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Amazing Change

Stories from Around the World

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When considering change initiatives, what does amazing success look like? With all the important collaborative work being done around the world, little evidence exists that examines the efficacy of approaches referred to as Whole System Collaboration and Change (WSCC) methods; also referred to as large group methods. Some examples of WSCC methods include: Appreciative Inquiry, Charrettes, Future Search, Open Space, Real Time Strategic Change, Whole Scale Change, and World Café (Holman, Devane, & Cady, 2007). In this article, we present findings from interviews with expert practitioners who have facilitated or co-facilitated amazingly successful WSCC processes, share a model highlighting characteristics of success and its key drivers, and discuss implications for building evidence in this emerging field. The most important contribution of this article is that it describes for the first time a research study looking across a set of lived experiences that affirms and deepens what we know while setting the stage for more practical exploration.

Part of a WSCC process, whether looking at Kotter's, Lewin's, Schein's or any other model, includes transforming a system into a unified whole. The science worldview currently being explained to us by chaos theorists and leaders like Fritjof Capra, Peggy Holman, and Meg Wheatley emphasizes the awareness of and focus on systems thinking. We must no longer see the world as a machine with isolated pockets of problems needing to be "fixed."

Wholeness is literally a "healing" experience. The etymology of "whole" and of "healing" is found in an old British word, "weal," which is "a sound, healthy, or prosperous state of a person or thing" (Merriam-Webster.com); "prosperity; happiness; welfare" (dictionary.com). This definition demonstrates that the term "whole" means more than "all of something," it also includes the idea of a healthy balance, unity, and completeness. When applied to a system we refer to the regularly interdependent group of bodies forming a unified whole interacting under the influence of related forces. Transforming such a system into a unified whole is the operation of changing from one configuration or expression into another in all parts of the system. In order for true transformation to take place, the organization will always need to be "whole." Thus, the notion of "whole system transformation" means more than simply a change that impacts the entire system; it means that the entire system is involved in creating itself anew. The focus moves from imposing change to crafting a transformation of the system by the system itself.

Procedure and Analysis

Leaders in the field of WSCC methods were asked in writing for recommended names of practitioners who work as consultants leading or co-leading transformative experiences and events utilizing WSCC methods as described by Bunker and Alban (1997) and Holman, Devane, and Cady (2007). Each of the recommended practitioners was sent an email describing the study and

requesting an interview. An interview time was established in which each interview lasted about 90 minutes. We analyzed 16 interviews that represented a cross section of methods. These interviews addressed four main areas of interest:

1. Questions that focused on the participants experience with whole system transformation, "how many projects have you led or co-led as a consultant?"
2. Questions that focused on a successful critical incident, consultant leading or supporting a WSCC intervention, "describe that experience to me."
3. Questions that focused on a challenging critical incident "tell me about a time when you encountered your most difficult challenge as an internal and/or external consultant leading or supporting a WSCC intervention, "describe that experience to me."
4. Questions that focused on demographic information (e.g., gender, ethnicity, education, and age).

All interviews were audio recorded and then transcribed. Each transcribed interview was shared with the participant and clarifications were made. Any clarifications were marked and noted as additions to the data. Drawing from Strauss and Corbin (1990), Erlandson, Harris, Skipper and Allen (1993), and Bogdan and Biklen (1998), an inductive analysis process was used to develop a thematic framework. First, the transcribed data were coded by each segment of the transcription that showed a unique thought, idea, or meaning. This could be a paragraph, sentence(s), or a part of a sentence. NVivo (Bazely & Richards, 2000) was used to facilitate the coding of the data. In so doing, we were able to automate the coding process more quickly and efficiently than manual methods through categorizing, searching, and visually organizing the information. Each theme was established as a node in the form of parents, children, and siblings. Three scholars from the fields of organizational behavior, organizational development, and psychology reviewed the results and discussed the groupings of ideas. From these discussions, patterns inductively emerged that provided for a heuristic set of results arranged under Characteristics of Success and Keys to Success (see *Figure 1*).

In response to the question, "tell me about a time when you experienced your own most Amazing Success as an internal and/or external consultant leading or supporting a WSCC intervention... describe that experience to me," the interviewees expressed a sense of knowing. They would say things like, "Oh, yes, I have one in mind" or "Okay, good... I know that." Then they were asked, "Take me on the whole journey from the very beginning to the end; bring it to life for me." The interviews were full of emotion, laughter, tears, somber responses, and silence. The stories when described through the lens of the results presented here in *Figure 1* lend themselves to some insightful and practical learning. In some cases, these results may seem obvious, in other cases, intriguing. We hope to set the stage for more practical research that will be described in later sections. Before we get to that discussion, we will elaborate on what we found.

Figure 1: An Amazing Success
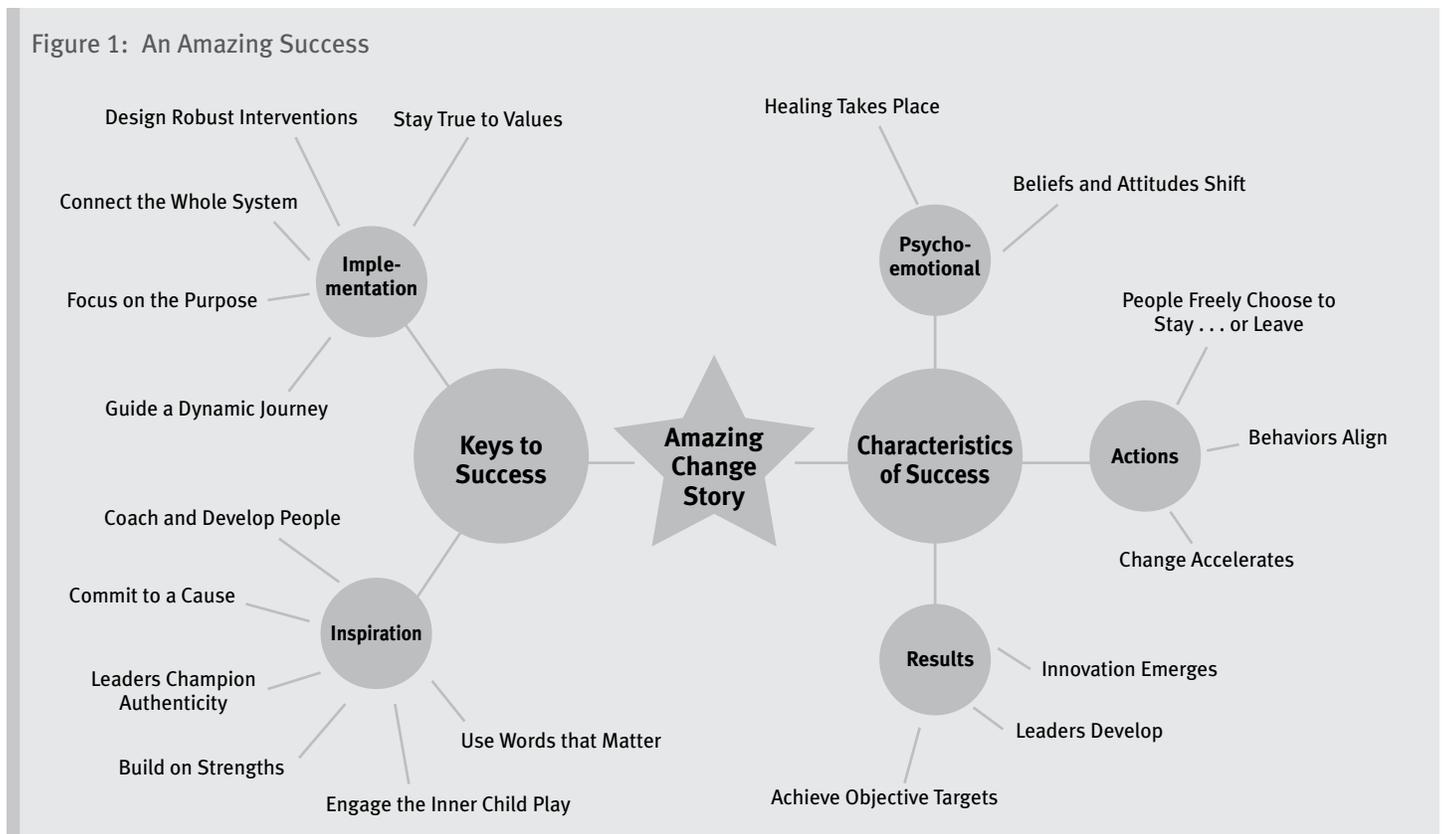
Characteristics of Success

The words "amazing success" can conjure up all kinds of thoughts with a variety of meanings. What we uncovered in the interviews are eight Characteristics of Success that fell into three core characteristics (see *Table 1*).

Psycho-emotional

Psycho-emotional refers to mind and soul states that spontaneously arise and result in affective and physiological changes. Simply put, practitioners called this the "paradigm shift." The shift was something that they look for and could experience themselves. One of the common words used was "healing"--in terms of the self, between people and groups, and among the whole system involved. One practitioner stated:

> The immediate pay off was... the healing that took place. This was evident in the closing circle when participant after participant thanked my client for bringing them together in this way and allowing them to finally get past the issues that had been holding them apart for so long.

In addition to the healing, there was a shift in the beliefs and attitudes of those involved. The attitudes revolved around improved morale, more happiness, less stress, and a general appreciation or gratefulness for the process being undertaken and for the way it was undertaken. Evidence of the shift in attitudes was seen through "laughter" and "smiling." There was also a greater respect for one another with a particular focus on leadership. People believed that they were heard and that this time something was going to happen; they could trust again. Another word that cropped up was hope. People believed that the ideas and decisions made were theirs. They envisioned a future that they owned and believed could happen. Such a shift was described by one practitioner who was working with two warring ethnic groups with a history of killing and maiming each other:

Table 1: Characteristics of Success

Core Characteristic	Amazing Success Looks Like
Psycho-Emotional	» Healing takes place between and among departments, factions, groups, and more. » Beliefs and attitudes shift through a new found hope and a trust in each other.
Actions	» Members freely choose to stay or leave the system of their own accord. » Organizational members align their actions with the whole in order to be in harmony. » Behaviors accelerate the change in a more fluid and energetic fashion.
Results	» Innovation emerges from all over the place, some new and some old. » Leadership competencies develop at all levels, as people take on more responsibility. » Objective targets are achieved that add measureable value.

At the end of that, we were standing in a circle and there wasn't a dry eye in the place and the next thing I knew, this incredible group was holding hands and saying nothing, just pure silence. But what we noticed was when we started, the conversation was really about there is no respect, there is no trust... there is no hope. Gradually over the course of two days, we began to see hope, trust, and respect, really just sort of emerging just out of the way people treated each other.

Actions

The next dimension of success focused on the action of people; literally the focus here is on movement. To begin, people choose to freely leave the system versus being forced out. This is a subtle but important distinction. A person sees that the future direction has been developed by the whole and the whole is moving together; as a result, the person leaves the system because he or she does not fit or is not willing to do what is necessary to be part of the whole. As one practitioner stated, "allowing them to choose to self-select out and that's a part of it, part of declaring who you are and what you want to be..."; and another practitioner emphatically shared, "I think what it was, was seeing people... that have their whole background (in a

particular profession) understand that they are going to have to operate in an entirely new way." This leads to the second notion of behaviors aligning. There is a change in behaviors to be more harmonious with others and more helpful. Negative or destructive behaviors diminish and are replaced by more citizenship behaviors characterized by helping, supporting, and taking initiative outside of formally defined responsibilities. One practitioner described success as:

> ...a completely changed organization. They're operating with assurance, they're listening much better to the people that they serve... the nature of the way they're doing projects is much more collaborative and their relationships with the rest of the system are much, much stronger.

Also, the change accelerates. Physical movement picks up in a systemic fashion. Individuals move with fewer words; conversations shift from "why" to "how." The acceleration is a fluid phenomenon in that it is like watching a school of fish quickly changing direction in unison. Interviewee descriptions suggest that the organization is better prepared for change in the future, as if the organization is more change capable. As such, the organization is able to "cut through and accelerate the cycle of change."

Table 2: Keys to Success

Core Action	Checklist for Success
Implementation	» Stay true to your values and the values of collaborative work. » Design robust interventions that lead to predictable results. » Connect the whole system through iteratively enlarging the circle of involvement. » State and focus on the purpose and outcomes for each activity. » Guide a dynamic journey that will change as you learn.
Inspiration	» Clarify and commit to the cause even when trying something new. » Demonstrate "leaders as authentic champions" through their time, money, staffing, and words. » Utilize the process as an opportunity to coach and develop people experientially. » Build on strengths through discovering moments of success. » Engage the inner child through creative expression such as drawings, skits, music, games, and more. » Use words that matter and familiar terms that people can understand.

Results

In addition to witnessing important psycho-emotional and action oriented shifts, the system experiences or achieves important results. Amazing Success "sets loose unimaginable innovations"; there are the innovative ideas that have been floating around the coffee room and discussed in open forums, yet these ideas seemed to be seen as too risky or subject to poor timing. Some of these ideas get a second life and are embraced and seen as a "proactive" way to realize the vision of the organization. In one organization:

> They were able to launch for the first time into the retail market a product that is still incredibly successful today. Prior to that time there was no way they could have. There was no way from a quality perspective they could have done that. So I look at what they have been able to do as far as the results they are creating and the impact they are making both financially and as an organization.

Hence, change "will always result in better initiatives as long as the consultation process is effective" in which "radically different ideas" emerge that are "out of the box." In one evaluation, shared by a practitioner, a person in the organization stated, "I just can't believe how many important ideas emerged as a result of this process."

Another result of an Amazing Success is that leaders develop, existing leaders turn into better leaders, new leaders emerge, and more people take on information leadership roles. One practitioner described this characteristic as follows:

> ...a lot of the people who were part of the team that we put together in the beginning went on to become leaders and executives, and in fact, there was one of the high potential (employees), who was involved in the initial study of the company's best practices, and he, eight or ten years later, became the president of the organization. He, in his kind of acceptance speech, talking about how he became president, really talked about... his early days when everybody was working together to create the future.

There are also tangible or objective targets that are achieved. These are results from improved sales, quality, and profits to reduced waste, turnover, and cycle-time. As one person said, "When you look at a balanced scorecard... we can point to what they are doing today to say this is pivotal, this made a big difference." A common idea mentioned is characterized by the following: "And the reason I think of them as successes is because they are still alive and well and moving forward and growing and all of that." In addition, the notion that the organization is still alive and in existence was often stated before talking about typical measures of performance.

Keys to Success

What happened that led to such Amazing Success in these whole system transformations? The practitioners had much to say in which the Keys to Success fell into two main core action dimensions: Implementation and Inspiration. As shown in *Figure 1* and *Table 2,* the Characteristics of Success are presented as outcomes or end-states, while the Keys to Success are presented in verb form as a core action checklist for an Amazing Success (see *Table 2*).

Implementation

The focus of implementation is on the consultant or facilitators of the change process. The interview responses really seemed to focus on the interviewee's practices and how the change was implemented. In a way, each practitioner described her or his own way of approaching the work. While they mentioned certain methods described by Bunker and Alban (1997) and Holman, Devane, and Cady (2007), these practitioners had a way of internalizing their work and giving it meaning.

One of the first areas to emerge was the notion of values. As one practitioner stated, "know what you really believe in and care about, and put that into life and into your work." Within this conversation of values arose the idea of being healthy as a person and as a change team. Staying true to values is key to being healthy, centered, and not getting one's ego in the way of the work with the client. In these instances, modeling of behavior and learning can occur:

And, we were really paying attention to the ebb and flow of the emotional roller-coaster that was going on all around us, and so it was a good lesson in working collaboratively and in many ways we were, as a small team, modeling a different way of working for the larger community.

The following two example comments emphasized self-awareness as an important aspect of health. The first practitioner stated:

I'm kind of a self-appointed "Joan of Arc" who'll come in and save the little people. So, I have to be aware of the bias... I have to be on guard because I can get protective around the little people or the worker bees... so I learned, re-learnt that lesson about vigilance, about my own biases creeping into... influencing my perceptions.

The second person shared a question:

How do we stay conscious about our own readiness to make projections and I guess take a look deeper and really how to stay effective in managing our boundaries with our clients?

Designing robust interventions means that the techniques used, events designed, and activities planned lead to predictable results like those described in the Characteristics of Success. In order to achieve such results, it is important for interventions to be based on solid experience, grounded in sound theory and research, and drawn from best practices in the field. As one practitioner said, we are "creating a new field of organizational transformation and you need to be able to talk about it, the theory as well as the practice of it." The more robust the intervention, the more predictable it is and the more resilient it is to violations of its basic design assumptions. There were stories told of moments where the client or members of the design team were afraid that a process might not work. Invariably, in these moments, the practitioner would tell the client to "trust the process."

What may appear intuitively obvious to those of us in the field of WSCC, connecting the whole system is a must for a successful implementation. There is a subtlety that is represented by the following comment:

The fewer people you have involved in a change, the easier it is to get a decision. So, the fewer the people, the faster you can go... The more people you have involved the more diversity of thinking you have, the more questions people can ask, the more things for people to think of... You cannot possibly be aware of all of the factors to be considered when designing a new system. So, what you have to do is you have to say, okay here is the process and here is the change we want to make and what are the implications? You ask the people who have the knowledge and sometimes you have to go kind of low to do that because quite honestly high-level leaders should not have that kind of information.

Various practitioners described the ways they get people in the system to see a bit further than they ordinarily see. The practitioners ask questions like, "who else might need to be involved?" As the leaders and others involved in designing the journey (e.g., change team or steering committee) think more systemically, they begin to see the whole system and the perceived boundaries of the system broaden. The result is the involvement of "a critical mass of employees at every level" and beyond.

In today's society we hear a lot about "focus" but what do we need to focus on in our field? Focus on the purpose that is directed toward the impending journey. That focus should answer, "How will the system be different as a result of going through this process?" In the words of two interviewees: "I think the things we know about large-scale change is you need a clear purpose"; and "We don't just go out every day, and say, oh, I'd like to create change, because change for change's sake is really quite foolish." As those people involved in designing the change journey discuss what they believe is the purpose, divergent thoughts are shared and common threads are identified. Developing a common purpose for the change connects those designing the journey and ensures that key people are on the same page.

There were some interviewees that shied away from discussing a concrete journey and there were others that were very clear about a process. The common theme that did emerge here is that the change journey is dynamic and balances structure with the unpredictable nature of change, thereby allowing self-organization to unfold. As one interviewee put it:

It would seem reasonable to expect that the basic function of any well functioning self organizing system is to be constantly transforming. Isn't that interesting? So, how do you create the conditions under which that can occur?

Consider the following example:

So that was our three days and at the end of the second day, one of the things we did, was have the design team get together with us at the end of the day on each day and tell us—so, what do you see, what's the reaction, and is there anything we need to adjust or change to understand better? At the end of the 2nd day they said yeah, I think we're heading for some trouble here... we need to go back and redo a section. Of course I wouldn't have known that because there are too many people to keep track of. So, we listened carefully to them and then we went back after everybody left and sat down and redesigned the third day almost completely based on their feedback. It worked really well.

We also noticed that the practitioners were adamant that transformation is more than an event, within that, there were quite a few ideas expressed for managing the journey.

First, keep it simple and do not over design: "it's getting people comfortable with the fact that they are not in charge and that they cannot control it." Design a

journey that is "based on passion, responsibility, the need to work with diversity... to move the process forward." Use of sample or generic journey maps can help create buy-in because people are looking for some kind of structure.

Second, manage the logistics well by paying attention to the details when executing. Keep in mind, flexibility is possible. As one person stated, "it was an excellent lesson in tight—loose, being clear and disciplined in our design and yet fluid to move with whatever arose over the course of the experience."

Third, adapt the design to the unique qualities of the system and innovate along the way through the use of action learning. What did we plan, what happened, what did we learn, and what do we do next? Review the learning after each step and use that information for the next step or even the next day's event.

Inspiration

We chose inspiration to characterize the next node under Keys to Success because these themes focused on stimulating the mind and emotions in order to heighten feelings and actions. One important key is to clarify and commit to the cause. Often, the practitioner would describe how the people in the organization believed in the mission and were truly committed to serving their constituents. This commitment set the stage for people to be open to new ways of thinking and to try something new. As one person said:

> Yeah, and actually it was one of the things that we un-uncovered. When we did the work with him... many of the people who worked in this organization were 20-30 year employees and they cared deeply about the people they served... and really were looking for a way to reconnect with that original commitment that they had made to this aspect of something they felt very proud of.

While people need to be committed to a cause, it is vital that the leaders champion the change authentically. This includes

taking risks by providing the necessary resources (e.g., money and personnel) and time away from daily work duties (e.g., to attend meetings, benchmarking visits, or a system-wide planning event). When these things are supported, people in the organization take notice and begin to believe that the change itself is an important priority. The result can be seen in the following comment:

> I think that was critical but I think it was the impact of leadership showing up and the result of how it triggered employee enrollment and engagement. I mean for me the aha was WOW, if leadership really can understand the core essence of what they can provide, it's amazing how they can manage and I don't know whether I really want to use the word control. The conditions that allow the people to step up and realize their potential, it's incredible, and for me, that's what was amazing. You know the trigger and really the power, if used appropriately, leadership has in opening up their organizations.

Further, authentic leadership involves being role models. Consider the following comment:

> Breakthroughs are huge and most of the breakthroughs are about individual leaders recognizing and understanding their strengths and weaknesses, what their leadership approach and style is all about and how it impacts the organization. It's about helping them understand from a values and vision perspective the way that their behavior shows up and how important it is to model that to the organization.

And, when leaders show up, speak their truth, and allow themselves to be vulnerable, there can be a powerful shift that occurs across the organization as demonstrated in the following example:

> ...one of the executives approached the room in the wrong way (despite

some serious coaching beforehand), and eventually came back and apologized, which was a first for (the organization) on that sort of scale. The effect that incident still has on the corporation today is not to be underestimated... the thing just swung around. When he came back and apologized, news of the event spread like wildfire.

Another important activity emphasized is that of coaching and developing the people involved in the process, particularly leaders as exemplified by the following statement:

> ...it's all really about setting the stage with leadership, helping them understand what whole system change is about, what leadership is about in orchestrating and pulling together the pieces of a systemic change not only for the organization but helping them understand what the change will exact from them in personal change. They will need to confront their own personal issues alongside the organization issues or else it won't be successful.

It was consistently mentioned in the interviews that there is a tendency for groups to focus on problems and to get mired in negativity or blame. Practitioners described how it was more effective to build on the strengths of the organization by focusing on moments where things worked well and people felt energized. A client of one practitioner said:

> You know... there are a lot of consultants that we... hire that I would say... work on the downside. They would want to know about our problems and they want to help us fix our problems. You work on the upside. You want to help us create our future and be the best we can be.

There was another intriguing theme of engaging the inner child through play. This was seen in activities that involved the use of drawings, skits, poetry, and songs. One

practitioner described an impactful experience as follows:

> ...we asked people to make presentations about their dreams; we suggested to them with a little bit of trepidation, that they take the opportunity to present their dreams (in a creative way). We wondered what these folks would do. Well... they were creative, artistic, funny, and full of energy. We allowed two hours. It took four hours. Every group had something to say. People were having such a good time we just couldn't cut it short... People talked about it a lot at the end. They didn't know that their colleagues were so much fun, they had no idea... [of] some folks who've worked there for 10 years. They really appreciated the sense of humor that people brought to what everybody assumed was such a grim time in the organization's life. It really unleashed a lot of creativity and frankly it had a real team building aspect to it...

Finally, a consistent theme that emerged was that words matter. There was an emphasis on how words can set the tone, take a group deeper, and lead to important paradigm shifts. Words take the form of questions, statements of noticing, key jargon, etc. Consider the following example provided by a practitioner when reflecting on questions:

> Well, yeah! The first question we asked when people first walked in the room before they even finished getting their coffee was, we asked everybody to pair up and sit down and talk to each other for ten minutes and then switch and talk to the other guy. The question was tell me about a time when you felt most excited (or) most connected... with the (organization). The room just exploded...

Words also mattered in forming consensus among the people in the system. When people saw their words become part of important documentation (mission, vision, goals, values, etc.), they really felt heard and even more so, they believed that they were co-creators of the future.

Key Takeaways

By looking across various WSCC methods, we are better able to understand the common ground that exists. This article is a starting point for future examination in three areas. First, the themes that emerged in this study can be further confirmed through qualitative techniques based on a panel of raters reviewing additional interviews. Second, the findings here can be linked to findings and theories from other disciplines. Finally, the model presented here lends itself to quantitative studies and other more deductive approaches. The aim of this study was to clarify and uncover the expertise that exists in the lived experience of the WSCC practitioner. Our hope is that the framework presented will provide guidance to practitioners and scholars as the field of WSCC methods continues to grow and take shape.

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