.org/10.1016/j.

Cilliers, F. (2000). Facilitation skills for trainees. *Journal of Industrial Psychology*, 26(3), 21-26.

Cooperrider, D., & Withney, D. (2005). *Appreciative inquiry: A positive revolution in change*. San Francisco, CA: Berret-Koehler Publishers.

Cebon, P., Newton, P., & Noble, P. (1999). *Innovation in organizations: Towards a framework for indicator development*. Melbourne Business School Working Paper #99-9, September.

Doyle, P. (1994). Setting business objectives and measuring performance.

European Management Journal, 12(2), 123-132.

Dunn, S. (2001). Motivation by project and functional managers in matrix organizations. *Engineering Management Journal, 13* (2), 3-10. DOI: 10.1080/10429247.2001.11415110.

Galbraith, J. (2009). *Designing matrix organizations that actually work: How IBM, Procter & Gamble, and others design for success*. San Francisco: Jossey-Bass.

Garbers, I., & Konradt, U. (2014). The effect of financial incentives on performance: A quantitative review of individual and team-based financial incentives. *Journal of Occupational and Organizational Psychology*, 87, 102–137.

Garcia, S.K. (2007). Developing social network propositions to explain large-group intervention theory and practice. *Advances in Developing Human Resources*, 9, 341-358. DOI: 10.1177/1523422307304100.

Garganta, J., Guilherme, J., Barreira, D., Brito, J., & Rebelo, A. (2013). Fundamentos e práticas para o ensino e treino do futebol. In F. Tavares (Ed.), *Jogos desportivos coletivos. Ensinar a jogar* (pp. 199-263). Porto: Editora FADEUP.

Ghiglione, R. & Matalon, B. (1977). *Les enquêtes sociologiques : Théories et pratique*. Paris : A. Colin.

Isaksen, S. (2020). Unleashing creative talent in organizations – Linking learning and creativity through creative problem-solving. In M. Mumford & M. Todd (Eds.). *Creativity and innovation in organizations*. New York: Routlege.

Kearns, M. (1995). Using Kolb: implementation and evaluation of facilitation skills. *Industrial and Commercial Training, 27* (6), 8 – 14.

Kelly, G. A. (1963). *A theory of personality: The psychology of personal constructs.* New York: W. W. Norton & Company.

Kolb, D. A., Boyatis, R. E., & Mainemelis, C. (2000). Experiential learning theory: Previous research and new directions. In R. J. Sternberg & L. F. Zhang. *Perspectives on cognitive, learning, and thinking styles* (pp. 201-231). New York: Lawrence Erlbaum.

Mento, A., Jones, R., & Dirndorfer, W. (2002). A change management process: Grounded in both theory and practice. *Journal of Change Management, 3* (1), 45-59.

Mintzberg, H. (1991). The innovative organization. In H. Mintzberg & J. B. Quinn (Eds). *The strategy process-concepts, contexts, cases* (pp. 731-745). Englewood Cliffs: Prentice Hall.

Nielsen, K., & Abildgaard, J. (2013). Organizational interventions: A research-based framework for the evaluation of both process and effects. *Work & Stress: An International Journal of Work, Health & Organisations*, 27(3), 278-297, DOI: 10.1080/02678373.2013.812358.

Page, T., Rahnema, A., Murphy, T., & Mcdowell, T. (2016). Unlocking the flexible organizations. Deloitte. Retrieved from https://www2.deloitte.com/content/dam/Deloitte/global/Documents/HumanCapital/gx-hc-unlocking-flexible-%20organization .pdf

Puccio, G. J., Firestien, R. L., Coyle, C., & Masucci, C. (2006). A review of the effectiveness of CPS training: A focus on workplace issues. *Creativity and Innovation Management, 15*(1), 19-33.

Reed, F., Blackman, A., Erath, T., Brand, D., & Novak, M. (2018). Guidelines for Using Behavioral Skills Training to Provide Teacher Support. *Teaching Exceptional Children*, 50(6), 373–380.

Sasha, R. (2013). Talk-in-interaction in facilitated and training workshops in organizations: A summary of findings from conversation analysis. *Group Facilitation: A Research and Applications Journal*, 12, 5-15.

Shaw, M. (1981). *Group dynamics: The psychology of small group behaviors.* New York: McGraw-Hill.

Sousa, F., & Monteiro, I. (2021). *Acelerar a inovação organizacional: Preparar agentes para a mudança [Speed up organizational innovation: Prepare change agents]*. Lisbon: Sílabo.

Sousa, F., Monteiro, I., & Pellissier, R. (2016). Création d'un petit monde au moyen d'une méthode de travail avec des grands groupes. *Projectics / Proyéctica / Projectique, 2*, (14). 41-57. DOI: 10.3917/proj.014.0041.

Sousa, F, Monteiro, I., Walton, A., & Pissarra, J. (2014). Adapting creative problem solving to an organizational context: A study of its effectiveness with a student population. *Creativity and Innovation Management.* 23 (2): 111-120.

Sousa, F., & Monteiro, I. (2019). How to save time for change: A field study. *Revista Ensino de Ciências e Humanidades - Cidadania, Diversidade e Bem Estar- RECH*, 5, Jul-Dec, 94-119.

Steiber, A., & & Alänge, S. (2015). Organizational innovation: a comprehensive model for catalyzing organizational development and change in a rapidly changing world. *Triple Helix*, 2 (9), 1-25. DOI 10.1186/s40604-015-0021-6.

Tani, G., Bruzi, A., Bastos, F., & Chiviacowsky, S. (2011). O estudo da demonstração em aprendizagem motora: Estado da arte, desafios e perspectivas. *Revista Brasileira Cineantropom Desempenho Humano, 13* (5), 392-403. DOI: 10.5007/1980-0037.2011v13n5p392

Thomas, G. (2005). Dimensions of facilitator education. In S. Schuman (Ed.), *The IAF handbook of group facilitation (Chapter 29, pp.525-541)*. San Francisco, CA: Jossey-Bass.

Wardale, D. (2008). A proposed model for effective facilitation. *Group Facilitation: A Research and Applications Journal, 9*: 49-58.

Weick, K. E. (1979), *The social psychology of organizing.* Reading, MA: Addison-Wesley.

Weisbord, M., & Janoff, S. (2010). *Future search: Getting the whole system in the room for vision, commitment, and action.* San Francisco: Berrett-Koehler Publishers.

Zobal, C. (1999). The “ideal” team compensation system – an overview, part II. *Team Performance Management*, 5(1), 23-45.

Zingheim, P., & Schuster, R. (1995). Supporting teams with multi-rater performance reviews. *Compensation & Benefits Management*, Summer, 41-45.