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Effectively developing a program within a producer-client relationship

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Effectively developing a program within a producer-client relationship

Abstract

My pursuit of a Masters in the area of Communications Media is necessary for the further development of my communicative skills and administrative education. The area of research I am developing is Producer-Client Relationships. I will explore the aspects of meeting the client, discovering his/her needs, developing a program, selecting a medium, producing the program, evaluating the results, and implementing the product. The topic of my research is labeled "Effectively Developing A Program Within A Producer-Client Relationship". I hope to find and analyze successful models of development which professionals in the field of communications currently use. I will begin this discussion by presenting a review of the literature and personal experience to accumulate the background information. From this, I will develop a list of guidelines which will best fit my needs.

EFFECTIVELY DEVELOPING A PROGRAM WITHIN
A PRODUCER-CLIENT RELATIONSHIP

Submitted to the
Department of Curriculum and Instruction

In Partial Fulfillment
of my Master of Arts
with a Major in Communications Media

by

Patrick Esser

December 1, 1981

This Research Paper by: Patrick Esser

Student No. 149632

Entitled:

"Effectively Developing A Program Within A
Producer-Client Relationship."

has been approved as meeting the research paper requirement
for the Degree of Master of Arts with a major in Communica-
tions Media.

Roger A. Kueter

4/14/82
Date Approved

Director of Research Paper

Robert R. Hardman

4/15/82
Date Approved

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Head, Department of Curriculum
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INTRODUCTION

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REVIEW OF LITERATURE

In discussing the qualities of a media specialist, Ronald Crook, audio visual coordinator of Clark Equipment in Battle Creek, Michigan, sees the need for persons in the field to be able to "start with an idea and end with a program". The ability to write and put things in logical order is an essential characteristic of a good producer. He admits, one of the first persons chosen for a position are people with knowledge of development of instructional media. They generally demonstrate the ability to organize, seek out problems, find solutions, and implement programs. These are all important abilities of a producer in working with a client.

The Action Research Model

David Whitsett, Phd., has developed a model called "An Action Research Model Involving An External Change Agent". The system is used by Whitsett in his work as an organizational consultant. He has laid out a series of ten steps which are major areas in working with clients.

Insert Table 1 Here

Step 2, which is called Preliminary Contracting, deals with the basis of laying out expectations. The producer plots

out what is expected of him/her in the project by the client and vice versa. The topic or problem is not discussed yet. A pitfall pointed out by Whitsett, may be attempting to gain the acceptance of the client or organization by the recitation of past accomplishments. According to Whitsett, "Don't give testimonials", but do lay out that you are a professional and very competent.

Whitsett adds that it is important at all your client meetings to keep good notes on what you agree and what will be whose responsibilities. After each meeting, copies should be sent to all involved.

It is during the next meeting, labeled as step 3, that the actual problem begins to become uncovered. In "Establishing a Working Contract", the problem or program is beginning to be layed out as well as each persons' responsibilities.

Step 8, called "Design and Introduce Primary Change", can be seen as the actual production of the program and implementation. The importance of monitoring an evaluation is clear by Whitsett.

In step 9, "Gather Data On Effects Of Change", he sees a cycle as the way of viewing an evaluation system for any redevelopment.

A Problem Solving System

Gerald Susman, in his article "Planned Change" Prospects For the 1980's", introduces an action research model

designed as a problem solving system for organizations.

His action research model is a cyclical process with five phases; diagnosing, action planning, action taking, evaluating, and specifying learning.

Insert Table 2 Here

Susman presents his process for several reasons. First, many of the data gathering techniques used for planning and organizational development, e.g. questionnaires, interviews, observations, records, et., are undertaken in one or more of the action research phases, particularly in diagnosing and evaluating. In this way, these tools are used with definite purposes and clear cut objectives.

Secondly, action research and planning are both future oriented and purposeful endeavors, thus complementary approaches to problem solving. This type of concern needs to be incorporated into the plotting of media plans as well. Communication pieces which are more future oriented, and are constantly under evaluation for revisions, will be highly used, last a longer period of time, and have higher outcomes.

Susman's approach also solves problems in a manner which simultaneously develops the capacity of those who

face such problems to solve similar situations for themselves in the future.

In looking at the steps which are involved in the actions research process, the first is "Diagnosing". This step assumes a problem exists. Susman suggests gathering information from the organization's members where the plan will be implemented.

Step two, "Action Planning", involves the development of goals and objectives. The decisions for the courses of action available are made.

"Action Taking" is the next step in the process. The selection of the proper course of action is completed here. This also includes the actual writing, development, and production of the program.

"Evaluation" is the next phase which determines whether the aims of the action research are being achieved. Susman states, "Action researchers and clients collaborate in the definition of the problems and the generation of solutions, and plans are continuously revised under the emergent and uncertain conditions that are often faced." The producer and client act in unison in the evaluation of the project.

The last step in the cycle is "Specifying Learning". Here it is discovered to the fullest extent possible to what degree the objectives were met. Did the proper learning occur? Suggestions for revisions of the program will

complete this step if needed. This is what causes the cyclical effect. The added change will begin the "Diagnosing" phase.

In concluding, Susman states, action research "can reach its full potential for dealing successfully with organizational and societal problems in the 1980's if it is conceptualized as a general problem solving method rather than a tool of the practitioner of organizational development."

The Interview Technique

The interview is an important vehicle of exchange within the development of a program. This device is used, in the opinion of several professionals, well below its potential in the business world. The producer, when coming into the interview situation, must first decide this type of intervention is the best procedure to fit his/her needs. Secondly, the producer must be well organized and have done much planning to pull out the most information possible.

(Kueter Handout, 1980)

There are four areas or questions the producer should ask himself/herself before the interview.

- 1) What do I want to know?
- 2) What am I going to talk about?
- 3) How am I going to get the client or interviewee to talk?
- 4) What am I going to do with what I have? (Whitsett, 1980)

Interviewing, which is a data collection device, serves the producer in a variety of ways:

- 1) gathering information from persons considered to be authorities in their field,
- 2) understanding a problem, its underlying causes, its present state and seriousness, and
- 3) determining whether some intended goal has been attained.

In the article "Business Policy: A Framework For Analysis", the authors discuss two approaches to consulting on a problem. They support the belief to conduct indepth interviews with key people apparently connected with the particular problem area. Secondly, they suggest starting with the symptoms of problems as they appear in the operating statements. Work backwards until the responsible area is defined. Strong interviewing techniques can be seen as the key to this success.

Some suggestions for facilitating a discussion with the client are: ask questions that are open ended; silence after the question is asked to encourage the interviewee to answer; show interest while the person is talking; and restatement of client comments.

Ways in which the producer should be showing interest during the interview are: sitting upright; lean slightly towards the client; good eye contact; and nod the head in attentiveness. These simple but proven forms of approval

will make the interviewee feel "listened to" and relaxed. (Whitsett, 1980)

The interview itself may be either structured or unstructured. The structured interview is a series of questions organized in a developmental pattern. The unstructured interview is a more conversational approach which allows the interviewer the freedom to discuss any aspects of the program.

The advantages of the unstructured interview seem to well outweigh those of the structured approach. This type enables the producer, working as an interviewer, to use probing questions, and to encourage the respondent to talk freely. It is important to note that some questions should be developed prior to the interview to keep the discussion on track and make good use of time. "The unstructured interview is most appropriate for conducting exploration to gain insight into a particular situation." (Kueter Handout, 1980)

Another feature uniquely characteristic of the interview is the opportunity for participants who may encounter difficulties putting their ideas on paper to communicate them face to face.

"Recording responses by hand during a free response is difficult. Recording from memory after the interview is likely to result in errors." A tape recorder may be

useful but also insulting to the client. It is important to sharpen note taking abilities and also to develop the usage of "customized shorthand". This is a personal form of shorthand. For example, the use of symbols, or words like "thru" for "through", etc. (Keuter Handout, 1980)

Effective Professional Meetings

Many times media designers and organizers need to make use of professional meetings to aid them in their problem solving process. The following is a discussion of the productivity of this event.

Among managers, "meetings" was the third most significant "timewaster" in organizations today. This finding is supported by R. Alec MacKenzie's research into organizational effectiveness. In discussing the productivity of professional meetings, MacKenzie, in the article, "How To Plan And Conduct Productive Business Meetings", points out what he calls "timewasters". He sees the lack of clear objectives, priorities, and deadlines very significant causers of the loss of meetings' effectiveness.

He stresses to beware of attempting too much at once. Meeting leaders should set-up clear and simple written agendas. Everyone needs to adhere to this established guide in order to assure direction and productivity. The leader of the meeting should be willing to present information so it can be understood by all and allow all their right to interject.

The key, then to many professional meetings success, is their preparation as well as execution.

The first step is to prepare clear objectives and communicate these to the participants. Getting to know the members and researching their background, will help in working on a good communicative level. Picking proper time and place may also lead to a more productive effort.

Getting the necessary involvement may be a problem. It is suggested to follow these clear steps as a leader.

- 1) Be prepared
- 2) Start the meeting on time (as well as ending on time)
- 3) Offer a good introduction
- 4) Convince the participants of the meeting's importance
- 5) Clearly communicate the objectives

(the participants should have been aware of these in advance)

- 6) Maintain control
- 7) Play the appropriate role of the leader
- 8) Take the necessary breaks
- 9) Use variety
- 10) Maintain enthusiasm as a leader (Kirkpatrick, 1976)

George Prince, author of the article, "How To Be A Better Meeting Chairman", supports the idea of a strong meeting leader. He stresses, "The chairman of the meeting is its heart and will." He goes on to point out four major stumbling blocks to a productive meeting: one, the

objectives are too vague to the meeting members; two, chairmen too often stifle creativity and free speculation; three, many times the leader uses his/her power and influence to direct the meeting; and four, members create and express antagonism to new ideas. The first step to minimizing these problem areas, according to Prince, is to recognize their existence.

Suggestions for better meeting productiveness includes the idea of restating the problem intermittently throughout the session. If the leader finds a person is bringing up an idea that is leading to an endless discussion away from the point, Prince suggests "temporary shelving". Have the idea written down, and it will be taken up later as a subproblem.

An interesting technique to better productivity is Prince's idea of "metaphoric vacation". The chairman creates an artificial, instant vacation from the problem. After working for some time on a problem, the members may become dry with ideas. This technique removes everyone's mind to a new concept to add freshness to the meeting and possibly reshape some frames of mind. When you return back to the point at hand a new clue may be discovered.

Prince goes on to list ten principles of good leadership. Most speak for themselves with little explanation.

- 1) Never compete with the group members.
- 2) Listen to the group members.
- 3) Don't permit anyone to be put on the defensive.

- 4) Use every member of the group.
- 5) Keep the energy level high.
- 6) Keep the members informed about where they are and what is expected of them.
- 7) Keep your eye on the expert.
- 8) Remember that you are not permanent.
- 9) Do not manipulate the group.
- 10) Work hard at the technique of chairmanship. (Prince, 1969)

The Movement of the Training Director

Gordon Lippit and Leonard Nadler in their article, "Emerging Roles of the Training Director," present a model for persons in the training field to work in relationship to management. The model demonstrates how the training department can serve management as a consultant.

They write of the importance to work with managers who understand the value of plans and objectives. Training directors "need to develop their skills and role in the organization as internal consultants on problem solving, change, and organizational development." This is the direction of tomorrows media consultants.

Insert Table 3 Here

In looking at the authors' plan, it contains eight (8) steps designed in a cyclical pattern.

Step 1, "Helps management examine organizational problems", can be seen as the identifying of the problem in many other models.

Step 3, "Helps examine the long-range and short-range objectives of the training, is simply the establishment and defining of goals.

In steps 4 through 6 the alternatives are examined, the program is chosen, produced, and implemented.

The model in steps 7 and 8, calls for the consultant to review with the client the program and evaluate its effectiveness. Possible program changes would be discussed here and implemented in the next cycle of the model.

Lippit and Nadler in their article also discuss the multiple consulting approaches of the training director. They present this in an easy to follow diagram.

Insert Table 4 Here

They view the training director as working in many varied roles as a consultant. This can also be seen as the direction the consultant moves as his/her programs are initiated with a client. As the cycle continues, the expert

leadership of the consultant lessens and so the client becomes educated on the process. Now the consultant/producer becomes a "Reflector", there to ask and answer questions to keep the process moving in the proper direction.

APPLICATION AND IMPLEMENTATION

Discussing The Models

Let's begin the discussion by looking at the three main models presented in this paper: Whitsett's "Action Research Model", Susman's "Problem Solving System", and Lippit and Nadler's "Function of the Training Director". They all have good strategies which may answer many structural problems in modern media plans.

They see the need for strategic planning in any system. A concern for a future-oriented plan is evident, and this attitude needs to be established in any model. In early steps, they stress a "Diagnosing" of the problem in very early stages. Whitsett, even more importantly, points out the need for all persons to know their responsibilities. This is also supported by Alec MacKenzie in his research. In order to develop clear cut objectives, which aim at the solution of a "Diagnosed" problem, people have to know for whom and what they are responsible.

Whitsett and Susman both agree that before the needed action is decided, the actual problem is defined. In terms of a media producer, this can be translated to "before the proper medium is selected the objectives are defined."

A very important key to the development of the program, and is supported by Lippit and Nadler's model, is the

cyclical approach. Although Whitsett stresses the point in his Step 9, the others actually developed a model which shows their awareness that all information needs to be evaluated and fed back into the system. I perceive the authors as saying, "All evaluation is used in better diagnosing or defining the problem area." This seems to be a very important attitude in the development of the program. This also allows an opportunity for the client to assess whether his/her needs are met.

It is interesting that Whitsett includes in his model the actual withdrawal of the change agent. I agree that this is an important step, and Lippit and Nadler also have developed a diagram of how they view the withdrawal. If we are to really be successful planners and producers, it seems important to pull out at some time in the cyclical process and let the system function on what you have designed.

In getting the client involved in the process, he/she learns how to better or more effectively develop and utilize media strategies such as behavioral objectives, audience analysis, etc. This is crucial in systems such as Instructional Development where the client will be the main user of the program.

Lippit and Nadler do a good job in laying out the approaches from an expert to a reflecter. It is important to know what role or function you fill as a consultant as

well as which direction you should attempt to move.

Susman seems to use a more media consultant approach in that the actual decision on the alternatives is a step. Whitsell leans more towards the role of a change agent and doesn't say enough about this step in his model. Lippit and Nadler hit the nail on the head and actually discuss the alternatives with management or the client.

Data Gathering Devices

The various authors touched briefly on various methods used in gathering information during diagnosing and evaluation. Although most mentioned such devices as questionnaires and other "paper" collecting approaches, I felt the interview was the most important.

Susman states, "Effective data gathering devices can be seen as important elements when working with a client."

Among the advantages of the interview is its primary characteristic of flexibility. It permits the interviewer (producer) to change the line of questioning and to pursue leads that appear fruitful. It is important to know that the interview may help to uncover other aspects of the problem which are much more significant because of its flexibility.

The establishment of rapport is another feature of the interview worth discussing. The relationship between the producer and the client actually begins to develop links as

each learns more about the other. As rapport develops, the producer--in a consultant approach--is able to uncover important issues which may be related to the problem. Many other data collection devices are not capable of this humanistic trait.

An example of an effective use of the interview would be in the case of a child as the interviewee. The audience may be made up of children with little or no writing abilities, such as in Instructional Development, and their response is needed. The interview is one information collecting device which works effectively.

In looking at the pitfalls of the interview, the producer must remember all components are human, so he/she must be aware of personal bias. Record the information as is, not as interpreted. Restate the information to the client if unclear as to what was said.

By using the tips which are given by Whitsett and Kueter's handout, the interviewer needs to be well prepared, know what to do when they are in the interview, know what to do with what is heard, and put to use the information gained!

The Girl Scout Project

In conjunction with my research in the area of producer-client relationships, I produced a project with the Conestoga Council of Girl Scouts in Waterloo, Iowa.

The initial meeting with the agency took place on July 30, 1980. I was introduced to Linda Turner, the

Council Media Representative, by Dr. Roger Kueter. At that time, it was laid out what their needs were. Dr. Kueter explained I would be producing the program for them, and he would be stepping back from the actual production.

Ms. Turner had previously seen several programs from different councils. She felt they had a need to produce a program which could be used to show in what activities the Council was involved. The program theme, desired by the local Council, would center on community awareness of what Girl Scouting is. The program was to introduce the "new" girl scout. This was to be accomplished by covering the activities of the past year.

I'll stop here and explain some early problems which would have been corrected through a good media consultant approach.

First, our responsibilities were not clearly laid out. Secondly, they not only had the perception of what they already wanted but also in which medium. They wanted a slide and audio program which aimed at exposing the "new" scout. I should have backed up and said, "Wait, what's the problem area? Is there a more effective way?" Fortunately, the slide show came out well and fulfilled their need for a program which aided in educating people on Girl Scouting. A better Consultant Approach would have removed the element of luck.

Because of a tight schedule we moved into a shooting schedule before the actual script was written. I was able to draft a quick treatment before I started wanting to make sure I envisioned the same concepts as Linda. This still left way too much room for error.

From the following week until November 7, I met with Ms. Turner an average of twice a week to work on scripting, shooting, and screening of recent and previously shot slides.

Looking back I can see that my responsibilities included the creation of and handling of the subject matter, developing it into a logical program, visualizing the information, verbalizing the information, producing the program, and evaluating the project.

A major problem, which I have since learned from, is taking good notes on every meeting and then duplicating copies for all involved. This point is supported in Kirkpatrick's article on "How to Plan and Conduct Productive Business Meetings". There came times in the project where major misunderstandings of what was decided almost ruined the project. In one instance, I had explained to Ms. Turner the type and amount of film I needed. She was to buy the film through the Council. She called me the day of the shooting and told me she wasn't able to get the film, and could I please pick up what I needed. I purchased the film and set out for my first shoot when I met Linda's director. When she heard of the cost of the film, she said she would

not pay for it, and I was to return it. Well, I was stuck. If I would have been better read on the approaches suggested by Whitsett or Susman, she would have been informed, and I wouldn't have been caught in a communication blunder. Luckily, through Dr. Kueter's support, the solution was a conversation between himself and the director. In the "working consultant world", the solution is not quite this simple. Next time I'll know better!

This project was not one which could be placed within the cyclical approach. They planned on living with "my" final production. Notice how I used the word "my". If any one major problem I encountered needed improvement, I would say the poor way in which I did not get the Council involved would be it. Even in the actual evaluation phase, Ms. Turner just commented that the production looked professional and she was happy. I should have been more pressing during the entire program to aim and talk in terms of objectives. This could have given us a yardstick to measure by in the final steps.

All in all, I came before the Council Board in late November with the program which Ms. Turner and I had prepared. We ran the program, and the board was very pleased. They all felt the project was a success. The actual audience which would be the final test is the residents of the Council area. I stepped back from the project, since my role was completed, before the program was initiated.

Personal Guidelines

Personal guidelines reached with my research include:

1. The importance of early role definitions and expectations. I need to enter media planning meetings with an early attempt at laying out clear cut responsibilities.
2. Diagnosis through proper investigation and establishment of clear objectives. It is very important that I always investigate any problem area. Using the good interview techniques as described by several authors of articles, this area can become one of my stronger skills. The problem may not be as clearly identifiable as the client perceives.
3. Get the client involved in all planning and developmental stages. Let the client learn the "consultant media approach" and how it operates. This will prepare the client and their understanding for the evaluation phase.
4. Make use of good note taking during all meetings. This will help to ensure what was decided as well as reminding persons of what their responsibilities are. It will also help to keep things moving along the predetermined timetable.
5. Use the evaluation phase as an early step to the next cycle rather than a final step. Use the information gained in evaluation to continue the cycle and feed it back into the problem solving process. The program will take on an ongoing format.

6. Make the consultant approach a movement from one of expert to one of reflecter. Lippit and Nadler's concept of the changing role of a consultant as he/she pulls out of the relationship is very important. I believe this intention needs to be one of all media consultants' goals.

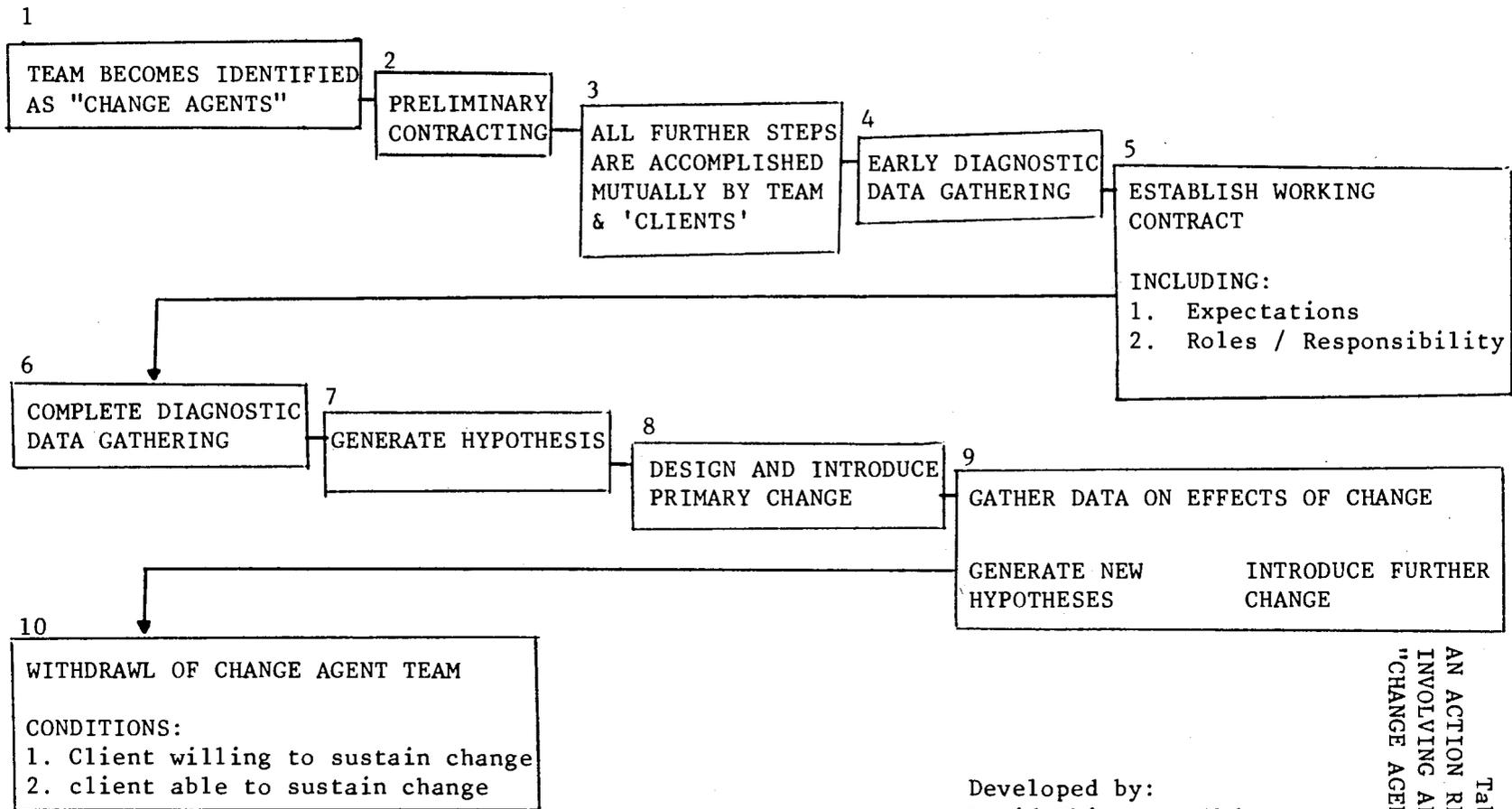
Don't misunderstand my comments as not supporting the need for strong skills in the traditional model of production planning. I do feel it is important to be able to master the steps of statement of purpose, content outline, treatment, script, budget, and production schedule, but the media consultant approach takes this model further.

Production planning is actually a step or phase such as "Design and Introduce Primary Change" in Whitsett's model. My discussion is much more macro in view of the entire process.

The need of media professionals appears to be a consultant approach as used by other professionals such as organizational consultants. The persons who can work within the guidelines suggested by the various authors I've discussed will be one step closer to the effectiveness and efficiency organizations strive for in all areas.

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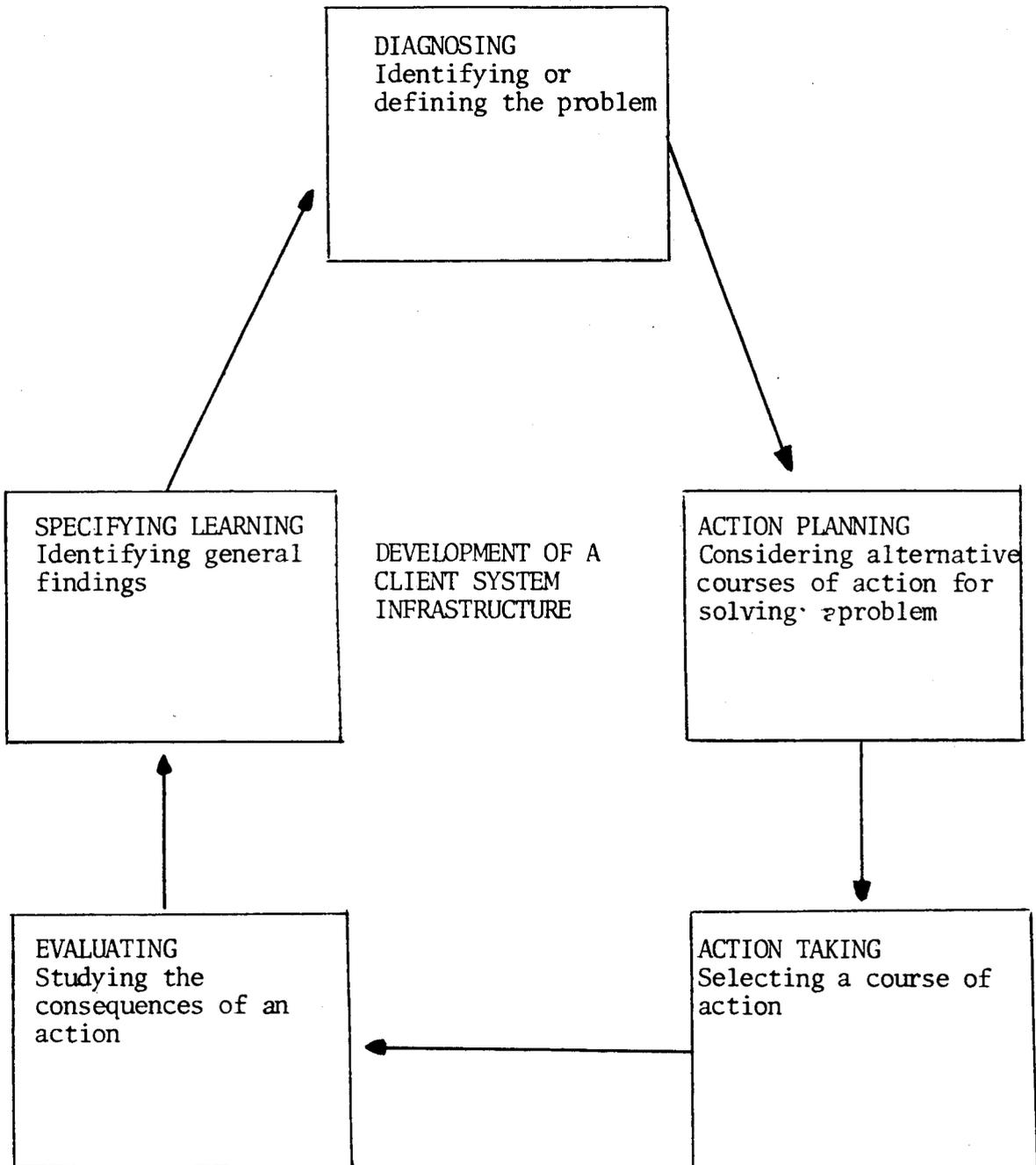
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Developed by:
David Whitsett, Phd.

Table 1
AN ACTION RESEARCH MODEL
INVOLVING AN INTERNAL
"CHANGE AGENT"

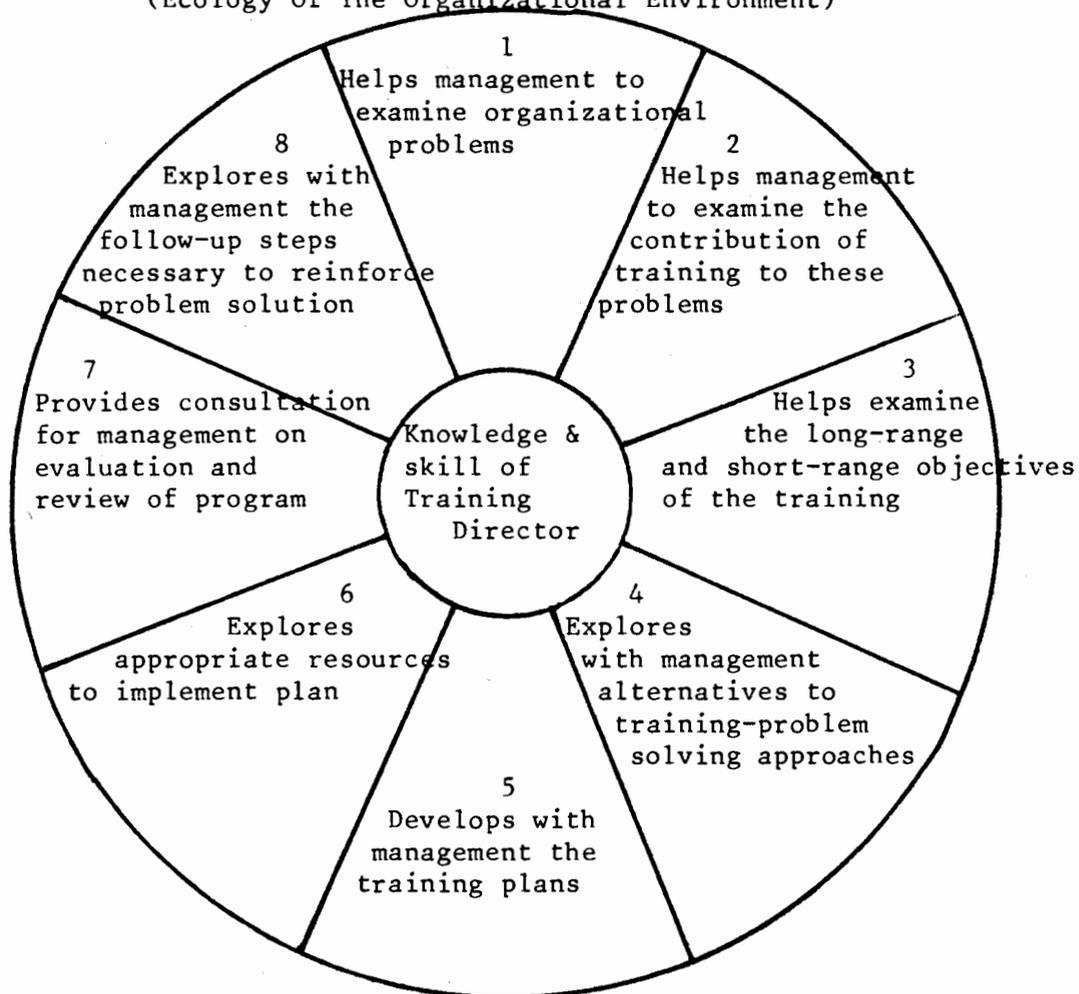
Table 2



(Susman & Evered)

Table 3
 PROBLEM SOLVING FUNCTION OF THE TRAINING DIRECTOR

(Ecology Of The Organizational Environment)



(Gordon L. Lippitt & Leonard Nadler)

MULTIPLE CONSULTING APPROACHES OF THE TRAINING DIRECTOR

<u>Directive Consultation to the Organization</u>				
1	2	3	4	5
Expert	Advocate	Alternative Identifier	Process Specialist	Reflector
Gives Expert Advice to Management	Persuades Management as to Proper Approach	Provides Alternative to Management	Assists in Problem Solving Process	Serves as Catalytic Agent for management in Solving the Problem
<u>Non-Directive Consultation to the Organization</u>				

(Gordon L. Lippitt & Leonard Nadler)

Table 4