

Selling Packaging to your CEO  
Strategies and Techniques on how to gain support for the packaging function

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Abstract

Hewlett-Packard is reorganizing itself to become a more process-focused organization. Packaging is one of the first disciplines to undergo this re-engineering process within the company. This paper will discuss how the packaging team developed foundational elements, which lead to their ability to articulate its value to the enterprise and gain upper management support for its restructuring activities. The intent of this paper is to expose readers to some core elements needed to help present their own value within their organization and gain more support / recognition.

## Preamble

This paper was written to describe a process approach along with some techniques for promoting packaging within an organization. The opinions expressed here are that of the author alone and do not necessarily represent those of Hewlett-Packard Company.

Disclaimer about the author.

I want to make it clear that I'm not claiming to be an expert on this subject. Last year at ISTACON we had a discussion about what other topics should be covered. At that time Hewlett-Packard was "re-inventing" itself and the packaging function was one of the areas being looked at for "re-invention." It occurred to me that we, as a group, have these meetings and only share technical information. We never talk about how to improve our "station" or increase appreciation for packaging in our companies. In addition, I have always had a belief that we – as a community, need to increase awareness of packaging's contributions to the general populous.

In this paper I'm going to give you my thoughts on what I feel helped lead HP management to recognize the value of the packaging function and its contribution to the company. Now, as I expressed before, I'm not claiming to be an expert and if you feel I'm deficient in this presentation, I hope you are inspired by its purpose and come forward next year and present a more compelling story.

However, with that said I must also warn you that I have packaging on the brain. It is almost like a religion for me as in, there are two kinds of people – believers (converted) and non-believers (heretics). The Dimensions.01 conference is for the converted, people that know the value of packaging and believe so much they are willing to pay the conference fees and take a week out of their lives to learn more. Outside the conference room attendees will huddle in small groups and talk about our discipline with fellow disciples, using terminology only we understand, and others, outside our sect, will look upon us with confusion. When you leave at the end of the week, you will go back home and try to explain the wonders uncovered to those that just don't get it. So, this paper has been designed to help aid you with strategies and techniques to convert the heretics in your organizations.

## **Overview**

The paper has been organized into three major sections: Foundation, Approach, and Sustainability. The foundation covers elements that are needed to create a supportive community and a compelling proposal. The approach will cover three areas: what you'll be up against when trying to talk to other functions and upper management, the items you'll need to talk about and how to communicate so that others can

understand, and who you will need to talk with to gain support and resources. Lastly, sustainability will wrap up the paper on what you'll need to do to keep that level of support.

## **1.0 Foundational elements**

The foundation is what I feel is needed before you can start your journey as these are elements which will be critical in later stages.

### **Know the Value**

First and foremost, you should have a good understanding of the value your packaging function has in your organization. I'm sure that many people already understand, but may not have put it in a format that can be easily shared or expressed to others. What I'm getting at here is it is always good to clearly identify the elements that are the most important to your particular company.

In general, your management needs to know that products are distributed worldwide in air freight, rail, truck, padded van, and sea freight shipping environments. Of paramount concern to a packaging function is that no matter where and how the products are shipped, they arrive at the customer in proper condition. This is especially important in the computer and electronic industry where future sales may be based largely on the quality, integrity and performance of a company's previous delivery. As we, a packaging community, know, correctly designed packaging delivers the product to the customer in proper condition so that they can put it to use immediately, realizing all of the performance designed into the product. This is difficult to do as distributed products experience a number of potentially damaging forces, including shock from handling drops, vibration from transportation, and compression from stacking in warehouses and vehicles. Today's e-commerce distribution environment is particularly challenging because customers often require rapid delivery, and environmental shock forces increase at faster handling speeds. Understanding the distribution environment for your products, along with having the capability of testing products and packages for this environment, allows the packaging engineers to design protective packaging. They work closely with product designers to optimize the product-package combination, balancing the cost of the additional packaging against the cost of improving the product. This is a function of matching the protective level of the package with the needs of the product, using a minimum of material. The reason for this is simple: shipping costs and material costs increase as the size of the package increases and even small reductions can affect significant savings. In addition, the packaging engineers must keep in mind the environmental (green) aspects of their design in order to meet mounting legislative requirements.

Therefore packaging, or product protection systems, is complex, requiring a unique engineered solution for each product platform. It is a blend of science, engineering, art, and business needs, which operates cross-functionally. Below is a graphic (figure 1) showing the packaging functions interactions in typical division.

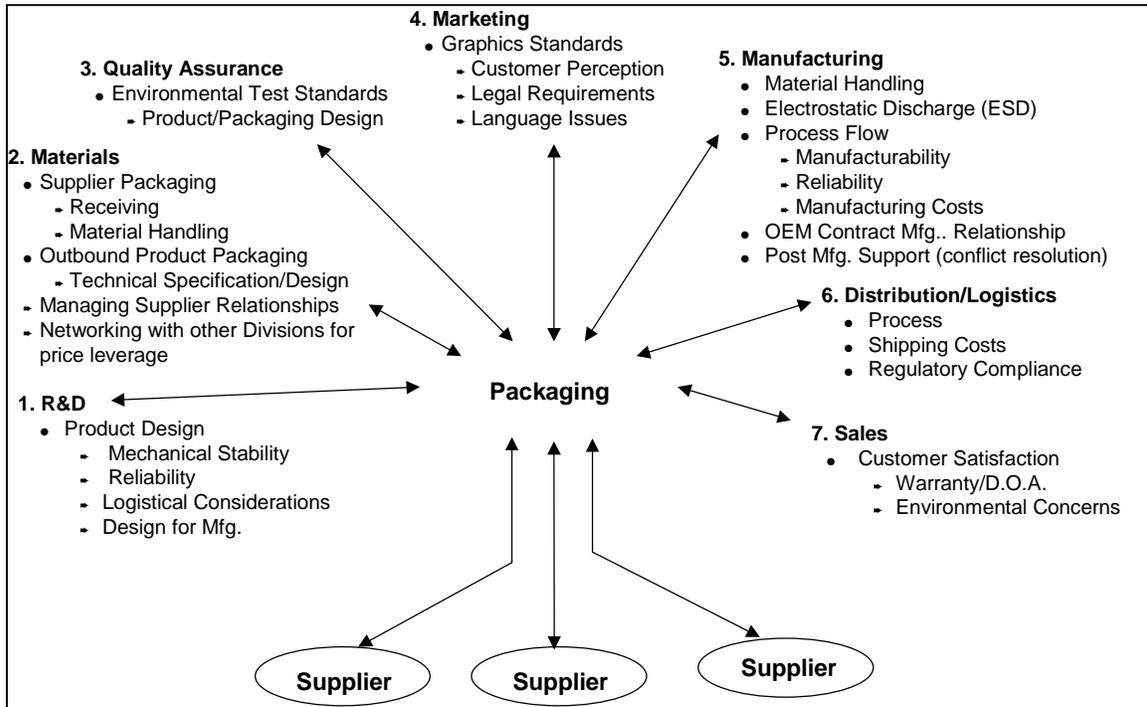


Figure 1

Listed below are just a few other basic values packaging brings a company.

- Branding
  - Customer selection
- Linkage to bottom line
  - Material costs
  - Storage
  - Logistics (1 to 5X)
- Linkage to other functions

## Community

Community is the most critical part to being successful in the future. They are the people that will actually engage with whatever plan you develop and are an excellent source of new ideas & approaches. So the first thing you have to do is figure out who's who, what roll they play, and in what functional area they report. You'll also need to identify key organizational contact and identify process interactions. This will help later in communications and building a core identity leading to sustainability.

As you move forward, you'll need to keep this community well informed. You can do this in a number of ways: Newsletters, web conferences (Webshops), E-mail dist. lists, & Phone Lists. Try to ensure that they have a clear understanding of current state, arising issues, and potential solutions/outcomes. This will

enable the community to feel that they are part of a large cohesive group and give them a sense of a "Core Identity." Having a core identity keeps everyone's eye on the same ball and encourages mutual self-respect. (Freedman)

### **Collection of ideas**

As you start to define your community, this is an opportune time to collect ideas of what items need improvement, need to be investigated, and where measurements are necessary to improve a situation. I'm sure that many of you already have a list of these in mind but this will help you gauge the relative importance your community places on it which will lead to great support down the road.

### **Foundational questions that need answers**

Other, what I call foundational questions, need to be addressed. Below are some of the basics that you are likely to be asked by management to see if you have a handle on your situation.

- How many people are involved in packaging (engineers, procurement, regulatory, logistics, customs, etc.)?
  - How many FTE involved in packaging?
  - Where do they report?
  - How good is the communication with them and between them?
- How much do you spend on packaging?
  - % of cost of goods sold (COGS)
  - How many vendors are in the picture?
  - Are your buys centralized or decentralized and why?
- Have you done any benchmarking (Inside your industry & Outside your industry)?

I recommend that you don't spend a great deal of time collecting this information – just get enough information quickly so you feel comfortable characterizing the situation. What I tell people is that they should aim for the 70% percent solution as it's better to decide quickly on an imperfect plan than to roll out a perfect plan when it's too late. (Freedman)

### **Metrics to capture** (what is measured is improved)

However, all this I'm describing may be difficult to communicate or sell to your manager on the value of those activities. In that event, try to build a case to see if you can capture metrics on which are important to the success of your company. The collection of this information will lead to understanding. Below is a laundry list of potential metrics, which can be investigated (Colby, Kent, & Howard):

- Operational reviews
  - Regulatory compliance
  - Test documentation & product protection profiles
  - Pkg/product cost review
  - Linkage to other functions
  - Supplier performance
- Time to Market
- Costs savings and avoidance
- Competitor benchmarking
- Total packaging costs (people/materials/process)
- Increased productivity & flexibility
- Reduced distribution logistics costs
- Reduced cycle time
- Increased supplier quality & service
- Shared Metrics with other groups
  - Tight linkages to other organizational metrics to maximize effectiveness and accountability.

### **Desired Outcome**

Once you have an understanding and appreciation for the situation, you can derive what action plan is best and how to proceed. You should also have an idea of why your doing this and what you want the outcome to be, so you'll know when you're there. Below is a list of potential outcomes (Heslink):

- Resources
- Enlightened Representation
- More influence and recognition
- Build Strong Credibility
- Expand boundaries of Pkg. Value Add

All that has been described above can be simplified in the illustration below (figure 2). You have collected the raw data, processed it, and analyzed it to gain knowledge, which lead to a better understanding of your situation, resulting in a possible future action plan. (Navy, MCDP 6)

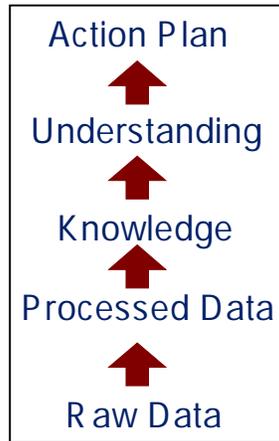


Figure 2

It is also critical before the next stage that you have a belief that upper management has the capability of understanding the issues and being faithful until their resolution.

### **Communication plan**

This leads to the need for a communication plan. Keep in mind that over communication is impossible. This is particularly true with packaging engineers who want to be kept informed about everything. Later we'll see why that is. It is also important that all your communications be engaging and vivid. You'll be marketing your ideas/projects to capture the imagination and provoke curiosity and gain support. When you do this remember to keep it simple, consistent, and realistic. The best way to do that is by having three basic pieces. The first is a clear "end state" vision that describes what the outcome of your adventure will look like. This must be something people can understand and believe can happen. Next is to list the strategies on how you plan to get to vision state. And finally, a list of tactical projects that map to the strategies and a time line for completion.

The most critical of all, focus your communications on quick wins to prove your point and retain support.

Figure 3 shows a communication model (Sarullo) that helps illustrate that point. The more time and effort you put into communicating, along with understanding the level and need of your audience, the more support you will have later on in your projects when they run into difficulties.

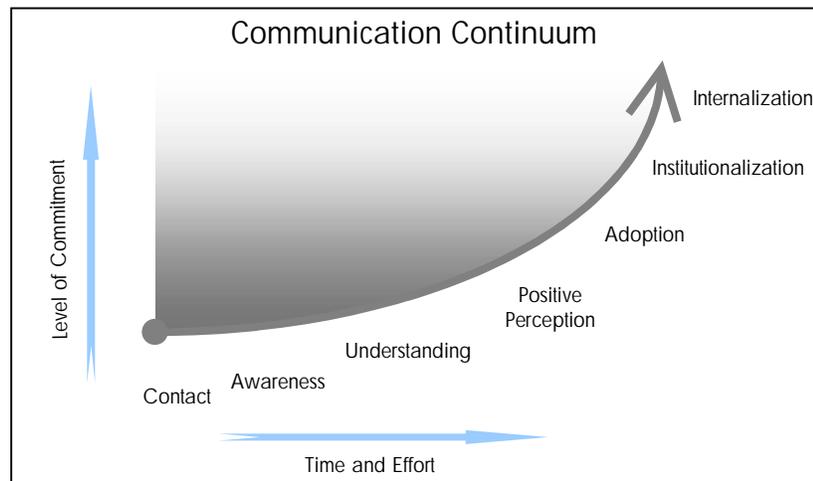


Figure 3

## 2.0 Approach

The approach will cover three areas: what you'll be up against when trying to talk to other functions and upper management, the items you'll need to talk about and how to communicate it so that others can understand, and who you will need to talk with to gain support and resources.

### What you are up against

This first part discusses some basics on information needs and communication challenges, and looks at what you are up against when talking to upper management.

### The Challenge of talking to management

When approaching upper management you must keep in mind that they are not likely to have an appreciation for packaging. Therefore, they will be lacking in understanding packaging's interplay with other functions in the company and the impact on the bottom line. In the past, communications may not have been the best because managers have fundamentally different styles of thinking and may be uncomfortable dealing with issues that are unknown to them. It is likely they have no personal experience with the packaging process. Other challenges may come from self-preservation and the concerns about negative personal implications/repercussions if they support the wrong thing. Others may be resistant to change or are fed up with unfilled initiatives (Hammer).

Now, I know I have heard some of you ask why they don't get it. Well it is simple - They Can't. They are unaccustomed to or uninterested in packaging and in most cases not analytically or systems oriented. They

may misapprehend packaging or are more accustomed to point issues rather than systemic packaging interactions.

On the otherhand, it could be they don't want to get it. This could stem from being uncomfortable with apparent lack of control, a disinclination to try something new or unfamiliar, or worst yet mistrustful of empowerment (losing power).

In traditional organizations, upper level managers are in charge of their own kingdoms (figure 4). I'm sure many of you can identify with this description. Each organizational unit manager guards their turf and interjects opposition when it looks like their power base could be eroded.

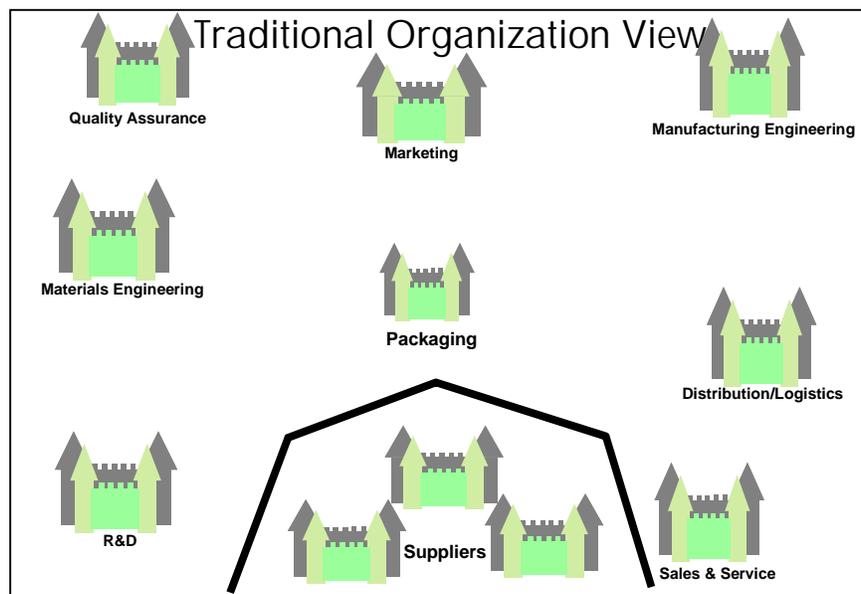


Figure 4

Packaging is unique because we are given free passage and interact with all these kingdoms. We perform many roles depending on the situation and need (messenger, service provider, consultant, spy, etc.). Remember I mentioned that packaging people want to be kept in the loop on everything, well, that is because they interact with everyone from development of the original idea to the disposition at the final customer (Figure 5). They have the best handle on how the whole process works.

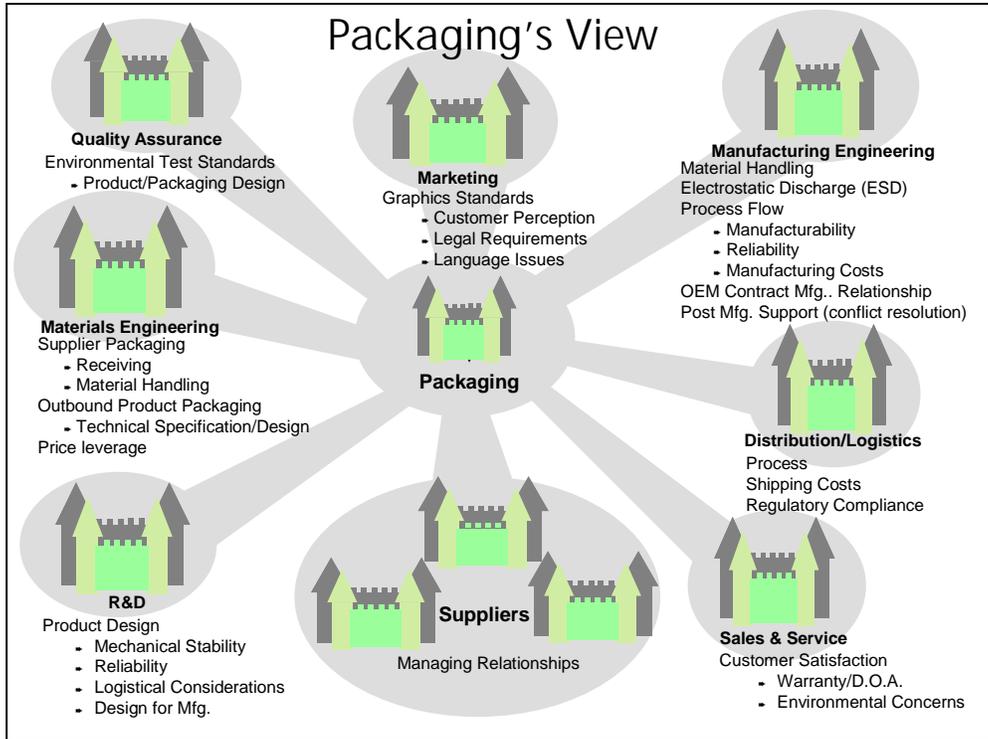


Figure 5

To be successful in communicating with all these different kingdoms, you'll need to understand and appreciate the value of SPIN control. Now, this term has some negative political connotations to it but the way I think of it is the observing, collecting, and harvesting of information then putting it into a proper or advantageous context for yourself and the management structure you are working with. It also inspires confidence which when times or situations get rough, will keep you in the game.

### What you'll need to Pitch

This next section will examine what items you'll need to discuss and why.

Hopefully you know the old adage, "before you judge a person, walk a mile in their shoes." This is no different. It is always good to think about what kind of issues a senior executive must make decisions about everyday. They're hard ones otherwise they would have been dealt with at lower levels. These people have only a broad exposure and understanding of the day-to-day operations and activities around them because they are bombarded with so many different issues that need their attention daily. Also, look at the track record of the executives in your organization and try to understand or profile the successful ones. Using that mind set, start to think about what kind of initiatives and ideas you would approve of and why. Determine what is it about the projects that get funded or supported and what it means for that executive.

There are four major forces that motivate people to do things. They are: Money, Ideology, Conscience, and Ego (MICE). These same forces also motivate managers in the decisions they make for your company. Any one of these is a potential driver for your executives, the tough part is figuring out which one. This is where your profiling comes into play. Looking at past decisions, try to determine which buckets they normally fall into. This will lead you to the most potent and will tell you how to structure your initiative or idea. Remember, when selling up, orientate your communication or idea to show how it will help the person you are trying to influence reach a minimum of one of these items.

This leads to the development of the presentation. I'm sure you are like me and find it difficult to pull together an "executive" presentation. I like to fill mine with things I'm comfortable with – lots of technical items I can talk in depth about. However, as I discussed earlier, this isn't the best approach. You'll have better success if you translate what you are trying to accomplish into a language that is familiar to them. Many executives have "MBA terminology" on the brain so if you don't have an MBA, pick up a book on the subject and examine the style and language used (Delagardelle). For example, there are myriads of measures you can describe, all of which can be set up as internal or external measures (customer feedback/perception). However, to effectively communicate it to your management you could frame it like the following (Colby):

- Cost (ROI, ROA, inventory, unit/material cost, scrap, logistics, etc.)
- Quality (defect rates, customer returns/perception, reliability, audits, etc.)
- Service/Efficiency (cycle time, time to market, turn around time, surveys, etc.)
- Safety (OSHA reportable, lost work days, ergonomics, customer feedback, etc.)

It is also best to avoid theological fanaticism (some packaging people I know are very passionate about some subjects and forget their audience) and relate projects that answer business imperatives or will result in progress expressed in financial terms.

Keep in mind "Big picture" thinking. One way to test this out is to try the Elevator speech. Imagine the CEO of your company just got into an elevator with you. He/she asks what you do for the company or what projects you are working on. You only have their attention for a few floors. Can you explain what is most likely a very complex issue in simple terms and a short amount of time? If there is ever a need to show data, put it in an easily understood context or form. Position your presentation and request as an easy win or sure thing and try to exude confidence or "command authority." This is important, as it will help them become comfortable in trusting you. And remember, it is much easier to get approval and support if they can clearly see what is in it for them – MICE.

Below (figure 6) is a simple example of a current issue related to pests in solid wood packaging materials. Very quickly you can capture an understanding of the issue and what the possible impact is going to be. If

you were the exec responsible for low cost shipment of goods on time, you would immediately see that if this were left un-addressed, it could negatively impact your organization, and even cost you a promotion.



Figure 6

One way managers evaluate and prioritize projects is by comparing effort vs. impact (figure 7). Impact levels can be described as profit/cost/ROI, customer satisfaction, strategic, initiative, technical, and crisis. Effort levels can be described as duration, resources required, span of control, technology, and skill required. Figure 7 is fairly self-explanatory, but I want you to look at the “kill zone.” If you structure your presentation or request to appear to be low impact or urgency, but requiring a high degree of effort, you’ll never get it approved unless you have some really good MICE.

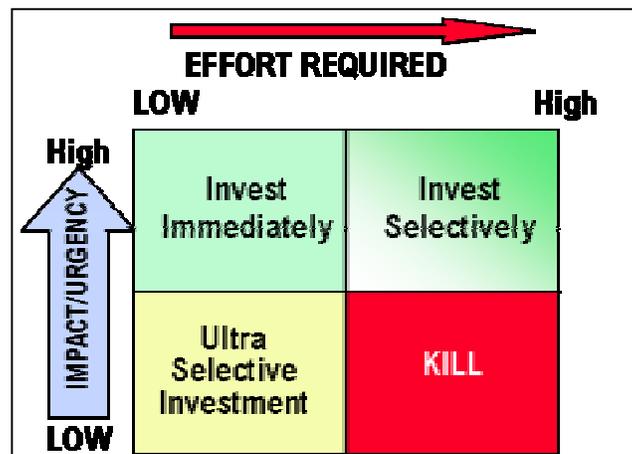


Figure 7

To wrap up this section on what you need to pitch, I would like to show you this mission architecture model (figure 8), which will help you build a successful dialogue with your executives and help guide you once you have obtained approval.



Figure 8

To illustrate this further, below is a simplified example.

- Mission: Reduce operational (or total) costs and increase customer experience
- Strategies: Characterize and improve processes & increase effectiveness  
Sustain strong community and increase information sharing  
Insure legal compliance to retain competitive advantage  
Pioneer new technologies, processes, and support infrastructure to increase market position  
Leverage total procurement buys to outperform our competitors
- Projects: All projects you work on should fall into one of the above strategies

Clearly these are very generic but you can leverage from the terminology used. And in the same vane, below is a laundry list of possible projects that you can examine if you have any similarity to leverage from (Kent, Colby, Sarullo, Delagardelle):

- Process Improvement Analyzing root causes
- Identify the points of leverage by understanding:
  - The core physical processes for packaging
  - The systems and information infrastructure(s)
  - The packaging documentation systems used
  - Analysis of aggregated volume potential to leverage purchasing power- materials, suppliers

- The packaging systems that are currently used, and what could be used in their place
- What is outsourced and what is in-sourced, and why
- The unique value and profound knowledge that resides in the packaging
- How the businesses are unique, and what set of solutions they require to go to market successfully
- Opportunities;
  - Leveraging core processes, resources and strengths, and going to market better than our competitors
  - Bring processes and a solution set to packaging areas of the company
  - Strengthen the packaging community, knowledge, and expertise among business units to enable greater value delivered
  - Increase value and contribution from key strategic suppliers and service providers

**Who you need to Pitch and when**

Now let's move on to the final part of the Approach and discuss possible tactics of who to talk with. Although the title of this paper is “Selling Packaging to your CEO” it is really about selling the value of packaging function throughout your organization.

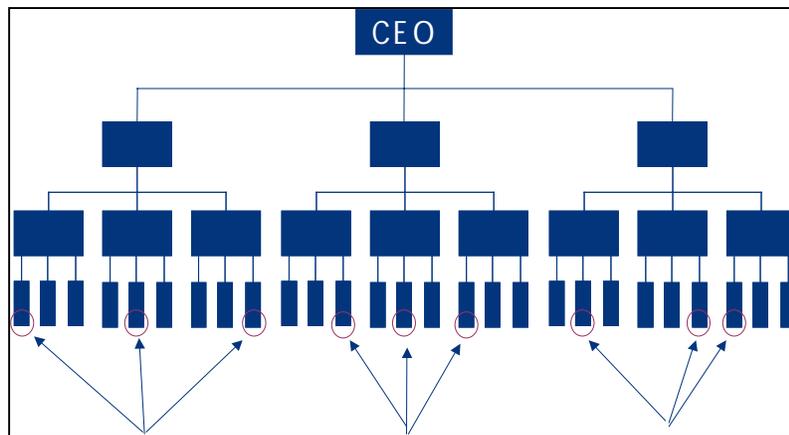


Figure 9

Figure 9 shows a typical organizational structure. You first need to start off at the lower levels and find common bonds and issues to rally around. Good things (projects, benefits, success, etc.) float up the chain of command and sometimes so do the people. One thing I want to make sure we address here is that the higher you go in an organization food chain, the more information is controlled. What I’m getting at is that managers and admins of executives help shape the world the executive sees. They are glasses (filters) the executive sees the world through (Collins). Befriending these individuals and meeting their MICE needs

can truly help promote your exposure. Please keep in mind that the process I have been describing is a long one and can truly take some time and determination to be successful.

During this process of building a support structure, you will likely come across an individual that “Gets it” and can help carry the ball forward. This is not the time to become greedy for recognition and power; if you are successful it will come later. A champion will most likely have a higher success in advancing an idea upwards because they normally operate in these domains and understand how to navigate difficult terrain. If you are fortunate to have a number of possible champions to choose from, select one that you feel can appreciate packaging’s value and will help carry you up with them. It doesn’t do you much good to align yourselves with a “cut and run” type individual, as they are likely to upset other managers and leave you holding the bag along with a bad impression of packaging.

Support your champion by giving them a good understanding of the foundational elements and what the possible projects and solutions can be realized from their support. You can do this through osmosis by having scheduled one on ones and exposing them to conferences like Dimensions. Consider it an ongoing literacy campaign. Help develop their presentations and structure it in their style of communicating (this, by the way, is a great learning opportunity for yourself). As you gain support and move forward be sure to focus on some quick win projects or “low hanging fruit” for this helps support your champions position and continued support. Finally, communicate these activities and events to the community and identify the champion as the driver. This leads the champion into having a higher appreciation for the community & function and will defend it more passionately in hard times. Don’t think this kind of “support” doesn’t go unnoticed by other executives. If for some reason your champion retires or moves on to another company, the other executives will spar to take ownership.

Who are you and your champion going to sell the value of packaging to? Everyone. You need to convert the unbelievers: executive management, business unit management, staff unit leaders, functional managers, middle managers, the masses, and customers.

### **3.0 Sustainability**

Finally, let's now address how you can keep the ball in play. You have received approval and support to move forward, it’s now time to formalize clear roles and responsibilities and assign distinct accountability for each individual. Get a set of agreed upon deliverables and objectives from everyone and publish the schedule. You’ll need this to track progress and identify where additional support is needed. Also assure accurate interpretations among all the players by holding frequent meetings or teleconferencing and allow for clarification and articulation of ideas and concerns (Sarullo).

As you move forward on any project, plan, or initiative, you will face numerous challenges and learnings that will change your original perception or understanding of the issue. You will need to be flexible and operate in a dynamic state, adapting to the new environment. Observe your surroundings as business conditions and organizational structures change. What was important before is no longer the case. Orientate your attention to those new issues and redefine your objectives. Steer the ship accordingly as you move forward, but do not pull up short and wait for more information. Continue to move forward and make decisions based on the best information you have at the time. Then observe again to see what effect your action had on the overall issue (Navy, MCDP 6). This is illustrated in figure 10.

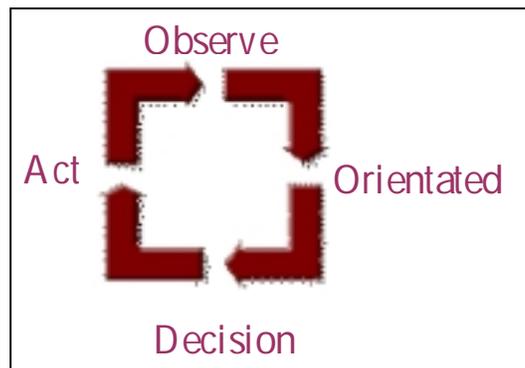


Figure 10

The result is speed and continued support. It will be seen that you are in touch with market and business conditions and your initiative will still be seen as having value (Heslink).

As with anything new, there will be failures and problems along side of successes and positive payback. The key here is to recognize this and keep the scales balanced (figure 11). Do diligence in documenting the positives and sharing them with the community. You'll also have to share these with your champion, as they too will be under pressure from other managers as they jockey for position.

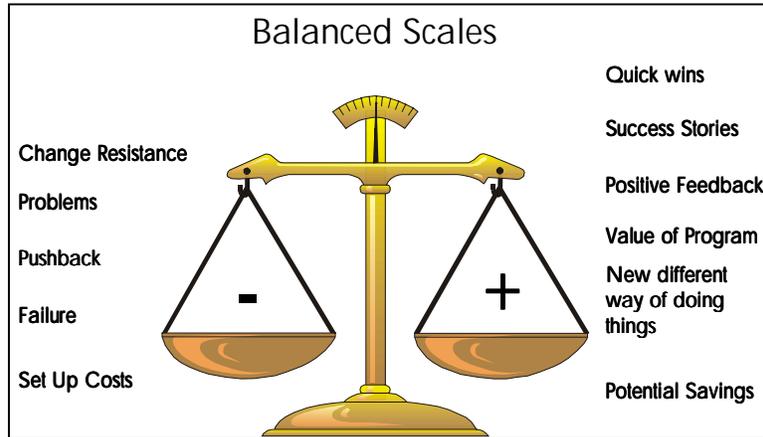


Figure 11

The key here is maintaining momentum because nothing succeeds like success. Early results will get the fence sitters in the game and it will aid you and your champion in retaining resources and reducing uncertainty. Quick successes also help increase the clarity of what you are trying to do, resulting in less management and community anxiety, along with silencing your critics (Hammer).

In figure 12 (Hammer), there are three progress models that show several approaches to a major change or goal. I'm sure as I describe them you will see correlation to some project conducted at your own company and its resulting success or failure. If you were to follow line 1, you would be aiming to make your initiative as fool proof as possible, which can take a great deal of time. Then put the whole thing into production all at once. This normally doesn't happen and can be killed mid-way because management doesn't see any changes or progress that was promised, loses faith in this perceived "sink hole", and cancels the project. The second scenario, line 2, is one where you make a lot of change all at once. This is not very effective as too much change too quickly leads to high up front costs and high frustration in adapting. This can result in a reduction in performance, and leave your support management under pressure for a "bad decision". These types of projects get killed soon after launch. The final approach, which has been the most successful, is where you have little change or progress over small periods of time. Think of the analogy of cooking a frog, if you put him in boiling water he'll jump out from the shock, but if you put him in warm water, he'll sit there as you slowly turn up the heat. In this approach, you help demonstrate success early in the game and develop the momentum I covered earlier. It helps prevent that keen jerk reaction, typical with any change. In addition, it helps avoid "change fatigue" which I think we all feel we have.

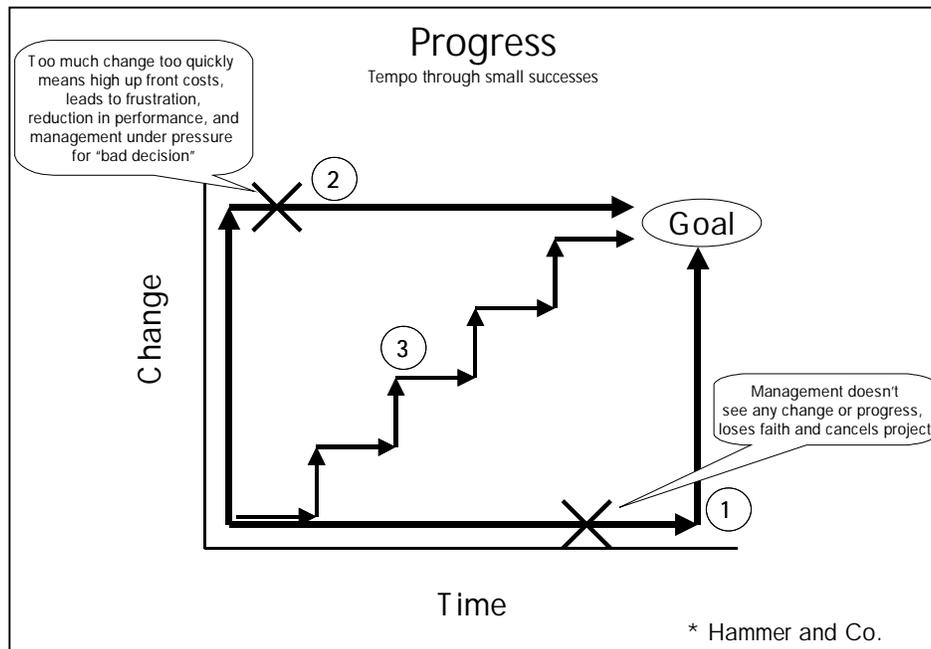


Figure 12

At the same time as making progress by small steps, you'll need to continue to increase your exposure by inviting others in your organization to see your work or by putting it out in a public area. One very successful idea, that our Home Products Division used, was to have a Mini-Pack Expo. They setup display tables in the cafeteria (or you can do it in the front lobby) and had their suppliers come up with "concept cars" type ideas and package samples for their products. They had all of their suppliers engaged and manning their own tables. This really opened some eyes. They had General Managers and Financial People asking questions and dragging the Marketing Mangers over to "check it out".

Another idea is an Open House, which may not be new, but it is often forgotten about. Invite the whole site. Put your "value add" projects & ideas on posters and display around the room. Put out packaging designs that are conversation starters. Display a chart that shows all the functional groups packaging interacts. The key here is to get people thinking about packaging as more than a bag or box.

#### How to stay on track

The last item I what to cover about sustainability is knowing if you are doing the right things. The keys to tracking progress towards your overall objectives are to measure the outcomes. You must also know where to intervene if you are off track or the activities are creating an undesired effect. Figure 13 (Hammer) shows a metric review protocol. At the top level are measurements of outcomes. If it is OK, then you should review if they are still the appropriate outcomes. If it is not OK, then go down a level and examine if you are meeting your strategic goals. If you are meeting these goals but not achieving the outcomes you

desire, then you need to rethink the strategy. If not, then go down to the next level and repeat the process until the weak link is identified.

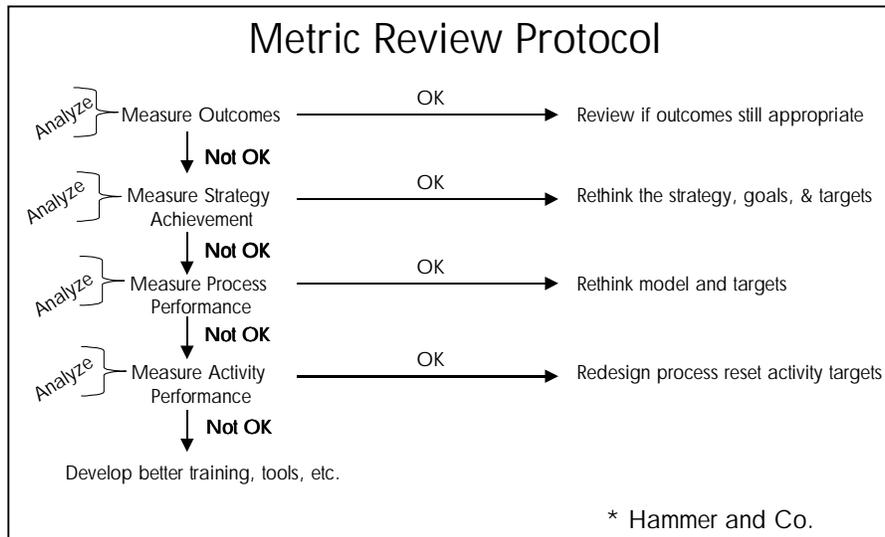


Figure 13

This protocol is an excellent forensic tool in diagnosing what changes need to be made and where to maintain progress and meet your end goal.

### Conclusion

To conclude, I hope you found some benefit in this paper. I wanted to expose you to a possible approach to selling the value of packaging elsewhere in your organization along with some techniques and tactics of communicating to different groups and people. Ideally, this will help you increase your management appreciation for packaging, leading to an increased awareness of the value of packaging, resulting in more raises, resources, and job security for all of us.

## Appendix A

The following are twelve rules (adapted from Freedman's Corp Business) that I have found effective in maintaining speed and support for packaging projects.

1. Aim for the 70-percent solution. It's better to decide quickly on an imperfect plan than to roll out a perfect plan when it's too late.
2. Find the essence. When it comes time to act, even the most complex situations and missions must be perceived in simple terms.
3. Orient to speed and complexity. The ability to react quickly and effectively in chaotic environments usually trumps other competencies.
4. Organize according to the rule of three. In times of stress, most people can efficiently handle exactly three key responsibilities.
5. Focus on the small team. The lowest-level managers and their subordinates accomplish most of the organization's critical tasks, so anything done to make them more effective will have a large payoff.
6. *Operate* by end state and intent. Tell people what needs to be accomplished and why, and leave the details to them.
7. Establish a core identity. Everyone in the organization should feel they're performing an aspect of the same job.
8. Make tempo a weapon. Controlling the pace of competition can exhaust and demoralize the competition.
9. Keep plans simple and flexible. It's better to have a few options that can be easily adapted to changing situations than to try to make specific plans for every contingency.
10. Make organizational doctrine a living thing. It's good to standardize practices, as long as one of them is to continually refine and occasionally change the practices.
11. Build new tactics around new technology. Fully leveraging technology requires new styles of *operating*.
12. Get an outside perspective. Insights into organizational improvement can often come from people in seemingly unrelated fields.

## Reference

Below is a list of information used in the creation of this paper. Many of the items and descriptions used may not have been directly cited, as the concepts described were distilled from several sources.

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