

HOLISTIC MANAGEMENT

Resumen

Este artículo describe los componentes administrativos estratégicos que garantizan una operación efectiva y eficiente en la organización. También presenta las áreas (o dependencias –*clusters* en la terminología aquí empleada) donde se deben llevar a cabo estas intervenciones; describe los fines de cada una de estas intervenciones y presenta los elementos que deben analizarse y evaluarse en cada dependencia.

Este artículo contempla cinco componentes básicos de misión estratégica, desde un enfoque holístico: a) misión, logros y objetivos; b) unidades funcionales de producción y operación, mercadeo, finanzas y contabilidad, y recursos humanos; c) las unidades auxiliares de administración de los sistemas de información, investigación y desarrollo; d) las opciones alternativas de reducción de costos, estabilidad y crecimiento; y e) los procesos de implantación. Las dependencias de desarrollo que se tienen en cuenta son: diseño organizacional y estructura; políticas y procedimientos; costos de operación; entrenamiento de personal administrativo y no administrativo; comunicación intragrupal e intergrupala y liderazgo.

Abstract

This paper presents the strategic management components that are conducive to the effective and efficient operation of the organization. It also presents the areas (clusters in this work) of the organization development interventions, describes the goals of each intervention, and exposes the elements to be analyzed and evaluated in each cluster.

The design of this paper presents the strategic management components as (a) mission, goals, and objectives; (b) the functional units of production and operations, marketing, finance and accounting, and human resources; (c) the ancillary units of management information systems, and research and development; (d) the alternative choices of retrenchment, stability, and growth; and (e) the implementation process. The eight organization development clusters are: (1) organizational design and structure; (2) policies and procedures; (3) performance appraisal; training for (4) the management and (5) non-managerial personnel; (6) intra-group and (7) inter-group communication; and (8) leadership.

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I NTRODUCTION

The term “holistic”—from the Greek “*holisticos*”— means “total”. Holistic Management in this work incorporates Strategic Management and Organization Development in a sequential form. This combination, in the author’s opinion, constitutes a total approach to management because it creates an effective and efficient organization, and, subsequently, contributes to its continuous development.

The first part of the work indicates that the organization must use Strategic Management in order to operate effectively and efficiently by (a) establishing and sustaining its mission, goals, and objectives; (b) maintaining high performance in its functional and ancillary units—production and operations, marketing, finance and accounting, human resources, research and development, and management information systems; (c) have alternative choices available when needed by the decision makers; and (d) implement its strategy effectively and efficiently. Strategic Management is a comprehensive and continuous management process for the formulation and implementation of strategies for the effective and efficient operation of the organization. Strategic Management does not develop the organization, but it makes it operate satisfactorily within the same “possibilities curve”.

In the second part of the work, the author indicates that Organization Development makes the organization more open and more adaptive through increases in capability and potential in order for it to continue planned change efforts on an action orientation basis. Organization Development is a planned change effort, which, as in Strategic Management, involves all the parts of the organization, and it is initiated and managed from the top hierarchy. By making the organization more open and more adaptive, it enters into new “possibilities curves” by unfreezing from the existing status quo, making the planned changes, and refreezing the new status quo in order to avoid re-

gression. The utilization of consultants specializing in strategic management is of paramount importance. These external agents must work closely and cooperate with commensurate internal personnel in every component of the strategic management.

Organization Development is precipitated by the organization’s internal and external environment that requires changes in one or more of the organization’s elements, such as planning, communication, structure, etc. Again, these changes are developmental and cannot take place until Strategic Management has brought the organization an acceptable level of performance in all of its components. Developmental changes begin with (1) the diagnosis in order to identify the elements to be analyzed and evaluated in their respective area, followed by (2) the creation of the implementation proposals, and (3) terminate with the implementation through planned change efforts. The first two are done under the auspices (in most cases) of external agents, such as management consultants, whereas, the last one is conducted (in most cases) by commensurately



trained and qualified internal personnel. These planned activities are conducive to the change of the status quo. The consultants and the internal personnel profoundly utilize the behavioral sciences in all three phases cited above. The results of the findings of the diagnosis and the idiosyncratic characteristics of the organization dictate what methods, techniques, and instruments will be used for the correction of the deficient and/or dysfunctional elements and for the developmental change of all the elements in the eight clusters which are described in the paragraph that follows.

The purpose of this paper is (1) to present the strategic management components that are conducive to the effective and efficient operation of the organization, (2) present the areas (clusters in this work) of the organization development interventions, (3) describe the goals of each intervention, and (4) expose the elements to be analyzed and evaluated in each cluster. The totality of the goals in the eight interventions leads to the ultimate goal, which is to make the organization more open and more adaptive. This paper does not include the external environment of the organization, the formulation of the organization development implementation, and the implementation per se.

The design of this paper presents the strategic management components as (a) mis-

sion, goals, and objectives; (b) the functional units of production and operations, marketing, finance and accounting, and human resources; (c) the ancillary units of management information systems, and research and development; (d) the alternative choices of retrenchment, stability, and growth; and (e) the implementation process. The eight organization development clusters are: (1) organizational design and structure; (2) policies and procedures; (3) performance appraisal; training for (4) the management and (5) non-managerial personnel; (6) intra-group (a group in this design is a department, a division, or any other organizational unit) and (7) inter-group communication; and (8) leadership. Each of the eight clusters includes elements that are strongly related to one another. Some elements exist in more than one cluster.

STRATEGIC MANAGEMENT

Mission, Goals, and Objectives

The organization must have a well-defined mission and should include in it the entity's unique identity, the emphasis placed on the functions performed by the organization, and the latter's developmental direction. The mission is a unifying force of all organizational activities and must be depicted in the mission statement. Subsequently, goals—the ends against which organizational efforts are





directed—must be established. The purpose of goals is to establish direction, identify expected results, and improve teamwork and a sense of purpose by setting targets and improving performance. Goals should be defined, measurable, achieved in specific time frame, and achieved at the lowest possible costs. Goal setting should be participative because all participants should be involved in achieving the goals they established. Objectives are statements of more specific goals that the organization plans to achieve. Their purpose is to create performance targets that measure the mission and the strategy of the organization. Setting and measuring objectives is necessary for measuring organizational progress.

The Functional and Ancillary Components (The Internal Environment)

1. Production and Operations

Production is the creation of the utilities produced by the organization. To begin with, the organization must establish viable plans for production. First, it must attain design planning for converting a product idea to an actual product. This requires a product line which is a group of similar products that differ only in relatively minor characteristics; product design which is the process of creating a set of specifications from which the product can be produced; required capacity that entails the amount of products or services the organization can produce in a given period of time; and the use of technology.

Subsequently, the organization must have good facilities. In the area of the production site, a viable operational plan is necessary. This includes the planning horizon (the time required to implement the plan); the estimation of the market demand; comparing market demand with production capacity; and the adjustment (if any) of the production capacity to meet the demand.

The organization must also create and maintain a viable operations control system. This includes (a) purchasing (all the activities involved in obtaining required materials, supplies, and parts) either from other firms and/



or other entities affiliated with the organization; (b) inventory control that manages inventory in such a way as to minimize inventory costs; and (c) scheduling that ensures that materials and other resources are present at the time needed. Finally, quality control that ensures that goods and services are produced in accordance with designed specifications is absolutely required. The aspect of technology utilization is of paramount importance in this functional unit. The organization must utilize the current technology available in order to maintain its internal operations and its external competitive edge.

2. Finance and Accounting

The organization must determine the effective and efficient avenues for financing its short and long-term operations. This entails the issuance of stocks and/or bonds, as well as other main and supplementary sources of financing. Its accounting system must maintain a constant financial flow and must be closely scrutinized and managed in order to avoid legal repercussion. A value chain analysis is necessary to expose how



the organization's cost position compares with its rivals. The traditional accounting measures identify broad categories of expenses. Activity-based accounting entails defining expense categories based on specific activities being performed within the organization. Determining the differences between cash hogs and cash cows in order to enhance cash flows leads to resource shifts between organizational units and optimizes its entire portfolio performance. It is of paramount importance for the organization to correctly determine the fixed and variable costs for finished goods or services and to minimize capital and operating expenses while maximizing profits. Financial information, such as profit ratios, liquidity ratios, debt-to-asset ratios, and return on investments (ROI) must reflect the organization's performance.

3. Human Resources

The most valuable part in the organization is its human resources. Planning for human resource needs involves planning and forecasting short, intermediate, and long term need requirements, as well as analyzing the

jobs to determine the skills and abilities needed. The creation and implementation of plans and programs ensures that commensurately qualified persons are available for employment when needed. Subsequently, the organization must detect qualified applicants and select the best of them. Therefore, recruitment should both attract such qualified individuals to the organization and offer immediately training and education when these individuals are employed. Once the employees are on the job, their efforts must be evaluated and commensurate rewards must be provided. Such rewards are tangible and intangible. Rewards are the results of performance appraisal. A formal performance appraisal system must be required. Training must include designing, determining, and implementing programs that increase performance and ability on the part of the employees, and designing and providing opportunities for employee careers. Continuous training is critical to the organization because it provides the skills needed for both present and future operations. The organization must continuously improve the work environment. The role of occupational safety and health is of paramount importance since it encompasses the physiological, psychological, legal, ethical, sociological, and cultural elements of the personnel.

4. Marketing

Marketing (which includes sales, promotion, advertising, and public relations) must have a long-term consumer analysis perspective in order to analyze, understand, and respond to the marketplace in which it operates. The examination of commensurate demographics, including the life-styles, the decision-making patterns, and the organization of consumers must be under serious consideration by the marketing unit. Subsequently, marketing must conceive, develop, and market its products. This must be a concerted effort with the participation of the other functional units. Production, finance and accounting, and human resources, as well as research and development, and management information, highly contribute in this marketing stage. Creating and maintaining



a viable distribution system is another area of marketing. Major considerations in this area must be the distribution functions; the factors the organization considers for selecting and maintains its distribution channel; the general and unique characteristics in the distribution channel; and inventory issues. Promotion planning must involve how the organization communicates, informs, and persuades its market segmentation about its goods, services, and corporate image. Advertising and public relations are the carriers of promotion planning which are followed by selling and sales promotion. Finally, marketing, assisted, again, by the other functional and ancillary units, must establish for price considerations and a price strategy that will be incorporated into the total strategy of the organization. Such strategy should consider a sales-based, profit-based, and/or any other alternative-pricing element.

5. The Management Information System

The author of this work does not consider the management information system of the organization as a functional unit, but as an element that transcends throughout the entire entity and which is omnipresent in each functional unit, in each strategic component, and in every part of organization development. The marketing unit has its own infor-

mation system and so do the other functional units. The totality of those information systems is the management information system that provides the organization with the information it needs to perform its tasks. The management information system must distribute timely and useful information from both internal and external sources to the decision centers and vice versa.

6. Research and Development

The research and development element, which also transcends throughout the entire organization and which is omnipresent in the other functional units, must play a vital role in sustaining a competitive infrastructure and developing it for equally competitive activities in the future. There are three basic factors governing the success of all research and development projects for upgrading existing products and/or developing new ones and for participating in other commensurate activities throughout the organization. These are (a) technical feasibility, (b) the existence of a market into which the products can be sold, and (c) the organizational resources. Teamwork and planning are required not only to create the new products and/or upgrade the old ones, but also to prepare for the resulting changes caused by successful new and/or upgraded products. The same is true for other com-

mensurate activities performed by this unit. In teamwork, representatives from the other functional units must communicate their objectives, ideas, and current solutions to problems, and try to mutually support those solutions. Furthermore, such representatives must agree on the project under consideration. For the effective and efficient completion of research and development projects, the organization must exhibit competence and high standards of performance that emanate from all functional and ancillary areas.

Alternative Choices

The organization must have three alternative choices after an effective and efficient analysis of its functional and ancillary units has taken place: retrenchment, stability (the maintenance of the status quo in this work), and growth. Large organizations may employ a combination of the above three.

Organizational units must be reduced and/or deleted when they no longer strategically fit in essence and/or size because they do not make the necessary earnings contribu-

tions, or no longer serve a function. The reduction and/or elimination of such units free resources for debt reduction, support other areas of organizational expansion, and allow for acquisitions that will strengthen the organization's competitive position.

The maintenance of the status quo (stability) is espoused when the organization is performing almost acceptably and/or opportunities in the external environment are limited in order to pursue expansion/growth. Preparing for better performance and waiting for external opportunities to arise is the wisest decision the organization can make during this alternative choice.

Finally, expansion/growth becomes an alternative choice when the organization is operating effectively and efficiently and the external opportunities are favorable to such an endeavor. Growth and expansion must not be equated to development. Growth and expansion entail more units and more volume added to the organization. On the contrary, development indicates continuous increases in the capability and potential of the organization.

Implementation

The organization must finally implement its alternative choice(s) and its decisions in general. The implementation of the organization's strategy must ensure the entity's position in its commensurate industry and the market in general. There are three integral elements in the implementation phase: monitoring, evaluation, and providing feedback.

Monitoring assures that the organization adheres to the standards and that activities are followed from the beginning to the end of the implementation. The uses of monitoring indicators that measure the quantitative and qualitative aspects of the organization allow the organization to observe the attainment of goals. The indicators show the extent to which the objectives of every activity have been achieved. Monitoring indicators should be clear, significant, and objective. This clarifies whether to change or continue with the current strategy that is





undergoing implementation. Monitoring encompasses not only the detection of problems, but also tracking the progress of the implementation. Finally, it provides information on how adjustments made affect the overall strategy of the organization.

The evaluation of the implementation must be effective, efficient, timely, and impartial. The information collected must be applicable to what is being evaluated. The completed evaluation, subsequently, is channeled back to the strategic center of the organization in the form of feedback and helps the organization sustain good performance by making commensurate adjustments during the implementation process. This assures the attainment of desired goals.

ORGANIZATION DEVELOPMENT

Organizational Design and Structure

The organizational design indicates how an organization abides by its internal congruence and configuration while it receives inputs from and provides outputs to the external environment. Congruence is the organizational effectiveness, which results when the organization is adapted to its external environment. Organizational configuration, on the other hand, is the effectiveness based upon the internal coherence of its various elements that exist in the eight clusters in this work. Therefore, organizational effectiveness is the result of internal coherence and the quality of organizational outputs.



The organizational structure defines relationships among organizational elements: tasks, personnel, hierarchy, information, and control. The organizational structure incorporates departmentalization; delegation of authority and responsibility and its parity; unity of command (here reporting to designated superiors, not necessarily to one); span of control; and, finally, the elements of horizontal and vertical communication.

The goal of the intervention in this cluster is to develop positional roles and relationships that cause more effective arrangements in tasks, resources, and hierarchal responsibilities.

The diagnosis focuses on the analysis and evaluation of: (1) inputs/outputs; (2) departmentalization (including job design); (3) authority and responsibility of persons and departments, as well as the delegation of authority and responsibility under parity; (4) unity of command; (5) span of control; and (6) line/staff responsibilities and relationships.

Policies and Procedures

Policies are guides that dictate the parameters within which persons, groups, and organizational units must operate in order to accomplish their goals. Policies create the framework for implementing organizational strategies, whereas procedures dictate how tasks need to be executed in order to implement such strategies. Policies and procedures are related to the mission, goals, and objectives of the organization and provide guidance for daily work, decision-making, and rewarding (or punishing) behavior by establishing the base for systems of internal control.

Policies and procedures are commensurate to the demands of the internal and external environments in order to assist the organization in the process of selecting the correct inputs provided by the environment, and in the process of transforming those inputs into outputs acceptable to the expectations of the environment. Policies and procedures are consistent and flexible in order to allow for changes in the elements of the organi-

zation. Non-human resources policies are pertinent to production and operations; marketing, sales, advertising, promotion, and public relations; research and development; and finance and accounting. Human resources policies are pertinent to the selection, maintenance, and development of the personnel.

The goal of the intervention here is to create (1) non-human resources policies conducive to better operation and control of the organization, and (2) human resources policies conducive to a Theory Y organizational environment. The diagnosis has to do with the analysis and evaluation of current organizational policies and procedures.

Performance Appraisal

There are two areas of concern in performance appraisal: (1) to design jobs and work systems for the establishment of the organization's mission, goals, and objectives, and (2) to effectively select, maintain, and develop human resources.

Because performance appraisal is related to the organization's mission, goals, and objectives, it is an integral element for the improvement of the overall organizational performance. Employee performance is a function of various conditioning factors, such as personal abilities, individual effort, perception about the role performed, and perception of equity, among others. Therefore, performance appraisal takes under consideration all these factors in order to be an effective tool in organizational development. Other characteristics of the performance appraisal system include objective and unbiased ratings (quantitative and qualitative), job knowledge and performance, individual characteristics, financial indicators, measurement instruments and systems, and preparation of those conducting performance appraisals. The goal of the intervention in this cluster is to (1) increase personnel effectiveness in performing their tasks through reinforcing, sustaining, and improving performance; and (2) to improve the design of jobs and work systems.



The diagnosis focuses on the analysis and evaluation of the preparation and function of those who conduct performance appraisals; the types, instruments, methods, procedures, and techniques of performance appraisals; the legal, social, and ethical considerations in performance appraisals; and the analysis and evaluation of the design and the components of jobs and work systems.

Management Training and Development

Training and development provide the knowledge and skills managers need to perform their jobs effectively. Training focuses on the improvement of current managerial jobs and the acquisition of knowledge and skills. Development has to do with building the knowledge and skills so that managers will be prepared to assume new responsibilities. Management development necessitates actual practice and experience, especially for the development of the upper middle and top managerial echelons.



The management development process begins with the assessment of the organization's training and development needs that are formulated by considering all organizational requirements, tasks, and other elements associated with the managerial jobs for which training and development are needed. This is followed by designing training and developmental programs and the implementation of them.

The goal of the intervention in this cluster is to assist the management to develop their technical, human relations, and conceptual skills. The diagnosis focuses on (1) the analysis and evaluation of the training needs of managers; (2) the analysis and evaluation of training programs dealing with planning, organizing, staffing, directing, controlling, and monitoring the environment; and (3) the analysis and evaluation of the satisfaction of the managers' needs based on Maslow's Theory of the Hierarchy of Needs.

Employee Training and Development

Employee development is a continuing process involving all aspects of the non-managerial employee's jobs, careers, and working environment. It is designed to ensure that employees are properly trained and developed so that organizational goals are met. This practice begins with the selection process and continues throughout the employee's affiliation with the organization. As is the case with managerial training and development, the success of its counterpart in this cluster depends on the organization's ability to identify training and developmental needs, prepare training and developmental programs, and finally implement them. Furthermore, the psychological and mental ability of the employees to learn is taken under consideration.

The goal of the intervention in this cluster focuses on the creation of job enrichment. Job enrichment is enhancing the job by adding more meaningful tasks and duties to make the work more meaningful and rewarding. It assumes that task changes are caused according to the psychological needs of the employees and that the latter are involved in the design and redesign of

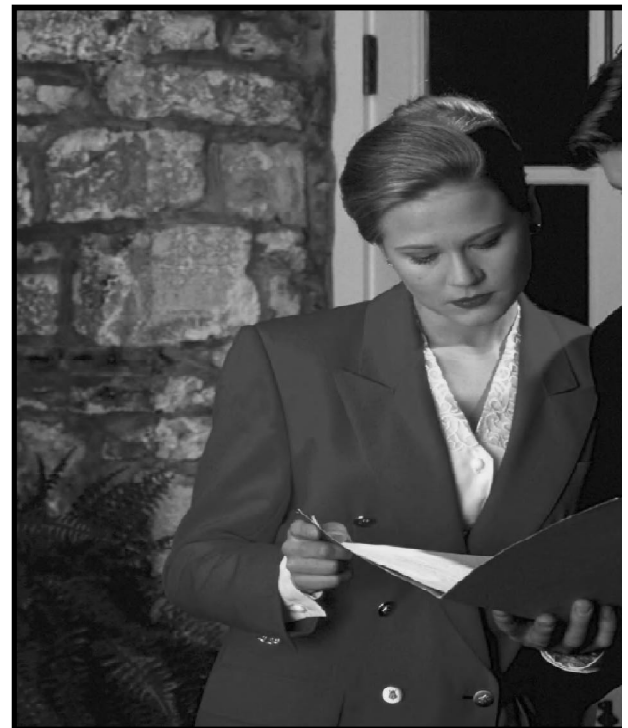
their respective jobs. Job design and redesign are aimed at the satisfaction of those needs.

The diagnosis is pertinent to (1) the analysis and evaluation of the satisfaction of the employees' needs according to Maslow's Theory; and to (2) the analysis and evaluation of the training needs in functional areas.

Intra-Group Communication

Communication is the process of transmitting information from one source to another. In most cases, in the intra-group cluster, communication is transmitted from one person to another, whereas in the inter-group cluster it is transmitted from one group to another. Effective communication takes place when the message suffers no or minimal distortion from the sender to the receiver.

Organizational communication is vertical and horizontal. Vertical communication flows up and down the organization, along formal reporting lines. It involves persons and groups. Upward communication incorporates information from subordinates to su-



periors. It may be responses to downward communication or initial messages requiring attention or merely providing information. Downward communication occurs when information flows down the echelon from superiors to subordinates. In most cases, downward communication includes directives, feedback, and general information.

Horizontal communication flows laterally and involves individuals of the same rank, both in the intra-group and inter-group clusters. It facilitates coordination among the group members and among groups, and strengthens the decision-making process in both entities. A group is an entity that consists of two or more persons who interact on a regular organizational basis in order to accomplish one or more goals. In this work, the author refers to functional groups that are permanent and created by the organization in order to accomplish organizational goals within a specified period to time. Functional organizational departments (production and operations; marketing, sales, public relations, advertising; research and development; finance and accounting; and human resources) are considered groups in this work.

Individuals in groups play roles in helping the group reach its goals. Furthermore, there is role structure, which has to do with the set of defined roles and interrelationships among those roles that the group members define and accept. The standards of behavior in groups are called norms. Cohesiveness indicates the extent to which members are loyal and committed to the group.

The goal of intervention in this cluster is to develop intra-group communication in order to help its members (1) better understand their functional roles, and (2) make better decisions by analyzing available data effectively.

The diagnosis has to do with the analysis and evaluation of (1) oral, written, formal, and informal communication; (2) feedback; (3) communication channels; and (4) the decision-making process.

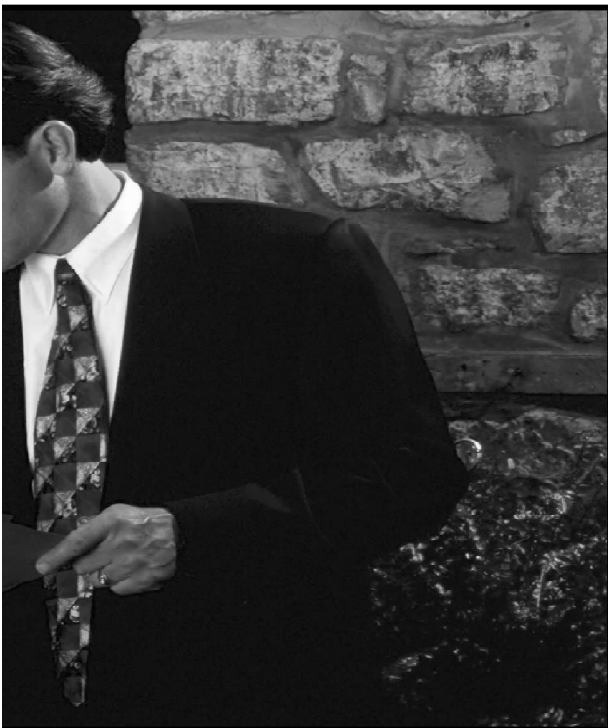
Inter-Group Communication

In addition to the communication elements cited in the previous cluster, inter-group communication requires a well-placed and functional communications system, a mechanism of introducing changes to the system, a method for storing important information, and a process for controlling undesirable information. The goal of the intervention in this cluster is (1) to develop inter-group communication in order for the participants to improve and develop their inter-group relationships for the attainment of common organizational goals, and (2) to change of groups' perception toward the other groups from negative or neutral to positive.

The diagnosis deals with the analysis and evaluation of formal and written communication; communication channels; feedback; and the analysis and evaluation of the perception of individuals and groups on personal and organization matters.

Leadership

Leadership is the process of influencing others to achieve organizational goals. An effective leader is depicted by the following





characteristics: He/she has interpersonal skills, such as diplomacy, respectfulness, listening skills, empathy, and fairness in dealing with others. Furthermore, the leader possesses mental capacity and ability, such as commensurate formal education, decision-making ability, communication and creativity skills, experience, diligence, and the ability to create and articulate a clear vision. Credibility, charisma, encouragement, and the ability to motivate are additional leader-

ship characteristics. Finally, the leader has certain basic values, such as strong ethical bases, honesty, and trustworthiness. The goal of the intervention here is directed toward the leader's perceived developmental needs in order to make him/her aware of the leadership areas that need development. The diagnosis focuses on assisting the leader to analyze and evaluate his/her current interpersonal skills, mental capacity, perceptions, and values.

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