Spring Year 2019 Vol. 51 No. 2

Organization Development Network

Organization Development Review

JOURNAL OF THE ORGANIZATION DEVELOPMENT NETWORK

ISSN 2640-0669

Leadership and OD

Spring Year 2019 Volume 51 No. 2

Organization Development Review

Published quarterly

ISSN 2640-0669

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From the Editor

Leadership and OD

Welcome to the spring issue of *Organization Development Review*.

D. D. Warrick focuses on the need for self-aware leaders who know how to minimize their possible leadership illusions and the need for organizations and organization development professionals to provide much needed training and coaching in preparing leaders to be more self-aware.

Martin Goldberg discusses the socioeconomic and psychological ground in which a "golden age of OD," from the late-1960s to mid-1990s, took root and soared; then those conditions that led to its wane. This mini social and intellectual history is followed by distillation of two strategic paths forward, underway in fact since OD's glory days faded.

Steven H. Cady reflects on the past seventy years of work in organization development and change. Many of the change processes have evolved away from small groups conducting traditional action research or leader groups determining the best way forward. Today, we are emerging on a new era with a more collaborative system-wide engagement.

Robert J. Marshak uses the phrase "dialogic meaning-making in action" to capture the essence of a method that is based on the premise that the way people see and act in the world is determined by the contents of often out-of-awareness mindsets that may be identified and addressed during everyday conversations. To help support understanding and practice of the method, the underlying premises and core concepts are reviewed along with examples to illustrate key ideas and suggested actions.

Nalia Bello and **Precious Campbell** explore the use of organization development theory and practice during a recent natural disaster in India and in a current period of civil unrest in Central America from the perspective of two relatively new North American scholar-practitioners. Within the last six months, the authors found themselves in situations beyond the level of organizations: situations that utterly disrupt the way organizations go about their daily business; situations that threatened health, safety, quality of life, and even life itself, as well as relied upon and taken for granted social orders, imperfect as they are.

Yabome Gilpin-Jackson, **Carole Falkner, Dale Min,** and **Jacquie Block-Glass** recognize that change is a challenge in any organization, but especially in the context of a complex health care organization, with reach across multiple communities, services, and partnerships. Fraser Health is the largest of seven health authorities or agencies providing public health care services in British Columbia, Canada. How does engagement unfold inside this world? This was the question that the Organization Development team responsible for engagement strategy needed to answer.

Allan H. Church, **James A. Scrivani**, and **Breanna M. Paynter** contend, if organization development (OD) is to remain relevant and impactful as a field, practitioners need to be constantly on alert regarding the latest trends, theories, and concepts being pitched in organizational settings. It is critically important that we are aware of what the business world is talking about at the "proverbial watercooler" so we can most effectively assist the organizations we support. In the recent past, for example, concepts such as emotional intelligence (EQ) employee engagement, and learning agility have quickly gone from being intriguing new ideas in academia worthy of further theory development and research, to major practice areas for consulting firms engaged in selling tools and interventions.

Practicing OD

Editors: Stacey Heath, Deb Peters, and Rosalind Spigel

Bette Gardner describes a team learning simulation, Friday Night at the ER.

Matthew J. Painter offers a roadmap that helps foster a leadership culture.

MJ Kaplan explores self-management as a viable adaptation to competitive pressures.

Liane Davey focuses on two approaches to prevent, rather than resolve, conflict.

John Vogelsang

Former Editors

Larry Porter	1973–1981
Raymond Weil	1982–1984
Don & Dixie Van Eynde	1985–1988
David Noer	1989–1992
Celeste Coruzzi	1993–1995
David Nicoll	1996–2000
Marilyn E. Blair	2000–2008

Organization Development Network

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JOURNAL OF THE ORGANIZATION DEVELOPMENT NETWORK

Organization Development Review Special Issue – Winter 2020

Deepening Our Understanding of Use of Self

Call for Articles

While the Use of Self has been around the OD field since the early founders began, there has been little direct literature written in OD about it. Thankfully, various elements have been discussed along the way from gestalt, interpersonal relations, social psychology, psychotherapy, and basic individual psychology, some aspects of leadership and some focused in social work and nursing. It is time we work on expanding and deepening our understanding of use of self and how it plays important roles on the impact and results of what we do and what all professionals involved in serving and helping do. We want to know what people are doing, how people think about and use the concept, how they learn about it and continue to develop themselves, and what people think should be done to improve the understanding and use this critical aspect of our self-management. We need to become clearer about what it is, how it influences our impact, How we need to teach it, and the pathways to continuous development of our Use of Self as we progress in our practice.

We invite articles that explore topics such as (but not limited to):

- How has the concept of Use of Self contributed to the field, especially in improving the effectiveness of the field of OD?
- What will the field look like if we do not focus on Use of Self?
- Are there generational or cross-cultural differences in working with Use of Self?
- What have we done well in promoting Use of Self? What more do we need to do?
- What are cross disciplines' views on Use of Self, and the implications on practice?
- What type of educational and development programs should we innovate to help OD practitioners to engage in this life long development in their Use of Self?
- How can we assess use of self? The improvement and development over time?
- How do we measure the impact of Use of Self on others and the system?
- Does Use of Self have different applications at different levels of system?
- What is the importance of Use of Self in sustaining the future of the field?

» How can we bring Use of Self to other critical roles serving and helping others such as leaders, doctors, professors, etc?
» How do other fields of knowledge treat the subject of Use of Self?
» What are other needed research questions to improve our understanding and how widely it gets considered?

We encourage submissions from around the world.

The articles submitted can be:
» Regular articles (up to 4,500 words)
» Shorter articles (up to 1,600 words)
» Brief notes (approx. 600 words)

In addition, we invite quotes about why Use of Self is important in our work and in sustaining the future of the field.

Submissions due by:
September 1, 2019

Send to: John Vogelsang *jvogelsang@earthlink.net*; **Mee-Yan Cheung-Judge** *lmycj@quality-equality.com*; and **David W. Jamieson** *jami1396@stthomas.edu*.

Thank you.

Special Issue Guest Editors:

Mee-Yan Cheung-Judge, BSc, MA, PhD, is a "scholar-educator-practitioner" working globally with organizations to deliver powerful transformational change. She is a senior visiting Fellow of Roffey Park Management Institute in the UK and the Singapore Civil Service College. She founded the OD Network in Europe and has been the Dean of the NTL European OD certificate. She is the author of numerous OD articles, books, and reports. Cheung-Judge was a recipient of the ODN's *Lifetime Achievement Award* in 2013, the *Richard Beckhard Award for Contribution to the Field of OD* by IODA in 2016. *HR Magazine* in the UK voted her one of the top influential thinkers in the field of HR in 2008, 2013, 2014, 2015, 2016, and 2017, culminating this year in naming her to the top of its rankings as the most influential thinker of 2018. She can be reached at *lmycj@quality-equality.com*.

David W. Jamieson, PhD, is Professor and Chair, Organization Development Programs, at the University of St. Thomas. He is also President of the Jamieson Consulting Group, Inc. and a Distinguished Visiting Scholar in other OD programs. He has nearly 50 years of experience consulting to organizations on leadership, change, strategy, design, and human resource issues. He is a Past National President of the American Society for Training and Development and Past Chair of the Management Consultation Division and Practice Theme Committee of the Academy of Management. He was recipient of *The Lifetime Achievement Award* from the Organization Development Network (2012) and *Distinguished Scholar-Practitioner Career Achievement Award* from the Academy of Management (2015). He can be reached at *jami1396@stthomas.edu*.

“The greater the responsibilities and the higher leaders advance, the greater the potential consequences from a lack of leadership awareness and leading with leadership illusions.”

Leadership Illusions

Important Implications for Leaders and Training and Coaching Leaders

By D.D. Warrick

You most likely have experienced the *leadership illusions phenomena*. An illusion is seeing something different than it is. The more illusions leaders have about themselves and other relevant information, the more flawed their thinking, perceptions, behaviors, and decisions will be. Perhaps you have experienced decisions coming from the top leader, or a top-level leader that make no sense to those who must carry the decisions out. The leader never bothered to listen to those closest to the issues being addressed and is certain the decisions are just what the organization needs. Maybe you know of a leader who believes he or she is an excellent and beloved leader. However, the reality is just the opposite. Employees see the leader as an arrogant, know-it-all leader with a big ego and little awareness of what is going on or how he or she is perceived.

The Major Focus of the Article

This article will focus on the need for self-aware leaders who know how to minimize their possible leadership illusions and the need for organizations and organization development professionals to provide much needed training and coaching in preparing leaders to be more self-aware. Interestingly, although some experts have cited self-awareness as the most important leadership capability to develop, training in self-awareness and how to minimize leadership illusions is rarely included in leadership development and organization development efforts (Hougaard, Carter, & Afton, 2018; Toegel, Ginka, & Barsoux, 2012; Goleman, 2014). However, building organizations and groups for success and effectively leading and managing change are highly dependent on leaders having a clear sense of reality.

Keep in mind in reading the article that while the article may bring to mind both good and bad leaders you have experienced who clearly have leadership illusions, the emphasis should be on clearing up your own possible leadership illusions. If someone else was reading this article, they may very well have thought of you or me as the ones with leadership illusions! Also, keep in mind that even though the article is about leadership illusions, we are all likely to have some blind spots and can learn from the concepts being presented.

Leading with Leadership Illusions Can Have Significant Consequences

The reality is that leading with leadership illusions is no small matter and that leadership illusions can have significant consequences to one’s own effectiveness, the effectiveness and morale of those who leaders lead, and to whole organizations, countries, societies, and groups of all types and sizes. For example, numerous studies have reported the impact of unaware leaders on employee motivation, morale, and health. One study reported that caustic, abrasive, and overbearing bosses may be taking years off their employee’s lives (Armstrong, 2005).

Especially in these fast-changing times, leaders at all levels are needed that are skilled leaders committed to achieving high level results and building healthy organizations. To do so and be effective in today's times, leaders will need to have a keen sense of self-awareness and be skilled at listening to others, involving and engaging others, building trusting relationships, and welcoming and seeking candid communication and helpful feedback. Edgar and Peter Schein in their top selling book, *Humble Leadership: The Power of Relationships, Openness, and Trust,* point out that the old top down leadership where leaders are know-it-all leaders who make most of the decisions and keep a professional distance with employees is "hopelessly inflexible and outdated." They point out that future leaders will need to be much more relational and able to build more personal, trusting, and open relationships as well as cultures also built on more personal intragroup and intergroup relationships (Schein & Schein, 2018). All of these skills will require highly self-aware leaders that are in touch with the people and realities they are involved with and that lead with minimal leadership illusions. The greater the responsibilities and the higher leaders advance, the greater the potential consequences from a lack of leadership awareness and leading with leadership illusions.

Degrees of Leadership Illusions

The term "self-awareness" in this article is intended to include both personal awareness and an awareness of what is going on in the organizations and groups that leaders are leading as well as other important information leaders need to be aware of to be effective leaders. The theories that particularly place a strong emphasis on self-awareness are *Servant Leadership* (Blanchard & Broadwell, 2018), *Emotional Intelligence* (Goleman, 1995), *Transformational Leadership* (Warrick, 2018), *Positive Leadership* (Cameron, 2010), *Humble Leadership* (Schein & Schein, 2018), and *Authentic Leadership* (George, 2003). With limited self-awareness, leadership illusions are sure to follow with various consequences.

Leaders have varying degrees of leadership illusions. In evaluating the potential for illusions, consider three levels of leadership illusions:

1. **Narcissistic Leaders.** Narcissistic leaders are leaders who tend to be know-it-all, egotistical, overly-confident leaders who have an inflated and unrealistic view of their capabilities and how they are perceived (Carlson, 2014; Maccoby, 2007; Maccoby, 2004; Rosenthal & Pittinsky, 2006). They are known for having a grandiose view of self while showing little concern or empathy for others and for having a high regard for their own opinions and ideas and little regard for the ideas and opinions of others. They discourage or dismiss feedback unless it fits with their own perceptions of reality.

   Narcissistic leaders are the most likely candidates for leadership illusions. Since their reality is the only reality and they are not that interested in soliciting ideas and feedback from others, they must rely on their own sometimes distorted perceptions of reality and the likely distorted information others share with them for fear of consequences for being candid. While some narcissistic leaders are smart enough and manipulative enough to be highly successful at achieving their personal goals, they are sure to have numerous leadership illusions that will have consequences for them and the organizations or groups they lead.
2. **Moderately Aware Leaders.** Moderately aware leaders are well intended leaders who have a good but not great sense of self-awareness and awareness of what is going on. Their good but not great sense of awareness could occur for many reasons. For example, they may not actively seek feedback and opportunities to listen to the ideas and perspectives of others. They may also have some behaviors they are not aware of that discourage open communication and feedback. In addition, they may be lacking in the knowledge and skills needed to gain a clear sense of reality and minimize leadership illusions. It may also be possible that they purposely avoid feedback or methods for discovering reality for fear of exposure or having to take responsibility for their actions.
3. **Mostly Aware Leaders.** Mostly aware leaders are leaders who have a high level of self-awareness as well as an awareness of what is going on that impacts their effectiveness. They make special efforts to welcome feedback and listen to the ideas of others and to assure that they are in touch with what is going on with those they lead and with information relevant to their effectiveness. Mostly aware leaders are typically humble leaders that genuinely care about the welfare and ideas of others and create a safe environment for open and candid communication. The term "Mostly Aware" is used to acknowledge that even the most aware leaders are likely to have a few blind spots and may not be aware of some information that could influence their effectiveness. Before placing yourself in the Mostly Aware category you may want to consider that a study by Tasha Eurich highlighted in the *Harvard Business Review* estimated that only 10-15 percent of people are self-aware (Eurich, 2018).

Examples of Leadership Illusions and Their Consequences

The following six real life examples illustrate that leadership illusions are a very real problem that can have significant consequences. Some examples are taken from a series of case books on leadership, leading change, and changing culture (Warrick & Mueller, 2011; 2012; 2014).

Example 1: A leader who is very intelligent and competent at many things but lacks leadership and people skills, thinks all is going well, but in reality, has created a culture of fear. The leader is skilled at management, finance, and achieving bottom line results, but is lacking in leadership and people skills and in building a culture of excellence characterized by open and candid communications, teamwork, and high morale. While he assumes that all is going well, his actions and overreactions and need to do things his way on his terms has created a culture of fear and an organization that is becoming increasingly dysfunctional. People tell him what he wants to hear, avoid being candid at the risk of real or imagined retribution, and find ways to stay out of trouble rather than operate at their full potential. Morale is sinking and his decisions, motives, and efforts to make changes are treated with suspicion. He is not trusted to look out for the best interest of his employees. He is out of touch with the realities of his organization and those he leads, and future results look questionable. He has put his organization, and possibly his career, in a vulnerable situation but he is the last to know the realities he is facing.

Example 2: A fast track, high potential middle level leader who is a favorite of top management for rapid promotion has a very different reputation among her peers and employees. You have probably witnessed a similar situation where both top-level management and a high potential person have blind spots that are having consequences that are not seen by either. The fast track leader is highly motivated, works long hours, and is known for doing whatever it takes to get people to deliver the desired results on time and on schedule. What the leaders don't know is that among her peers and employees, she is known as a know-it-all, self-promoting, manipulative, not-to-be-trusted leader who is very congenial and supportive if she wants something, but can be abrupt, critical, rude, and demeaning if her direct reports do not do or say what she wants. This has resulted in leadership illusions on her part and the part of her leaders as she gets excellent feedback from the leaders and has no idea how she is seen by her peers and employees as she does not receive feedback well that she disagrees with. The leaders will likely continue to promote her based on assumptions that are only partially accurate. The illusions will eventually have costs to both the high potential leader and upper management if they are not corrected.

Example 3: A top level leader who is very confident and persuasive but rarely seeks the involvement or counsel of others launches an organization-wide change that requires considerable time and resources and makes little sense to those who must carry out the change. A member of an executive team of an organization is very confident in his ideas but lacks skills in listening to others, involving and engaging people in sharing ideas and making decisions, and in welcoming feedback or considering the implications of his decisions. He reads a book that recommends having every unit in the organization prepare a detailed report on its performance and value to the organization and purging the organization of low value operations. He assumes that this approach will be of considerable benefit to the organization and persuades the other top-level leaders to launch the program. However, he does not consider involving those impacted by the approach in evaluating the plan and its implications.

The leader launches his plan that occupies the time and resources of hundreds of units and thousands of employees throughout the organization. The approach pits organizations against one another as they all prepare reports favorable to their self-interest. There is considerable confusion about what should be in reports, how to rank order the units, how decisions will be made, and what constitutes a unit that may not be cost effective but is critical to the mission and success of the organization. Morale, teamwork, and trust are eroded, and the process becomes so demoralizing and confusing that basically nothing is changed. The leader did not solicit or receive feedback on the project and assumed that it failed because people are resistant to change. The leader will probably involve the organization in other time and resource consuming projects in the future and will be just as unlikely to be aware of the implications and consequences.

Example 4: A skilled and well-intended leader who wants to build an exceptional organization characterized by open and candid communications has gotten so busy that she has become out of touch and inaccessible and her approach to open communications is causing the opposite response to what she thinks. A capable leader who genuinely cares about her employees and wants to build something special is so swamped with meetings, e-mails, filling out reports, and trying to get bottom line results that she is becoming increasingly inaccessible and out of touch with the realities of her people and her organization. She also has a blind spot about how to achieve a goal that she is very passionate about. She is strongly desirous of candid and open communications, but her busyness has limited her communications with others and her approach to achieving candid and open communication is not well informed. She believes that setting an example of confrontational, in-your-face, tell-it-like-it-is communication will cause others to be more open. She is unaware that being so inaccessible and out of touch is affecting her decision making and credibility and that her approach to open and candid communications shuts down rather than encourages open communications. Dissension, frustration, and low morale in her organization is growing and she has no idea.

Example 5: A talented and respected leader makes an important decision without considering the implications, involving key stakeholders, or exploring innovative alternatives and causes a world-wide reaction that derails his career. One of the more interesting examples that should alert all of us to the potential for leadership illusions comes from a university President who was an outstanding leader and President but allowed a leadership illusion to derail his career and bring world-wide bad press to his university (Edgers & Schworm, 2009). During a recent global financial crisis, the university President was faced with declining revenues and endowments from donors and faced a shortfall of $10 million. The President and the Board of Trustees reasoned that a quick solution would be to sell off some of the art work assessed at over $350 million from their world-renowned art museum and possibly close the museum since attendance at the museum was somewhat low.

The decision made good sense to the President and Board of Trustees but their lack of involvement of key stakeholders in the decision or in exploring other possible alternatives resulted in a significant leadership illusion regarding the reaction they would get. The museum board, Director, and employees were shocked and outraged as they learned of the decision second hand. Faculty leaders were deeply concerned that such a significant decision that affected the reputation of the university would be made without their input. Students let their voice be heard in various student outlets such as the university newspaper and the press. The story made the news across the US and art enthusiasts and associations from around the world condemned the decision and how it was made. The President eventually resigned.

Example 6: **A leader has strong convictions about how to run an organization and how to get things done and is so convinced that he is right in his perceptions and ideas that no amount of feedback or information is likely to change his mind unless it agrees with his own thinking.** While the leader is good at saying the right things, delegating responsibility, and even involving others in sharing ideas, in the final analysis, it is well-known that it is his way or the highway. While he sees himself as a skilled leader, he is known by his people as a micro manager who over-manages what goes on and how things are done. There is some evidence to suggest that if you disagree with him or he does not like you or something you are doing, you are likely to have consequences. He can be very charming in achieving his agendas and does have his followers who have learned how to please him and get along with him. However, he also has his share of those who do not trust him and do not like working for him. The turnover of people who work for him is quite high, but he believes that the reasons have little to do with him.

Hopefully, you are now seeing the picture of the significant potential costs of leadership illusions and the need to train leaders with skills in knowing reality before making decisions that can have undesirable consequences. While no one operates with a total sense of reality and while we all have illusions, there are ways to minimize our illusions and the potential consequences.

Why Leaders Develop Leadership Illusions

Having worked with thousands of leaders in many types and sizes of organizations for over 45 years, I have noted ten patterns of how leaders develop leadership illusions that are likely to have consequences to the leaders, to those they lead, and to their organizations. There are no doubt other patterns that could be added but these ten will give leaders important considerations to be aware of.

1. **Having a leadership style that discourages openness and feedback.** There is considerable research available on the significant impact of a leader's leadership style (for example, see Voon, Lo, Ngui, and Ayob, 2011; Warrick, 2016). However, few leaders seem to be aware of the possible positive and negative consequences of their style. A study of close to 4000 leaders worldwide by the consulting and organizational research firm DDI, found that most front-line leaders lack the fundamental interaction skills and behaviors needed to be effective leaders and that senior leaders have even worse skills (Frasch, 2013). In the DDI study they also found that 90 percent of executives act before checking their understanding of an issue and are ineffective at inviting ideas from others. A large study by the Gallup organization showed that most leaders score low on emotional intelligence and interpersonal skills. It takes aware and skilled leaders to create a safe environment for people to be open and candid. Unfortunately, many leaders have a leadership style that discourages openness and feedback. Their words, behaviors, and reactions may come in many forms, but they make it clear that it is risky to be open and candid and especially to provide feedback. These leaders place themselves and those they lead in potentially precarious situations because they train others to tell them what they want to hear and to avoid providing them valuable information and feedback.
2. **Assuming that you know more than you do.** Any time that leaders operate on assumptions that they do not check out, they run the risk of making faulty decisions based on faulty assumptions. This is particularly true of overly confident, strongly opinionated leaders who prefer to express their own ideas rather than listening to the ideas of others and who give the impression that they know all and see all and will ultimately do things their way on their terms. They make assumptions, assume that they are right without checking their assumptions out, and behave based on their assumptions. This can cause leaders to have a limited view of reality and to be the last to know when their assumptions are wrong.
3. **Personal blind spots that go unchecked.** It is unlikely that anyone has reached a level of perfection where they do not have any blind spots that need improving. Blind spots are areas of our behavior and life that others see that we do not see. For teachable and humble leaders who seek and welcome feedback, blind spots are usually fairly easy to correct. However, for leaders who by their actions and reactions discourage feedback, the blind spots continue and most likely grow. Blind spots can create disconnects between how leaders think they are seen and how they are actually seen, between the reality they are operating by and the reality that actually is, and between their perception of how their decisions are received and how they are actually received.
4. **Flawed knowledge, thinking, and paradigms.** We can be completely wrong, slightly wrong, or sincerely wrong about our knowledge, thinking, and paradigms, but the outcomes of being wrong will likely be the same. Leaders may not be knowledgeable about how to lead or about other skills they need or other things they need to know to do their job. Their lack of knowledge or possible flawed thinking or paradigms will influence their perceptions, reasoning, behaviors, and decisions unless they are cleared up. Leaders who have a high degree of awareness and are constantly learning and growing and are open to correcting flaws or gaps in their

knowledge, thinking, and paradigms will be less prone to this particular source of leadership illusions.

5. **Out-of-touch with present realities.** Unless leaders are committed to being in touch with the realities of those they lead and have an organized way to keep up to date on current events, best practices, and future trends that influence what they do, they can become out of touch with internal and external realities that impact their ability to be effective leaders. This is easy to do with the high pressure demands to get results, do more with less, and meet institutional demands and government regulations. Leaders can easily become preoccupied with performance, meetings, electronic communications, and busywork, keeping them increasingly inaccessible and detached from the realities of those they lead. However, it does not change the fact that making important decisions without being in touch with present realities can have significant implications.
6. **Not understanding the importance of involvement and wise counsel.** Many leaders either do not understand the importance of involvement and seeking wise counsel before making important decisions or they do not have good skills in involving others and seeking wise counsel. Therefore, leadership decisions are often made without the benefit of input and buy-in from key stakeholders or contributors who could provide valuable input into decisions and their implications.
7. **Not understanding the value of good listening skills.** One of the most important skills a leader needs to develop to avoid leadership illusions is good listening skills. Good listening skills require more than being silent while someone else is talking. It is important for leaders to create a climate that invites open and safe communications, to draw others out, and to listen more than they talk. Unfortunately, leaders are not typically known for their listening skills. They are more likely to not be that interested in listening to the thoughts and ideas of others, to be over-confident in their own thinking, and to dominate conversations, all of which limit what they can learn and know from others.
8. **Listening to the wrong people.** Just as problematic as not listening is listening to the wrong people. Leaders sometimes rely on information from people that do not provide reliable information or wise counsel or who have ulterior or self-serving motives. An article in the *Harvard Business Review* (DeSteno, 2014) points out how important it is for leaders to know who they can trust. Bad decisions have been made and careers sometimes ruined by trusting and listening to the wrong people.
9. **Convictions and personal agendas that go unchallenged.** An extreme form of leadership illusions occurs when leaders have such strong and often wrong thinking, convictions, agendas, and motives that no amount of feedback, data, or counsel can influence their preconceived ideas. This happens particularly in the political or activist arena where facts may have little influence on perceptions, realities, and decisions. However, it can also happen when leaders have uninformed or wrong paradigms about leadership and how to build a successful organization and when leaders are over-confident and assume they are right regardless of the contrary information they receive.
10. **Organizational dynamics.** This source of leadership illusions was included last because it is clearly one of the most common causes of leadership illusions. Unless organizations have excellent leaders committed to building healthy organizations and cultures and to keeping people well-informed, leaders are often lacking in the information they need to do their jobs and at best get incomplete, conflicting, and inconsistent information. Add to this a culture that is somewhat dysfunctional and does not value openness, teamwork, and collaboration, and the result is leaders at all levels trying to make decisions based on faulty information and assumptions. This tends to create a blame game culture where leaders avoid making needed decisions knowing they will be blamed for things going wrong.

Table 1. *Ideas for Increasing Awareness and Minimizing Leadership Illusions*

1. Develop a leadership style that encourages open and candid communications.
2. Encourage and solicit helpful and accurate feedback.
3. Seek involvement, collaboration, and wise counsel before making important decisions.
4. Listen more than you talk, use speech that encourages open dialogue, and learn to be discerning about who can be trusted to give candid and objective information.
5. Check out assumptions before assuming they are accurate.
6. Develop and continuously improve an effective communication system.
7. Plan ways to stay in-touch, engaged, and involved, and do regular reality checks.
8. Develop an organized way to stay up-to-date and skilled at what you do.
9. Involve the appropriate people in building a healthy, high performance organization and culture.
10. Provide training, consulting, or coaching.

Ideas for Increasing Leader Awareness and Minimizing Leadership Illusions

Ten ideas are presented that can improve skills in increasing leader awareness and minimizing leadership illusions (See *Table 1*). You can well imagine how much more effective leaders would be if they significantly increased their self awareness and decreased their leadership illusions. The ideas discussed below can be taught in leadership development programs and can be coached by organization development professionals in helping leaders build healthy, high performance organizations and lead and manage change.

1. **Develop a leadership style that encourages open and candid communications.** This is the most critical of all the solutions. If a leadership style does not encourage open and candid communications, the other solutions will be suspect and limited in their effectiveness. It is well documented that humble and approachable leaders who genuinely care about others, have good people skills, and have good emotional intelligence not only create a climate of openness that encourages candid communications and feedback, but are also likely to achieve results far above the norm (Collins, 2001; Goleman, 1995; Tischler, 2005). An effective leadership style invites open and straightforward communication and encourages others to provide helpful feedback that makes it possible to correct personal blind spots.

   Leadership theories regarding leadership style typically encourage leaders to develop a leadership style that places a strong emphasis on people and performance (Warrick, 2016; Cuddy, Kohut, & Neffinger, 2011). This balanced approach to leadership where leaders treat people with considerable respect and value and motivate people to perform at a high-level, builds credibility, trust, and confidence in leaders that helps create a culture of open and candid communication.

   As mentioned previously in this article, specifics on developing a leadership style that increases awareness and minimizes leadership illusions can be found particularly in leadership books and articles on Servant Leadership, Emotional Intelligence, Transformational Leadership, Positive Leadership, Humble Leadership, and Authentic Leadership. *Servant Leadership* focuses on serving others, placing the needs of others above your own, helping others learn, grow, and develop, and seeing a leader's primary role as service to employees, customers, shareholders, communities, and the general public (Greenleaf, 1970). *Emotional Intelligence* (EI) emphasizes that the heart (emotions) and mind (intelligence) must work together in managing yourself and your relationships. EI relies on skills in self-awareness, self-management, social awareness, and relationship management (Goleman, 1995). *Transformational Leadership* requires leaders to create a culture of openness, engagement, and collaboration so leaders and employees can work together to achieve high level goals (Bass, 1985). *Positive Leadership* emphasizes creating a positive work climate, developing positive relationships, using positive communications, and making work positive and meaningful. All of these efforts help create a climate of trust and openness (Cameron, 2012). *Humble Leadership* is essential for creating a culture where leaders are approachable and where you can be open and candid with leaders without fear of retribution. There is increasing research that suggests that the leaders of the future will need to be humble enough to diligently seek and listen to the ideas of others in order to be aware enough and on top of reality enough to succeed (Hess & Ludwig, 2017). *Authentic Leadership* emphasizes the importance of leaders being self-aware, genuine, fair-minded, doing what is right, and being transparent (George & Sims, 2007; Luthans & Avolio, 2003).
2. **Encourage and solicit helpful and accurate feedback.** This is related to the first solution but much broader. A wise leader will make a practice of welcoming and soliciting appropriate feedback from trusted people and sources. The focus could be on the leader's leadership style and its consequences, on what is going on in the organization that the leader may not be aware of, and on other relevant information and possible blind spots. Leaders can increase their self-awareness and awareness of what is going on by using informal and formal methods such as asking questions that will provide valuable feedback and using questionnaires and interviews to gather relevant information pertaining to how they lead and how the organization they lead is doing. It can particularly be helpful to gain feedback from 360-degree questionnaires and interviews that typically provide self-ratings as well as ratings from a leader's manager, direct reports, and peers. Some assessments are best done by professionals that can provide a process for finding out what is going on and help interpret the results and provide follow-up coaching.
3. **Seek involvement, collaboration, and wise counsel before making important decisions.** To avoid making foolish assumptions and decisions, it is important for leaders to learn to involve the appropriate people in the decision-making process, to value collaboration and the ideas of others rather than thinking they see all and know all, and to have at least a few trusted people from which they can seek wise counsel. Leaders particularly should involve knowledgeable people in evaluating the potential implications of decisions, and when they do make decisions, to build in progress reports so that needed corrections can be made.
4. **Listen more than you talk, use speech that encourages open dialogue, and learn to be discerning about who can be trusted to give candid and objective information.** It takes discipline and self-control for leaders to learn to listen more than they talk and to use speech that encourages open communication. Leaders need to develop skills in humbly *"drawing someone out, of asking questions to which you do not already know the answer, of building a relationship based on curiosity and interest in the other person,"* (Schein, 2013). They also need to learn to choose wisely what they say, how they say it, and when they say it to encourage vital and candid dialogue and not unintentionally discourage open communication. There is no great virtue in "telling it like it is" and "saying what you think and feel" without doing so in helpful rather than harmful ways. It is also important for leaders to be discerning about who they listen to and who will provide information in a straightforward, concise way without exaggeration or the infusion of personal agendas.

5. **Check out assumptions before assuming they are accurate.** It is important for leaders to learn to check out their assumptions. Especially over-confident leaders can tend to assume that their perceptions, ideas, paradigms, and convictions are correct and therefore are prone to acting without checking their assumptions out. This can result in faulty thinking that can lead to faulty decisions. The solution to avoiding this potential for developing leadership illusions, like the solution to avoiding many other leadership assumptions, is to check out assumptions with informed and knowledgeable people before proceeding as if they are true.
6. **Develop and continuously improve an effective communication system.** Effective, two-way communication is essential to avoiding leadership illusions. It can be helpful for leaders to involve key people in planning a system for communicating and keeping people informed. The communication system may include, for example, the types of meetings that are needed, how often to meet, and what meetings should include. It could also include various ways to keep people informed and to communicate the information people need to know to do their jobs well and ways to periodically evaluate and improve the communication system.
7. **Plan ways to stay in-touch, engaged, and involved, and do regular reality checks.** Faced with the many demands that preoccupy the time and priorities of leaders, leaders can get out of touch with the realities of the organizations they lead and assume that all is going well while the organization is regressing (Warrick, 2002). Leaders need to have planned ways to be visible, accessible, and engaged and to stay in touch with the realities surrounding their jobs. This can be done with regularly scheduled, well-planned, and purposeful face-to-face or virtual meetings, brief reports, quick reality check surveys that track performance and cultural essentials, arranged focus group meetings, and specific meetings in which the leaders are involved to evaluate what is going on and what needs to be done or improved. It is also helpful to assign people with the responsibility of keeping current in key areas and to share what they have learned. Bringing in those impacted by what a leader's group does can also be helpful. Especially important is focusing on both performance and people indicators.
8. **Develop an organized way to stay up-to-date and skilled at what you do.** In such a fast- moving world, it is also important for leaders to have an organized way to personally stay up-to-date and skilled at what they do. It can be helpful, for example, for leaders to subscribe to one or more management journals like the *Harvard Business Review* and a few journals in their area of expertise and to attend at least one valuable association meeting or conference each year that exposes participants to the latest thinking, trends, and best practices. It can also be helpful for leaders to have good internal or external contacts, consultants, or coaches they have access to who they can rely on for wise counsel and keeping up-to-date. Without an organized way to stay up-to-date, it is easy for leaders to rely on what they used to know and do and to become increasingly less effective and out-of-touch with current best practices.
9. **Involve the appropriate people in building a healthy, high performance organization and culture.** An excellent way to minimize leadership illusions is to create an on-going process for involving the appropriate people in identifying and managing what it would take to build a healthy, high performance organization and culture. The dialogues involved in implementing decisions in building the organization and culture will keep leaders and those they lead well informed about the organization and what is working and what needs to be improved (Lencioni, 2012). Keep in mind that the more poorly led and run and dysfunctional the organization and organization culture is, the greater will be the potential for leadership illusions throughout the organization. This is another area where it may be helpful to engage internal or external professional expertise.
10. **Provide training, consulting, or coaching.** This last point is perhaps the best way to help leaders avoid leadership illusions. Providing training that presents concepts and skills similar to those presented in this paper has the advantage of reaching a larger population of leaders and of creating a group learning dynamic that is more likely to change behavior than encouraging leaders to make improvements on their own. Training can also be complimented by working with consultants or an executive coach.

Implications for Leaders and Training and Coaching Leaders

This article has important implications for leaders, for training leaders, and for organization development professionals who are helping leaders build healthy, high performance organizations and manage change. Leader effectiveness is significantly influenced by a leader's self-awareness and clear sense of reality. Blind spots in self-awareness and miss-perceptions in understanding what is going on, what it will take to succeed, and in effectively managing change will lead to leadership illusions that can have consequences to a leader's effectiveness, the effectiveness and morale of those leaders lead, and to the organizations and groups leaders lead. Making leaders aware of the importance of self-awareness and minimizing leadership illusions and training leaders in skills in being more self-aware and aware of the realities they need to know to be effective can have considerable payoffs to leaders and those they lead. The article presents an area of leadership development and coaching that should be given careful consideration in preparing leaders, groups, and organizations to succeed.

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The Rise and Fall of OD—and Two Paths Forward

By Martin Goldberg

This essay discusses the socio-economic and psychological ground in which a "golden age of OD," from the late 1960s to mid 1990s, took root and soared; then those conditions that led to its wane. It highlights the values and humanization of work, original hallmarks of the field, and their eclipse by splintered methods of practice, often with conflicting ends, that came with a radical shift in dominant modes of production—away from manufacturing as the major source of labor in the US to the ascendance of globalization, services, and networked information technology; away, that is, from when capital remained king in a post-industrial era to the pre-eminence of information as the chief economic and organizing principle of today's knowledge society (see Peter Drucker's prophetic 1994 *Post-Capitalist Society*). In between, we've seen a twenty-year transitional mix in our socio-economic order, neither fish nor fowl—and not infrequently a confusion of voices in OD.

This mini social and intellectual history is followed by distillation of two strategic paths forward, underway in fact since OD's glory days faded. The first, I claim, is a "lower path" with its tendency to capitulate to HR; a profusion of isolated techniques in change management, reengineering, and positive psychology; and heady organization transformation models that don't seem to go very far in practice. This path I contend amounts to a "road to Abilene," with practitioners often finding themselves in a blind alley, left with the gnawing feeling "how the hell did we get here?" and, as a result, tempted by the formulaic.

The second is a higher path, with glimmerings still of the strategic promise of the field, a promise for a deeper, more systemic, and humanized practice; a practice addressing the needs of evolving networked-based organizations that drive for results and meaning in the new economy. In this, my intention is to be descriptive, but also explanatory of the inner logic of the dynamics as it plays out over time.

My conclusions and inferences draw from my own winding course of development as a consultant, teaching and mentoring others, and lessons of some of the leading lights in the field: Eric Trist, Bob Tannenbaum, Dick Beckhard, Billie Alban, Ed Schein, Herb Shepard, Harvey Hornstein, Tony Petrella, Marv Weisbord, Barbara Bunker, and others. The two paths forward have implications for how we as practitioners, emerging and experienced, fashion our careers, face the existential choices before us, and cultivate a potential renaissance of the field befitting the organization challenges and world issues we face.

This paper represents my reflections, and I wish to make clear that by no means do I intend for them to be comprehensive or a last word. There are many pioneers in the field not mentioned, and this is a complex set of events to make sense of and untangle. I am continuing to ponder. I hope this serves to stir further pondering and conversation in the OD community.

A Golden Age of OD

While there is no strict dating of the onset of OD, clearly there are marker events that defined its emergence. In the university, Kurt Lewin in the 1940s and Douglas McGregor in the 1950s made major theoretical contributions to understanding group dynamics and the "human side of enterprise." Lewin's contributions were particularly profound, influencing so many who followed. Dick Beckhard and Billie Alban by the early 1960s were already well at work innovating practice. Their and others' efforts, including Warner Burke, informed the rise of the field as a body of concept and craft, albeit somewhat loose, that took off amid the socio-political tumult and anti-establishment mood of the late 1960s. Corporate attendance at NTL T-groups, establishment of the OD Network as a professional association, and the publication of Addison-Wesley's first of its series on OD marked the beginning of a "golden age." So did the first consultancies dedicated to OD practice, notably Block Petrella Associates (later BPW, Block Petrella Weisbord). Excitement about the values and new business of OD was in the air.[1]

BPW was explicitly devoted to bringing out the "human face of business," while still focused on business achievement. Peter Block, Tony Petrella, and Marv Weisbord all had significant prior business experience with OD, and they could get into corporate boardrooms because of their credibility. Columbia's Harvey Hornstein, who also partnered with Beckhard, noted BPW found success on the strength of its principals *and* principles. Says Hornstein, "They were *acceptable* and got in the door with executives because they spoke, and could identify with, business as well as larger human purpose. They were not 'beads and sandals guys.'" At the same time, Hornstein noted, in the mid-1960s companies were flush with cash because of economic policies implemented during the Johnson administration, and were willing to invest in new ideas and innovation, including OD programs.[2]

Herb Shepard at Cleveland's Case Western established one of the first doctoral programs in Organization Behavior, and he also published his seminal "Rules of Thumb for Change Agents" (1975), still unmatched as a piece of writing on value-based OD practice. Jerry Harvey's "The Abilene Paradox" (1974) was also prominent for its humanistic approach and emphasis on the "existential courage" needed for leaders and others to own up to and resolve thinly masked organizational conflict. Extensive, long term OD programs began at Esso by Yale's Chris Argyris and NTL's Lee Bradford, and on the west coast at TRW Space Systems by UCLA's Bob Tannenbaum, paired internally with Shel Davis. Socio-technical interventions too, rooted in the socio-psychoanalytic work of Wilfred Bion in the 1940s, later became prominent under the tutelage of Eric Trist. Trist was among the first to understand that significant reform in factory productivity and quality were dependent on employee driven work redesign, while simultaneously addressing the underlying cultural conflicts that erupted in the process ("The Evolution of Socio-Technical Systems," 1981).

All these efforts showcased the claims of core OD values and principles during its heyday. Effective change required the:

1. Assent of the organization and its key leadership to work on change;
2. Work to bring people's voices and candid thinking to the fore, unhindered by fear or groupthink;
3. Organization to be thought of as an "open system," with stakeholders internal and external to the boundary of the organization engaged;
4. Collaborative partnership of OD agents with clients in discovering, envisioning and creating better organizations;
5. Recovery of organizational purpose and effective interaction for joint action and results; and
6. Openness and resolve of change agents to understand themselves as whole persons, using "self as instrument" in intervening.

Two other historical streams also played into the picture. The first was the birth of the "human potential movement" in psychology. Carl Rogers' client-centered psychotherapy put dialogue front and center, as it did an appreciation for familial and social environments being fertile enough to allow for personal growth. This stream was seen too in the rise of Gestalt psychology, individually and in group therapy, with "human encounter" as central, and as reflected in California's Esalen Institute and the emergence of innovative body- and feeling-oriented therapies.

The second stream was the introduction of powerful new information technologies, exploding as a field from its earlier development. The rise of computer giants such as IBM, first in its large-scale mainframes in the 1960s and Apple and Microsoft in personal computing in the 1970s and 1980s, found welcome homes in corporate America and internationally. Firms could now capture and process volumes of proliferating data at high speed, in usable reporting formats, and with user ubiquity. All this contributed vastly to the environment of change and, like its human counterpart, although coming from another direction, new organizational potential.

What is essential to recognize is that OD came of age in a period of incredible change, culturally, technologically, and economically. Large-scale manufacturing, whether in oil and gas, electronics, transportation, agriculture, textiles, or others, was dominant but presented frequent organizational challenges: the need for keen leadership foresight, the rigidity and dehumanization of bureaucracy, and inflexible norms and patterns of communication for people to be as forthcoming as needed. The opening for OD to help address these issues was especially evident in the 1970s and 1980s, with American industry's competitiveness being challenged in the emerging global economy. Japan was rising as an economic and quality powerhouse,

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1. A more nuanced history of OD's emergence can be found in Art Kleiner's The Age of Heretics *(2008); BPW's years in my own "Marvin Weisbord: A Life of Action Research" (2017).*

2. Personal communication (2016).

Germany too, in their full recovery from their devastation during World II. By the mid-1980s and 1990s, downsizing and consolidation of firms, threats of hostile takeovers, and rapid decline in union membership were stressing firms' organizational viability and capacity to employ the mass numbers of workers they had in the past. The times were right for OD to help companies effect change, structurally in their efficiency and productivity, but also to reinvigorate them humanly: freeing-up and revivifying stultifying, sluggish, and even dying organizations. These were organizations in need of innovative and far-reaching change, affecting firms of all kinds to a greater or lesser degree, but magnified in America's largest economic sector: the manufacturing of durable and non-durable goods. During this time, socio-technical interventions were well suited for manufacturing's linear processes compared to those of other industries. But as powerful as socio-tech could be when enough sponsorship could be found, the redesigned and sometimes newly designed plants such as Digital Equipment Corporation's Enfield facility were often not sustained and eventually closed.

The Decline of OD

Manufacturing organizations continued to wane *as organizations* through the 1990s. Ever more potent efforts were required to create change and help ensure their survival. Communities they were a vital part of for decades were dependent on them for livelihoods. Keeping those communities and companies alive, however, was seen from the lens of a fading paradigm. A new socio-economic order, emphasizing knowledge and service workers, was emerging. Information technology became increasingly sophisticated with the advent of the Internet and wireless networks, connecting companies across their supply chains and around the world. Major renovations in core systems, such as enterprise resource packages, also came to the fore. They provided common relational databases with real time capabilities to replace previously splintered batch processing, and they promised to reduce redundancy and improve quality for interdependent operations. Robotics too, in development years earlier, was introduced to assembly lines in the mid-1990s.

Its effects? While net productivity became more robust, large labor pools in manufacturing increasingly became less relevant. Demand shrank to salvage manufacturing organizations through systemic, human-oriented OD. Productivity, driven by information technology, along with a new market focus on product innovation and profitability, became the shiny new objects of corporate demand. OD itself thus became less pertinent.

Quite a few practitioners began abandoning the OD moniker and re-orienting their work around productivity and performance. This was somewhat rationalized in the name of becoming more business focused. But something deeper was amiss. The language of human resources shifted to "human capital," embodying the objectification of the human asset, which continued to be treated as a cost and liability on the balance sheet—not "our most important asset" as company annual reports rhetorically and regularly claimed. The human dimension, always at the heart of OD, was being diminished.

The field began splintering into increasingly compartmentalized support activities: change management to increase adoption of the new technologies; business process reengineering to streamline workflows and eliminate unnecessary labor; and coaching, outplacement, and new applications of psychology to help employees cope and transition to the new realities. To be sure, each of these and other courses of action were useful, and their upsurge represented a certain amount of experimentation and specialization. But they also tended to dilute OD's core values and the collaborative role of the consultant. Global firms in "expert," content-driven consulting took off, using detailed project plans, prepackaged solutions, and slideware.

Meanwhile, OD seemed to split itself into two sometimes antithetical directions that exaggerated tendencies always lurking in the field: the first, a hard-edged mechanical side, as in input and output analysis; and the second, what was more pejoratively called "fluffy," a side focusing on behavior cut off from work tasks and business strategy. Also contributing to the decline of OD was that quite a few of the field's founders—Shepard, Trist, Beckhard, Tannenbaum, and Pepperdine's Pat Williams—had died by the end of the 20th century. While they left their legacies with students and those they had mentored, they were no longer around to remind people of OD's basic values and calling.

The miniaturization of manufacturing, from a macro economic standpoint, and OD in its original sense, amounted to a "jump in S-curves" with its inevitable decline in the old ways of operating. The new world of service and knowledge work and organizations was materializing, but not before a period of a significant transition, with mixed situations, orientations, and at times confusion about what was happening and how to best respond. The financial services industry, shrinking in its brick and mortar branches, was also beginning significant consolidation, with technology-enabled offshore call centers and customer self-service displacing workers. De-regulated telecom businesses, with new offerings given the pervasiveness of cell and smart phones, were doing the same.

Compared to the steep hierarchies of the past, flatter, more diffuse networked organizations—networked in both a technological and human sense—were the wave of the future. These would encompass alliances, communities, and the larger social fabric in which they were embedded. But voices in the field were generally not clear, beyond broad descriptors, what these kinds of emerging organizations would look like or how they would function in the new environment.[3]

During this transition, OD was certainly not dead. Pepperdine's Master of Science in Organization Development program, started in the 1970s, continued in its teaching mission, and the OD Network was still sponsoring national and regional conferences, though with fewer attendees than at its height. These sometimes emphasized surface, cognitive models, and procedures at the expense of more strategic craft to move organizations to qualitatively new ways of operating. Immersion in T-groups for in-depth interpersonal learning also largely became a thing of the past. Quite a few practitioners began abandoning the OD moniker and re-orienting their work around productivity and performance. This was somewhat rationalized in the name of becoming more business focused. But something deeper was amiss. The language of human resources shifted to "human capital," embodying the objectification of the human asset, which continued to be treated as a cost and liability on the balance sheet—not "our most important asset" as company annual reports rhetorically and regularly claimed. The human dimension, always at the heart of OD, was being diminished.

Two Paths Forward

As the year 2020 approaches, the clouding of much of the field is clearing. The shape of new organizations and the imperatives of the shifting social context are coming more sharply into focus, matters of fact more than speculation. So, the questions are: what will these organizations look like? What to do in supporting enterprise change in the new era? What choices confront us as continuing students and practitioners in the field? What will be the relevance of a field when the "other AI," artificial intelligence, reigns? Will there be a viable role for OD to play—and what? Put more finely, how do we enact a role by the choices we make—in what we focus on, do, and why we do it—that vividly revitalizes the field, whatever it may be called?

While there are numerous possibilities, I submit there are essentially two paths forward, though not equal in meaning or impact. The first is a continuation of the trajectory of splintered solutions formed during the twenty-year transition from the closing of OD's glory days till now. The second is a path some have been traveling that reclaims OD's core values, re-positioned for the realities of our fully unfolding knowledge and service economy—our organizations, communities, and planet. These paths, with some practitioners treading each, are described below.

A Lower Path: Point Solutions

Specialized "point solutions" describe much of what became of OD in the transition years. Hungry for relevance and acceptance, many practitioners focused on fragments of the field to support organizations, and more immediately, to stay alive in a world of productivity, performance, and imposing information technologies. This was a world where OD was often denigrated if not sometimes unknown. Techniques used in isolation were not new to the world of OD, as T-groups and team building were often treated this way. Still, techniques in these transition years burgeoned, and the list of offerings seemed endless. Change management, coaching, 360 feedback, culture programs, transformation models, appeals to business strategy, and more, captivated the attention of those in the OD community. What is more, these new solutions frequently shared a common flavor of being prescriptive and programmatic, veering away from a whole systems perspective and organic manner of practice. The deep humanism at the root of OD, as David Noer has highlighted, was also largely stripped away (*Humanistic Consulting*, 2017). These solutions more or less became commodities.

This trend continues among many today. It is seen in certified coaching and change methodologies, notwithstanding their value and claims to professionalize the field. Polarity management, neuroscience models, and liberating structures each provide valuable insights, but they too can miss the mark when treated as little more than techniques.

So can Appreciative Inquiry, despite its emphasis on generative dialogue and potential. An uncritical use of positive psychology can become a prejudice against seeing institutional resistance, avoiding the heart of conflict in a system and the courage to face and unpack chronically felt frustrations standing in the way of fuller movement. These models are basically cognitive and behavioral, not ones that unlock blocked emotional energy. A wider theory of organization, intervention strategy, and practice is needed.

It might be said that OD's presence did not disappear after its golden age, but rather *morphed* into these new point solutions. This represented a kind of continuing influence of the field. Nonetheless, it seems apparent that OD's own identity waned. It was frequently appropriated by HR organizations within which internal OD functions reported and were subordinated. The new role of HR business partner often was the main job available to recent graduates in OD. Or else they went into training positions, sometimes called "learning and development" to signify a higher aspiration, but circumscribed, nevertheless. Similarly, it was the exception that newly designated Chief Human Capital Officers held the same status or power as other C-suite executives.[4] Externally, change management roles in large consulting firms, like the Big Four, were frequently the main opportunities available to those who otherwise aspired to OD. They

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3. A notable exception at the time was the work of Harvard's and Nolan Norton & Company's Richard Nolan. Nolan was among the first to use S-curve concepts in portraying radical open system change. He well envisioned the basic structure and functions of the new "networked organization," including its IT and human dimensions. See his "Creating the 21st Century Organization" (1988), with Alex Pollock and James Ware. Nolan and David Croson's Creative Destruction *(1995) further fleshed out the picture.*

4. For more here, see Claudy Jules and my OD Practitioner *article, "OD and HR: Why the Uneasy Alliance?" (2010).*

had to content themselves with supporting the "roll out" of clients' corporate initiatives with pre-defined deliverables, struggling to introduce co-discovery and co-invention in how change work was performed.

The absence of fuller OD roles—grounded in clear theory and craft—has been unfortunate in its effects, unfortunate in the experience practitioners could accumulate as well as in their impact and value. This is only compounded now with incipient, radical shifts across industries. These changes, fueled by inter-connective technologies and machine learning, are afoot in health care delivery, retail, and alternate energy self-driving cars. Huge supply chain and logistics firms, like Amazon, already profoundly demonstrate the further changes yet to come.

I have called this trajectory of point solutions a "lower path." I mean this in two senses. First, it is lower in that it is made up of activities that are stove-piped, fragmented, and "partial;" "partial" in that they are biased in their point of departure without the intent to see specific dimensions in light of a whole system.

The second sense in which this path is lower is that it represents an act of survival by OD practitioners. This of course is Shepard's first meaning in his change rules of thumb "stay alive." Yet this is a compromised act of self-preservation that can lead to an impasse; it is not Shepard's fuller meaning of "staying alive" as a whole practitioner, bringing a self-actualizing life to the arena for fuller whole systems effect.[5] I have heard emerging practitioners lament this time and again. Many of them feel trapped, on a road to Abilene. The way out is considered next.

A Higher Path: Co-creating Network Organizations of the Future

Organizations, increasingly networked in their conception, culture, and structure, are already in existence. They are coming on the scene more and more in mixed forms, as modified hierarchies and matrix hybrids; rarely yet are they "pure" formal organization networks. Many of them are IT dominated in their product and service lines themselves. Apple, Microsoft, Google, Facebook, and Wikipedia are examples. But so are non-IT firms in their markets like Amazon and Uber. Common hallmarks are their capacity for speed, adaptability, and innovation, and their ability to scale and make alliances in complex, information rich environments. Some change scholar-practitioners contend that the idea of a network is even too narrow to capture their essence, that enterprises with such permeable, "fuzzy" boundaries are better described as "platforms." YouTube and LinkedIn are instances here, where their vast "external" networks of stakeholders are simultaneously consumers and creators of content, but also customers when they buy enhanced services.[6]

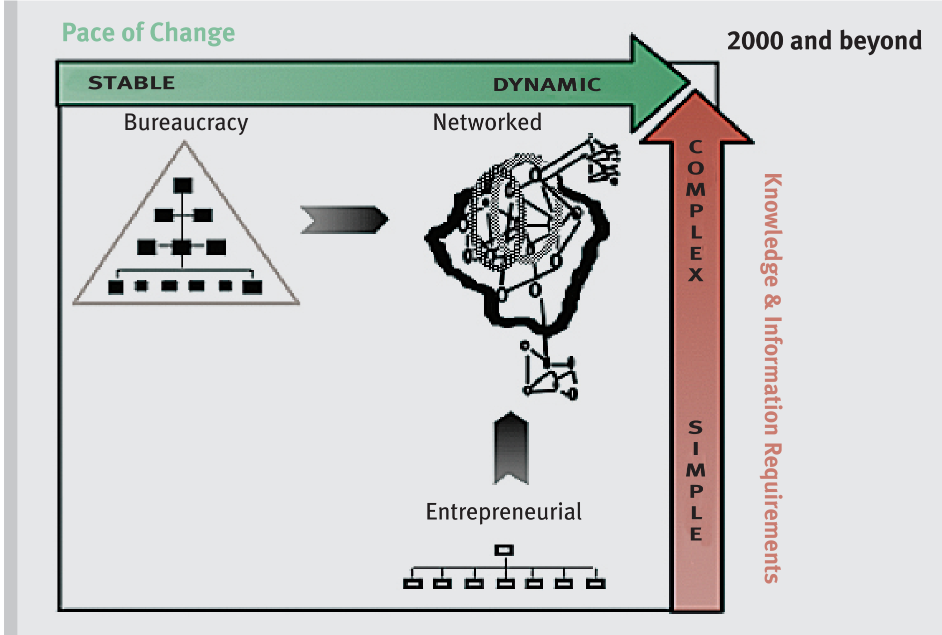

Figure 1. Evolution of Organization Forms.

To return to Dick Nolan's original formulation: the network-enabled structure responds to two fundamental environmental conditions—pace of change and complexity of information requirements. When the pace of change is comparatively slow but information requirements are high, command and control hierarchies predominate. When the pace of change is high but information-processing requirements are comparatively low, simple entrepreneurial forms are apt, with employees wearing many hats, often reporting to a single leader. However, when dynamic change co-exists with complex information requirements, the network form comes into being. *Figure 1* depicts this.[7]

The strength of command and control structures is their stability and repetitive capabilities in order to scale; their weaknesses lay in their slowness, inflexibility, and difficulties in interoperating, internally and externally, technically and humanly. They are bureaucracies. The strength and weaknesses of entrepreneurial forms are the reverse: their ability to rapidly react to change and opportunities, but inability to regularize operations for purposes of scaling. The alternative Nolan logically deduced was the IT-enabled network form, combining the strengths of each of the classical forms, while mitigating their weaknesses.

In their design, these network firms rely on an array of interdisciplinary project teams held together by the power of a guiding vision and norms, and by self-regulating coordinating mechanisms. Without this center to the organization, confusion ensues with project teams and other units drifting apart and hunkering down even further into stovepipes.

I saw this organizational dilemma resolved during my tenure as a consulting director at KPMG, later BearingPoint, when as knowledge workers we increasingly needed to unite to sell, scope, and

5. *"Rules of Thumb for Change Agents" (1975).*

6. *I thank Claudy Jules for this distinction; personal communication (2019). Implications for organizational identity here are considered in Elizabeth Altman and Mary Tripsas' "Product to Platform Transitions" (2015).*

7. *Adapted from Nolan et al. (1988).*

service complex engagements. The small, partner-dominated fiefdoms that historically made up the firm could not effectively interoperate when it came to large-scale projects. Diverse specialties were required at once from different regions, industries, and horizontal competencies. Governing protocols were needed to establish clear accountabilities and points of coordination. So were supporting infrastructures, such as information technology, human assets, resource allocation, project tasking, performance standards and monitoring, and knowledge management. After a period of trial and error and heated debate, these were blueprinted in a new operating model sanctioned collectively by the partnership, which then enabled swift deployment of the cross-cutting project teams throughout the US and globally. A flat, federated structure with organizational coherence resulted, leading to a more collaborative and open culture for joint action and results. What we designed for the consulting firm is becoming the way of all knowledge organizations, including intelligence agencies that must share highly classified information in a transnational intel community, real-time.

This is the pivotal contribution practitioners in the field can now make: The development of network enterprises—their overall architectures, infrastructures, cultures, and leadership—is the core work of a re-birthed OD. Due to the network organization's very complexity and collaborative nature, this work must be carried out in a collaborative design process, a full partnership between consultant and client system, one that considers the enterprise as a whole open system in its socio-technical dimensions.

Parallel to the emergence of change point solutions, a growing number of change strategists developed the way forward here. In addition to Dick Nolan, others have helped lead the way. In the late 1980s and early 1990s, Les Berkes and Michael Mann pioneered collective mapping of as-is and desired to-be network organization structures, using computer-assisted analysis, at AT&T, Northrop, and other organizations. The analytics here had the power to reveal hidden "trust networks" that could be better harnessed for work. Karen Stephenson and Rob Cross are two others who have been working widely on this with client-systems. A rich heritage and various design methodologies exist to draw on.[8]

In this, human *being* is restored at the center of the equation. It is restored in participative design teams, which can be augmented in large-scale, future-search type meetings. But it is also restored in understanding *de-facto* ways people interact and work-around formal hierarchies to creatively get work done across value chains. Here lie the seeds of the new organization, considered alongside information age management principles, principles such as communications being swift and point-to-point, rather than stuck in "need to know" formalisms. Another, for example, is organizational leadership being directly involved with establishing rules of engagement and strategic priorities rather than focused on narrower planning, management, and control. A deep future exists for OD practitioners to work with leadership teams and other stakeholders developing governing operating models and collaborative norms for these new kinds of enterprise.

One aspect of this future work will be for practitioners to help organizations better understand and move through the "dark side" of networks. It is a commonsense observation that network connections between people can be superficial, and because of their transparency lead to anxiety and issues of trust. Facebook among users is an example. Technology is not a magic bullet. It can be used in limiting, self-defeating ways, and as we have seen in cyber-security breaches an instrument for corrupt ends. Just because organizations are functioning networks is no guarantee of them creating deeper patterns of human connection and authenticity.

Yet with people who are in good emotional contact with themselves and others, opportunities await for fuller realization of these organizations' collaborative potential and for purposes of good. Organizational leaders and consultants can light the way. OD practitioners can also serve here as a kind of conscience for the enterprise in line with a proud legacy.

Whole systems do not need to be approached all at once, as some OD people suggest. Change will be multi-modal and multi-phased. Organization shapes will morph and re-morph as their people learn, unlearn, and re-learn. Again, as Shepard taught, it is a must to "start with where the system is" and "light many fires," but to do so with an eye on the whole. Now is the time as Shepard would say to "capture the moment."

Building better organizations and communities, and improving the world, are hard tasks. There are "no easy victories," as John W. Gardner said about meaningful social action in a book of that title years ago (1968). But they can be approached a step at a time in light of a bigger vision and in concert with others. The trick, in keeping with so many of the original voices in the field, is to be grand but not grandiose.

The development of network enterprises—their overall architectures, infrastructures, cultures, and leadership—is the pivotal work of a re-birthed OD. Due to the network organization's very complexity and collaborative nature, this work must be carried out in a collaborative design process, a full partnership between consultant and client system, one that considers the enterprise as a whole open system in its socio-technical dimensions.

8. *See Stephenson's* The Quantum Theory of Trust *(2005); and Cross and Robert Thomas's* Driving Results Through Social Networks *(2009).*

Moving ahead will require courage for clients and OD practitioners alike. Trips to Abilene can be reversed. This is all the more so amid the double-edged sword of robotics and artificial intelligence. These and other technologies yet to come do seem like they are on an inscrutable march. But there will always be a need for meta-programming, even though we may go back, and further back again, to the human being at the center of the creative process.

A central teaching question Bob Tannenbaum asked was "does this path have a heart?" Geoff Bellman has reminded me that where people are concerned, there is always "a deep human longing," a spiritual need at the core of our existence where "the human heart seeks to be fed and expressed." We can take comfort in the fact that OD has something essential to offer here—in the new, and in reclaiming the wisdom of the past.

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> "The CEO almost laughed when we suggested that 'organizations are centers of infinite relational capacity, alive with infinite imagination, open, indeterminate, and, ultimately—in terms of the future—a mystery.'"

Collaborative Change

Generative Approaches that Transform Organizations, Revitalize Communities, and Develop Human Potential

By Steven H. Cady

Here is a story to illustrate what we have learned about cultivating a spirit of inquiry. Park Plaza was a flea-bitten, one-star hotel that was taken over and challenged to transform itself. The mandate to the managers of this low- cost, high-turnover, poorly managed hotel was frightening: the new parent company wanted a rapid turnaround in service from one star to four stars, an externally determined rating. They immediately invested $15 million into transforming the physical setting to marble floors, exotic furniture, new rooms, and the like. But they did nothing on the human side. So, a year later, nothing had really changed.

We were asked to do action research that would engage everyone in a collaborative diagnosis and creation of an action plan that would help the hotel reach four-star status. In the meantime, people feared they would fail and be fired; there is always the possibility of wholesale housecleaning in any takeover of this kind; there was one moment of powerful learning. We proposed, in the organization-assessment phase, that we let go of all diagnostic, problem-oriented analysis—literally put a moratorium on all deficit analysis of low morale, turf issues, gaps in communications, mistrust, and bureaucratic breakdowns. But the general manager would not accept it when, for example, we said that the deficit-based assumptions would make the organization change come to a slow crawl, that is, if we treated and defined the system as ''a problem to be solved.'' What might happen, we suggested, if we engaged everyone in an inquiry with an alternative metaphor? The CEO almost laughed when we suggested that ''organizations are centers of infinite relational capacity, alive with infinite imagination, open, indeterminate, and, ultimately—in terms of the future—a mystery.'' One of the ''issues,'' for example, was the horrendous lack of responsiveness to guests and a culture of not caring. So, we proposed an experiment.

One group of employees was asked to do an organization diagnosis. In the prep workshop, we gave them classic analytic models, and they created problem-finding questions: What are the largest barriers to your work? What are the causes of breakdowns in responsiveness to guests? The other group would have a workshop on appreciative inquiry. We asked them to ''try on'' a half-full assumption: that the capacity for caring was in fact everywhere in the system, and there were moments of revolutionary responsiveness to guests in which people went way beyond job descriptions to go the extra mile and serve with passion.

When the two workshops were completed, we asked the groups to do separate interviews with different people in the hotel. We did not mention, however, how the two groups differed. ...So far, so good, until the day of the reports. The appreciative group was the first group that volunteered to share. Each person was visibly excited and had a role in the session. Their energy was infectious. They had discovered that every employee they talked to wanted to participate in building a four-star vision and that there was one story after another of exceptional responsiveness to guests. In addition, the images of the future were compelling and inspired. The group shared wonderful quotes from the people they interviewed. The problem-finders sat motionless and then made a tough charge: ''Where did you find all this? Certainly not here at this hotel, with all its breakdowns? We did not hear anything like what you are saying. Why are you fabricating?''

Now the tables turned. We said, ''Hold on, let's give the other group a chance to report.'' So, the second group presented (or one person presented, while the others sat back) a listing of about 50 serious problems, such as negative supervision, interdepartmental friction, and statistics on rock-bottom customer satisfaction. The scenario they had heard and painted of the future was dismal, loaded with a vocabulary of threat. Some people felt that housecleaning should indeed take place. There were anonymous quotes saying the hotel should close. The first group questioned the authenticity of the data: ''These are not the things we heard in the interviews.'' Both groups were now confused. We then asked everyone to exchange interview guides and to read the questions. This set the stage for one of the best conversations about social construction of reality we have ever had: language and reality, the impact of analysis on our feelings of motivation and fear, the impact of human inquiry on the development of relationships, the idea of culture and narrative, notions of reflexivity and the ''enlightenment'' effect of inquiry, and the relationship between inquiry and change.[1] (pages 57–58)

In the story above, management seemed to have a different idea of what it means to "engage" employees in their own collective self-assessment. In the second paragraph, note how management used the word "engage," yet when the consultants, Cooperrider and Barrett, proposed a true collaborative process, management balked. It seems as if the top leaders wanted the consulting team to gather data, define the problem and root causes, provide clear and concrete changes to make, hold a workshop to create "buy in" for the decision, and roll out a communication and a project management plan to ensure the changes were implemented through processes of compliance. Does this sound familiar to you?

Cooperrider and Berrett proposed a radical departure from what the top leaders thought of as "engagement" and it worked. It worked, despite themselves and the organization. It worked because collaborative processes are inherently human and natural. Nature is our best teacher. Many of the thought leaders in organization development and change, those with years of experience, will tell you to get the collaborative process going… and get out of the way.

Organizations and communities have moved from a focus on mechanistic structures toward more organic designs. The professions of consulting, training, and educating has shifted as well. This shift is heralding in a new era for transforming organizations, revitalizing communities, and developing human potential. We are witnessing collaborative change as a human experience that is both deep and wide. Circles are re-emerging to replace the square as a metaphorical and literal aspect of life.

1. *Adapted from Cooperrider, D. & Barrett, F.J. (2002). An Exploration of the Spiritual Heart of Human Science Inquiry.* Reflections, 3*(3). 57–62.*

Reflecting on the past seventy years of work in organization development and change, you will find that many of the change processes have evolved away from small groups conducting traditional action research or leader groups determining the best way forward. Today, we have entered a new era of collaborative system-wide engagement. From the work of Sandra Janoff and Marv Wiesbord, it is, "getting the whole system in the room."[2]

Collaborative Change Defined

What is unique about the concept of collaborative change? Consider each word. In the context of organizations and communities, change can involve the alteration of a system, including strategy, structure, core processes, power distribution, controls, culture, and people's work.[3] Collaboration adds an important dimension with, "exchanging information, alteration activities, sharing resources, and enhancing the capacity of another for mutual benefit and to achieve a common purpose."[4] Combining these two perspectives, I offer the following definition:

> Collaborative change is the achievement of mutually desired outcomes through the purposeful experience of sharing among two or more people.

Collaboration brings an important feature to the concept of change. Scientific management with "one-to-many" communications has been a mainstay framework guiding our world for centuries. As we look to the future, leaders are embracing "many-to-one" approaches. As a result, traditional structures are in decline and the rote experience is soon to be gone. Organizations

2. *Weisbord, & Janoff.*
3. *Cady, S.H. & Hardalupas, L. (1999). A lexicon for organizational change: Examining the use of language in popular, practitioner, and scholar periodicals.* Journal of Applied Business Research, 15*(4): 81–94.*
4. *Himmelman, A.T. (2002).* Collaboration for a Change: Definitions, Decision-making Models, Roles, and Collaboration Process Guide. *Himmelman Consulting, Minneapolis, MN.*

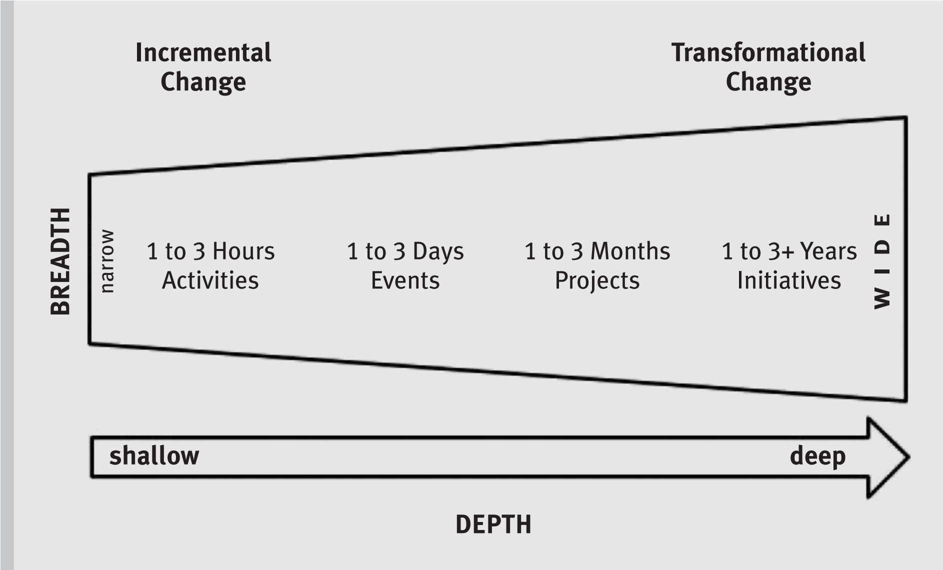

Figure 1. The Spectrum of Collaboration

and communities have moved from a focus on mechanistic structures toward more organic designs. The professions of consulting, training, and educating have shifted as well. This shift is heralding in a new era for transforming organizations, revitalizing communities, and developing human potential. We are witnessing collaborative change as a human experience that is both deep and wide. Circles are re-emerging to replace the square as a metaphorical and literal aspect of life.

The Spectrum of Collaboration

Collaborative change processes are generally designed for 1-to-3-hour activities, 1-to-3-day events, 1-to-3-month projects, and 1-to-3+ year initiatives. The emerging trend is to combine elements of various methods, mixing and matching activities and events, to create blended experiences for projects and initiatives that are often called change roadmaps, or what Juanita Brown, large-scale change strategist, calls "architectures of engagement."

Figure 1 presents the spectrum of collaboration showing how these processes can lead to a range of outcomes from incremental to transformative change by engaging the depth and breadth of a system. Depth refers to the number of levels or layers within a system that are involved. Levels are characterized by power and influence that people have over other levels or layers. Traditionally, in an organizational hierarchy, the higher one goes, the more power and influence they have over those at lower levels. Breadth of a collaborative process refers to the various aspects or areas of the system that are engaged. Different groups with diverse perspectives serve specified roles within and around the system. A narrow breadth typically means fewer people and groups involved, while a wider breadth means there are more people from different perspectives being engaged. It's important to note that breadth and depth applies to the area of the system that is being engaged. It can be a portion of the system, sub-system, whole system, or network of systems.

Incremental Change

As shown in *Figure 1*, incremental change is typically a result of a shallow or narrow collaborative experience. Activities can be blended together into 1-to-3-hour meetings or 1-to-3-day events such as a summits, conferences, and retreats. A greater amount of time is required in order to allow for more breadth and depth of the system to be involved and subsequently impacted. As you engage more people from across the system in the process, you have an opportunity to accelerate change, but that is not guaranteed. Just bringing more and more people together doesn't necessarily result in deeper or wider impact. That often requires intentional architectures of engagement that build on each collaborative activity over time. There is a common saying in the Whole Scale Change community,

> Only do together, what you could not otherwise do alone.

You've been there. We all have. A meeting begins with a report followed by random questions and comments, then another report, followed by more questions and comments. As you walk out, someone says, "that was a waste of time." Another person replies, "Yep, I don't even know why we meet." Whether you are holding a 1-to-3-hour meeting or a 1-to-3-day summit, it is vital that the group is engaged in purposeful interaction that fosters collective understanding, agreement, and movement to action.

What's the principle to apply here? When you are in the room physically or virtually, use that time wisely. It's valuable. A report can be read in advance or an update can be watched as a video recording or even a podcast. Give people direction on pre-work that is essential to the real work of the meeting. Essentially flip your meetings by moving rote aspects of the meeting out and meaningful engagement in. If you can read it, review it, or prepare it - then, create the expectation that the participants do it in advance to make the most productive use of the collaborative time and space.

By ensuring that people come to a meeting prepared to apply what they know to figuring something out, the stage is set for a worthwhile meeting... maybe. Designing and a facilitating a collaborative experience is not that simple. Collaborative change methods provide the processes and tools to ensure that activities, meetings, events, projects, and longer-term strategic initiatives are a productive experience for those participating. Try asking this question at the beginning of your next event, "what do you want to get out of this experience to make it a worthwhile use of your time?" The answers will help ensure that the current and future events are just that. If you have not tried this before, you will find it to be eye opening.

Transformational Change

Crucial temporal aspects of organizational change need to be considered as there are other dimensions in addition to a sequence of events. On one end of the spectrum there are activities that bring about incremental change. On the other end, there are transformational experiences that engage more people, impact the system on a deeper level, and ultimately take longer to implement.

The Parable of the Butterfly

One day while walking through his garden, a man found a chrysalis hanging delicately from a branch. As he admired it, it started to move, and a small opening appeared. The man enchanted, watched for hours as the Chrysalis moved frantically, the butterfly struggling to free itself from its confinement through the small opening. Then almost as suddenly, the butterfly stopped, appearing as if it had gotten as far as it could go, and could go no further. The man feeling sorry for it decided to help the butterfly, and with a small knife he gently slit open the chrysalis allowing the butterfly to emerge easily.

The butterfly broke free, only to wilt over into a completely motionless state in his hand. Its tiny swollen body and shriveled wings withered and deformed. The man continued to watch expectantly, waiting for the moment the wings would unfurl, expand, and enlarge enough to support the still limp body, enabling the butterfly to get up, but he waited in vain. Instead the butterfly spent the remainder of its short existence, crawling awkwardly, dragging its fragile body and shriveled wings… never able to fly.

What the man in his kindness, goodwill, and haste failed to understand was that the restrictive chrysalis and the struggle required for the butterfly to get through the small opening, is nature's way of forcing the fluid from the swollen body into its wings. So that, the wings can then unfold and enable the butterfly to dance in the air once it achieves its freedom.

We need struggles in our lives, if life would not contain obstacles it would cripple us. We would not be as strong as we could have been and would never be able to fly.

–Author Unknown[5]

What's the moral to the story? Transformation occurs through a change process referred to as metamorphoses, which can be rapid and dramatic, while evolving over time. There are two criteria that serve as characteristics to tell when a transformation has occurred: behavior and energy. At the most fundamental level, a living system is characterized by distinct behaviors or movements fueled by an energy source. The notions of behavior and energy apply to every entity – on every level. In the case of an organization or community, behavior can be seen in its structure and processes, while energy is its resources such as type of funding or sales. Transformation means that there is a complete change in these two characteristics.

The collaborative human experience is akin to the metamorphosis of a caterpillar. Transformation is the result, while metamorphosis is a shift referred to as the process. For example, the caterpillar's behavior is to crawl, while its energy source is leaves. As the caterpillar changes into a butterfly – it's behavior and energy source shifts from crawling and eating leaves to flying and eating nectar. The shift demonstrates the distinction between process (metamorphosis) and content (transformation). Imagine the before and after photo demonstrating the transformation; while in its cocoon, the real gooey shift happens, deep and wide.

Interestingly, the DNA of the living entity, the caterpillar, stays the same throughout its entire lifespan. Often this DNA is referred to as the core purpose and values of an organization. Not clearly understanding this on an individual and collective level can lead a "toast of the town" business or widely acclaimed lifesaving non-profit to become a dinosaur. When you consider organizational change, the collaborative process is the mechanism that facilitates a healthy transformation built on that solid core.

The butterfly parable tells the story of transformational change, gruesome and unsettling - inspirational and beautiful. It's not for the faint of heart, for sure.[6] On every level, change is a necessary struggle. If you choose to go down the path toward transformational change, you are choosing to make an important difference in the world; and in that choosing, you believe in what is possible. Those who have a passion for this work, and the shoulders upon which they stand, embrace the struggle. It informs and ensures the transformation is as beautiful as a butterfly.

The Pace of Change

There is a polarity that exists within our way of thinking about change - it can be fast and slow at the same time. It can even be instantaneous. Start from the very beginning of time – there is the cosmic explosion that marked the beginning of the universe called the big bang theory, also referred to as the big crunch or big rip. The theory suggests that the universe, as we know it, started as a small singularity and expanded into the cosmos we inhabit today. Other scientists disagree and offer alternative explanations with theories like steady state universe, oscillating universe, or eternal inflation called a multiverse. Some even suggest we could be in a digital simulation running on a vast cosmic computer.[7] These theories and other interdisciplinary perspectives support and expand our own thinking about change.

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5. *Adapted from Mieke Byerley, "The Parable of the Butterfly," https://clockworxnz.wordpress.com/2016/07/28/the-parable-of-the-butterfly, (March 20, 2019).*

6. *Tibi Puiu, "How Caterpillars Gruesomely Transform into Butterflies," https://www.zmescience.com/ecology/animals-ecology/how-caterpillar-turn-butterfly-0534534, (March 20, 2019).*

7. *Dan Vergano, "Big Bang Discovery Opens Doors to the Multiverse," https://news.nationalgeographic.com/news/2014/03/140318-multiverse-inflation-big-bang-science-space/ (March 20, 2019).*

The spectrum of change implies that while it often takes longer for system-wide transformation to occur, disruption can be a unique event that transitions into an intentional collaborative experience… or not. Like the big bang, such change often begins with a catalyst that can be considered "ground zero." In some cases, the event leads to an intentional broad-based collaborative response to move forward together. In other cases, it's an unintentionally reactive and unhealthy mess. In both cases, there is collaboration among key actors. It's just that some collaborative responses are more effective in achieving meaningful outcomes than others.

A Closing Word of Wisdom from Billie Alban

One evening during dinner with Billie Alban, co-author with Barbara Bunker of Large Group Interventions, we discussed the utility of change roadmaps. Is it possible to map out a one-to-three year collaborative change initiative? They never seem to work out as planned, to which she replied,

> The best plans are meant to be deviated from.

Complex adaptive change means that each and every step in a process informs the next step. A well-planned collaborative change is necessarily adaptable. Some experts suggest that transformative shifts can co-evolve, not only from purposeful planning, but also from small acts of collaboration at multiple levels of scale. Today's leading scholars in our field are asking the question, "Why and how do small changes amplify and accumulate at the organization level, over time, to become continuous change." (p. 1)[8] Collaborative processes enable members of the system to elegantly "move together" like starlings in a murmuration as they shape shift their flight patterns. Search for it on YouTube. What an amazing site to behold! These birds demonstrate collaboration in complex adaptive systems – a collective agility catalyzed by small movements.

The metaphor of the starlings provides an image of how this type of change, small movements, can occur in organizations and communities. Christopher Alexander, the famed architect and systems thinker shares that living systems, including human systems are made up of wholes at every level of scale—from the individual to the family to organizations, all the way to complex towns, cities, and societies. Alexander suggests that life-enhancing transformations often co-evolve, not from grand formal plans or edicts, but from small scale acts of collaboration at every level of scale. "Every act helps to repair some larger, older whole," Alexander explains, "but the repair not only patches it, it also modifies it, transforms it, sets it on the path to become something else, entirely new.[9]"

With collaborative change processes you *can* make a difference, whatever the breath, depth, or level of the system that you initially enter. With these processes, you can create a sense of coherence and meaning through the accumulation of emergent changes that lead to substantial changes with high impact.

> *If not you, then who?*
> *If not now, then when?*
> –*Hillel*

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“Coaches and consultants with dialogic mindsets conceive of organizations less as machines or organisms or whatever, and more like ongoing conversations that can reinforce or re-shape implicit perceptions, possibilities, and patterns of behavior.”

Dialogic Meaning-Making in Action

By Robert J. Marshak

This discussion builds on an earlier *OD Practitioner* article and explains in greater depth how coaches and consultants can use generative conversations to help clients address limiting assumptions and create new possibilities (see Marshak, 2004). The phrase “dialogic meaning-making in action” is used to capture the essence of this method and is based on the premise that the way people see and act in the world is determined by the contents of often out-of-awareness mindsets that may be identified and addressed during everyday conversations. To help support understanding and practice of the method, the underlying premises and core concepts are reviewed along with examples to illustrate key ideas and suggested actions.

Beginning Definitions

A central concern of the discussion is about words and their meaning(s) so let’s begin with some simple working definitions intended to convey how some terms should be understood. The definitions are hopefully in everyday language but are drawn from social science literatures relevant to the topic. No attempt is made to present formal definitions or reconcile differing nuances debated in the technical literatures. And, to be transparent, the definitions convey how I understand the terms based on my experiences as a consultant as well as someone who has made contributions to several of the relevant literatures, including dialogic organization development, organizational discourse studies, covert processes in organizations, and cognitive linguistics (Marshak, 1993; 1998; 2004; 2006; 2013; Bushe & Marshak, 2015). Most importantly they are the types of definitions I have offered clients when asked what I am seeing, thinking, or doing.

Mindset is the constellation of conscious and unconscious assumptions, beliefs, premises, and frameworks that shape how something is interpreted and the resulting reactions and responses. For example, someone may have a “scarcity mindset” that sees things in terms of absence, rarity, deficiencies, or what’s missing.

Meaning-making is the process of how people interpret and make sense of situations, events, outcomes, others’ actions, as well as their own actions. Someone with a scarcity mindset may tend to interpret a ten-ounce glass with five ounces of liquid as “half empty.”

The active role of language assumes that talk and text do more than just objectively report things, but instead construct the mindsets that shape meaning-making. It is also assumed that language in use, for example word images or storylines, can reveal unspoken premises and out-of-awareness frameworks. If a person with a scarcity mindset successfully influences everyone they encounter to describe similarly filled glasses as half empty and as a result everyone else experiences a sense of scarcity, then people’s mindsets and meaning-making will have been constructed through the “story of the half empty glass.” Additionally, hearing someone recount the

Table 1. *Dialogic Meaning-Making Core Concepts*

• Language is constructive.
• Language conveys literal and symbolic, as well as conscious and unconscious, meanings.
• Conversations continually create the meanings that shape social reality.
• Double-loop learning is needed for generative change.
• There are three processes that help lead to dialogic generative change.

story of the half empty glass might suggest the possibility that they have a scarcity mindset about things.

Dialogic change is the process wherein established and repetitive ways of talking about things are disrupted and new ways of talking lead to new ways of thinking and acting. Suppose we return to the community of people who all recount the story of the half empty glass and then add newcomers who point out the glass has enough liquid for any and all purposes. They then suggest the issue is the glasses are too large, not that there is too little liquid. If this happened, then maybe the ongoing talk and meaning-making about scarcity would be disrupted. It might then be possible for a new way of talking about things to emerge, leading to a change in mindsets and resulting meaning-making—perhaps that the organization's glasses are larger than needed and a "right-sizing" effort is needed.

Dialogic meaning-making through generative conversations is a coaching and consulting practice where language (talk) becomes the core tool for helping clients and client systems reflect on how they are making meaning of their situation, any limitations that it is creating, and new language to create new possibilities. Because language, such as narratives, storylines and word images, is considered a primary means to construct a person's or system's reality and not just objectively communicate things, seeking to change the prevailing stories, metaphors, slogans and the like is assumed to generate new meaning-making leading to new behaviors and actions.

The Practice of Dialogic Meaning-Making

All coaching and consulting are based in conversations carried out between two or more people. Typically, participants in these exchanges don't think very much about the language they are using. Consequently, except when there are misunderstandings or confusion, the specific words and phrases are listened to less than for the presumed intended message(s). Another view of what is going on in such exchanges, however, assumes that the words and phrases are not simply literal accounts, but are also symbolic and constructive. When we assume that language conveys implicit meanings and symbols and not just explicit, rationally intended statements, we are led to wonder what the specific words and phrases being used by a client signify about how that person is experiencing the world. We might ask ourselves:

> What is the structure of beliefs, orientations, and ways of interpreting the world that is leading this person to describe things in this particular way or to use those specific word phrases and images? What words and phrases might we use in return to get "in sync with," or confront, or alter the client's inner perceptions and assumptions that may be limiting their choice(s), and are often deeply held or even out-of-awareness?

We as coaches and consultants can use the insights provided by a symbolic and constructionist view of language to aid us with meaning-making interventions with our clients. Our conversations with clients can be generative as well as informational; they have the potential to construct and reinforce meanings and therefore perceptions and possibilities (Schön, 1993). Generative conversations, then, are interactions where the coach or consultant is intentional about using the symbolic and constructionist aspects of language to help clients better assess the ways they are conceptualizing and addressing their situations: their dilemmas, difficulties, opportunities, and possibilities.

Core Concepts

There are five core concepts that help us to understand and effectively work in this way. Those concepts are listed in *Table 1* and described in more detail below.

Language is constructive

Unlike the mirror-image theory of language which supposes talk and text should only report and describe aspects of an objective, independent reality, the constructionist theory of language places language and especially conversations at the center of meaning-making and the ongoing social construction of reality (Barrett, 2015; Gergen, 2009). Adherents of this core concept suggest that organizational phenomena exist only as far as they are constructed through reciprocal conversations that implicitly assert and affirm agreed upon social meanings. This is not to claim that organizations are nothing but people talking to each other, but rather that conversations are the principle means by which organization members create a coherent social reality that frames their sense of who they are, what they should do, and what the requirements are for their own and organizational success, indeed even what "success" means.

What any particular individual or group believes is "reality," "truth," or "the ways things are," is a socially constructed mindset. Thus, how things are framed and talked about becomes a significant, if not the most significant context shaping how people think about and respond to any situation. Different individuals, groups, strata, and silos of an organization might, of course, develop their own mindsets about a particular issue through internalized stories, word images, narratives, and so on that define the way things are as they see and experience them. Attention to the prevailing conversations of individuals and groups within an organization, what they are about, how they are created and sustained, what impacts they may have on perception and action, and how they may change over time becomes, as a result, a central aspect of dialogic coaching and consulting. This also implies the added complexity that there may be potentially multiple realities (different stories, different narratives, different images, different mindsets, and so on) in any given situation, including the social realities of coaches and consultants.

Consequently, changing the behavior of individuals and groups—for example about the strategic requirements for success or about needed organizational changes—requires challenging or changing the storylines, images, narratives, and so on that shape the mindsets which govern thought and action. This concept helps us to understand that more than continuing to talk about things in established ways may be necessary to change mindsets. Instead, alternative conversations which convey ideas and images that generate new possibilities may be necessary. Consider how the implicit mindset and metaphor that an "organization is a machine" naturally leads to thinking and talking about keeping things smooth running and when necessary hiring a consultant to bring a tool kit to repair what's broken. What happens if a different implicit metaphor begins to shape talk and action? Suppose instead of a mechanistic storyline the leader of the organization begins talking about the "organization is a living organism" needing a healthy environment to learn, grow, and develop to its fullest potential (Marshak, 1993; Oswick & Marshak, 2012).

Language conveys literal and symbolic, as well as conscious and unconscious, meanings

In most day-to-day interactions there is a tendency to assume that "people say what they mean and mean what they say" and that what is said is consciously intended and no more. This core concept challenges that assumption. Instead, language in all its forms, including day-to-day conversations, is assumed to convey both literal and symbolic information coming from both a person's conscious and unconscious mind. Indeed, sometimes important meanings from a person's unconscious are conveyed symbolically, whether consciously intended or not (Jung, 1964). Yes, Dr. Freud, sometimes a cigar is more than just a cigar (and sometimes it's not). If this core concept has any validity and the cues and clues to how someone is making meaning in a situation is also connected to out-of-awareness symbolic expressions, then the generative, dialogic coach or consultant must develop skills in listening both literally and symbolically.

Cognitive linguists, especially Lakoff and Johnson in their seminal work, suggest that virtually all subjective thought and reasoning is shaped by underlying *conceptual metaphors* (1980; 1999). "Conceptual metaphor is pervasive in both thought and language. It is hard to think of a common subjective experience that is not conventionally conceptualized in terms of metaphor." (1999, p. 45). They also assert that the conceptual metaphors that shape most of our reasoning operate out-of-awareness in the *cognitive unconscious*. … (M)ost of our thought is unconscious, not in the Freudian sense of being repressed, but in the sense that it operates beneath the level of cognitive awareness, inaccessible to consciousness and operating too quickly to be focused on" (1999, p. 10).

An example of this way of thinking would be working with a client who said something like:

> We have a long road ahead before we can hope to arrive at our desired change destination. I see lots of obstacles along the way especially middle managers who are blocking movement and making us spin our wheels with side trips that go nowhere. I need someone who has been down this road before who can help guide us on the way ahead…

If we listen literally at a surface level, we are likely to hear someone concerned about all the problematic barriers to the desired change. Coaching or consulting responses to those concerns might be to discuss ways to address the potential problems and overcome the barriers and resistance to change.

If we also listen symbolically at a deeper level, we might also hear that the person's mindset and thinking is being shaped by an underlying conceptual metaphor something like "Change is a Difficult Journey Filled with Obstacles." Instead of continuing to converse within the boundaries imposed by that implicit framework we might suggest an alternative metaphor that might generate transformed ways in how the person makes meaning of the situation. For example, how might the conversation and choice of intervention activities go if the underlying conceptual metaphor implicitly shaping the client's mindset was something like "Change is an Opportunity to Realize New Possibilities." This might lead to thinking more optimistically about intervention activities that seek ways to realize new possibilities to previously difficult dynamics—like the question of whether a ten-ounce glass filled with five ounces of liquid is half full or half empty, how one's mindset frames the situation generates the ensuing reactions and responses (Schön, 1993).

Conversations continually create the meanings that shape social reality

The importance of conversations to socially construct reality, inform mindsets, and frame experience versus simply convey objective information needs to be understood and cultivated by those who wish to coach or consult dialogically (Ford, 1999; Ford and Ford, 1995). All conversations and communications can be used to challenge, re-enforce, or create new premises and possibilities. This means paying attention to how prevailing beliefs and storylines are reinforced in day-to-day conversations throughout the organization, and especially conversations the coach or consultant engages in with clients and organizational members. They would then have the opportunity to seek to intentionally influence those conversations in ways that could allow new ideas and possibilities to emerge—not so much by directly offering counter-rationales or argumentation, but by addressing how the client is implicitly framing their experience; that is, by listening for the implicit metaphors and storylines that reveal how a person is interpreting their experience and the responses available to them. For example, coaches and consultants working from a strengths-based orientation might conversationally encourage the client to change their storyline from describing problems and barriers to discovering strengths and possibilities. Another example might be to conversationally note that the client keeps describing the situation they face metaphorically as being "bankrupt" (of ideas, possibilities, resources, and so on) while wondering if the client had any untapped riches such as the good will of others.

Consequently, how to listen to and implicitly influence conversations becomes a central aspect of dialogic meaning-making in action. This could involve, for example, creating safe containers for more open discussions, inviting a broader range of voices and communication modalities into the conversations, changing the types of questions asked, introducing new generative metaphors or images, altering how conversations unfold, and so on (Marshak, 2013; Bushe & Marshak, 2015).

It is important to keep in mind that what is considered to be possible or the way things must be is constantly in the process of being created or re-created in everyday interactions. In other words, mindsets are always in a state of becoming depending on what is being conveyed and reinforced conversationally. Dialogic change is potentially possible at any moment during interactions, whether intentional or not, depending on how ongoing conversations unfold (Shaw, 2002).

Double-loop learning is needed for generative change

In addition to explicit reasoning, how people think about and respond to situations is guided by unexamined or untested assumptions, beliefs, and premises. These are collectively referred to here as *mindsets*. Because people generally don't think about the underlying, out-of-awareness frameworks that guide how they reason and interpret the world, mindsets have a profound but usually unexamined impact on how people interpret situations and the choices available to them. In the words of the learning organization guru Peter Senge, mindsets are "deeply ingrained assumptions, generalizations, or even pictures or images that influence how we understand the world and how we take action" (1990, p. 8). Mindsets frame situations and inform what is considered possible. They also prevent people from imagining possibilities that exist outside of their unexamined assumptions. Individual and organizational mindsets, therefore, can form implicit conceptual traps that limit our thinking and require a "mental revolution" in order to change how we will act and react in the world. Such a change in the implicit frameworks that guide behavior requires generative change that alters how something is experienced in a fundamental way. When successful, this is considered *double-loop learning* (Argyris, 1977).

Double-loop learning connotes the ability to examine and then modify, as appropriate, existing beliefs and assumptions that are guiding thinking and action-taking; in short, the ability to reflect upon, and as appropriate, change the usually out-of-awareness mental mindsets that guide our day-to-day actions. This is different from single-loop learning where one learns how to adapt and problem-solve consistent with one's implicit mindset's untested beliefs and assumptions. It is the ability to address not only problems and issues, but the logic that guides how situations are conceptualized and what is considered to be feasible that makes it a double-loop process. Usually, of course, the implicit beliefs and assumptions that guide our thinking and actions are taken for granted and therefore not readily accessible for consideration. Because the same beliefs and logic applied to the same situation will produce the same results (single-loop), it is only when the existing beliefs and logics are questioned (double-loop) that new possibilities emerge. Double-loop learning therefore requires generative change aimed at altering some aspect of the mindset that is framing a situation in potentially limiting ways. Reflecting on implicit beliefs that an organization is like a machine with people as mechanistic parts, realizing those beliefs are inappropriate and limiting, and then choosing to think and act from a different and more enabling set of beliefs, would be an example of double-loop learning involving generative change.

There are three processes that help lead to dialogic generative change

Generative conversations have the potential to transform dialogic meaning-making if at least one, and more likely a combination of all three, of these processes occur (Bushe & Marshak, 2015):

» A disruption in the ongoing social construction of reality is stimulated in a way that leads to the emergence of a more beneficial way of thinking and acting.

» A new generative image surfaces or is introduced that leads to novel and compelling alternatives for thinking and acting.

» A change to one or more conceptual metaphors and/or storylines takes place and becomes the prevailing way of thinking and acting.

A disruption in the ongoing social construction of reality is stimulated in a way that leads to the emergence of a more beneficial way of thinking and acting. Disruptions to ongoing ways of thinking and acting occur when the implicit conceptual metaphors and storylines within a person's mindset are brought into awareness and recognized as no longer effective or viable. This then creates an opening for a potentially more beneficial metaphor and/or storyline to emerge to shape new patterns of thinking and acting, for example a shift from implicit metaphors or storylines about (tangible) scarcity and poverty to metaphors or storylines about (emotional and social) abundance and plenty. Disruptions can be planned or unplanned, and an individual or group may be able to recognize and replace their limiting way of thinking without the help of a coach or consultant. However, a dialogic coach or consultant can help speed the process along, or help a stuck client, through generative conversations.

A new generative image surfaces or is introduced that leads to novel and compelling alternatives for thinking and acting. Generative conversations are intended to encourage transformational changes to a client's mindset leading to new ideas and new ways of looking at things. When working dialogically, the coach or consultant may note the existing cognitive frameworks that seem to be creating and limiting possibilities for a client or client system. At that point, given the purpose of the requested help, the consultant or coach could seek to conversationally alter the limiting mindset by encouraging novel and compelling ways of looking at the client's situation. In essence, then, the consultant or coach seeks a new image to emerge that will elicit new and more beneficial ways of thinking and acting. A generative image, then, could be a new conceptual metaphor, a few words suggesting an alternative storyline, or other symbolic media that stimulate new ways of thinking about the client's social and organizational reality. It encourages people to imagine alternative decisions and actions that they could not imagine before the new generative image surfaced.

A second property of generative images is that they are compelling; people want to act on the new opportunities the generative image evokes. It is important to understand that what might be compelling to the coach or consultant may not be compelling to the intended audience. The image of "doing more with less" was once considered by management consultants to be a compelling generative image inviting workers to invent new and more productive ways of working. Unfortunately, this was often experienced by workers from their mindsets as mandating workforce cuts and increased workloads.

A change to one or more conceptual metaphors and/or storylines takes place and becomes the prevailing way of thinking and acting. Generative conversations assume that most of what is "real" or "true" to an individual or group in an organization (e.g., what is my job, how best to achieve it, who is and isn't influential, what are my most important challenges and opportunities, how much influence do I have, and so on) is based on the implicit frameworks within an individual's or group's mindset. That is, regardless of what might or might not be "objectively true" from the perspective of an onlooker, what a person believes to be true (and therefore, what influences their thoughts and actions) is based on mindsets and conceptual metaphors and storylines that construct and reinforce realities for that person. Those frameworks were originally formed, re-enforced, and modified based on conversations, readings, teachings, education, and so forth dating to childhood (Marshak, 2006). Every day, in every conversation, those ways of framing reality are continuously being re-created, maintained, sometimes challenged, and sometimes, as a result, changed. People and groups change when new words and ways of talking, like "doing more with less" or "rightsizing" become part of their daily conversations and ways of thinking and acting. The dialogically oriented consultant or coach assumes that transformational change is not possible without the emergence of new, socially agreed upon word images and storylines that explain, support, and reinforce the new reality and possibilities. Consequently, from a dialogic meaning-making perspective, change is both initiated and sustained through ongoing conversational reinforcements to the cognitively unconscious frameworks guiding how people are making meaning of their current reality.

A Short Case Example

The leadership of a mid-sized corporation decided that a "complete transformation" of the organization was needed following a merger and facing increased global competition. A task force was appointed to work on what would be needed and charged with looking at everything: the competitive challenges, corporate culture, leadership, strategy, structure, reward systems, and so on. This example of dialogic meaning-making in action occurred during their first half-day meeting.

SVP Delta: We need to start thinking about what aspects of the organization need to be changed now and in what ways.

Others: *(All verbally or head nods)*. Yes, we agree.

VP Beta: Well, I don't think we have to look too closely at manufacturing. That's been running smoothly and efficiently since the installation of the computer-aided systems a few years ago. I wouldn't want us to waste our time with something unless there is a clear problem. Maybe we should start making a list of things that are a problem.

Mid-Manager Zeta: Yeah, we can't afford to have a lot of down time talking about things that don't need to be fixed. We need to address what's broken and get this whole organization up and humming as soon as possible.

SVP Theta: Yeah, let's not fix things just because we are on this change team. I agree with Beta. Let's inventory everything that's a problem and figure out ways to fix them.

Others: *(Murmurs of agreement.)*

Consultant: Hmm. As I listen to the discussion it sounds to me almost like you are *talking about fixing or repairing a broken machine*. I thought the assignment was more like being asked to *re-invent the organization*.

SVP Delta: *(After a pause by everyone.)* Well, when you put it that way maybe we are here to re-invent or re-design parts of the organization. I hadn't thought of it that way before, but that sounds more like what we need to do then fixing broken parts.

Consultant: Hmm, what if your task was to *re-design or re-invent the entire organization*?

VP Beta: Well, that would make our task a completely different story. We'd have to re-think and look at everything.

Others: *(Comments and head nods of agreement.)*

SVP Delta: You know we probably should step back and look strategically at the whole operation with a fresh drawing board. How should we begin?

Others: *(Pause and then nods and expressions of agreement.)*

In this example the consultant "disrupts" the conversation about *fixing what's broken* and invites the task force members to consider a different metaphorical image to guide their assignment before there is too much agreement on a potentially misleading conceptualization of their task. The invitation in this example leads to reconsideration of the initial implicit assumptions and adoption of a more appropriate image and mindset to guide their work. The adoption of the new image and mindset is revealed and reinforced by the new way of talking about what needs to be done.

Summary and Closing Questions

A dialogically oriented coach or consultant who seeks to be intentional about generative conversations assumes socially constructed realities are continuously being created, sustained, and changed through stories, word images, symbols, and conversations. Their role is to help foster, support, and/or accelerate new ways of talking and thinking that lead to the emergence of transformational possibilities.

The implications of this way of thinking is that dialogic consultants and coaches will pay attention to leaders and organizations in terms of their meaning-making processes, seek to address how conversations create social reality, and understand organizational change as a process of continuous emergence shaped by language and conversations.

Finally, change in dialogic meaning-making is possible during conversational interactions if three conditions are met to some degree and in any order. There must be something that disrupts or challenges the ongoing ways people talk about things that is creating current perceptions and patterns of behavior. Something that sparks people to think in new ways that is compelling and offers new possibilities must enter ongoing conversational interactions. A new way of talking about things that creates a new storyline and associated possibilities must emerge and reinforce new ways of thinking and acting.

In brief, then, coaches and consultants with dialogic mindsets conceive of organizations less as machines or organisms or whatever, and more like ongoing conversations that can reinforce or re-shape implicit perceptions, possibilities, and patterns of behavior.

So, now that you have read this discussion, do you agree? What are the metaphors and storylines about organizations, clients, consultants, and change that guide your thinking and acting?

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"In times of crisis, how can OD theory and practice be employed to support groups or organizations find themselves? Can OD theory and practice be useful and applicable outside of the structure of an 'organization' when macro environmental factors are dominant?"

Systems in Crisis

Practicing OD in a VUCA Environment

By Nadia Bello and Precious Campbell

Organization Development exists as a field of study and practice because organizations exist. At least that is how the field has developed from its origins in Lewinian explorations of group dynamics (Anderson, 2015). In practice, OD is a field dedicated to levels of system found within organizations: whether through coaching an individual, tinkering with the group dynamics of a team, coming up with a sociotechnical model for an organization, or negotiating between a company and the political, social, or economic factors that force or lead or create change. OD has been defined in many ways, including as a process, as planned, and as top down (Anderson, 2015). What happens, however, when change is abrupt, violent, external, and not entirely under human control? When, as has been explored in an anthology by Burke, Lake, and Paine (2009), the environment is the stimulus for change?

This article explores the use of organization development theory and practice during a recent natural disaster in India and in a current period of civil unrest in Central America from the perspective of two relatively new North American scholar-practitioners. Within the last six months, the authors found themselves in situations beyond the level of organizations: situations that utterly disrupt the way organizations go about their daily business; situations that threatened health, safety, quality of life, and even life itself, as well as relied upon and taken for granted social orders, imperfect as they are. Because we had the resources, privilege, and ability to exit the situations we found ourselves in, we are now able to write about it and ask the following questions: In times of crisis, how can OD theory and practice be employed to support situations groups or organizations find themselves in? Can OD theory and practice be useful and applicable outside of the structure of an "organization" when macro environmental factors are dominant? What happens when there is a fundamental breakdown of societal order – of which organizations (bricks and mortar or otherwise) form a foundational layer?

Nadia Bello uses the experience of a group of Canadian students caught in the 2018 monsoon floods in Kerala, India to explore group dynamics, decision-making using VUCA (volatility, uncertainty, complexity, and ambiguity) and what relationships to organizations – and therefore to OD – exist when there is severe environmental disruption to organization structure, both physical and operational. Precious Campbell uses VUCA and neuroscience to link to intention, vision, and outcomes of individuals caught up in the current ongoing civil unrest in Nicaragua, which threatens the safety and stability of ordinary people and families, and the country itself. The conclusion we come to is that having an OD perspective on situations that typically would be assessed through other means, disciplines, and tools – for example disaster management or socio-political analysis – provides for greater awareness, understanding, and ultimately responsiveness to how large-scale crisis incidents can be handled at every level of system.

OD and Natural Disaster

In August 2018, seasonal monsoon rains in Kerala, India peaked and caused the worst flooding in 100 years, according to the Government of India (2018). Over 1 million people found themselves displaced, crowded into relief camps as *The Times of India* reported (2018). There were close to 500 deaths as a direct result of the rains and compounding human activities such as releasing the Northern dams, and the ensuing mudslides and flash floods (*The Times of India*, 2018). Of the 14 districts in Kerala, 13 were underwater (Government of India, 2018). In the midst of this, a small group of Canadian undergraduate and graduate students accompanied by a supervisory staff member from Ryerson University in Toronto, Ontario, found themselves trapped by and eventually evacuated away from the flood areas. This group of students ranged in age from 18-45, representing a diversity of academic disciplines: Nursing, Social Work, Urban Planning, Nutrition, Biomedical Engineering, and Industrial Engineering. While predominantly a group of women, they also represented a diversity of ethnicity, race, skin colour, nationalities, life experience, mental health, ability, and other identities. The project was a Live-in Laboratory run by Amrita Vishwa Vidyapeetham, a private Indian University. This program is a multidisciplinary experiential learning program that facilitates the research, development, and deployment of sustainable solutions for current challenges faced by rural communities in India and designed to engage young participants in a mutual learning and sharing experience (Amrita Vishwa Vidyapeetham, 2019). The Canadian students were joined by other international students from different parts of the world as well as Master of Social Work students from the Indian University. The focus of the student project was, ironically, clean water and sanitation.

VUCA as a Practice, Not Just a Theory

The idea of VUCA has been long taken up by business from its military origins and applied to economics (Lawrence, 2013). VUCA has very direct, and literal, application to natural disaster situations as well. VUCA was not just a theory in Kerala, but became a tool for analysis and decision making. For example, the characteristics of volatility in VUCA include the unexpected, unstable, and unknown (i.e., duration) – but information about the challenge itself is not unknown or even difficult (Bennett & Lemoine, 2014). A lot of information is available on monsoon rains, and we know that water falls from the sky. The monsoon rains were expected to end and they did not. The timing and intensity of the rainfall and subsequent flooding, daily and overall, was unstable. The duration of the rains was unknown. This volatility made decision making an hour-by-hour activity for all the leaders on the ground.

Uncertainty means that we know cause and effect, but don't have other information (Bennett & Lemoine, 2014). The volatility of the rains made relief efforts, research, mobility, and indeed our own living conditions uncertain. Amrita staff sent out scouts before every planned (and unplanned) outing to check roads, flood levels, safety, site conditions, and other factors to ensure student safety. Collecting information and data (even as the students pivoted on their projects to engage in field research and data collection on the impact of the flooding) was key. Data collection has been identified as a way of mitigating uncertainty (Bennett & Lemoine, 2014). Constant check-ins and debriefs with students about their fears and frustrations, and emotional and physical well-being helped alleviate the anxiety of uncertainty.

The ambiguity of VUCA played out in the lack of precedent for us Canadians and the newness of the relationships we all had to navigate. The severity of the floods was such that even a seasoned populace and state was unprepared for their impact. All the relationships across all levels of system were new for everyone even though institutionally both universities have been partnering for several years; it was the first time under these circumstances. After all, natural disaster or not, group dynamics are always at play: Canadian students had to navigate their relationships among themselves (and to themselves), with the Indian students, with other international students, with Amrita staff and faculty, with me, with the community. And we all had to do that with each other in official and unofficial capacities. Sorting out relationships, building bonds, learning to work together, navigating expectations in a setting where there were so many differences in culture, customs, language, teaching and learning expectations, and myriad other factors would have happened regardless of the environmental circumstances; they are challenges and opportunities in their own right. The uncertainty caused by the natural disaster and VUCA environment of the

Where we could not determine cause and effect, we mind-mapped and brainstormed to figure out relationships and problem solving. And although the backdrop of rising flood waters was a considerable source of tension, especially for the Indian students, frantic about the well-being of their families and loved ones, the shared circumstances created moments of bonding among all the students. Their ingenuity and experimentation – their use of self, to invoke another fundamental OD value and practice – allowed them to care for and learn from each other.

monsoons, however, sped up and intensified those challenges and opportunities making even normal relational organizational activities such as forming teams, decision making and leadership, and programming questions of physical safety and survival.

Ambiguity allowed the students to shine however: they experimented in terms of how they navigated relationships, language, and cultural differences, approaches in the community, and were able to pivot in their data collection. Where we could not determine cause and effect, we mind-mapped and brainstormed to figure out relationships and problem solving. And although the backdrop of rising flood waters was a considerable source of tension, especially for the Indian students, frantic about the well-being of their families and loved ones, the shared circumstances created moments of bonding among all the students. Their ingenuity and experimentation – their use of self, to invoke another fundamental OD value and practice – allowed them to care for and learn from each other. An example being in the middle of our own evacuation, a student was injured by a glass object unseen under the water. There was no electricity or even furniture in the building, and minimal supplies. The flood waters had almost reached the height of the entrance threshold. Other students sprang into action, using flashlights, the first aid kit, and whatever limited resources were on hand to jerry-rig a treatment area, treat the injury, lift the injured girl out over the waters and get her safely on the bus.

Finally, complexity was interwoven through all the VUCA factors above and demonstrates all the different factors involved in planning for and responding to the situation we found ourselves in. Each interaction became a point of navigation, negotiation, complexity, incident, or need during this international student experience against the backdrop of natural disaster. We were far away from home, with limited internet, phone, and other ways of connecting to Canada and the home organization. One way of mitigating complexity using VUCA is restructuring (Bennett & Lemoine, 2014). Knowing the constraints, it helped to recognize that organization structures were still present and very much at play. One may be cut off from the home organization, as was the case for the Canadians, or the organization incapacitated or completely turned around by the impact of the environmental issue, as was the situation for the Indian university. As one of the few areas and buildings not at risk from flooding, several Amrita campuses in Kerala became relief camps for thousands of displaced families. For the Canadian students, the policies, procedures, and emergency resources of their home university still existed and provided a framework for behaviour and expectations. Ryerson University was symbolically present through its values and physically connected through the staff member, emergency international supports, and other measures (Bolman & Deal, 2013). Similarly, staff and faculty of Amrita provided the same link to the organization supports and expectations for their students and for us, as our host, even though the bricks and mortar became repurposed. The medical relief camps that students participated in had their own organizational life, although everything from the location of the camps to the available supplies to the number of persons seeking services was in constant flux. The communities we were in had their own structures and ways of living and decision making. Even though in crisis themselves and stretched beyond capacity, we were all welcomed and included in community life. This included self-help groups of women organizing in their own communities, local officials, village leaders, children delighted at meeting newcomers, and others. While there are lots of ethical questions that can and should be raised about what it means to divert resources to keep foreigners safe when local people are in need, in the moment, everyone had a role to play in the upkeep and safety of the whole community at a time and place when whole communities were cut off from supplies, transportation, and large-scale relief efforts.

Using VUCA and other organization development theories and practices allowed for a broader response than a traditional disaster management or even standardized academic institutional response. Use of OD in general and VUCA specifically enables divergent thinking, or the ability to widen the context for decision making in a very unstable, turbulent, and rapidly changing physical environment, as identified by Foster & Kaplan (2001) (as cited in Burke, Lake, & Palmer, 2009, p. 45).

In the next section of this paper, Precious Campbell explores the use of OD during political and social unrest.

OD and Civil Unrest

In 2018, I traveled to the second country which I call home, Nicaragua. Nicaragua had erupted in civil unrest during a most unexpected moment. After 30 years of peaceful, steady economic and social growth, unarmed citizens found themselves targets of police gunfire during a protest to cuts in social security benefits. This ballooned into many more marches, protests, and barricades calling for government reform that ultimately have left hundreds dead, thousands wounded and tens of thousands fleeing. To this day, thousands are being imprisoned and charged as terrorists for their involvement in protests (A.L., 2018; Kinzer & Robles, 2018).

When I was visiting in country, every Nicaraguan asked me the same question: “We are in crisis; how can your degree help us?” Answering this question leads to the social science roots and foundations of organization development (OD) and its application to our current environment, where it seems we are experiencing crisis more rapidly than ever. According to psychological studies, a crisis is an acute change for which there are no immediate solutions, which threatens the life goals of an entity, and can result in helplessness, fear, and anxiety (Allodi, Coates, & Eastham, 1970). Referencing Thompson, Marshak (2017) describes the essence of our current environment: “...the emergence of a global economy, increased competitive forces, advances in information technology, more diversity in all dimensions, faster cycle times on a 24/7 schedule, and so on, has created a VUCA (volatile, uncertain, complex, and ambiguous) world” (p.13). Volatility, uncertainty, complexity, and ambiguity (VUCA) are the ingredients for acute change without immediate solutions.

OD can help build the capacity to navigate a VUCA environment by generating movement toward sustainable change, even amidst fear and crisis. OD can do this by focusing on the OD tenets of experiential learning through applied social science to engage multiple levels of system (Anderson, 2015). These principles provided the foundation to my response in Nicaragua, along with recent research from social neuroscience and interpersonal neurobiology that enabled me to engage individuals and groups in the attempt to respond to the VUCA environment of Nicaragua at a societal level.

VUCA is Spelled F-E-A-R

The helplessness, fear, and anxiety that accompany crisis were at the forefront of conversation with Nicaraguan leaders. They told stories about coworkers, friends, or family members who had fled, disappeared, died, or been incarcerated. Everything was happening quickly and unpredictably (volatility); they did not know what the future would hold (uncertainty); what, when, or how the next round of conflict and violence would occur or how to address it (complexity); or if the situation would change – for the better or worse (ambiguity). The common denominator in every experience was fear. Identifying and reflecting fear back to the leaders I spoke with resonated deeply, and led to the question: "How do we act, live, and bring about change in the midst of constant fear?"

Most of us are familiar with the natural human response to fear. Our amygdala triggers our automatic survival responses of fight, flight, or freeze (Edmondson, 2019; Van Der Kolk, 2014) – on this occasion exemplified by the tens of thousands of Nicaraguans fighting for and against the government, fleeing the country, or otherwise trying to stay invisible. Recent advances in social neuroscience and interpersonal neurobiology show us more specifically what happens in the brain during these responses, individually and collectively. Several areas of our brain actually shut down, inhibiting our capacity for imagination, goal setting, creativity, relationship, and keep us stuck in a loop of fear, repeating familiar patterns. When we act in fear, we are unable to envision a better future, a place to go, or a goal to reach. Even when options and new opportunities exist, fear drives us to seek refuge in the familiar rather than risk experimenting with possibilities. (Van Der Kolk, 2014; Edmondson, 2019)

The greatest danger that a VUCA environment poses is triggering a cycle of fear that prevents innovation, adaptation, creativity, and responsiveness. By learning more about fear and how to engage the areas it keeps offline, we can enable movement during crises and navigate a VUCA context for sustainable change.

Fear & Problem Solving

The current crisis in Nicaragua is the third of its kind in the past century. The civil unrest of the 1920s and 1930s as well as that of the 1980s also fought against government oppression and injustice and successfully caused a governmental change of power and reform (Kinzer, 2007). Yet, within two generations the country repeatedly returns to the same state, even when led by those who spearheaded previous change.

The conversations with Nicaraguan leaders revolve around a desire to fight against the injustice, oppression, human rights violations, economic corruption, and undesirable state of living in Nicaragua. The rhetoric focuses on what to fight against; absent is rhetoric about who and what might replace it. This is congruent with our natural biological response when presented with an intense problem or emotion. Our right brain significantly deactivates, and our left brain becomes the primary driver during times of crisis and survival (McGilchrist, 2019). It specializes in using the knowledge of *what we are already familiar with* to problem solve and create a mechanical, self-contained world (McGilchrist, 2019). This infers that our primary responses during crises naturally lend to the repetition of existing patterns. The left brain may get us through the crisis, but not beyond the crisis.

Block (2018, p.33) writes that a problem-focused approach

> may actually limit any chance of the future being different from the past. The interest we have in problems is so intense that at some point we take our identity from those problems. Without them, it seems like we would not know who we are as a community. Many of the strongest advocates for change would lose their sense of identity if the change they desired ever occurred.

How would Nicaraguans know who they are once injustice is overcome? Would they be able to forge a different path forward once the crisis resolves? The tendency to rely on left-brain problem-solving during crises prevents time, energy, and resources from going toward developing a different future. Once we "change" or get rid of something, a vacuum occurs. If we have not already done the legwork to prepare and develop something to fill the vacuum, we will repeat what is familiar to us. A change in leadership, structure, policy, or procedure can lead to needed change; yet, it is likely that the same problem will recur without a shift in identity. As long as a collective sense of identity is derived from problems, sustaining transformation does not occur.

Fear & Identity

A human sense of identity generates from the balance between our rational and our emotional brains (Van Der Kolk, 2014). "The core self-system is relational and emotional and lateralized to the right hemisphere, and not to the analytical left brain" (Shore, as in Bullard, 2015). The right brain responds to experience, emotion, relationship, and what meaning they hold for us – providing the basis for our identity. The right brain is responsible for providing a sense of self, making judgments, and sensing others (Shore, 2012; Van Der Kolk, 2014). This, along with the right brain's ability to recognize and mirror an other's self, forms the foundation of purpose, empathy, and moral, social and goal-directed behavior. Identity and relationship are the potential wellspring or sinkhole of curiosity, creativity, direction, innovation, and motivation.

When fear derails and shuts down our access to the right brain, how do we access the potential wellspring of ourselves and others? The influence of the Human Potential Movement of psychology says that the answer to this rampant acceleration of change is that we should be fluid, rather than persistent and constant (Kirkpatrick, 1975). In response to the environmental demands of VUCA, organizations and their leaders are encouraged to become more agile, flexible, and adaptive (Burke, 2018; Lawler & Worley, 2010). Yet, the innate human need of organizations and their leaders for certainty, predictability, and control (Rock, 2010) immediately causes dissonance and anxiety when attempting to adopt an identity of fluidity, flexibility, and adaptability, including learning anxiety (Marshak, 2017). This can loop us back into fear and problem-solving.

Considering the research that is emerging in social neuroscience and interpersonal neurobiology, increased focus on changing the identity of an organization to become more flexible, fluid, and adaptive may not be the most effective way to implement sustainable and transformative systems change. Alternately, a sense of core identity seems essential for responding well in a VUCA environment.

Focusing on the core can provide a source of stability and strength amidst turbulent, chaotic, and changing times (Marshak, 2009). Three essential continuities contribute to our core identity – the past self, the anticipated future self, and the significant relationships with those who witness us (Kilpatrick, 1975). "It is our sense of continuity that allows us to tolerate the contradictions and inconsistencies of [rapid change]. A sense of continuity reassures us that despite the redefinitions we have made, there still persists an essential self" (Kilpatrick, 1975, p.24). A lack of clear identity is the greatest deterrent of sustainable change when navigating a VUCA world.

The experience living through the Holocaust crisis depicted by Viktor Frankl (2006) captures the influence of core identity. He shares that a prisoner was close to death when meaning orientation subsided and seeking immediate pleasure and survival took over. A person who remembered and shared who they were and imagined how they could express their identity with others was able to connect with a future goal to which to look forward. This would feed a unique sense of purpose that gave meaning to their existence. Frankl (2006) states: "[They] know the 'why' for [their] existence and will be able to bear almost any 'how'" (p. 80). A sense of self and others provide meaning, which renders not only happiness but also the capability to cope with suffering.

In the face of crisis, fear, and VUCA, our access to identity and relationships are the best tool we have. The capacity to adjust and adapt to the intensified demands of our VUCA world requires groups and organizations to have greater knowledge, understanding, and connection with their "self" and others' "selves." Agility, safety, and trust naturally ensue a solid sense of self and the ability to recognize and mirror an other's self. Seeing an "other" and allowing our self to be seen is one of the most powerful and radical acts we can do, especially when coupled with an appreciative, curious response that creates a joy bond.

From Contagious Fear to Contagious Change

According to her recent research, Amy Edmondson (2019) outlines three practices for creating a fearless environment through psychological safety that is essential to any system confronting VUCA. The three practices are: 1) pursue purpose, 2) invite participation, and 3) respond productively. Frankl's story highlights two important functions of the right brain: the pursuit of purpose and creating connections with others. Once a prisoner shared their sense of self, they were able to be seen and joined in their future goal and purpose. Relationship with others is key to keeping our right brain online.

In learning about our sense of self, "it takes two to know one" (Jamieson, Auron, & Shechtman, 2010). What we are at any given moment is determined by our relationships with others (Powell, 1998). We are able to experience each other because we have mirror neurons which allow us to sync with each other, picking up another's movement, emotion, and intent (Van Der Kolk, 2014). In order to "invite participation" as Edmondson recommends, we need the ability to tap into the right brain's aptitude to connect with others.

Van Der Kolk (2014) indicates that intervention "needs to reactivate the capacity to safely mirror, and be mirrored, but also to resist being hijacked by negative emotion" (p.59). The brain generates motivation via a joy bond or a fear bond (Warner & Wilder, 2016). While a constant fear state can shut down our ability to see and mirror one another (Van Der Kolk, 2014), connecting in a state of joy can help us connect and invite participation. Sharing a space of camaraderie that is rooted in the delight of the experience of ourselves with another increases our capacity for play, imagination, and mental flexibility (Van Der Kolk, 2014). In this way, the right brain can help us imagine and act on what there may be to bring to life.

Our analytical, logical left brain is a wonderful asset when following the direction of our relational right brain. Without the left brain, we would not be able to grasp and utilize the world around us to express what the right brain is trying to bring to life, or give language and logic to share it. They are the proverbial cart and horse. If the cart (left brain) is in the lead, it does not move or is simply toppled by the horse from behind. By shifting the attention to driving from the relational right brain (the horse), we can help create movement in the midst of VUCA.

"Productive Response"' and OD in a VUCA Environment

Purpose is not a singular vision that then gets implemented top-down by singular people. It is a sense of ourselves and one another that spurs on movement and creation; adrienne marie brown (2017) calls it "intentional adaptation." Just as thousands of birds, bees, and fish can move in sync with one another based on the information of each other's bodies, so can human beings (brown, 2017). I witnessed this during the time in Nicaragua. Like a murmuration, swarm, and shoal, hundreds of thousands of citizens organized for nationwide protests mainly through word of mouth – community to community. Their capacity to form and stay in connection through cycles of fight, flight, and freeze will be critical to the continued movement and change in the country. Joyful connection with one another toward a common purpose can transform contagious fear to contagious change.

The work we did together in Nicaragua focused on how to take joy and courage in being with one another amidst the most grievous conditions. We discussed questions such as: Who do we want Nicaragua to be?; Whose actions are helping and how?; and, What are we committing to bring to life? We experimented with how to create different connections to generate movement with exercises as simple as rearranging the seating order of the leaders' meetings. There seemed to be a renewed sense of hope, and most importantly, the ability to continue moving amidst the VUCA environment.

In the face of crisis, fear, and VUCA, our access to identity and relationships are the best tool we have. The capacity to adjust and adapt to the intensified demands of our VUCA world requires groups and organizations to have greater knowledge, understanding, and connection with their "self" and others' "selves." Agility, safety, and trust naturally ensue a solid sense of self and the ability to recognize and mirror an other's self. Seeing an "other" and allowing our self to be seen is one of the most powerful and radical acts we can do, especially when coupled with an appreciative, curious response that creates a joy bond. Through cultivating our identity and relationships, we are able to create new possibilities in VUCA.

Conclusion

In looking at two specific macro-environmental crisis situations, we can look to Weisbord (1981) who draws attention to important foci that can be leveraged during VUCA – a focus on who is involved, the interaction and relationship between actors, and participation and learning. OD offers practices which can focus on the development of:

» Core identity (Who we are, not just how we do things) – at multiple levels of system, including individual, group, organization, and environment
» Relationships (How we are with each other, not just how we do things) – a focus on interactions and connections, and increasing participation
» Fostering movement through a sense of purpose, of what we are able to create together, different than a problem mindset

Weisbord (1981) writes: "[People] often believe they have a crisis, an extraordinary problem, or a set of problems. They seek science, in the form of expertise, to provide answers and solutions. What we [OD practitioners] offer is not only science, but also democracy and learning. 'Who else is involved?' is frequently the first question we ask. As a scientist, I know the 'problem' cannot be resolved unless all the relevant actors talk openly with each other" (p. 166–167).

This essay asks perhaps bigger questions than we have answers to, but the stark backdrop of environmental and social crisis provides different ways to employ or deploy organization development practices and theories when organizations themselves are not the locus. With its focus on building capacity and development in human systems (Marshak, 2013; Anderson, 2015), OD can have a substantial impact in a VUCA world. The temptation is to" help" organize structures, systems, and models to solve the problem, propagating further cycles of fear and VUCA. Instead, OD practitioners can draw from the foundations and roots of OD, which comes to life during times of crisis (Alban & Scherer, 2005). Our experiences in India and Nicaragua are two examples of this.

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> "Our research shows that regardless of a similar or higher workload, Engagement Radicals compared to non-Engagement Radicals report higher psychological capital, engagement, commitment, and organizational citizenship behaviour as well as less burnout."

An Innovative Approach to Engagement in a Complex Network

A Health Care Case Study

By Yabome Gilpin-Jackson

with Carole Falkner, Dale Min, Jacquie Block-Glass

Introduction

Change is a challenge in any organization, but especially so in the context of a complex health care organization, with reach across multiple communities, services, and partnerships. Fraser Health is the largest of seven health authorities or agencies providing public health care services in British Columbia (B.C.), Canada. Fraser Health includes 25,000 employees, 2,600 physicians and 8000 volunteers, and provides health care services for 1.8 million people from Burnaby to Hope. This area is the province's fastest growing and most culturally diverse region, with the population expected to grow at least 10 per cent by 2019. We operate 12 hospitals, an outpatient care and surgery centre, 7,760 residential care beds, mental health care, public health, home and community care services, all within an operating budget of $3.3 billion annually (Fraser Health, 2018).

How does engagement unfold inside this world? This was the question that the Organization Development team responsible for engagement strategy needed to answer. Over the past 5 years of addressing this question, the team has stretched beyond frameworks of employee engagement creating space for transformation and growth through an internal network known as the Engagement Radical Network (E-Rads). In this paper, we provide an overview of the E-Rad journey which developed over time to include over 500 Fraser Health employees. We:

1. Outline the context, challenge that led to the formation of the network
2. Describe the Organization Development theories and approaches that we applied to address the challenge
3. Showcase two different research projects illustrating our results to-date: the difference between Engagement Radicals and other employees and impact of supporting engaged ways of working.
4. Conclude with discussion about future directions as we consider, *Now What?*

Background

In 2008 and 2010 Fraser Health's response rates for the Gallup Q12 Engagement Survey were 48% and 50% respectively. We know that health care organizations that emphasize employee empowerment are shown to reap higher levels of organizational effectiveness (Byham, 1993).

In order to increase survey participation in 2013, the Engagement Team created Engagement Champions to encourage and provide support for their peers to complete the survey. Engagement Champions ended up going above and beyond what was originally expected to have people engaged. They organized and planned activities such as decorate 'survey computers' and survey parties and allocated time during their meetings and morning huddles for people to complete the survey. This was the first time an informal distributed peer-to-peer network had been actioned in Fraser Health. They were so successful in their innovation and creativity with their colleagues that Fraser Health got the highest participation rate in their history of doing surveys and in the province at 67%.

The facilitation of creativity, local actions, collaboration and participation created by the Engagement Champions clearly engaged Fraser Health in a profound way. Helen Bevan, the Chief Transformation Officer of the National Health Service (NHS) suggests that people in peer-to-peer networks "are far more likely to be influenced to adopt new behaviours or ways of working from those with whom they are most strongly tied" (Bevan, 2017). It was clear that there were strong ties in the system located at the frontline that needed to be activated.

The impact among front line healthcare workers was remarkable. A strong interest in sustaining the momentum was generated. The question now was, "is there a way that we can use this model to follow-up with the survey?" As a result, Leadership & Organization Development (L&OD) drafted our first ever engagement strategy. The strategy included the creation and development of a frontline network of employees originally coined as "Engagement Advocates". The criteria for selecting Engagement Advocates included anyone who:

» **Is a conversation activator:** passionately interested in making improvements that are within their control;
» **Has good communication and facilitation skills:** aligned to Fraser Health values of respect, care and trust;
» **Cares about people and supports their potential:** positively driven with a strong sense of self-efficacy;
» **Is committed to improvement and remains connected to the larger network:** strong sense of partnership and energized by opportunities to influence improvement;
» **Offers & accepts constructive feedback:** embraces challenges.

At the beginning, each Engagement Advocate was nominated by their senior leaders. **Over time, the network evolved from about 80 individuals in 2014 to over 500 in 2018.** It became clear early on that the name Engagement Advocate was not entirely relevant with the intention of the network—the network wasn't for merely advocating, but for being sparks and activators of change. After many conversations and a lot of thought among network members, it was decided to change the name to "Engagement Radicals," influenced by the work of Helen Bevan, Chief Transformation Officer at NHS Horizons. 'A radical' as deemed by Helen Bevan is a change agent who resists the status quo when they can see a better way to do things (Bevan, nd).

Change, Engagement and Engaging a Network

Change context

We are on new ground. Disruption has emerged as a movement in traditional industries and workplaces grassroots voices are demanding change. Traditional systems are breaking down under the intuition and the belief that the world can and must change.

At the same time, the existing traditional structures which enabled the economic development of the world remain. Our world is still one in which hierarchical power structures are received as an imposed order and exist in tension with emerging flatter, horizontal models for working.

The pace of change and how change is implemented has also impacted the dynamics of the workplace. In complex health care settings where the pace of change is altogether accelerated, it behooves us to prepare to meet a world where "everything moves faster, everything will be connected, knowledge is transparent and disruption hits harder and faster?" (Lindegaarde, 2016).

The engagement context

Engagement is to the 21st Century what advertising was to the 20th Century (Bolger, 2014). Google search results of the word "engagement" in the early 2000s offered about 50,000 hits and now the same search offers nearly 50,000,000 hits. When we embarked on this work in 2013, Twitter tweets on employee engagement occurred just about every minute (Zinger, 2013).

There is a growing level of research findings which conclude that without engagement an organization cannot thrive. It's hard to find an organization these days without some mention of employee engagement in its corporate strategies. The pressure is on organizations to engage, measure, and refine. *Have we got it? Why do we need it? Why do we need to improve it?*

Gallup's Q12 Employee Engagement Survey gained momentum in the 1990s, collecting millions of responses across all major industries. In addition to measuring employee engagement, the results had implications for further research on benefits for individuals and organizations (Buckingham & Coffman, 1999; Buckingham & Clifton, 2001).

Early adopters believed engagement was about employees' personal attitudes and motivation; however, this thinking evolved to include the role of good leadership in motivating and engaging their teams. Highly engaged employees have a "*psychological commitment above and beyond discretionary effort that is tightly coupled with strong management influences."* (Harter, 2009). Other factors add to the complexity, as gathered by Gallup: relational dynamics, work-life balance, digital technology and globalization.

David Rock's exciting neuroscience discoveries about relationship to self-engagement are impressive and convincing. His SCARF model (S = status, C = certainty, A = autonomy, R = relatedness, F = fairness) resonates with many organizations and engagement experts. Engagement is something the employee has to offer: it cannot be required as part of the employment contract (Rock, 2008). We are learning that optimal frontline commitment is related to levels of self-excitement and connectivity. We need to capture the employees' attention and help them understand that they "have it." In our current state, it is critical that we harness neural drivers to enhance engagement. This foundational shift to self-ownership of engagement is designed to first impact the individual and then in theory should scale up and positively impact organizational performance.

In his TED talk, *The Puzzle of Motivation*, Daniel Pink argues that while carrots and sticks may have worked successfully in the twentieth century, that's exactly the wrong way to create motivation under today's conditions. The key to high performance and satisfaction in all aspects of life is the deeply human need to direct our own lives, to learn and create, and to do better by ourselves.

At Fraser Health, we were curious about our passionate employees who felt called to their professions by a need to serve others. How could we connect and build on their natural talents to create an engaged workplace as the norm? Our challenge became aligning engagement initiatives in ways to further influence individual initiative and motivate collective action that results in organizational impact.

A dialogic & social networked approach

A new stream of practice, *Dialogic Organization Development*, describes the mindset and group of practices through which people directly affected by change are brought together to collectively co-create and generate emergent solutions. It entails involving the people most affected in co-creating the process and implementing the change. It has been shown that in contexts of adaptive challenges dialogic change practices, which engage high-engagement and high-inquiry methodologies produce successful outcomes (Bushe, 2017).

Our practice at Fraser Health is renowned for utilizing dialogic OD practices to address major complex changes such as hospital redevelopments, organizational restructuring and clinical practice redesigns. In fact, Richard and Emily Axelrod have credited our Fraser Health team for co-creating the large-scale change practice of Collaboration Loops with them and for being pioneers in the use of *The Conference Model* (Axelrod, 2010; Holman, Devane, & Cady, 2007, pp. 89–101).

The edge in our practice as we moved into this arena with E-Rads was how to convene & sustain our dispersed network of (in)formal leaders to deliver key information, tackle issues, create connection opportunities and engage change planning.

For this, we turned to emerging work on effective social networks. We listened to a Stanford Social Innovation Research webinar 'The Network Leader Roadmap' designed for networks that can drive innovation and make an impact. This confirmed we had intuitively and with our prior Organization Development knowledge, started developing a network that was healthy in all five functions recommended for thriving social network leadership (Ehrlichman, 2015):

1. Clarity of purpose
2. Convene the right people
3. Cultivate trust
4. Co-ordinate actions
5. Collaborate generously

A strong correlation exists between these 5 components and Axelrod's guiding principles for engagement:

1. Widen the circle of involvement
2. Connect people to each other
3. Create communities for action
4. Promote fairness

Both frameworks further support the argument for our overall approach of Collective Change Agency as described by Helen Bevan in the foreword of our Engagement book published at Fraser Health: "The E-Rads offer an outstanding case study in both individual and collective agency for change. Individual agency is about people building their own skills, knowledge and networks. Collective agency occurs when people act together, united by a common cause, harnessing the power and influence of the group and building mutual trust" (Falkner, Gilpin-Jackson, & Min, 2018).

Convening E-Rads

So, what was our programming to convene E-Rads around engagement issues at Fraser Health?

Engagement Radicals receive regular ideas, updates, and resources from the Engagement Team (also known as E-Team) to help facilitate and stimulate dialogue with colleagues and patients. No matter where they are in the organization, the work is about energizing people, caring about the work that they do, and nurturing relationships. It is emergent work—listening, responding and providing resources.

The curriculum for the Engagement Radical Network was developed over time and is adapted based on the Fraser Health engagement strategy, literature, and feedback from people in the network. Each of the resources and events are created by the E-team who take the coach approach and always believe that people *do* have access to their own solutions. **The following 5 resources are provided: webinar check-ins, newsletters, quarterly face to face sessions, a change agent development pathway and an annual summit.**

Results of the Network

Our evaluations and tracking of outcomes of the E-Rad work showed positive individual and organizational results.

Questionnaire Feedback and Other Results

Seven follow-up questionnaires have been administered since 2014 asking Engagement Radicals to provide feedback on what impact they believe they are having in the following three areas: their team, Fraser Health and patient care. **These questionnaires have made it possible to track the shift over time. This data has in turn informed required changes in the network.**

The longitudinal questionnaire results *(Figure 1)* indicate that a shift is happening over time. In each of the three categories the trend in their perception of their impact is increasing.

The three graphs in *Figure 2* are sample feedback from one module of the change agent pathway, showing results aligned with our learning goals for E-Rad participants—specifically around change agency and confidence building.

Our annual summits showed similarly positive results. The Engagement Summit is now the largest gathering for engagement across the organization and is the most visible flagship of this work. It is an annual gathering of a cross-section of Fraser Health employees and partners to learn about, share, and plan innovative approaches for engagement across Fraser Health using dialogic design and methodologies. The summits have also been used for participants to design and take away actions to advance the organization's strategic priorities (quality, staff & physicians, building capacity, fiscal responsibility).The following were initiated by Engagement Radicals at the summit or otherwise and made a difference for individuals (patients and colleagues), teams, and the system as aligned with our strategic priorities.

Staff & Physicians: Surrey Memorial Hospital (SMH)—A team of Engagement Radicals at SMH decided to give back for Christmas by offering support and donations to the very community they work in. They engaged employees across the site and collected 475 Children's gifts and 350 gently used handbags stocked with supplies for the Surrey Women's Shelter.

Surrey Memorial Hospital Engagement Radicals are very active and have followed through with other noteworthy initiatives including:

- **Puppy Love Day:** Brought people together on more than one occasion and location to spread "pawsitivity" and create awareness about service dogs, as well as collect donations for the Surrey Society for Prevention of Cruelty to Animals (SPCA).
- **Change Day BC:** Collected 28% (645 pledges) of the total pledges for Fraser Health by challenging units to write pledges and spread the energy enthusiasm for that which they can change.

Quality: Royal Columbian Hospital (RCH) Intensive Care Unit—In 2014, RCH's hand hygiene compliance rates were the lowest in Fraser Health. Over 18 Engagement Radicals at RCH used E-Rad tools to promote hand hygiene compliance which eventually changed the conversation at the site. As a result, hand hygiene rates at RCH increased to one of the highest across the health authority.

Quality: Surrey Memorial Hospital (SMH)—ShelleyLynn Gardener noticed that staff at Surrey Memorial hospital were

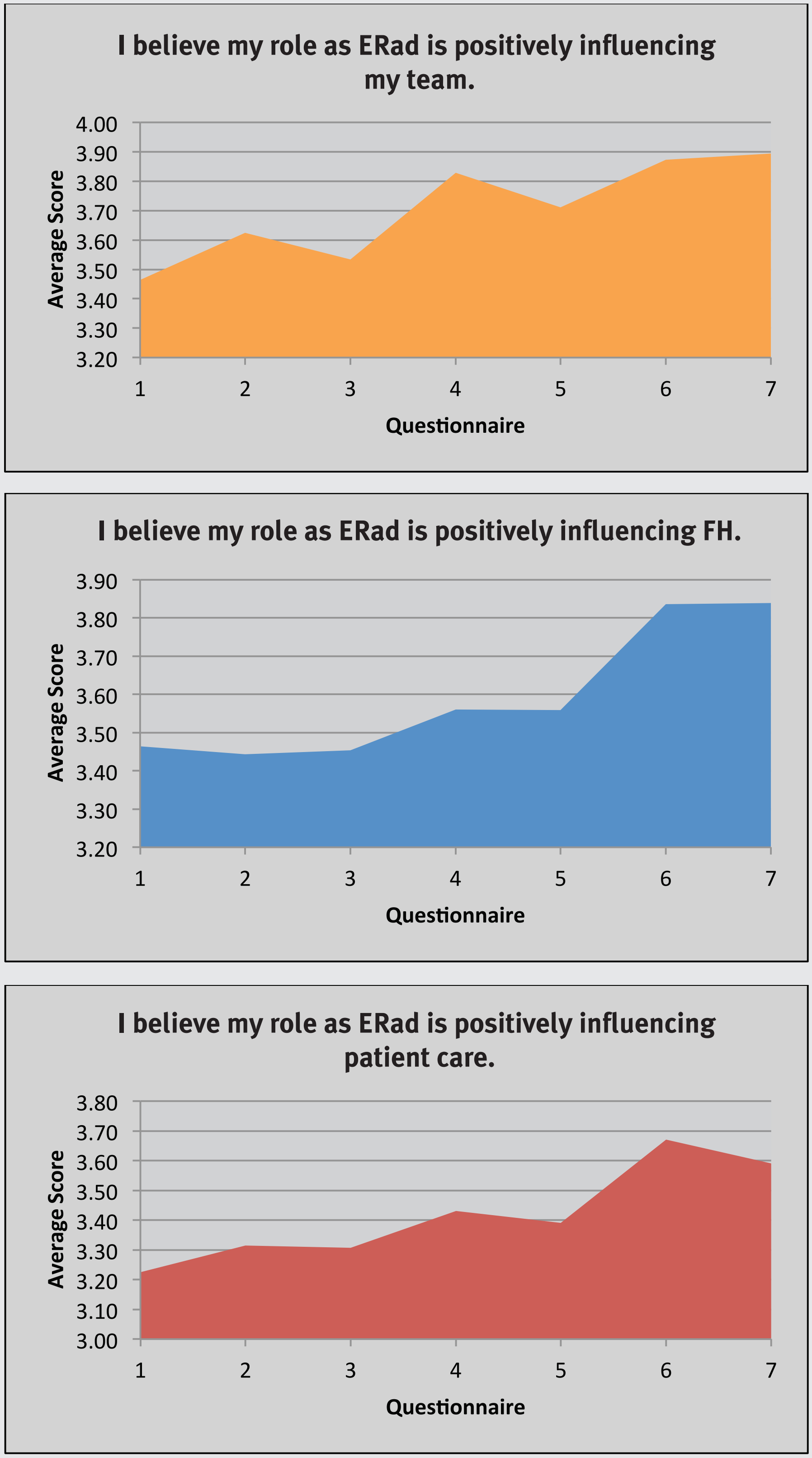


Figure 1. Longitudinal questionnaire results.

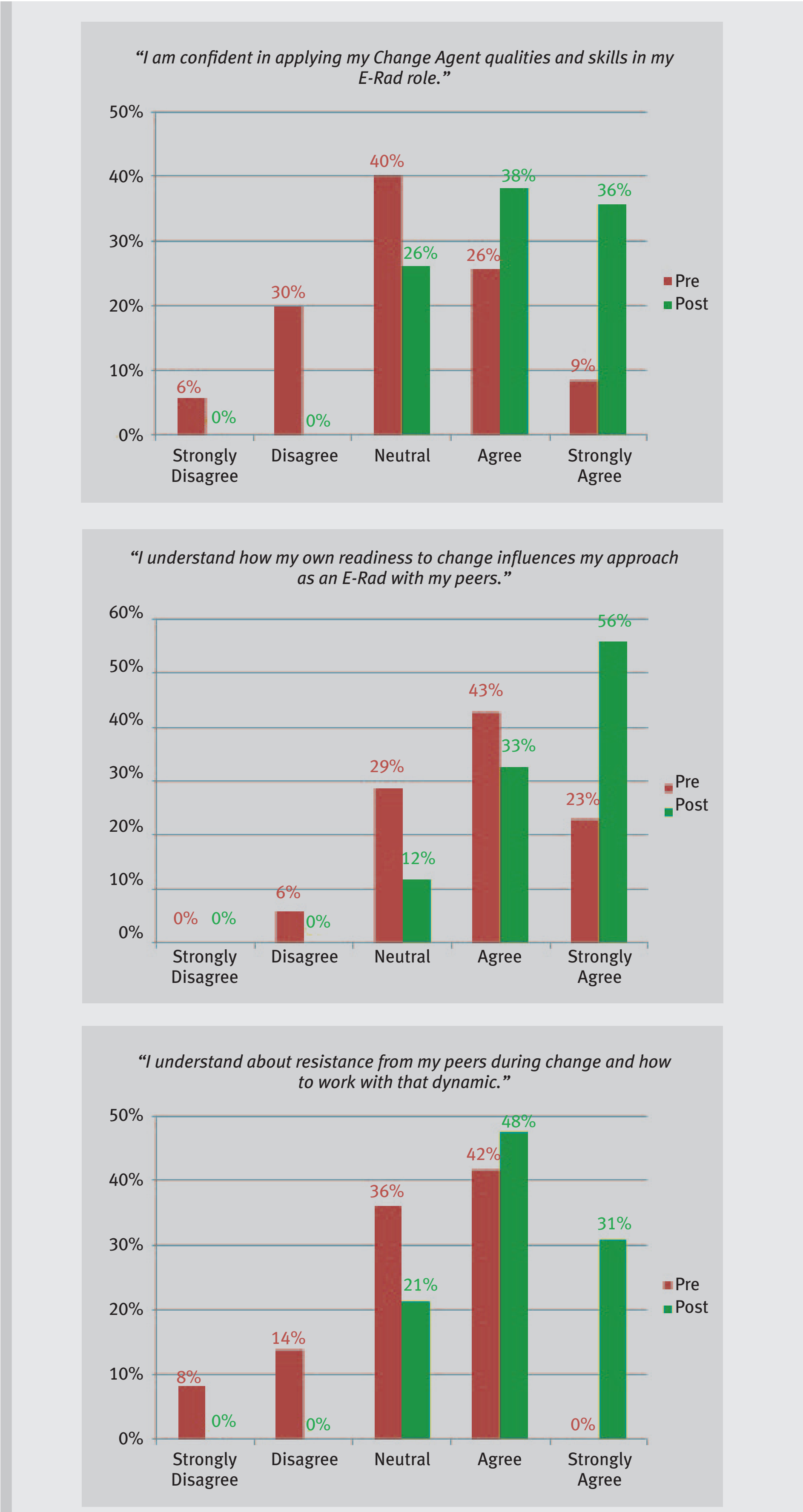


Figure 2. Sample feedback from one module of the change agent pathway.

using soaker pads to lift their patients which resulted in patient handling injuries and patients experiencing skin irritation. ShelleyLynn initiated the replacement of fabric soaker pads with disposable dry pads which is something that had not been done before. This change decreased skin irritation of patients and reduced total site injuries due to patient handling from 21.88% to 12.50%.

Building Capacity: Older Adult Program—In order to improve their team effectiveness and establish what they were doing well and areas for improvement, Jocelyn Wong enrolled her team to run result sharing sessions for the Worklife Pulse Survey and successfully followed-up on actions.

It is not surprising that Engagement Radicals have received recognition and acknowledgement from external partners. In 2018, BC Patient Safety & Quality Council awarded Shelleylynn Gardner, Rehabilitation Assistant at Surrey Memorial Hospital with the 2018 Everyday Champion Winner. She was acknowledged for her "passion for improving patient care at Surrey Memorial Hospital, and a talent for creative and compassionate ideas that make a big difference" (BC Patient Safety & Quality Council, 2017). Further, Surrey Memorial Hospital Engagement Radicals received runner up for the Quality Culture Trailblazer Award. They were recognized for acting when they see they think they can make a difference, and for improving the experience of patients and colleagues by creating a vibrant culture (BC Patient Safety & Quality Council, 2017).

Sample Qualitative Feedback

The following quotes further illustrate the impact Engagement Radicals have had on work conditions and patient care.

> *"What I like most about being an E Rad is feeling satisfaction. Satisfaction from improving connections with people, improving the culture at work, and making others smile and feel valued. I feel proud to call myself an E Rad. Being a part of the E Rad network gives me*

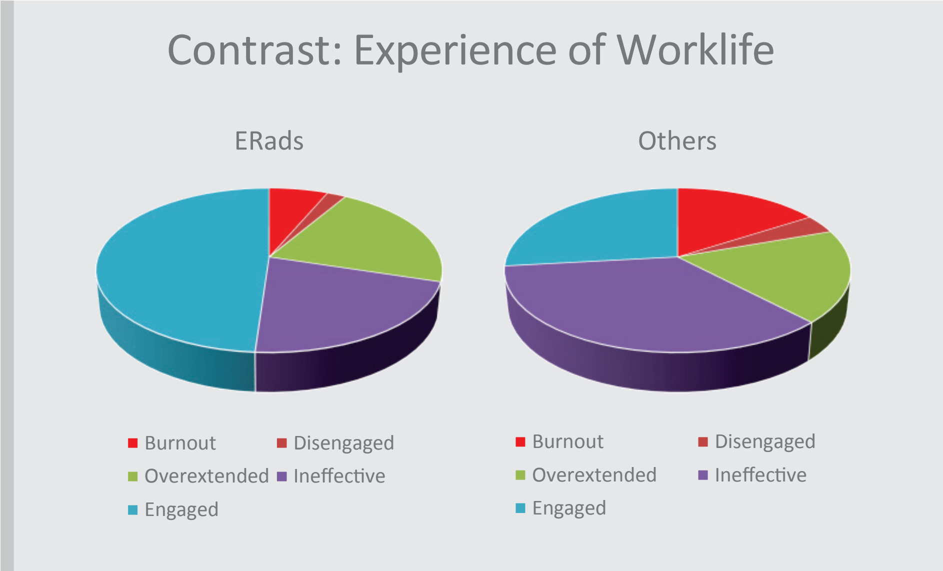


Figure 3. More E-Rads are engaged and are experiencing work life in a more positive way.

another purpose at work and has allowed me to be creative. Even the little things make a positive change."—**Candace Larson, Regional Physiotherapist, Day Programs for Older Adults.**

"A value that the e-rad role adds is a sense of union, connectedness for all staff. I have and will continue to be a reminder that every voice matters, every employee matters and we as E Rads are there to lead the way to encourage effective communication and collaboration." —**Polly Kainth, Coordinator, Surrey Mental Health, Jim Pattison and MSDSI.**

"E Rads make a significant difference in the day to day experience of both patients and staff. It is without question that their work is changing the face of those areas and sites that they support. Their commitment extends beyond work hours—they are appreciated and valued."—**Cathie Heritage, Executive Director Surrey Memorial Hospital**

"My goal for this year to recruit and engage as many people as possible to join the Abbotsford Regional Hospital E-RAD team. Being an ERAD is one of the best parts of being part of Fraser Health, the check ins are like a monthly dose of awesome and keep me excited about the future at Fraser Health."—**Joanne Halligan, Coordinator Volunteer Services, Abbotsford Regional Hospital**

Research and Impact of the Engagement Radical Network

It was important to track and demonstrate the impact of the Engagement Radical Network to ensure that this work was making a difference both on work conditions and patient care outcomes.

Research has identified that there is a wide range of pre-conditions that foster employee engagement. William Kahn suggests that it is the meaningfulness of work, safety to bring one's whole 'self' to work and availability of physical and emotional resources (Kahn, 1990). Recent studies in health care tell us that thriving, engaged employees feel inspired and enthusiastic about their work, and they experience pride, job and organizational satisfaction (Lowe, 2012).

There is evidence that shows that high levels of employee engagement in health care are associated with: employee retention (Lowe, 2012), lower rates of sickness absence (Ham, 2014), lower employee turnover (Ham, 2014), lower patient mortality rates (Ham, 2014), lower infection rates (West & Dawson, 2012), higher quality services (Ham, 2014), improved financial performance (West & Dawson, 2012), patient-centered care (Lowe, 2012), patient safety culture (Lowe, 2012), and better patient experience (Ham, 2014).

There are further studies that show that the negative impact of stressors that lead to burnout can be minimized by factors such as a supportive social environment, peer support, supervisor support, and team cohesion (RT & Ashforth, 1996). It is widely regarded in academic literature that the opposite of burnout is engagement (Maslach, Schaufeli, & Leiter, 2001). We wanted to test whether the Fraser Health Engagement Radical Network was achieving these desired improvements in workplace environment factors and engagement.

We conducted two studies to assess the correlations between the work of Engagement Radicals and these workplace conditions attributed to higher engagement in the literature. We also were able through our research to examine the differences between the profile of effective Engagement Radicals and other employees.

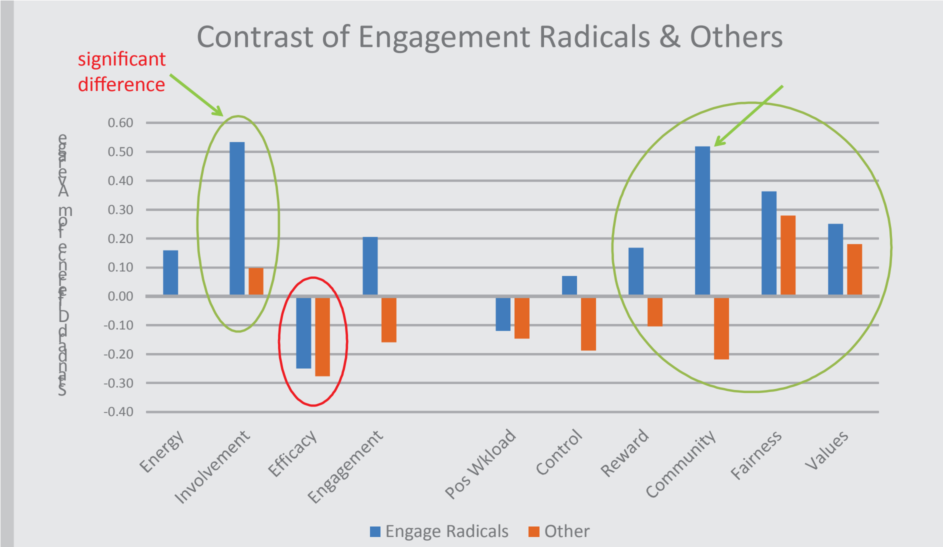
Study 1: Profile of Engagement Radicals

A 2015 research study conducted by Fraser Health in partnership with Dr. Michael Leiter asked the question: "What makes an E-Rad different from others at Fraser Health?" (Leiter, 2015). Participants included 48 Engagement Radicals and 83 others. Constructs explored include effect of being in the E-Rad Network on Burnout/Engagement, Areas of Worklife and Organizational Social Dynamics

Key findings were:

- More E-Rads are engaged and more effective than the general employee group
- More of the general employee group feel "burned out" than our E-Rads
- Both E-Rads and the general employee group feel overextended (unable to manage their workload)

The study revealed a significant difference between the two groups on involvement. This aligned with our assumptions that E-Rads would score more positively than the general staff group on the indicators of reward, community, fairness, and values. Professional efficacy is significantly



Note:
- The midline of the graph is the normative level for health care providers.
- Bars above the midline are good; bars below the midline are problematic.

Figure 4. E-Rads & Non E-Rad responses to how they see their worlds

different than the normative level, with E-Rads scoring more positively than the general staff group.

Sharing this data with the senior executive and the Fraser Health Board confirmed for them the credibility and rationale for the existence of this network.

Study 2: Yes, Higher Engagement Means Lower Stress and Burnout

In 2017, our second research study was conducted in a partnership between the University of British Columbia, Adler University, and Fraser Health with an objective to: examine the individual and contextual factors that are associated with psychological health and wellbeing outcomes for Engagement Radicals at Fraser Health as compared to others in the general employee group. Scientifically validated and reliable scales were used to create a comprehensive questionnaire.

Participants in the study included 97 Engagement Radicals and 234 in the general employee group. Survey results showed that Engagement Radicals had statistically significant higher levels than the general employee group in the following variables:

- Psychological Capital: a personal resource comprised of four psychological dimensions: self-efficacy, optimism, hope, and resilience.
- Engagement: A positive work-related state of mind characterized by vigor, dedication and absorption.
- Organizational Citizenship Behaviours: A measure of extra-role performance whereby individuals go above and beyond what is required in their jobs, behaving in pro-social ways that benefit their organization or other individuals within.
- Commitment: An enduring employee attitude about the organization they work for, characterized by an emotional attachment to and identification with the organization. (Skarlicki, Gilpin-Jackson, Kay, Vasandani, & Min, 2017)

Comparisons were made between means of E-Rads (N=97) and non E-Rads (N=234). (See *Table 1*.) Statistically significant ($p<.05$) differences were found between the two groups on several variables.

The results are depicted in summary (*Figure 5*) where the +/- symbols indicate relationship direction only.

Ongoing Adaptations & Now What?

The Executive of Fraser Health continue to support the work of The Engagement Radical Network. However, in a context of scarce resources the E-team are now challenged with determining what the next phase of developing the Network looks like. We are focusing the next evolvement of the Network on increasing enrollment as well as having existing E-Rads deepen their current involvement. The hope is that both enrollment and involvement will develop their capacity for leading engagement across sites, programs and communities.

There are focused E-Rad development efforts at the three major regional hospitals and two of our community hospitals. We are working to strengthen local E-Rad presence and actions in other sites, centers and

Table 1.

	E-Rads		Non E-Rads		
	Mean	SD	Mean	SD	Sig.
PsyCap	5.78	.66	5.45	.78	P<.000
Demands	3.36	.58	3.19	.62	P<.026
Stress	2.51	.55	2.62	.55	—
Burnout	2.49	.62	2.66	.66	P<.037
Engagement	5.17	.87	4.80	.86	P<.000
OCB	5.92	.64	5.54	.74	P<.000
Job Satisfaction	4.37	.74	4.21	.76	—
Commitment	3.56	.83	3.29	.87	P<.008

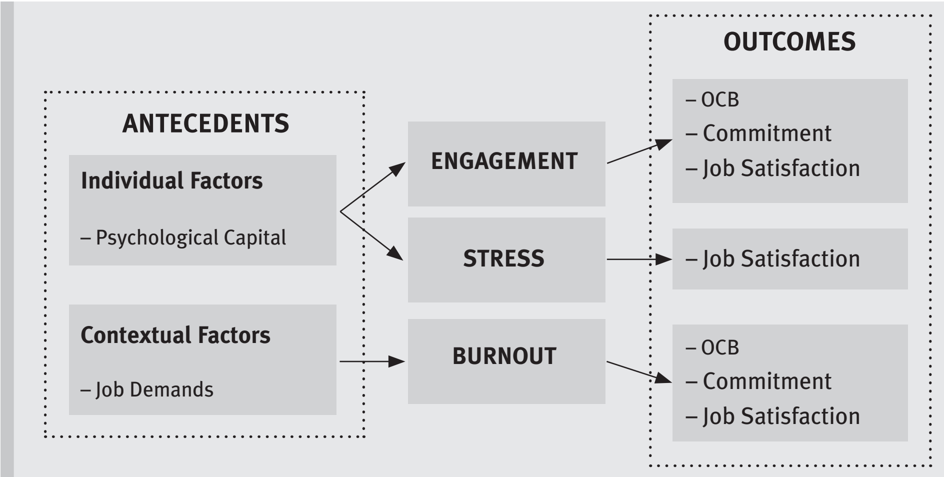


Figure 5.

residential homes. We are also in inquiry around:

- How might we ensure the network is self-sustaining?
- How might we maximize engagement while minimizing costs?
- How might we maximize the work of the E-Rads within the engagement strategy now being renewed?
- What generative images/stories will renew the network?
- What is the enduring vision for the E-Rad Network into the future?

Conclusion

Engagement Radicals contribute to Fraser Health by going above and beyond their daily work and taking radical actions to contribute to an exceptional patient and provider experience. Improving hand hygiene rates at Royal Columbian Hospital and bringing a full-size horse to Surrey Memorial Hospital to fulfill one patient's wish are only some of the results that emerged from Engagement Radicals' actions. While the E-Team supports E-Rads by providing resources such as running webinars and facilitating yearly Engagement Summits, it is the E-Rads' passion and willingness to embrace challenges that drives their actions and produces results.

Engagement Radicals contribute in and outside of Fraser Health. They participate in campaigns and social movements if they see an opportunity to make a difference. As a result of their involvement, the network has gained international attention and is recognized as leading edge work around employee engagement in health care.

Our research shows that regardless of a similar or higher workload, Engagement Radicals compared to non-Engagement Radicals report higher psychological capital, engagement, commitment, and organizational citizenship behaviour as well as less burnout. This research is consistent with external research showing specific pre-conditions of employee engagement.

Engagement Radicals see the opportunity to make a big impact by doing things just a little bit differently. The hope is to have Engagement Radicals inspire others to be the change they want to see in the organization and to champion engagement in service of exceptional patient care.

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Keywords:
Organization Development, Engagement, Complex Change, Health Care, Dialogic OD, Social Networks. Radical Change

Acknowledgment:
This paper includes excerpts taken in whole or in part from internal organizational documents, white papers and the engagement book written and published by the authors at Fraser Health.

Note: Data tables reprinted from, *Report–2017 Survey Psychological Health & Well-being*, by Skarlicki, Daniel; Gilpin-Jackson, Yabome; Kay, Adam; Vasandani, Resham; Min, Dale; & *2015 Report–Fraser Health Baseline Report: Centre for Organizational Research*. Nova Scotia: Canada by Leiter, Michael.

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Jacquie Block-Glass has been in the field of Leadership and Organization Development for four years. She has been passionate about the possibilities she saw from this work since childhood as a result of her diverse family system and the radical approaches to learning she was raised with. She completed her Bachelors of Business Administration at Simon Fraser University and is currently completing her Masters of Arts in Organizational Psychology at Adler University. She is completing her Coaching Certification through Erickson International. Alongside her Fraser Health work, Jacquie coaches people committed to developing their leadership through Landmark Worldwide and private clients.

When External Trends and Internal Practice Collide

Is There an App for That?

By Allan H. Church,
James A. Scrivani,
Breanna M. Paynter

If organization development (OD) is to remain relevant and impactful as a field, we as practitioners need to be constantly on alert regarding the latest trends, theories, and concepts being pitched in organizational settings. Given the trends that are shaping the nature of work and the workplace today (Church & Burke, 2017), it is critically important that we are aware of what the business world is talking about at the "proverbial watercooler" so we can most effectively assist the organizations we support. In the recent past, for example, concepts such as emotional intelligence (EQ) employee engagement, and learning agility have quickly gone from being intriguing new ideas in academia worthy of further theory development and research, to major practice areas for consulting firms engaged in selling tools and interventions. More recently topics such as digital leadership, agility, and curiosity are making their way into the corporate consulting milieu as well (e.g., Catlin, Scanlan & Willmott, 2015; Kashdan, Disabato, Goodman, & Naughton, 2018; Rigby, Sutherland, & Noble, 2018).

As a consequence of these trends, organizational appetite for new concepts quickly follow as many senior leaders and human resource (HR) professionals are attracted to bright shiny objects (BSOs) in an effort to enhance the effectiveness of their leaders or shift the organization's culture. This trend, which is particularly challenging for internal OD and talent management (TM) professionals to address has most recently been dubbed the "anti-talent management" movement (Rotolo, et al., 2018), but as many OD professionals know, it has been a constant issue for decades and arguably since the origins of the field. While only time will tell which of these concepts have staying power the attention they are given in the popular management press makes them appear to be latest panacea for all that ails management.

How does this scenario typically play out? For external practitioners the impetus tends to be one of competition – and in some respects the response in that area of practice is easier. It is simply a choice to play or not in a given space. On the internal practitioner side, however, the challenges are much more elusive to solve. Frequently, internal OD professionals are the ones who get the phone call from "upstairs" and are asked to provide meaningful data and/or insights about the organization and its key talent using the lens of any number of new perspectives or frameworks. A typical request might be along the lines of "we should explore whether we have a growth mindset in our culture" or "I met someone last night at a cocktail party and they told me about a really exciting new tool that measures learning agility and predicts business outcomes with only 6 questions – you should give them a call." If you're an internal OD professional and haven't yet experienced one of these types of requests count yourself lucky.

Of course, our role as internals is to help drive positive organizational change, so new concepts and tools should be welcomed. After all, one of the core values of OD is about embracing and integrating new theory, models and frameworks. But from our perspective, it is one thing to engage in the intellectual discussion of a new concept's relevance and another entirely to actively deploy it in an organization amidst an already robust set of change interventions and people development processes. We would argue that implementing one of these BSOs should only be done if they meet a certain set of criteria:

1. They add value or new insights above and beyond the existing models already implemented.
2. They are based in good science and have strong measurement properties (if tools are used).
3. They are aligned to the existing goals and values of the talent, organization and/or change agenda.

Unfortunately, with many of these new concepts, these criteria are often not immediately met. Moreover, time is often not on our side to engage in the appropriate due diligence needed, as leaders often suffer from the fear of missing out on the latest trend. Added to these challenges, as Church and Burke (2017) note, is the importance of our ability to recognize new forces and trends that do represent major shifts in the way organizations operate today or will do in the future. So the right answer to these BSOs is not always "yes" or simply "no" either, however well-crafted the argument.

This is where it gets complex. Many of the sample concepts or content areas provided above have multiple definitions, instruments to measure the constructs, and various companies looking to sell you their proprietary solutions. There is rarely one easy or best answer when it comes to introducing a new employee "engagement survey" for example. In times like these internal practitioners are faced with no clearly defined solution in sight yet a need to provide answers and/or interventions to our leaders quickly, while simultaneously deciding on what is the right approach for the organization. How should OD practitioners best approach this situation? Are there best practices in helping internals navigate some of these choppy waters when it comes to BSO's that continue to emerge?

From our perspective, as internals operating in a large global organization, the answer is yes. We have experienced these types of scenarios frequently over the years and have developed an approach for responding to new constructs that has served us relatively well. Perhaps not surprisingly, our approach reflects a social-systems mindset and is grounded in the scientist-practitioner model. The purpose of this paper is to outline our approach using a recent case example where the content presented walks the fine line between being a truly new emerging construct area, and yet ill-defined and lacking substance at the same time. The topic is digital leadership, and the request started out as an immediate need for answers without a clearly defined problem or burning platform. We begin the discussion with an overview of the topic itself, and then present our approach to solving the challenge using a reflective case study framework.

While our approach may not work in all contexts or organizational cultures (e.g., we have established ourselves internally in significant gatekeeping roles with credibility and influence over the years), we present it here in the hopes that others may find it useful in guiding their efforts to align new trends, ideas and the frequent BSOs with core OD principles, practices and theory to drive positive change.

Riding the Digital Wave

The topic of "being more digital" captures the zeitgeist of organizational culture today. A quick Google search of the term "digital organization" reveals over 2.4 million hits with guides, whitepapers, and lists of necessary skills from consulting companies, business magazines, I/O and HR researchers, and change management strategists. While the concept of digital has been center stage in certain functional disciplines such as marketing and IT for some time, it has now reached almost every aspect of organizational life. Universities such as MIT Sloan are beginning to teach courses on digital business strategy and the topic of digitizing HR is now quite popular at major conferences such as the Society for Human Resource Management and even the Society for I/O Psychology.

In fact, organizations shifting to digital is one of the key trends identified by Church & Burke (2017) currently affecting organizational culture, and subsequently, OD work. While definitions and suggestions vary, the one theme tends to be "change or fall behind." This creates an uneasy environment where executives recognize the future way of working is here, but they do not know exactly how to define it, measure it, and develop their employee base against it. Complicating things further, the very definition of the construct of digital is somewhat ambiguous and leads OD practitioners (not to mention HR and line clients) to question what is in and out of scope for the topic (i.e. is it leadership behaviors, inherent skills and capabilities, working knowledge of platforms and technology, or primarily related to HR systems, etc.). Enter various consulting firms capitalizing on this hot trend by attempting to sell proprietary approaches and tools to organizations, and the pressure is on to upskill the organization. The central question then becomes – if organizations do not know what digital is, how will OD practitioners know what to address?

The Organizational Ask

If we think about the implications of organizations and doing OD work in this new world order of digitization and agile organizations, one could argue we might need a completely different set of processes and/or competencies than in the past. This question recently became front and center for us. In response to the increasing trends in the marketplace noted above and various efforts already underway throughout the organization regarding the digital transformation of our business (e.g., in the marketing, sales, and operations functions for example), we were recently asked to explore the concept of digital capability and digital leaders specifically. The initial request from senior leadership was in the form of "who are our digital leaders" followed closely by "what does it mean to be a digital leader?"

Given our organization's long and deep history of developing outstanding

Figure 1. Digital Leadership at PepsiCo

leadership talent with robust HR, OD and TM processes and tools (e.g., Alziari, 2001; Church & Rotolo, 2016; Church & Waclawksi, 2010; Happich & Church, 2016; Tichy & DeRose, 1996), at the time of this request our agenda was quite comprehensive and well-integrated. Given recent articles in popular trade outlets such as *Harvard Business Review* and others, however, there was a new and clear interest on the part of senior leadership to ensure we were assessing and developing our leaders against the right set of "digital skills" needed for the future. This is a laudable request and an absolutely appropriate objective for ensuring a high-quality OD or TM set of programs. What was interesting, however, was the fact that we had recently launched a new leadership model globally and were already deeply engaged in executing against our existing agenda focused on future capabilities (called the LeAD program – short for Leadership Assessment and Development – see Church & Rotolo, 2016; Happich & Church, 2016).

Given the LeAD program and the competency model on which it was based had been designed and implemented over several years with c-suite level input and support, empirically validated as predicting future success at two or more levels higher in the organization, and was fully integrated into our talent management and leadership development architecture and multiple-levels from the c-suite to early career (and showing results), it presented a unique challenge for the OD and TM teams. How do we address these newly identified digital needs of the future while maintaining our foot on the gas of our existing leadership and talent agenda?

Taking a Systems Approach

From our experience as internals one effective way to approach these kinds of requests is to take a broader view of the problem, reframe the construct appropriately, and then develop a solution set that meets multiple needs (assuming those can be identified). This is in fact the approach we took.

Step 1: Reframe the Situation

Given the initial request (i.e., "who are our digital leaders?") our first thought was to determine the best way to generate a list of internal talent that would meet this criterion. The lack of an aligned definition of what a digital leader actually means, however, proved a challenge from the start. After asking for exemplars for profiling purposes proved too difficult, we went back to basics and reframed the situation. Specifically, we gathered a team of internal practitioners from multiple disciplines (e.g., OD, industrial-organizational psychology, human capital analytics, talent management, sociology, learning and development) to codify and understand exactly what new capabilities we were trying to address. While a recently published article on "digital leaders" had served as the impetus, there were additional reports, trend analyses, and other insights available that we used to determine the true set of capabilities and/or competencies we might be lacking in our current architecture.

After a review of the external literature (which albeit was limited in academic rigor) and internally available resources, we held several iterative working sessions where we content coded all the materials and created our own synthesis of what was being described as digital leadership capability across the various inputs. We did this completely independently of our existing models and tools as a whiteboard exercise. After some further iterations and inputs from key stakeholders, the outcome of this process was a new lens for looking at talent capabilities in the context of digital leadership for our organization. This framework outlined six dimensions or competencies required to be a Digital Leader at PepsiCo: *Data-Driven Agility, Innovation & Creativity, Digital Fluency, Design Thinking, Disruptive Change Agent, and Collaborative & Communicative Style* (see *Figure 1*).

Collaboration and communicative skills were included as the center hub of the model because we saw those as key enablers to the other competencies building effectively upon one another. The framework was well received by our stakeholders and reflected the right perspective they had been seeking. In short, it met the initial objective of having something new in hand.

Step 2: Align the Content Frameworks

The next step was to evaluate our existing Leadership competencies (i.e., those we were currently using with employees across a host of programs and processes such as LeAD and PepsiCo University) against this new framework to look for gaps and identify where we might need to make changes to our architecture. We approached this process by having I/O psychology experts specifically trained in assessment and measurement design deconstruct and list out the individual behavioral and skill components of each dimension (using definitional statements) in the new framework and compare those one-by-one with the same level of detail in the existing model. For example, the Digital Leader framework dimension of *Data-Driven Agility* based on the literature included elements of analytics and insights, critical thinking, intellectual capability, problem solving and agility. In the existing leadership model, we already had definitions and validated measures for Strategic Agility, Intellectual Capacity, Consumer Insights, and Judgement, as well as personality measures (using the Hogan Assessment Suite of tools) of Prudence, Learning Approach, Science, and Inquisitive characteristics. The conceptual overlap and coverage across both of these was clear.

Overall, the outcome of this analysis was extremely helpful. We found that most of the Digital Leadership dimensions were already being assessed through our existing framework. This enabled us to potentially remap our current assessment data against the new framework and provide the organization with insights regarding Digital Leaders across the targeted population. However, in conducting the review it was evident that "Digital Fluency" was an area we had not previously prioritized. We define digital fluency as awareness of and proclivity for embracing technology's capabilities. Discussions with thought leaders and a review of the marketplace indicated no targeted digital fluency solution existed that fit this criteria so we knew this was a potential area to further explore.

Step 3: Build a New Integrated Systems Solution

Having identified an area of opportunity, but before embarking on the hunt for a new tool, we wanted to step back and develop an overall systems-level approach for how we might solve the broader agenda. Ultimately, we felt it was not simply about "who are they" but rather "how to conceptualize digital capabilities broadly across the organization and plan to assess and develop these capabilities?"

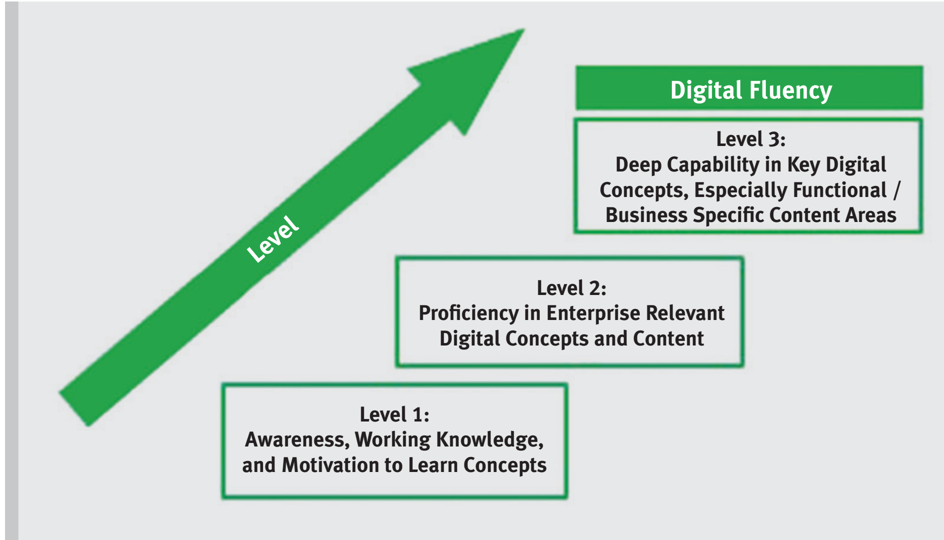

Figure 2. Digital Fluency Framework

Thus, to avoid falling into the consulting trap of an instant response to an expressed need we utilized the Burke-Litwin (1992) model to look beyond the initial ask and broaden our scope. Specifically, we examined the transformational factors: the organization's mission, leadership, and organizational culture as well as how an individual navigates within these frameworks. Knowing that true change occurs when transformational and transactional factors (e.g. management, systems, skills/tasks) work together, we decided to approach assessing and developing digital capabilities (including leadership) more broadly using a 3-pronged framework. We designed the new framework to examine three facets of digital fluency (see *Figure 2*):

» Level 1: Awareness, working knowledge, and motivation to learn concepts
» Level 2: Proficiency in enterprise relevant digital concepts and content
» Level 3: Deep capability in key digital concepts, especially focused on functional/business specific content areas

By building this framework we were able to provide even greater clarity regarding the construct, and begin the journey of capability building through a focus on both short-term and longer-term solutions. Specifically, this approach enabled us to quickly realize that "Level 3" interventions were best handled where they were already emerging or in place – i.e., within the specific functions or business units that had a very specific need (e.g., marketing, operations). Several focused efforts were subsequently identified for further development. "Level 2" required alignment on which concepts were best suited to be enterprise-wide focus areas, so we began a series of interviews to determine these focus areas with the intent of building a new measurement tool to close this gap in our Digital Leadership Model. For "Level 1" which represented the most basic of interventions from a cultural and learning standpoint, it enabled us to review various options for quickly bringing some level of rudimentary knowledge and understanding to the organization. This was where we could institute our "quick win," mollifying our clients while giving us time to build out a scientifically responsible approach to the issue at hand. In order to address the "Level 1" need, we moved on the concept of starting a broader scale culture change initiative as we launched this new tool to determine motivation and interest in "digital" cross-functionally and across the organization. In short, we wanted to 1) create pull for the gap we identified in our organization and 2) begin to assess the appropriate strategy for building capability in this area.

There's an App for That

Shortly after we received that initial request from senior leadership asking us who our digital leaders were and how we would define it, we received a secondary request to quickly evaluate an external tool which purported to assess and develop employees' digital strengths and opportunities. This was the result of one of those external connection points made by other leaders as described earlier. As with any new construct and/or tool, we knew we needed to test both the concept as well as content before we were comfortable deciding on whether to adopt this intervention for the enterprise.

Concept

Perhaps not surprisingly given the topic, this tool was exclusively delivered via smart phone app, officially qualifying it as a BSO ("bright shiny object") in our organizational context. The app consisted of an initial mini-survey which resulted in a score of digital knowledge, and then offered the user linkages to associated learning resources (e.g., courseware, readings, etc.). Using the approach stated above, we knew a pilot would be necessary to better understand the app within the context of organization and to determine scalability if we were to move forward. Thus, we used several key questions to guide both our thought processes and our conversations with the vendor and internal stakeholders such as "Does one size fit all – meaning is this applicable across all job levels, functions, and business sectors?" and "Can (and should) we use this app for development and decision making?" as well as "Can we validate the mini-survey for our organization?" We knew alignment to business priorities and other HR strategies/processes was key for creating buy-in, and of course, validation was critical if the information obtained from the app was going to be used for anything other than purely individual development purposes.

To encourage informed, multidisciplinary decisions, we teamed up with our partners in the Learning Center of Excellence as well as IT leadership and designed several pilot tests and a subsequent in-depth user experience feedback survey to determine both immediate participant impressions and broader cultural implications. The first pilot was conducted with a similar group of I/O psychologists and OD/Talent Management professionals that we assembled to build our initial Digital Leadership model. It focused on capturing an initial sense of the app's face validity and overcoming any technological difficulties before a broader launch would even be considered. This first pilot indicated that the app had potential to expand our thinking and convey some of the key messages regarding digital fluency that aligned to our strategy. In short, the idea of addressing the concept of digital directly, as well as the benefits of the linked learning feature, sparked curiosity for participants. We then took the learnings from the initial group and planned a broader pilot launch of over 1,500 participants globally. This second pilot population was a quasi-random sample of almost all of our global sectors as well as most functions. The sample also reflected a greater proportion of participants from our sponsorship functions (i.e., HR, IT) in order to generate continued interest and buy-in. We expected attrition during this pilot process and therefore doubled the sample size of what we actually felt we needed for an overall test of this nature. In the end, approximately 36% of this sample actively participated in the pilot.

Content

Simultaneous to running the pilot, we started to think ahead to the user experience feedback survey needed for post-participation. For this phase of the evaluation process, we created two surveys, one for those who downloaded the app and one for those who opted out and chose not to participate. In this way, we were able to look at the driving factors for involvement which could inform future decision making as well as assess the broader cultural change factors for our digital agenda going forward. As with any new topic, we wanted to get a better sense of how it was contextualized in our organization to define it more specifically for us—this is where we could truly evaluate the "content" piece of digital. As such, digital attitude questions were included in both surveys (e.g. "Digital Fluency is important to my job"). This also provided an opportunity to gather additional opinions from users and non-users regarding elements of our organizational culture that related specifically to digital fluency. The end result allowed for more nuanced pilot feedback, beyond basic participant perceptions of the app. Although the detailed findings from the survey work are beyond the scope of this paper, some key learnings from our results included the following:

» Survey respondents who downloaded the app were more likely to endorse the importance of digital fluency in their role (78% vs 69%) and the organization as a whole (92% vs 80%) versus those who did not. While the gap by itself was interesting, the overall level of endorsement of the need for digital fluency in general was pleasantly surprising and higher than certain stakeholders had expected (e.g., 92% overall).

» Senior executives were just as likely as junior executives to recognize the importance of digital fluency in their role and for the organization. This was meaningful because it runs counter to the assumption in books and popular trade publications that "millennials" are more concerned with digital outages in organizations than more seasoned counterparts. At least in our sample, this did not prove to be the case. It also suggested that a larger digital fluency change effort if pursued would be embraced by all levels.

» Finally, functions showed significant variability in terms of how important they found digital fluency to be for the work. While expected to some degree the pattern was nevertheless intriguing. IT (as hypothesized) for example showed the greatest agreement with the importance of digital fluency in their role (almost 100% agree or strongly agree). Other functions that are not typically thought of externally in the literature as having embraced digital fluency yet such as HR and Finance were both quite high in our organization as well (83% and 75% respectively). This was great news and indicated a path forward for future work.

With the pilot efforts completed, and the data collected from multiple groups, we can now look towards approaching Steps 2 and 3 in our framework (i.e., Capability and Integration) with a better sense of the organization's baseline perceptions.

Key Takeaways

In sum, this app and learning tools provided an easy and accessible way to test for digital readiness (content), while also testing for the overall appetite (concept). Trendy topics will continue to emerge within the OD/HR/TM world, and we need to be prepared to face them head on in a pragmatic, scientifically responsible way. This paper has provided an example of how our organization dealt with the "digital" ask. It is important to remember, however, that the same question could have been framed in terms of other BSOs (or anti-talent management) concepts such as mindfulness, curiosity, engagement, learning agility, etc. None of these are inherently good or bad, however these and many others do require careful thought and review we would argue before fully embracing them in an existing organizational ecosystem.

In closing, listed below is a summary of the steps in our approach that we hope will help other OD professionals (whether internal or external) the next time they are approached with a new construct to address:

1. *Define the construct:* Before jumping in, go to the published literature. Check past issues of the *OD Review*. Do your research on what exists in terms of measurement tools and definitions. Next, ask yourself "What does this/would this concept look like if applied in my organization?"How do existing leadership frameworks, competencies, values, EVPs change how this construct/tool would be interpreted in my workplace? Take a good look at what is readily available in your company, as well as what is already being measured or rewarded. Are you addressing the topic in a different way that could be adapted to fit these needs? To avoid duplicity and connect the dots organization-wide, determine what resources exist today that you might be able to leverage, map, and convert first before launching something new.
2. N*ever forget to "Feed the Beast."* Speed and responsiveness are key in consulting whatever the role. Figure out your short-term response while working on the long-term in the background. It is possible to respond to urgency with a well thought out "quick fix," while using core OD tools like interviews, focus groups, surveys and targeted whole group interventions to better understand the big picture result where the new construct fits. Try to understand an overarching model and philosophy first. It may enable you to take a multi-prong approach to solving the challenge (some with immediate results such as an app, and some with longer term such as assessment or large-scale OD intervention) while keeping good change management, learning, and I/O psychology in mind. Building a model or framework to help contextualize the construct is also important for alignment and overall continuity purposes with others. Of course, it is not scientifically sound nor legally defensible to embrace a new construct for certain types of uses without proper validation. However, if using tools for development only (e.g., disconnected from talent management decision making), it may not be necessary to validate in that context. This was a central question in our pilots, for example, and as a result of our decision not to use the information, we have protected confidentiality of the mini-survey and not shared individual data with anyone else internally.
3. *Build the solution at a systems level:* In our example, we took our existing leadership competency model and linked it to the multi-pronged short-term/long-term 3 level approach. This was easy to do because of the high level of existing integration, buy-in, and support for our Leadership Excellence Framework and tools within the organization (Church, Dawson, Barden, Fleck, Rotolo & Tuller, 2018). If that is not the case, you might have more work to do. Nevertheless, it is useful to ensure that your approach is considering both transformational and transactional variables (Burke & Litwin, 1992) and fits within the context of your organizational culture.

Figure out your short-term response while working on the long-term in the background. It is possible to respond to urgency with a well thought out "quick fix," while using core OD tools like interviews, focus groups, surveys and targeted whole group interventions to better understand the big picture result where the new construct fits. Try to understand an overarching model and philosophy first.

Think through how the intervention/tool etc. might apply at multiple levels (e.g., individual, group, organizational culture), and reflects capability broadly to support both development and decision-making models over time. Lastly, and just as importantly, do not forget to have some fun along the way! We certainly enjoyed expanding our own digital fluency while exploring the construct itself.

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Organization Development Network

Organization Development Review

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(continued next page)

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Although publication in the *ODR* is a way of letting the OD community know about an author's work, and is therefore good publicity, the purpose of the *ODR* is to exchange ideas and information. Consequently, it is the policy of the OD Network to not accept articles that are primarily for the purpose of marketing or advertising an author's practice.

Submission Deadlines
Authors should email articles to the editor, John Vogelsang, at *jvogelsang@earthlink.net*. The deadlines for submitting articles are as follow: **October 1** for the winter issue; **January 1** for the spring issue; **April 1** for the summer issue; and **July 1** for the fall issue.

Practicing **OD**

Welcome to *Practicing OD*, a collection of short articles (900–1200 words) on useful ideas, lessons learned, and practical suggestions for managing the day to day challenges of doing OD. We welcome brief case studies; guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools; and thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.

Submit Microsoft Word electronic copies only to:

Stacey Heath (*stacey279h@gmail.com*)

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Rosalind Spigel (*Rosalind@Spigelconsulting.com*)

Include your name, phone number, and email address. If your article is accepted for publication, you will be notified via email. We look forward to hearing from you.

Submission Guidelines

- Articles should be practical and short *(900–1200 words; 3–4 pages single-spaced)*
  - Write in your own (first-person) voice using simple, direct, conversational language.
  - Focus on **what** you are discussing, **how** it works, or can be used, and **why** it works (what you believe or how theory supports it).
  - Use bulleted lists and short sections with subheads to make it easier to read.
  - Include everything in the text. No sidebars. No or very limited graphics.
  - Do not use footnotes or citations if at all possible. Citations, if essential, should be included in the text with a short list of references at the end of the article.
- Articles can be written from various perspectives, including but not limited to:
  - Brief case studies that highlight useful concepts, applied theories, lessons learned, and implications for future practice.
  - Guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools.
  - Thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.
- Include a short (25–50 word) author bio with your email so readers can contact you.

> "In today's fast-paced business environment, how can leaders and emerging leaders boost competencies in areas that require soft skills not easily acquired on the job or in the classroom?"

Developing Essential Leadership Skills through Simulation

By Bette Gardner

Many essential leadership skills are learned on the job through experience, feedback and practice. Early in my career as a manager, for example, I was counseled that I was perceived by coworkers as aloof. That feedback shifted my mental model - a dose of reality that spurred me to change and resulted in my increased effectiveness as a leader.

That's a simple example with an easy solution. Yet in complex, dynamic organizations, learning is often interrupted because the results of our actions are unspoken, unseen, or obscured by intervening factors like process delays, change, overlapping initiatives and the fog of abundant-yet-unsorted data. Learning by experience on the job can be slow or impossible.

In today's fast-paced business environment, how can leaders and emerging leaders boost competencies in areas that require soft skills not easily acquired on the job or in the classroom? How can they lern to apply systems thinking? Critical thinking? Change management?

One solution: the Friday Night at the ER® team-learning simulation

One solution is to engage people in a simulation experience designed as a practice field for skill building and a catalyst for change. A business simulation is a simplified model of reality that can replicate challenges common in organizations while eliminating extraneous "noise." In a simulation experience, time and space are compressed so learners can try out ideas and see the consequences of their actions.

Friday Night at the ER®, a team-learning simulation created to build skills around systems thinking, accelerates performance improvement in diverse organizations. It is a scenario-based, tabletop exercise that challenges teams to manage a fictitious hospital during a simulated 24-hour period that takes one actual hour. The hospital setting is familiar to people in all industries and cultures, so it works well as a universal learning tool.

Guided by a trained facilitator, four players per table each play the role of a hospital department manager. Each player handles patient flow and staffing, deals with emergency situations that arise and documents performance as if it's happening in real time. Patients and staff arrive and depart, workloads are uneven, events pop up unexpectedly, department managers make decisions and communicate, and scores accumulate.

Players perform distinct functions, yet come to realize they also depend on each other. They discover that quality and cost problems can be solved only when they collaborate and share responsibility for performance beyond their own departments, remain open to new ideas and use data for decision-making. These are three essential behaviors for putting systems thinking into practice.

Originally designed to help people apply core concepts of systems thinking, *Friday Night at the ER®* is also used to teach critical thinking, distributed leadership, prioritization, change management, effective communication and other essential leadership competencies.

The learning process

The simulation and debrief create a multi-dimensional learning process in four stages.

1. *Engage learners in a motivating and revealing experience.* The learning starts by immediately engaging participants in a hands-on exercise that replicates challenges on the job. The experience feels "real," activating both visceral and thinking processes. Participants are motivated to excel by key performance indicators. They exhibit natural behaviors and ideas, with varying degrees of success, that can later be examined with receptivity to change.

   During the experience, pressure to perform leads initially to frustration, then gives rise to breakthrough idea generation among team members, and is followed by testing new behaviors to learn what works. The simulation is designed for the following to occur:
   - Silo thinking gives way to systems thinking as players discover they must let go of their own turf and reach across boundaries to solve systemic problems.
   - Mindsets become open to change as pressures build and it becomes evident that unconscious bias is in the way of needed improvements.
   - Data replaces instinct in the face of uncertainty about the best course of action to achieve desired results.
2. *Facilitate reflection and idea-sharing.* The experience is followed by reflection that begins to transition learners from the practice experience to relevance in their real world. What worked well in the simulation? What were the "aha" moments? What felt like their reality on the job? The facilitator guides participants in conversations that lead to shared understanding and idea generation.

Figure 1. Friday Night at the ER®

Bette Gardner is the creator of *Friday Night at the ER®*. She designed the simulation based on her interest in creating innovative tools that employ principles of systems thinking to manage within complex systems. She can be reached at *bette@blearning.com*.

3. *Distill lessons to a core, memorable set of guidelines.* From the many reactions and ideas that surface, the facilitator now brings the attention of participants into focus by distilling success factors into a concise set of key learnings. The learning from this exercise usually focuses on the three essential behaviors noted above -- collaboration, innovation, and data-driven decision making – for putting systems thinking and other improvement disciplines into practice.
4. *Integrate and apply to reality.* A final stage moves participants to create concrete ways to put their learning into practice on the job. The facilitator may choose to use gap analysis, or force field work or other techniques to assist the practical challenges of behavior change for individuals and teams.

Impact in the workplace

A challenge with a learning tool for building capacity around soft skills is the difficulty measuring its impact on workplace success. There is no effective way to control the multitude of individual and organizational factors that influence behavioral change to isolate a simulation's impact. Yet according to participant evaluations, this simulation is effective in helping identify leadership behaviors and skills, and put them into practice by considering alternate perspectives, and logistical coordination.

Conclusion

Simulation is no longer limited to technical skills and can be a dynamic way to develop leadership skills. By providing a practice field for learners to replicate common workplace challenges, test new solutions and receive immediate feedback, organizations can accelerate the learning process for current and future leaders.

> "When mission, values, actions, structure, and accountability are synchronized, amazing outcomes happen opening the way to successful interventions."

Leadership Culture by Design

By Matthew J. Painter

Does your organization have a leadership culture? A leadership culture has a certain interplay of mission, values, actions, structure, and accountability at every level. When synchronized carefully, the interplay results in a culture marked by high employee engagement and organizational performance. As an OD practitioner, I often find that organizations are not effective because they do not have this synchronization, and this is also why our interventions fall short. To mitigate this problem, there is a roadmap that can help us foster a leadership culture and it should be considered before other interventions take place.

The roadmap starts with understanding culture. Culture is complicated and there are many perspectives. Organizational culture guru MIT Professor Emeritus Edgar Schein, defines culture as "a pattern of shared basic assumptions ..., which has worked well enough to be considered valid and therefore, to be taught to new members as the correct way to perceive, think, and feel ..."

Culture is a reinforcing mechanism— whether it's good OR bad. For example, we act in accordance with the reinforcing mechanism of culture because that's the way things work here. Efforts to change an organization's culture must include an evaluation of the values that drive the actions. These values should drive behaviors toward the organization's mission or purpose as well its operations. Oftentimes, what an organization says its values are, its espoused values, do not drive actions or behaviors. For example, an organization may say it values innovation, but in practice new ideas are unsupported or criticized.

Since culture is pervasive and reinforcing, it is very hard to change and also presents an opportunity. Human Resources cannot fix culture any more than a new training program or quality initiative can if senior leaders are not involved. In a synchronized leadership culture, senior managers actively manage culture, set the stage for what is rewarded and punished, and model what is acceptable in the organization. If senior leaders help define the new vision, are hungry to change, and take deliberate action, the organization can take great strides toward the new culture in a short time. The executive team must be ready and should partner with OD practitioners on this culture-forming process.

Start with Vision and Mission

Vision is the foundation as it is the ultimate driver. Vision is future focused and describes where and what the company wishes to be in years to come. The mission is 'why' an organization exists. It focuses on the present and describes the business of the organization. Ensure there is clarity and alignment on vision and mission throughout the organization.

Key questions:

» What is our ideal future state?
» What are we really trying to accomplish?
» How do we add value to the market?

Define the Values

Values represent what is important and dictate how an organization operates. To design a culture of leadership, an organization needs to define how values are put into action.

In a synchronized leadership culture, senior managers actively manage culture, set the stage for what is rewarded and punished, and model what is acceptable in the organization. If senior leaders help define the new vision, are hungry to change, and take deliberate action, the organization can take great strides toward the new culture in a short time. The executive team must be ready and should partner with OD on this culture-forming process.

Key questions:

» How do we want to operate?
» Are our espoused and real values the same? How do we know?
» Do our values support how outcomes are achieved?

Describe Actions

Values result in actions. Actions are how we execute on our values to achieve our mission. For example, what actions result in trust?

Key questions:

» What does each value look like in action?
» Is there stakeholder agreement on those actions?
» Have the values, actions, and associated behaviors been communicated (i.e. expectations set) with all stakeholders?

In the absence of clarity, each person interprets behavioral norms differently based on cues from the top leaders. This creates confusion, cultural disparities, and promotes clashing micro-cultures. Everyone in an organization needs to know what the expectation is regarding each value. An organization's senior leaders must clearly articulate an expectation to follow to have a cohesive leadership culture.

While it might be tempting, we cannot possibly dictate or express every behavioral norm. For example, an article in *Strategy + Business*, '10 Principles of Organizational Culture,' suggests focusing on a few critical behaviors. The goal of narrowing the focus is to provide sufficient understanding or detail to consistently execute on actual values without confusion. "Organizational Culture," (Katzenbach, 2016).

Create Structure

Once values and actions have been defined, there must be reinforcing mechanisms in place to ensure they are communicated to all stakeholders and executed consistently.

Key questions:

» Are we recruiting, hiring, onboarding, and promoting based on our values?
» Are all stake-holding groups getting the same message?
» What reinforcing talent structures promote a culture of values-based actions?

The task for senior managers is to devise a strategy to communicate values and accountabilities, and consistently communicate this new standard. Communicating new standards should be replicated at every level through detailed, top-down workshops.

Emphasize Accountability

Senior leaders role-model and reinforce accountability.

Key questions:

» What accountability mechanisms are in place to hold people to defined actions?
» Does every employee have a role-model for these actions during culture change?
» Are employees empowered and have the psychological safety to act?
» Is accountability of values-based actions a standard practice?

If an organization values innovation, look at how it is reflected in action. If innovation is espoused but innovators are punished, then status quo is the true value. In order to hold people accountable, leaders must role-model and encourage behavioral expectations. This also includes willingness and diligence to have difficult performance conversations up to and including termination.

Assess Outcomes

Evaluation is an important step in any intervention. If progress is made in a way that is contrary to its values, outcomes are at risk of being short-term. Ultimately, the misalignment between values and actions may derail success. If the desired outcomes are not realized, then we are measuring the wrong things (not aligned to our values) or there is a breakdown at some point in this process. Get to the root cause and start at the top.

Key questions:

- » Is the organization making progress towards its vision and in what ways?
- » Are the process and the values in alignment?
- » Are we measuring the right things?

Conclusion

An intentional culture change with leaders growing leaders at every level creates a culture of leadership meant to drive a healthy organization. When mission, values, actions, structure, and accountability are synchronized, amazing outcomes happen opening the way to successful interventions. Executives and OD practitioners alike should first think about the type of culture that exists before attempting to execute short-lived remedies.

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> “The timing may be right to dismantle archaic bureaucratic structures and practices that trace back to the industrial age. Is self-management a viable alternative?”

The Imperative for Adaptive Organizations

Is Self-Management a Viable Model?

By MJ Kaplan

Meg Wheatley and Myron Kellner-Rogers made the case in a 1996 article that self-organization is the ‘irresistible future of organizing’ because work systems, like nature, are complex and must adapt as circumstances evolve. The metaphor of organizations as living systems gained popularity, but self-management did not follow suit at the same pace. The context for accelerating this framework maybe more relevant today as forces such as globalism, emergent technologies, changing workforce demographics, and market volatility conspire to drive enterprises to reconsider basic assumptions about how to design work.

Self-management addresses two fundamental business imperatives:

1. to unleash the talent, creativity and engagement of people and teams to innovate and produce value; and
2. to design a highly adaptive architecture and culture to respond to unpredictability and complexity.

Survival itself may be at stake as companies struggle to adapt to competitive pressures. Corporate longevity has shortened from 61 years in 1958 to 24 years in 2016, according to Innosight. At the current churn rate, about half the S&P 500 will be replaced in the next decade. The timing may be right to dismantle archaic bureaucratic structures and practices that trace back to the industrial age. Is self-management a viable alternative?

W.L. Gore and The Morning Star Company

W.L. Gore and The Morning Star Company were early adopters of self-management. Each company developed unconventional approaches to work that have resulted in decades of success. They share core principles:

- » clear purpose unifies and enables employees and teams to operate independently;
- » decentralized teams have extensive decision rights and accountabilities;
- » employees are responsible for their work, behavior and results – not bosses;
- » teams operate as close to the customer as possible with end-to-end accountability and persistent feedback loops; and
- » culture is highly people-centric, emphasizing shared responsibility, creativity and passion.

Bill Gore had a vision for a non-hierarchical company and a ‘conscious culture’ when he founded W.L. Gore in 1958. The company’s ‘lattice’ structure combines with a culture that values individual freedom and fairness to encourage experimentation and empowerment. There are no titles or bosses and compensation and promotions are determined by peer rankings. The company generates $3 billion annual revenues and its 10,000 Associates are part owners through a stock plan. W.L. Gore has demonstrated that a version of self-management can scale and grow for decades.

The Morning Star Company, the largest tomato processing company in the world, adopted self-management in 1990. The company boasts strong growth, solid profits and low employee turnover. These impressive results are in a blue-collar industry with a reputation for treating workers as expendable costs rather than valued assets. The workforce swells from 600 full time employees to 4,000 seasonal workers during the harvest. Notably, the highest-paid employee makes just six times what the lowest-paid earns. This ratio contrasts CEO pay at S&P 500 firms that is 361 times higher than the average worker. The Morning Star Company has two fundamental principles: no one has power or coercion over anyone else and people must keep their commitments to each other. Policies and practices reinforce these principles. No one at the company has a boss or title. Employees negotiate and set individual responsibilities with their fellow workers. The Colleague Letter of Understanding (CLOU) is a personal statement that employees write to document their commitments. Associates who are affected by someone’s work must accept the CLOU before it proceeds. The CLOU consent process balances individual autonomy and collective coordination.

Personal Experience at Loomio and The Ready

I work with two companies that are self-managed, Loomio and The Ready. I’ve gained first hand experience that it takes commitment, openness, comfort with failure, and humility to apply these principles and practices. Loomio is a worker-owned cooperative that produces open-source software for collaborative decision-making. I was on the team for three years and joined the board in 2017. Loomio was a career pivot for me after 25 years as an OD consultant. I took the leap from consultant to social entrepreneur after writing a case study about Loomio and being inspired by the bold vision to run the company collectively.

Loomio is owned and managed by members. Project teams identify short-term deliverables during disciplined, bi-weekly meetings. Retrospective meetings take place regularly to assess results, learn and revise work rapidly. Team composition adjusts as needs change. People assume roles rather than jobs. Without managers, team members support each other through a stewarding system so everyone has an ally to work through challenges. Regular retreats contribute to the yearly cadence, creating space for reflection and planning as well as fun and renewal.

Self-governance drives many of Loomio’s positive results:

- highly engaged, independent and versatile team members;
- rapid, customer-centric product development using agile methodologies;
- customer satisfaction based on persistent feedback loops and exceptional service;
- lean operations;
- strategic partnerships that amplify reputation and reach;
- global growth responsive to emerging trends; and
- resilience, a critical factor for start-up survival.

Last year I joined The Ready, an organization transformation consultancy. The Ready is also a self-managed network. Most of our clients are large legacy companies still mired in dysfunctional silos and command-and-control culture. Leaders engage us because they appreciate the gap between their company’s enduring bureaucracy and the imperative to become nimble. The OD journey begins when executives and intrapreneurs – we call them “insurgents with influence” – are ready to challenge deeply entrenched mindsets. We start small. Executive sponsorship is always critical, but our approach to change happens inside-out rather than top-down. Teams identify primary tensions and commit to pilots to experiment with new practices and behaviors. Change cascades team by team.

Decentralized teams unleash the collective talent and capabilities of the group, minimizing burdensome and costly oversight. Teams that are decentralized with substantial autonomy demonstrate high energy, engagement and accountability that translate to positive results. Distributed teams also eliminate organizational debt – processes that drain the bottom line such as layers of approval and dysfunctional meetings. The cost of unproductive meetings alone is staggering – more than $37 billion per year in the U.S. When teams have authority to choose their priorities, productivity, creativity and morale improve.

Decentralized teams unleash the collective talent and capabilities of the group, minimizing burdensome and costly oversight. Teams that are decentralized with substantial autonomy demonstrate high energy, engagement and accountability that translate to positive results. Distributed teams also eliminate organizational debt – processes that drain the bottom line such as layers of approval and dysfunctional meetings.

Conclusion

Businesses face more and more unpredictability that emanates from market volatility, socio-political instability, dramatic weather events, and global interdependence like a Federal Government shutdown, California fires, and cyber attacks. Complexity instills persistent internal uncertainty as well. Adaptability must be a core competence to respond swiftly and astutely to unplanned circumstances. Highly functional teams of teams operate like a nervous system. They act locally to serve the interests of the company as a whole as circumstances shift. Self-managed teams drive improved productivity, customer satisfaction, employee engagement and retention, and innovation. They may be the key to organizational resilience to evolve amidst micro and macro changes.

Transforming a company to become a network of teams with significant autonomy is an emergent process. No organization's journey is the same nor are the design, culture and practices. Self-management is not a panacea. Wheatley and Kellner Rogers suggested that organizations can learn greatly from nature. With certain conditions such as shared purpose, open information, diversity and emergent learning, we may discover that self-management is irresistible.

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> "By setting much clearer expectations up front and reframing discussions as healthy tension rather than unhealthy friction, I finally got the frequency of true conflict to a manageable level at work."

Employees Need Us to Prevent Conflict, Not Just Resolve It

By Liane Davey

As a team effectiveness facilitator, I spend most of my days helping teams work their way through unpleasant conflicts. The underlying issue has often been left to fester beneath the surface, creating what I call a "conflict debt." By the time I arrive, that conflict debt has cost the team in productivity and compounded into disengagement and eroding trust. Once a conflict has been avoided for a while, it is time-consuming, delicate work to extricate the team from the mess. Of course, there are also cases where the conflict has already erupted. Then the challenge is unwinding entrenched views and mending the hurt feelings.

Our Insufficient Answer

For the most part, the OD answer to unproductive conflict has been to teach people how to have conflict more constructively. We've been fortunate to have excellent books and training roadmaps like Difficult Conversations, Fierce Conversations, Crucial Conversations, and Radical Candor. I like each of these approaches and call on their insights and techniques frequently.

The problem is that we are building a skillset that many people are loath to apply. Yes, it's true they lack the skills to work through uncomfortable conversations. They also lack the *will*. The result is one of two scenarios: 1) they smile, nod, and leave our conflict training with absolutely no intention of ever applying what they just learned; or 2) they give productive conflict the ol' college try but quickly become exhausted and overwhelmed by the gumption it takes to face so many uncomfortable situations head on.

Instead, our focus could be on reducing the need to have uncomfortable conversations. That's where my work has taken me: How do we, as OD practitioners, do things that will help employees face fewer unpleasant and uncomfortable conflicts? I'll focus on two opportunities to reduce unpleasant and unproductive conflict in the workplace.

Neutralize Potential Conflicts

The frenetic culture in many organizations causes leaders to shortchange upfront planning to get things moving faster. The irony is that failing to clarify expectations actually slows things down and also sets up an uncomfortable dynamic (i.e., one of judgment, disappointment, and negative feedback).

We can prevent these misunderstandings by helping leadership teams clarify roles and set expectations from the outset. I use a process that works teams through the following questions:

1. What is the value you are expected to add in the value chain?
2. What do you need from your leaders to be able to add your full value?
3. What can you delegate to your direct reports?
4. What are your expectations of high quality work from individual contributors?
5. What value are front-line managers expected to add in first-level review?
6. What value does your team add even if front-line managers have done a great job?
7. What types of issues or decisions must you escalate to the layer above?

Answers to these questions can be used to address several very common sources of team conflict and dysfunction such as: an absentee boss delegating without providing direction or context, a micro-managing boss disempowering the team, a management layer unable or unwilling to delegate, and resistance or backlash to feedback from above. I have seen this conversation surface many misunderstandings and provide the framework for conversations that set up everyone for future success.

> *Bottom line: If everyone is clear on their roles and the value they are expected to add, they will be less likely to disappoint, or be disappointed by others in the group.*

Normalize Required Conflicts

The language and metaphors we use to talk about teams in the workplace also set up conflict issues. Our images of teams are all about getting along and going in the same direction, not about conflict. My personal favorite, the one that drives me completely mad, is the office poster with rowers making serene and synchronous ripples in the calm blue water. It has the word *"teamwork"* in big letters below. If that's hanging on the wall of the conference room, it's no surprise people have problems with conflict.

Practitioners can normalize team conflict by using an exercise to map out the unique value of each role and the tensions that *should* exist among them. For each role, ask:

1. What is the unique value of your role on this team? What are you paying attention to that no one else is? What would we miss if your role wasn't here?
2. Which stakeholders do you focus on most in your role ? Who do you serve? Who measures your success?
3. What is the most common tension you put on team discussions? What one thing do you have to say in your role that frequently makes others bristle?

As each team member answers these questions, they see how their different roles are *supposed* to be in tension with one another.

I particularly like to use this exercise to open up discussion such as: someone who is advocating too hard for their narrow point of view; a team member who has stopped adding unique value and has left the team exposed in some way; an imbalance with multiple incumbents on a team in one role who overpower the single-incumbent roles; and, conflicting performance objectives that encourage siloed thinking.

With heightened awareness and a shared language, your client will start to realize that much of what they have been interpreting as interpersonal friction has actually been perfectly healthy role-based tension.

> *Bottom line: Conflict and tensions are not the antithesis of cross-functional teams, they are some of the main benefits.*

Prevent Unproductive Conflict

I admit much of my work on productive conflict has been to meet my own needs. I've always been conflict averse and early in my career I paid the price for getting into conflict debt. I saw the impact on my business, my team, and my stress levels. I got a little better as I learned the skills of productive conflict, but conflict still took a lot out of me.

The secret was learning how to prevent the vast majority of team conflicts in the first place and share them with others who are conflict-avoidant like me. By setting much clearer expectations up front and reframing discussions as healthy tension rather than unhealthy friction, I finally got the frequency of true conflict to a manageable level at work. Now when I need to gather my strength and courage to address conflict, I can. I'm just glad those situations are now few and far between.

Liane Davey, PhD, is the *New York Times* bestselling author of *You First* and T*he Good Fight: Use Productive Conflict to Get Your Team and Your Organization on Back on Track*. She can be contacted at *Liane.davey@3coze.com* or *@LianeDavey* on Twitter.

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- Education directory of OD-related degree and certificate programs.
- Catalog of OD professional development and networking events.
- Bookstore of titles recommended by OD Network members.
- Links to some of the best OD resources available.
- E-mail discussion lists that allow OD practitioners worldwide to share ideas.
- Lists, with contact information, of regional and international OD networks.
- Case studies illustrating the value of OD to potential client organizations.