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Worklore
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current focus Helping leaders and teams increase the alignment, engagement and integrity that enable them to generate extraordinary value.

areas of specialization

Employee Engagement Opportunity Scans -- A toolkit and simple 3-step process for line leaders to diagnose and address specific engagement and alignment issues on their teams – as part of an ongoing management process. Surfaces specific opportunities for improvement, including what to stop doing.

High-engagement Change Methods -- A repertoire of high-engagement approaches to building shared commitment to an organizational change, in ways that leverage critical best practices from the past. Applicable to high-functioning teams or difficult environments.

Cross-functional Task Forces -- A targeted approach to strengthening collaboration and designing more effective processes across functions, business units or geographic divisions. Include support and facilitation for learning communities and efforts to distill shared knowledge.

Conflict, Compromise & Collaboration Skills – Collaborative practices for using competing views as a source of innovation, effectiveness and organizational integrity. Includes specialized frameworks based on *The Compromise Trap: How to Thrive at Work without Selling your Soul*.

experience

1993 - present

WORKLORE

SAN FRANCISCO, CA

Intuit, Inc – Co-facilitated task force to resolve persistent issues between field and Home Office HR staff. Coached leaders of five grassroots learning communities in managing change, building engagement, crafting metrics, capturing and sharing knowledge, and building division-wide participation. Co-led project team in redesigning and managing the rollout of a new performance evaluation process. Coached senior vice president in transition to strategic operating role. Led HR business partners in cultivating company-wide Community of Practice to support their transition to organizational development partners.

Archstone-Smith - Led team of nine consultants in organization-wide “opportunity scan” to improve strategic impact of mid-level managers and enable corporate growth, then framed the resulting initiatives and their rollout process. Coached change management team in developing communications plans and rollout strategies for adoption of revenue management program impacting 250 locations and hundreds of staff members. Assisted with design of company-wide customer experience change initiative. Designed and developed a custom on-line business simulation of company’s core business drivers, then led rollout of highly successful leadership development program based on the simulation. Developed methodology for knowledge capture from exceptional customer service locations.

Independent Study on Ethics & Compromise – Designed and conducted 52 in-depth interviews exploring pressure to compromise at work. Identified six personal foundations that recommendations for individual contributors and leaders on creating cultures of alignment, engagement and integrity. Resulted in *The Compromise Trap: How to Thrive at Work Without Selling Your Soul*, published by Berrett-Koehler in 2009.

CDM Inc. – Facilitated development, design and adoption of internal expert learning network on conflict management in global engineering firm of over 3000 engineers. Provided one-on-one coaching and group sessions to help engineering managers resolve conflicts with staff, peers, supervisors & clients.

Hewlett Packard – Supported department head with change management using story, high-engagement methods, and scenario planning. Team-coached and supported her successor in integrating 6 organizations in 8 months, including strategic planning, team building, and customer engagement.

Stanford University – From 2005-2008, taught highly successful staff development program, *Saying No to Make Room for Yes*. Worked with Graduate School of Business faculty Dr. Margaret A. Neale to develop video simulation to teach advanced negotiations techniques to executives and MBAs.

Dr. William Ury – Worked with the co-author of *Getting to Yes* and co-founder of the Harvard Negotiation Project, researching examples for his 2006 book, *The Power of a Positive No*. Identified and catalogued 350 stories about positive “no’s” in work, personal, community and political settings.

CTB/McGraw-Hill – Designed and conducted focus groups with Project Management staff during a period of low morale, identifying recurring patterns and key business drivers to enable Corporate University to recommend strategic interventions to senior leadership. Supported Corporate University in cultivating a Project Manager community of practice. Conducted assessment and knowledge capture following pilot team’s breakthrough achievements. Developed ROI Calculator for projecting potential impact of process improvements.

1990 - 1993 **SYMMETRIX, INC. (Change Services Consulting Firm)** **LEXINGTON, MA**

Healthcare Client – Co-led reengineering team to pilot best practices in two model districts which achieved 40% performance increases through improved patient scheduling, recruiting, and metrics. Co-developed change management rollout process. Designed and developed scheduling component of performance support software for clinicians.

Insurance Client – Led client-consultant reengineering team to reduce overpayments by \$12-28M annually through improved knowledge-sharing between novice and expert claims adjusters. Led client team in designing and adopting rapid product development processes using agile methods. Developed economic model linking operational improvements to financial metrics to support assessment of impact. Participated in change management core team responsible for reengineering quality of operations.

International Consulting Client - Managed team to create prototype, user interface design, navigational model, database logical model and common code specifications of workflow management system, to reduce repetitive work done by professional staff by 35%.

Telecommunications Client - Managed team which produced an economic model to assess potential impact of several possible improvements proposed by process improvement teams. Designed and led empirical studies in five locations to populate the model.

publications (selected)

Berrett-Koehler (2009): *The Compromise Trap: How to Thrive at Work without Selling Your Soul*
Strategy + Business (Spring 2007): *Winning The Devil's Bargain*
Pfeiffer HRM Annual (2006): *Story as Organizational Learning*
Story in Organizations SIG of National Storytelling Network (2004) *White Paper: Transforming Capabilities: Using Story for Knowledge Discovery & Community Development*
Seminars for Nurse Managers (Sep 2002): *Organizing to Learn: Recognizing & Cultivating Learning Communities*.

speaking & teaching (selected)

Harvard Business School Association, Boston, MA (upcoming 2010) – *Devil's Bargains by Degrees: Ten Misconceptions about Compromise and How the MBAAOath Helps Address Them*
Society for Organizational Learning (2010): *Using Compromise to Diagnose Employee Engagement Issues*
Dow Chemical, Houston, TX – *Courage and Compromise: Skills for Staying Engaged While Everything Changes*
University Rotary, Palo Alto (2010) – *Pressure to Compromise: Working with Integrity in the 21st Century, with Marijke Rijsberman*
Heartland Circle (2010) – *VisionHolder Call: Making Work Bigger Than a Game*

education

1989 - 1991 **HARVARD BUSINESS SCHOOL** **BOSTON, MA**
Masters of Business Administration, 1991, with Honors. Focused on change management, operations, and management ethics. Produced four-part case study on a textile manufacturer in Macon, GA, which demonstrated principles of time-based competition and organizational change.

1981 - 1985 **UNIVERSITY OF CALIFORNIA, BERKELEY** **BERKELEY, CA**
Bachelors in Economics, 1985, with High Distinction. Member, Phi Beta Kappa. Focused on international economic development, political science and comparative literature.