

Consulting that unleashes the spirit

By Kathie Dannemiller, Sylvia James, and Paul Tolchinsky

It was the evening of day two in a three-day meeting, which involved all 250 employees of a plastics manufacturing company in upper state New York. At the end of that day, the 10-member planning team for the meeting, together with the plant leadership and us consultants had read the 250 evaluations from the participants to understand what were the most significant learning's from the day and advice for tomorrow. We discussed the key themes we heard and tweaked the agenda based on the meeting purpose that the planning team had created:

We went to dinner with Ivor, who was coordinating the logistics for the meeting. When asked, "How do you think it's going?" Ivor responded, "It's not going anywhere; it's still the same old stuff. As I move around the room putting papers on the tables, I keep hearing the same conversations going on, the same dissatisfactions being expressed. I don't think it's going to work this time."

Kathie responded, "That doesn't sound too good. Would you do me a favor and around 10 or 11 o'clock tomorrow morning, report back to me whether the same thing is occurring." The next morning, around 10AM, his message came back, "It is as though someone has thrown a switch! Everybody is suddenly focusing on the main themes around their table that they have been sharing across the room. I can hear the energy in the room. It's obvious that nothing is going to stop that energy, the interactions. All of a sudden there's a ground swell of energy, manifesting a ground swell of activity all directed at common goals. It's like magic!" And so it was: the paradigm shift moment!...the magic. The spirit of all 250 people, connected and seeing the same things, feeling the same things...and all knowing that we all know, connected in a truly different way. The human spirit that is unleashed, we believe, is caused by the group and each individual accepting and embracing the joy of hope and possibilities for change of my/our own yearning.

What Ivor is describing is the moment we have come to know well in our work with clients. It is a moment when all of the people in the room connect around "one-brain" (everyone seeing and knowing what each person sees and knows) and "one-heart" (everyone connected around combined yearnings for the future, for each person individually and around the organization as a whole). We came to realize that the feeling of that moment signals a "paradigm shift" on the part of each and every person in the room. When the paradigm has shifted, everyone sees the world anew, sees new possibilities unfolding, and each person will find they are unable to go back to where they had been before the shift. All of us as consultants doing this kind of systemic work can literally FEEL the difference in the room, just the way Ivor felt the difference.

We believe there are key consulting truths that cause the spirit to get loose in this way. Ron Lippitt, from his work in the 60s and 70s, taught us that purpose drives every intervention into a system. The first step always is to identify and agree on "what needs to be different in the world," or "what is the purpose of this intervention?" Once we have a compelling answer to that question, Ron taught us to ask and answer two additional important questions: Who needs to be gathered together in a room in order to achieve that purpose? And what conversations need to take place to ensure that we have the "right" answer? Our

consulting is always driven by these questions.

What we have been learning, as we plan and implement change in this fashion, is that the answers to all three questions need to be developed by the system itself, not by the consultants alone. We discovered that there needs to be a process for answering these questions in a way that will represent the whole systems' answers. We do this before we risk bringing together a critical mass of the organization. Therefore, we start every intervention by getting the client system to convene a true microcosm group of 15-20 people, who will be an accurate reflection of the organization. This microcosm must represent all of the diverse organizational levels, geography, longevity, cultures, and attitudes of people who have come through acquisition as well as people who have been there forever. We think of that group as the "DNA" of the whole organization. We ask to have these people work with us in a two day planning meeting. We design that meeting to unleash the spirit of that group and combine their knowledge and yearnings.

As part of that meeting, we ask individuals to tell their own stories--something on the order of the following: "Why I joined this company/organization?; why I stay?; what I've done that makes me proud?; what's been frustrating this past year?; and, what I believe needs to change in the ways we work together in the future if we are to become winners again?" We urge people to listen to each other's answers in a way that will enable them to see what the other sees. For this process, we owe a debt to people at the National Training Labs, and people like Ron Lippitt and David Cooperrider who developed the concepts of preferred futuring and appreciative inquiry. This microcosm group, which we call an Event Planning Team, then identifies common outcomes and reaches consensus on a purpose for the intervention: "What needs to be different in the world because we engaged in this effort?" From that purpose agreement, we are able to move together into planning the "conversations" needed to accomplish it.

We are aware that what happens to this group (our Planning Team) in the two days is that they connect around the head and heart in significant ways that foretell what will happen in the larger system as we move forward. Beginning with this Planning Team and based on the journey that group will have taken and the design they develop for the larger system, others in later meetings will also experience that paradigm shift, leading to new hope and new empowerment in the organization.

When we are working with the Planning Team to decide on the conversations that must take place in the intervention, we are reflecting Meg Wheatly and Myron Kellner-Rogers' concepts about systems thinking. Together with the Planning Team we decide on what needs to occur to deepen our common understanding of Information, Identity and Relationships in order to get the paradigm shift to happen. We believe that it is the interplay of those three things that releases the spirit and sparks the magic.

INFORMATION: We know that a common database is essential to create real community. Each of us arrives at a meeting or gathering looking at the organization from our own idiosyncratic perspective. As we put ourselves in the shoes of others, we broaden and deepen our perspective. The whole, of course, is larger than the sum of the parts. Together we can see the system in powerful, exciting new ways. We continuously generate data by moving constantly from the views of the individual to the shared views at a maximum-mix (microcosm) table in the room to the combined views of every person and all people in the room. Each of us and all of us will begin to see things we've never seen before and will be able to influence farther because we see farther. Combining our information unleashes broader possibilities and an expanded world-view.

IDENTITY: Identity of the individual, of a table, and of the whole room comes from the new thinking, the new insights. We are people joined together to bring about a change in the way we do our business, and this gives us new identity. A colleague of ours, Barry Camson of Israel wrote about this as follows: "People are fulfilling the need they have to have their voices heard and to belong to a community in which they believe. The processes start with existing perspectives. It moves beyond that to a collective knowing, a new ordering of old and new wisdom. It expands what people know as individuals into a common database of what people know collectively. This becomes the basis for their new identity." It matters, in new ways, that we are all together working toward common goals. Each of us sees ourselves in a different light, and who we see in that light excites and energizes us.

RELATIONSHIPS: The processes we use for the intervention work are based on the central importance of each person, and then of each person connected with the whole. We quote Peter Block all the time, saying, "You have to have connection before you can have real content that will be of value." The magic of the moment is when people experience themselves in "true relationship" which will feel to each of them, and all of them, as a trust between participants, based in it's foundation of knowledge that we all care and we all yearn to do the right thing. This state of being is created in the interaction; we certainly rarely come together with an expectation that it will happen. They see themselves in relationship with their co-workers and feel themselves connected to their organizations. Conversations have an important role in re-creating relationships and reconnecting people to their purpose and to the meaning in their lives and in their work.

Perhaps a story from a client-journey might help. In the fall of 1998, we were approached by a former client who had become the Human Resources Vice President for a restaurant chain in Texas: Taco Cabana. He asked if we could do some Whole-Scale™ work of the type we had done for him on his previous job. We agreed to work with 150 managers for three days in February, 1999. He was accustomed to our way of working toward “one-brain and one-heart” and understood the need for a microcosm planning team. In January the consultants met with a maximum-mix group of 16 managers from different locations and different levels who were all part of the organization, a wonderful Tex-Mex restaurant chain in Texas and Oklahoma. We worked for two days with this group, bringing them together around a compelling purpose for the three-day event, as follows:

- To work together to:*
- *Develop a shared picture of the Cabana experience for customers and employees*
 - *Create a common purpose that would unite each of us and all of us in knowing how important we are to its success*
 - *Agree and commit to how we get there*

We then agreed on which conversations needed to take place, which stakeholder voices needed to be heard and what strategic direction needed to be developed and enriched in order to achieve the purpose.

During the actual meeting of the 150 in February, we invited real customers of the operation to describe what they particularly liked about the Cabana experience and what they would change if they could. We shared a video of front line workers in various locations, talking about their work and why they enjoyed it, what problems they saw and what they would like to see changed. That video, while only 10 minutes long, turned out to be honest, insightful and compelling, as real people often are when they are asked to speak from their own heart. The participants had an opportunity to interact with the customers and connect with the workers’ stories. Using what they learned from those interactions, they worked at maximum-mix tables to enrich the leadership team’s draft of the mission, vision, principles and ’99 imperatives (strategic goals for this year). In addition, everyone worked together to create a first draft of characteristics of the “Cabana Experience.” Overnight a combined group of executive leaders and the Event Planning Team, worked together to listen to the voices of the participants and consense on a rewritten document to present the next morning. What the overnight experience did was to engage this diverse team in a form of transformational leadership that allowed everyone’s voices to be joined in a common picture of the 1999 Taco Cabana strategy and a visceral description of “the Cabana Experience” which met people’s yearnings for what they wanted their customers to say about them.

The “magic moment” came the next morning when that overnight group reported out, both verbally and in writing, what they heard the participants saying and what they as the Leadership believed as well. The rewrite included the description of the Cabana Experience and the shared mission, vision, principles and '99 imperatives. The response from the whole group was immediate and electrifying. Actually they united to give a spontaneous standing ovation when asked by their leader: “Did we get it right?” In that moment, everyone was clearly seeing themselves in the document, feeling connected to others, and knew they would succeed together. In that moment, Information, Identity and Relationship all converge. Seeing myself in it (identity), knowing it is right (information) and feeling connected to everyone else in the organization (relationship) combine to create the magic. We believe that was the paradigm shift moment, the way Ivor described it in New York.

The rest of the day, the participants identified first-step action plans for the system as a whole and for their back-home groups. We finished with individual evaluations, which are summarized, and compared to the outcomes the Event Planning Team had identified, at the end of this article.

This was the beginning of a journey. We are confident that no one who was at the event will allow it to slip through their fingers. Additional work will continue through the next year with or without the further involvement of the consultants.

And so, the most important message we'd like to leave ringing in your ears is that it does not take magic to create the magic. We are clear that it takes real focus on purpose and it requires the consultants to truly believe that the wisdom is in the people themselves. The magic is in opening up information flow, building relationships and creating new identity definitions, thus combining and releasing the wisdom in the organization.

<p>Taco Cabana BREAK ON THROUGH A Leadership</p>	
<p>Purpose & Outcomes developed by the Event Planning Team prior to the February session</p>	<p>Summary of Final Evaluations from Participants</p>
<p><u>Purpose: To work together to:</u></p> <ul style="list-style-type: none"> • <u>Develop a shared picture of the Cabana experience for customers and employees.</u> • <u>Create a common purpose that would unite each of us and all of us in knowing how important we are to its success.</u> • <u>Agree and commit to how</u> 	<p>WHAT WERE THE MOST SIGNIFICANT OUTCOMES OF THESE THREE DAYS FOR YOU ? SUMMARY OF MOST OFTEN WRITTEN RESPONSES: We have a better understanding of where the company is, how others perceive it, and where it's going. Great to see everyone focus and understa</p>
<p><u>we get there. Outcomes: The intended outcomes of our Leadership Conference are:</u></p> <ul style="list-style-type: none"> • <u>A commitment to put fun into our processes.</u> • <u>Make "Guest Centered" the heart of the Cabana experience.</u> • <u>A commitment to make the Guest Experience mirror the Employee Exp</u> 	<p>nd their roles in this business. Lots of commitments made. Great to have input/be part of the process on new Vision, Mission, Operating Principles and Business Imperatives for '99. Finally the Cabana Experience is clearly communicated for us and our Te</p>
<p><u>erience.</u></p> <ul style="list-style-type: none"> • <u>A commitment to make internal and external peoples happy.</u> • <u>Feeling part of a closer knit family where we know each other well and can be resources for each other.</u> • <u>Knowing help is available and who can provide it.</u> • <u>Improved communications am</u> 	<p>am Members. Great chance to meet the rest of Taco Cabana face-to-face/ make new friends in the company. Great teamwork! Favorite sessions: Customer panel, Leadership panel, Board Member and Stock Analyst, commitments by each team. ACTUAL QUOTES: "I hav</p>
<p><u>ong upper management and lower management and corporate and field.</u></p> <ul style="list-style-type: none"> • <u>A shared picture of the Cabana experience and an expanded definition (in concrete terms) of what it is, e.g., "hassle free" in every facet of business.</u> • <u>Take ownership in the destiny of</u> 	<p>e new faith in Taco Cabana and the leadership" "The fact that we were all united seeing things the same way and committed on the same Vision and End Results" "We were allowed to speak out and not hold it back; and let it burn in our minds and hearts" "We</p>
<p><u>one's circle of influence and to enable others to do likewise.</u></p> <ul style="list-style-type: none"> • <u>Understanding and appreciation for other people's perspectives including my own.</u> • <u>To learn new ways from each other and to improve consistency and quality of restaurant</u> 	<p>are a family" "The great stuff we've learned and can now share with our people back at home" "We are not divided as a division, a city, a market, a region; we are a WHOLE COMPANY" "Feeling proud about the accomplishments of '98 and getting ready to move a</p>

<p><u>able to make it happen.</u> • <u>Know that each one of us is important to the success of the company and feeling proud of it.</u> • <u>Walk out with a common commitment to the importance of our own roles and responsibilities.</u> • <u>Know you can evolve individually, affecti</u></p>	<p>head in '99" "The uniting of our Company" "Our voices are heard by top management" ON A SCALE OF 1 to 10, HOW CONFIDENT ARE YOU THAT WE WILL CARRY OUT OUR COMMITMENTS TO EACH OTHER ? Answers ranged from one person marking a low of "5" to 73 people markin</p>
<p><u>ng the company as a whole (creative visualization).</u> • <u>Be able to demonstrate, transmit and sustain our commitments and passions.</u> • <u>A commitment and ownership of our enriched Vision, Mission, Operating Principles and '99 Imperatives that we all own.</u></p>	<p>g a high of "10". The average answer is 9.27 !!!!! WHY DID YOU MARK IT WHERE YOU DID ? SUMMARY OF MOST OFTEN WRITTEN RESPONSES: Be careful to follow-up and hold people and groups accountable to their commitments. We are all working together now. We</p>
	<p>are enthusiastic and committed. Teamwork will make it happen/ everyone had a part in the decision making. Let's be realistic about what some people can accomplish (guarded optimism). We're eager to get back to work and make all this happen. Follow-up</p>
	<p>must start at the top and will then work down. Some evaluations said that they "don't believe in scoring a 9 or 10 to anything". ACTUAL QUOTES: "We have laid out a great road map to follow..." "Because I always keep my commitments!" "We are united with t</p>
	<p>he same new Vision and Mission" "I saw moods change once upper management let us make changes and listened" "I think 80% achievement would even be great" "We have the Desire, Knowledge and Skill to DO IT!!" "I see the passion to make change" WHAT SPECIFI</p>
	<p>CALLY DO WE NEED TO DO FROM HERE TO MAINTAIN OUR MOMENTUM ? SUMMARY OF MOST OFTEN WRITTEN RESPONSES: By far the most repeated comment was "COMMUNICATION". Lots of responses suggesting more meetings like this one. even if done reionally. Keep deliveri</p>
	<p>ng the Cabana Experience to our Guests. Lots of follow-up to make sure we do what we said we would. Keep the commitment and support from upper management. We need to be consistent in service and quality for our customers. Commitment to development of o</p>
	<p>ur people. Take this excitement and commitment back to our restaurants and departments (don't forget Spanish version of some materials). ACTUAL QUOTES: "Walk the Talk" "Follow-up, follow-up, follow-up" "Keep the unity built up between Corp and Field"</p>

	"Believe in <i>MAGIC</i> and execute !" "Stay focused, have input, be heard" "Keep pumping up the balloon we created" "KEEP THE COMPANY UNI
--	--