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Resources for Getting Appreciative Inquiry Started

An Example OD Proposal

By David L. Cooperrider

OVER THE PAST several years people have been asking more and more for practical tools that will help them transform their OD consulting practice away from the diagnostic problem-solving approaches toward more appreciative inquiry methods. One of the most common requests (when I do workshops on Appreciative Inquiry) is for examples of proposals – proposals that set the stage for OD contracting. This article presents a “composite picture” of several actual proposals that have led to major OD work. The “AMX” proposal represents the best of several projects that combine Appreciative Inquiry and Future Search. The corporate names used in this composite proposal are fictitious.

What I like most about the “whole system” change process spelled out here is that it completely lets go of problem solving. In my view, the problem solving paradigm, while once incredibly effective, is simply out of sync with the realities of today’s virtual worlds. Problem solving is painfully slow (always asking

people to look backwards historically to yesterday’s causes); it rarely results in new vision (by definition we say something is a problem because we already implicitly assume some idea, so we are not searching to create new knowledge of better ideals, we are searching how to close gaps); and, in human terms, problem solving approaches are notorious for generating defensiveness (it is not my problem but yours).

Organizations are centers of human relatedness, first and foremost, and relationships thrive where there is an appreciative eye – when people see the best in one another, when they can share their dreams and ultimate concerns in affirming ways, and when they are connected in full voice to create not just new worlds but better worlds. Douglas McGregor was convinced of the power of positive assumptions about human beings. The AMX proposal is an example of an OD proposal that, in practical ways, mobilizes the appreciative process to the fullest extent I know how. The proposal was written the week Con-

gress passed legislation that would deregulate the telecommunications industry, changing the rules that guided the industry for over 60 years. AMX, one of the organizational giants, was literally in chaos with thousands being laid off. Facing the largest whole system transformation in their corporate history, the CEO asked, "How can we connect everyone to the adventure of creating the new century telecommunication organization?"

THE AMX CONNECTS! PROPOSAL

Accelerating Organizational Learning For
Winning the New Century

Background

During the past several years, AMX has positioned itself to take advantage of what may prove to be the greatest single business opportunity in history: the creation and management of the Information Superhighway Part of this positioning has been the clear articulation of the new strategic "ABC" vision and reaffirmation of the goal of being the most customer responsive business in the industry. Along with the vision has come action. There are literally hundreds of successful new initiatives – reengineering, product innovations, new alliances, public relations campaigns, employee empowerment strategies, etc. – all combining to give birth to the new AMX. The entire system is in the thick of fundamental organizational transformation, and exists in a world where the economic, technological, and regulatory foundations of the business have radically changed. It simply is not the same business it used to be.

Important questions, therefore, are many: How can leaders accelerate positive transformation where the proof corporate change is revolutionary in result and evolutionary in execution? How can people reduce the time lag between exciting organizational innovations (initiatives, large and small, that illustrate what the new-century AMX organization can and should look like) and organizational storytelling, sharing, advocacy and mass learning from those innovations? How will employees sustain, over a period of years, corporate confidence and faith in AMX's abilities to make fundamental change even in the midst of inevitable setbacks? How can AMX complement its problem-solving culture with an appreciative mind set that selectively sees, studies, and learns from every positive new development? Can AMX develop and reclaim an oral tradition of storytelling that connects people across corporate generations and that propels the speed and spread of good news? How can AMX leaders decisively connect people throughout the system to the Future Search, and engage everyone in a "can do" way as social architects of the new century organization – a transformed organizational entity that lives its vision in all its structures, systems, strategies, management behaviors, job designs, partnerships; everything that the company does.¹

Purpose

■ The mission of AMX Connects! is to accelerate positive

whole system transformation by actively connecting people to the "ABC" vision through the practice of Appreciative Inquiry.

Objectives

- To bring the "ABC" vision alive for 67,000 people at AMX by engaging a critical mass of people in an Appreciative Inquiry into the most positive and compelling organizational innovations, practices, and traditions that (1) best illustrate the translation of the "ABC" vision into transformational action and (2) provide an anticipatory glimpse into the kind of organization AMX should and might become in the new century.
- To deliver tangible follow-up to the 1995 Leadership Workshop (which builds on the momentum of the Aspen, Colorado success where 140 regional and corporate executives were introduced to the theory of Appreciative Inquiry), and tie together executive education with real-time organization transformation. By co-leading the Appreciative Inquiry/Future Search process at the regional and corporate levels, the "action learning" design will contribute as much to leadership development as it does to organization development.
- To augment AMX's problem solving culture with an appreciative mind set that provides a paradigm shift in ways of looking at managerial analysis of all kinds – e.g., new options for approaching organization analysis, customer focus groups, strategic planning methods, reengineering studies, employee surveys, performance appraisal processes, public affairs methodologies, diversity initiatives, benchmarking approaches, merger integration methods, and many others.
- To build an affirmative atmosphere of hope and confidence necessary to sustain, over the next several years, the largest whole-system transformation in the company's history
- To discover and pioneer connections between Appreciative Inquiry/Future Search Conference methodologies (often involving hundreds of people interactively) and the voice, video, and data capabilities of AMX's advanced teleconferencing technologies. The potential for building connection and commitment to the future directions of the company are enormous: corporate visioning, advocacy, and good news telling will not be isolated to a few technical gurus, senior visionaries, or communication messengers, but will engage potentially thousands. When it comes to bringing vision alive, process is just as important as product. People want to be listened to and to be heard. The large group conference methodologies discussed below are truly impressive in their ability to cultivate the thrill of being a valued member in the creation of new and exciting futures.

Leadership

- AMX Connects! will be led by President Sheldon Abrahms; Susan Taft, Vice President Public Affairs; John Williams, Vice President of Organization Development, and the 140 individuals involved with the recent Leadership Conference. David L. Cooperrider and Associates from Case Western Re-

serve University's Weatherhead School of Management will provide outside guidance.

Timing

■ The appreciative organizational inquiry and learning process will be formally inaugurated in 1996 with a workshop on Appreciative Inquiry. Participants will be the leadership group of 140 through 1996 and 1997. Appreciative Inquiry will be introduced and Future Search Conferences completed in every region of Operations. Results from each of these will form the basis of a synthesizing corporate-wide Future Search in the spring of 1998 and will culminate with a future report – Images of The New Century AMX Organization – to be issued by the 'I think tank' group of 140.

THE ABC'S OF APPRECIATIVE INQUIRY

In a typical Appreciative Inquiry, the process will lead up to a major Future Search Conference, two or three days in length, where a whole organization or representatives of the whole (anywhere from 100 to 1,000 people) will come together to both construct images of the system's most desired future and to formulate creative strategies to bring that future about. Often, an organizational model like the 7-S framework will serve as a template for building "possibility propositions" in each of the key organizational design areas - for example, what will the ideal organizational structures or systems look like in the future (the conference organizers will specify how far into the future to think... usually 3-5 years out). The stages for bringing the whole thing off productively typically follow the ABC sequence:

- A – Appreciative understanding of your organization (from the past to present);
- B – Benchmarked understanding of other organizations (exemplary models to learn from); and
- C – Creative construction of the future (sometimes called the Future Search Conference).

One possible design would be to launch, in each of the regions, a broad-based set of Appreciative Inquiry interviews leading to a regional Future Search conference. The design of the interviews would stress storytelling and study into the "ABC" vision in action – examples of being "the easiest company to do business with"; times when people feel truly "empowered", examples of new forms of "servant leadership"; illustrations of how AMX is "winning in the new world"; etc. All of these interviews would be done face-to-face by AMX managers and employees within the region. All the best quotes, stories, and illustrations would be compiled into a regional report and used to inspire a regionally based Future Search Conference into "AMX In the New Century: Images of Organizational Possibility". At the Future Search Conference, with 100 to 2,000 people, participants meet for two or three days to design the organization's most desired future and formulate creative

strategies to bring that future about. The key product is a planning document made up of "possibility propositions" describing the collective hopes and dreams people feel inspired to bring about. In the search conference mode, people learn to think of the future as a condition that can be impacted and created intentionally out of values, visions, and what's technically and socially feasible. Such purposeful planning greatly increases the probability of making the desired future come alive. What is unique about the Future Search Conference method as described here is (1) its Appreciative Inquiry Foundation (often experienced as a liberating personal paradigm shift for people); and (2) the broad base of authentic participation that is demanded.

We live in a world of relentless economic and social change, based on 21st century technologies. Now we struggle to discover management methods equal to the complexity. The power of Appreciative Inquiry and the whole system focus of Future Search combine, our experience shows, to both accelerate and sustain change. Transformation happens faster, at lower cost, and with more inspired collective follow-up than older, more piecemeal or fragmented approaches. Studies show that one well facilitated Future Search with "everybody" – a metaphor for a broad cross-section of stakeholders – will produce more whole systems learning, empowerment, and feelings of connection around business vision than hundreds of fragmenting small group meetings.

The Future Search Conferences, held in each of the regions, would then be capped off with a corporate-wide Future Search of the top 140, the leadership group and key stakeholders representing the whole. If held concurrently in each of the ten regions, the potential for linking up via teleconference for positive story-telling across regions might add a creative and powerful integrative dimension. Literally thousands could be involved in real-time inquiry and transformational planning around the "ABC" vision. Each Future Search would involve something like the following:

1. A conference coordinating committee at the regional level of 4-6 people would meet to plan dates, time, location, meals, group meeting tasks, and who should attend. The goal is to get "the whole system" in the room, or at least strong representation of all those that have a clear stake in the future of the organization. Often then, this includes people "outside" of the community members, partner role is organization like customers, organizations, etc. The ground that whomever comes to the Future Search must be there for the whole meeting and has the opportunity for full voice in the deliberations.
2. Participants (from 100 to 1000 people) sit in groups of eight to ten, with flip chart paper or a chalkboard available. Depending on the focus and assigned tasks, groupings may vary during the conference. All output from small group discussion is recorded, all ideas are valid, and agreement is not required to get ideas recorded.
3. The conference has four or five segments, each lasting up to

- a half day Each segment requires that people (a) look at or build a data base; (b) interpret it together; (c) draw conclusions for action.
4. The first major activity focuses on macro-trends likely to affect the organization in the future. Each group is asked to make notes on significant events, changes, and trends they see merging by looking at each of the past three decades from three perspectives: significant changes and events that happened at the world, personal, and institutional/industry levels over each of the past three decades. Each table reports to the total group, and a facilitator notes trends. The total conference then interprets the most positive macro-trends – those trends that indicate opportunities for building a better organization, society, or industry Even the macro trends that appear negative or threatening often generate creative thinking on hidden opportunities or possibilities for creating the future people want.
 5. The second major activity focuses on the appreciative analysis of the organization. Each group has a copy of the Appreciative Inquiry report that was compiled earlier, with quotes, stories, and comments from all the appreciative interviews. Three questions are then posed to each group: (a) What are the most outstanding ~ moments/stories from this organization's past that make you most proud to be a member of this organization? (b) What are the things that give life to the organization when it is most alive, most effective, most in tune with it's over-arching vision, etc. (make a list of up to ten factors)? and (c) Continuity: What should we try to preserve about our organization – values, traditions, best practices – even as we change into the future? Again, consensus is not needed as the results are displayed and discussed by the whole conference.
 6. The third major activity focuses on the benchmark understanding of the best practices of other organizations. Each group is given the report from benchmarking studies and is asked to make a list of the most interesting or novel things being done in other organizations. The list should include things that are interesting, novel, or even controversial and provocative. The list is not an endorsement of any of the practices – it is simply a compilation of interesting or new ideas and practices. There is to be no discussion of whether or not to adopt the practices in the present organization. If benchmark studies have not been done as part of the pre-conference Appreciative Inquiry process then group members should generate the list from things they have seen in other organizations have heard or read about. Reports are made to the whole conference and people are asked to comment on the most interesting or novel ideas.
 7. The fourth major activity focuses on the future, especially it's creative construction. New groups are formed and are given a half day to develop a draft of a preferred, possible future. The focus is on translating the business vision into inspired organizational vision. The focus is on the organizational dimensions of the future. Using a model like the 7-S model or a homegrown model of organizational design elements, groups develop a set of "possibility propositions" of the ideal or preferred future organization (3-5 years into the future).
 8. The fifth major activity focuses on the next action steps. Groups are then asked to reflect on what has surfaced and, depending on the nature of the groupings, to make three lists of suggested action steps: commitments they want to make as individuals to move the vision forward; action steps their region, and work unit, might take; and things the organization as a whole might do. Action proposals are shared in a total group session and a steering committee is formed to discuss proposals for the total organization, prioritize themes, and prepare a report to be presented at the capstone Future Search.

WHOLE SYSTEM INVOLVEMENT

In a comprehensive study of successful habits of visionary companies, Stanford University researchers Jerry Porras and James Collins put it simply:

It's become fashionable in recent decades for companies to spend countless hours and sums of money drafting elegant vision statements, values statements, purpose statements, aspiration statements, mission statements, purpose statements, objective statements, and so on. Such pronouncements are all fine and good – indeed, they can be quite useful – but they are not the essence of a visionary company Just because a company has a "vision statement" (or something like it) in no way guarantees that it will become a visionary company! If you walk away from this book thinking that the most essential step in building a visionary company is to write such a statement, then you will have missed the whole point. A statement might be a good first step, but it is only a first step.

Taken from *Built to Last*, 1994

Translating core vision into everything the company does requires ways of connecting everyone – evoking ownership, commitment, understanding, involvement, and confidence in the vision's promise. This proposal provides a do-able way to proceed: it is logistically possible and financially feasible to design a process where all of operations (67,000 people) are involved. Everyone, at a minimum, would be a participant in the Appreciative Inquiry as an interviewer, interviewee, or both. And up to 10,000 would participate in at least three other engaging activities of learning and doing: workshops on Appreciative Inquiry (one day long); conducting the interviews (doing 5-10 interviews); and one or more Future Search Conferences (three days in length). The working assumption, at the regional level, is that approximately 1,000 people would participate in a day long introduction to Appreciative Inquiry They would subsequently be charged with completing 5-10 interviews apiece, and then would serve as delegates to the regional Future Search Conference.

MEASURING FOR RESULTS

AMX Connects! will measure its results by asking how each step, and the whole process, achieves discrete, agreed upon objectives. This is a demanding approach that will force everyone involved to focus on how the method of Appreciative Inquiry actually affects the way people think, communicate, and act in relation to the process of whole system transformation. Some of the areas of expected impact include:

- Reduction in the time lag between organization innovations (innovations that are consistent with the “ABC” vision) and their spread throughout the corporation.
- The strengthening of a “can do” climate of hope and confidence in the corporation’s ability to manage the transition and realize its transformational goals.
- Significant increase in the corporation’s positive internal dialogue about the future (e.g., less cynical and deficit oriented discourse; less fear; less negativity; more vocabularies of positive possibility; more rapid spread of good news developments).
- Development of a more appreciative leadership mindset and culture which provides managers with new options for dealing with corporate and customer surveys, re-engineering, strategic planning analysis, team-building, merger integration, performance appraisal and others.
- Significant increase in the feeling of connection to the corporation’s “ABC” vision at all levels and regions of AMX Operations.

SUSTAINABILITY

The telecommunications industry is going through a profound change that involves reassessment of economic foundations, technological infrastructures, organizational forms and processes, and managerial mindsets. The whole-system transformation being called for is both comprehensive in scope and fundamental in nature. There are a number of things, therefore, that must not be overlooked. First, we must not overlook the reality of people’s resistance to such profound change – to even thinking about it – since it involves challenge to the inner assumptions which have become an inherent part of the culture and individual ways of constructing the “way things ought to be”. Nor should we fail to note that the coming changes will bring about a great deal of fear and uncertainty; in fact, keeping down the fear is probably the greatest challenge of all, since only with low levels of fear can people see clearly and take the right actions. But perhaps most important is the need to address questions of sustainability. What will make the appreciative inquiry/future search methodologies as outlined earlier more than just a one-time high? What will be done to sustain learnings at regional, corporate, and individual levels? Our own evaluations of Appreciative Inquiry and the evaluation studies of large group Future Search Conferences suggest the following

five strategies for long term sustainability.³

(1) **Skillbuilding: The Process of Organizational Transformation is a School for Leadership Development.**

In many respects, there is really no such thing as organizational transformation, there is only individual transformation. Because of this, especially with the leadership group of 140, every major session will involve both organizational analysis and personal planning as well as skillbuilding modules around all the phases of appreciative inquiry and the methods of facilitating interactive, large group meetings. In GE’s recent whole system “Workout Program”, for example, it was found that the most important outcome of the initial large group Workouts was managerial skill development – the Workout conference methodologies have become a way of life for almost two-thirds of the work units. Of course, Chairman and CEO John F Welch played a major role in making the new participatory methods a priority. He was notorious in his surprise appearances at local Workout sessions and was consistent in his message: ‘building a revitalized “human engine” to animate GE’s formidable ‘business engine’ “

(2) **Extending Appreciative Inquiry Into Change Efforts Where There Will Be High Value-Added.**

Already there are plans being made by various AMX staff to use the appreciative methodologies to re-think and revitalize organization development practices like corporate surveys, customer focus groups, public affairs projects, etc. These efforts at extending Appreciative Inquiry should be made more systematic and priority driven. Our suggestions is that we should prioritize no more than five major extensions of Appreciative Inquiry – for example AI’s contributions to merger integration methods, organizational surveys, process re-engineering, and diversity initiatives. Each of these efforts should be carefully documented and written up later in the form of a practitioner manual (e.g., a merger integration manual, or a customer focus group manual). Appreciative Inquiry involves a paradigm shift that will vitally transform, for example, how mergers or diversity initiatives are approached. The key, early on, is to prioritize several areas where there will be a high value-added contribution and, in those areas, take the appreciative approach to the hilt.

(3) **Customized Regional Follow-up Consultation.**

In preparation for the Future Search Conferences, and in response to needed follow-up at the regional level, there will be a consultant/facilitator team made up of internal AMX professionals (e.g., OD, HR, PA) and a specialist from Cooperider and Associates. This consultant team will commit, up front, to ten days of consulting follow-up at the regional level to tailor-make a response to the initiatives generated at the Future Search Conferences. By definition, the customized response is unknown at this time, but our experience shows that the commitment to ten days of follow-up consultation is the single most important thing that can be done to ensure sustainability. In a recent study of Apprecia-

tive Inquiry with 25 organizations, it has been found that ninety percent of the organizations are continuing with the appreciative methodologies, some two years after the start (see Wilmot, 1995). An essential attribute of the sustainability was that in each case, all ten days of promised follow-up consultations were in fact used. Likewise, the follow-up was completely at the initiative and request of the organizations themselves. Each organization had to “apply” in writing for the follow-up: what were the goals, what kind of support did they need facilitation, training, outside evaluation, retreat design, organization analysis, one-on-one personal counseling). The lesson is simple we must plan for sustainability from the beginning, and the commitment to the customized follow-up opportunity is critical.

- (4) **Advanced “Internal Consultant “ Learning Partnership.** Each year there will be two special sessions among all internal AMX change agents that are involved with Appreciative Inquiry and the Future Search Conferences. The learning partnership will deal with advanced theoretical and practice issues, and will use clinical/field-based modes of learning. The purpose will be to build internal skills and competencies, to build a support network among AMX units and regions, and to make good use of the program’s evaluation studies for advanced professional development.
- (5) **Appreciative Inquiry “On-line”.** Already there have been discussions with specialists at AMX about how to accelerate the spread of innovations and good news storytelling by adding an Appreciative Inquiry protocol to the new AMX on-line suggestion program. An analogy here is useful: an ongoing Appreciative Inquiry will be to the “whole system transformation” what time-lapse photography is to the visible blossoming of an otherwise imperceptible flower. Putting Appreciative Inquiry on-line is a very exciting venture that has yet to be done anywhere. There is no question the time is ripe for this to happen; and it makes sense that it would be inaugurated at AMX, where leadership in the positive human impact of advanced technology lies at the forefront of the corporate mission. One way to introduce the on-line approach would be to conceive of the 67,000 interviews as mini-training sessions in Appreciative Inquiry. After each interview, people would be given a short booklet with simple instructions on how to use the internal on-line “web page”. Stories and new images would be made available on a continuous basis. An award could even be established for the stories that best anticipate and give a glimpse of the new AMX, living its vision today. The implications of Appreciative Inquiry on-line are far reaching and exciting indeed. We are infants A when it comes to our understanding of the power of this kind of non-hierarchical information sharing and whole system dialogue. The results could be revolutionary.

In the course of developing the ideas described above, it has become clear that people at AMX have this hope that there’s a little window of opportunity for really responding to a

radically changed business environment. That window of opportunity, and the current season of hope being expressed, is going to last about as long as Sheldon Abrahms, in the early days of his new presidency, uses this occasion to boldly enroll everyone in the positive transformation. To make it all work we (as an internal/external team) will not only need to work collaboratively, responsively, and flexibly as a “learning organization,” but we also will need to be united around a shared revolutionary intent.

CONCLUSION

The relational, large group, participatory methods outlined here fly in the face of old hierarchical, piecemeal problem-analytic approaches to change. Likewise the appreciative paradigm, for many, is culturally at odds with the popular negativism and professional vocabularies of deficit that permeate our corporations and society at large. Most important, however, there are people, many people throughout AMX, that feel the time has come to make the “positive revolution” happen. These are the individuals that are just waiting to step forward and lead. The constructive, creative, and indispensable voices of the new AMX already exist. But their critical mass has yet to be legitimized. AMX Connects is about mass mobilization, it is about the is in full voice. It is internal about systematic creation of an organization that is in full voice. It is about transformation of the corporation’s dialogue. It is about creating, over the next several years of discovery and transition, a center stage for the positive revolutionaries. ■

FOOTNOTES

1. According to recent surveys by Yankelovich, 85% of Americans have lost confidence in the future. People report little confidence that current institutions and leaders will do the job. They see the gap between promised rhetoric about a better future and the continued breakdown, in the present, of many systems. Likewise the negative discourse and storytelling which dominates the media, politics, and the popular culture at large, is associated with increased levels of apathy among young and old, cynicism, fear, discrimination, and other damaging behavior. What is happening throughout society obviously has a spill-over effect in our corporations. Especially during times of major transition, ways are needed to rebuild essential connections, to renew hope, and to reinvigorate human creativity and leadership at all levels.
2. For an overview of the social constructionist theory behind the approach, see Cooperrider D.L. and Srivastva S. “Appreciative Inquiry Into Organizational Life” in Pasmore and Woodman (eds.) *Research in Organization Development and Change*. JAI Press, 1987. Also for more on the scientific studies of human behavior that provides a deeper logic for the appreciative approach see, Cooperrider D. “Positive Image, Positive Action: The Affirmative

Basis Organization” in Srivastva and Cooperrider’s *Appreciative Leadership and Management: The Power of Positive Thought in Organizations*. Jossey Bass Publishers, 1990.

3. See Wilmot, Tim (1995) “The Global Excellence in Management Program: A Two Year Evaluation of 25 Organizations Using Appreciative Inquiry” Case Western Reserve University For detailed analysis of large group methods and outcomes – from Ford Motor Company, First Nationwide Bank, SAS, Marriott, and Borning – see Jacobs, R. (1994) *Real Time Strategic Change: How to Involve an Entire Organization In Fast and Far Reaching Change*, San Francisco: BerrettKoeliler Publishers. For ten case studies of the Future Search methods see Weisbord, M. (1992) *Discovering Common Ground: How Future Search Methods Bring People Together To Achieve Breakthrough Innovation, Empowerment, Shared Vision, and Collaborative Action*, San Francisco: Berrett-Koehler.