

# Creating the futures we desire - getting the whole system into the room: part I

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## Abstract

For our organisations to flourish, they need to engage the intelligence, creativity and energy of the whole workforce and involve all stakeholders. One way of doing this is to use whole system approaches to planning and implementing change and what have come to be known as large-group methods. This article, the first of two parts, makes a case for these approaches and describes the major benefits, outlines their history and describes two well-tried methods: future search and open space technology.

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*“We are going to win and the industrial West is going to lose out; there's not much you can do about it because the reasons for your failure are within yourselves. Your firms are built on the Taylor model. Even worse, so are your heads. With your bosses doing the thinking while the workers wield the screwdrivers, you're convinced deep down that this is the right way to run a business. For you the essence of management is getting the ideas out of the heads of the bosses and into the hands of labour.*

*We are beyond your mindset. Business, we know, is now so complex and difficult, the survival of firms so hazardous in an environment increasingly unpredictable, competitive and fraught with danger, that their continued existence depends on the day-to-day mobilisation of every ounce of intelligence.” (Konosuke Matsushita, founder of Matsushita Electric Ltd. Reproduced here with the permission of International Creative Management Inc.)*

## Introduction

This is a two-part article to be published over two consecutive issues. The first part will explain why I have grown interested in whole system work and large group interventions as they have come to be known. It will also outline the case for using these approaches and the benefits they can bring. This part will describe two leading approaches: future search and open space technology. The second part will describe real time strategic change and search conferences. My intention is to introduce you to these approaches and tell you where you can find out more. The two-part article is based on a chapter in my forthcoming book *Making a Difference - Strategies and Tools for Transforming your Organisation* being published early 1998 by Gilmour Drummond Publishing in Europe and AMACON elsewhere in the world.

## My journey

I experience a growing unease as I reflect on the work I have done over the years with directors, managers and their teams.

It is all very well working at the top or in the middle but what about the mass of ordinary people in the organisation "doing the actual work" of making things, providing services and dealing with customers? How much effect was our work together actually having on the way things are on the shop floor or on the quality of product or service received by the customer? I am not sure. Also these programmes were taking a long time to roll out. Where there was an attempt to involve "ordinary workers", it was in a diluted form in less affluent surroundings. What message did that convey? Another reflection of our class attitudes perhaps.

I had other concerns, some more fundamental. Systems thinking tells us that in deciding the way forward or resolving fundamental issues you need data about the *whole* system. People at the top or in the middle, inevitably, only have data about *part* of the system. If good strategic decisions are to be made, data is required from people at every level including the bottom and from people outside the system such as customers and suppliers. Of course that data can be obtained, and often is, before decisions are made. But for maximum organisational learning to take place, different stakeholders or people from different parts of the system need to be in the room together, hearing and seeing the data being contributed. They all need to be listening to each other and the process needs to be interactive. There needs to be a common or shared database built *together* by everyone in the room. People at the bottom need to see people at the top taking on board what they have said, responding to it in a way that demonstrates a change in attitude and actually behaving differently; showing that they really mean what they say about involving people, valuing their contribution and wanting an empowered workforce. Also people at the bottom need to be given the opportunity to act powerfully, speak their minds honestly without fear of adverse consequences and take responsibility. Top management need to experience this and see that it works. People need the experience of hearing diverse views expressed, sometimes with passion, and perhaps being moved by this. They need to discover how constructive and valuable difference can be and have their fears and stereotypes dispelled by a constructive experience that worked. In other words a huge amount of *organisational learning* can take place only when you get the whole system into the room. Real sustainable change occurs when people experience the paradigm shift that enables them to see beyond their small part of the system. For the organisation to learn a different dance all the partners need to be present. Only those who are full-time participants really get the benefit.

However, it is not only about making sound decisions and learning from each other. It is also about successful implementation. For people to be committed to changes, they need to be involved in and informed by the process of making those decisions and take responsibility for their part in implementing them. People can more easily make

appropriate day-to-day decisions when implementing a strategy they have been involved in creating.

I had another concern. Sometimes, in the work which colleagues and I had done with groups of directors and managers, we had encountered dependency, counter-dependency, resistance to really doing serious work or taking responsibility for the outcomes. Was this because we facilitated too much? Would this be less likely to happen if we stood back more and gave *everyone* a share in facilitating small group work at least? That also fitted well with my conclusion that people who become facilitators benefit most.

With these thoughts in my mind I started reading Marvin Weisbord's *Productive Workplaces* (Weisbord, 1987) and I organised a development programme for myself to learn about "large group interventions" i.e., ways of working with much larger groups that make it possible to get representatives of the whole system working together in the same room. I attended workshops which not only described the methods but gave me experience of how they work either by my being a participant or through simulations. I looked in depth at four approaches.

- 1 future search;
- 2 open-space technology;
- 3 real-time strategic change;
- 4 search conferences.

In this article I shall do no more than introduce you to these four approaches (there are many others) and tell you how you can find out more about them. As yet I have limited experience of using them and I have no big stories to tell. I hope that will come later! The principles and methods have influenced all my work however and I suspect they would influence yours.

### **The case for getting the whole system into the room**

First I will summarise why I think these approaches need to be considered. Most of the work I have done over the past 20 years has been with directors and managers. The concerns I have expressed above do not invalidate this kind of work, at the top and in the middle. Real-time management development (as I call my own version of management development that combines working on the company's real opportunities and issues with learning) can have a powerful effect on individual managers who may then lead their organisations very differently (Nixon, 1996, 1998). It gives managers a new vision of how teams and groups can work together. It gives them some of the tools. It is also a good way of going with the energy, acknowledging where the organisation is and starting where you can. Like every good methodology it has its strengths and its limitations. It may offer you the best way forward given where your organisation is. And it may gradually open your managers up to the possibility of "getting the whole system into the room" - something for which the organisation was not ready when you started out.

This article may help you prepare yourself for when your clients are ready. To be ready to help your clients you too may need a new mind-set.

I see essentially four possibilities for initiating transformation:

- 1 starting at the bottom and working up;
- 2 starting somewhere in the middle and working upwards, outwards and downwards;
- 3 starting at the top and cascading down;
- 4 getting the whole system into the room.

The first two are "starting where you can" strategies. The last two are possible when your client is the CEO of the relevant system or sub-system. The last is appropriate when the CEO is really ready to share control which means giving up some control. Not all CEOs are ready to do this but it is an essential pre-condition for successful work of this kind. Top-down approaches to bringing about change have limitations. Strategic decisions made by top management may prove flawed because they were not informed by data possessed by people elsewhere in the system. Often top management have difficulty gaining "buy-in" or the full commitment of the workforce because the latter do not have a full appreciation of the situation and they were not involved in the decision making. Key messages may be diluted as they pass down the organisation. Similarly there are obstacles to information passing upwards. Traditional processes for communicating a new strategy are relatively lifeless as they are not sufficiently involving or interactive. The top-down approach to change does not provide adequately for organisational learning. Increasingly often today, traditional linear methods of making decisions are simply not up to the job because the data involved is so complex and the situation is in a constant state of flux. Finally, the process of cascading strategy downwards can take a very long time. That can be too long and thus, ultimately, too expensive in today's world.

Here are some of the major benefits of using large-group methods, or getting the whole system into the room.

- Decisions are informed by the whole system.
- A high degree of involvement and engagement and hence commitment is created.
- Collaborative behaviour is encouraged.
- There is a high degree of organisational learning and the organisation increases its capacity to adapt.
- People learn to value diversity and work with conflict.
- A sense of common vision and purpose is created.
- A huge groundswell of energy is generated to bring about change.
- Top management learn to let go of control and respond to feedback; people at the bottom (or in the middle) learn to act powerfully and contribute more confidently.
- New organisational norms about how to behave are created.
- People learn how to cope with uncertainty, complexity, confusion and the fluctuating emotions involved in planning strategic change.

- Top management can signal that they really are changing their way of bringing about change and managing the company.
- A large number of people can be involved.
- A high degree of personal responsibility is encouraged - dependency and counter-dependency are minimised.
- People learn self-management and facilitation skills.

However large-group methods should not be contemplated where top management want to tell or sell, have no intention of sharing power or implementing whatever has been decided in the event. They are only appropriate when top management are genuinely committed to involving their workforce or co-creating with them. If they do not respond honestly to feedback or demonstrate that they are "changing the way they do business", more harm than good will be done.

### **Background history**

Large-group methods can be traced back to the collaboration of Fred Emery, an Australian, and Eric Trist at the Tavistock Institute of Human Relations, London, in the 1950s. Together they developed the first Search Conference in 1960. Two British aero-engine companies had recently merged to form Bristol Siddeley. The purpose of this conference, to be known as the Barford Conference, was to help the newly formed company create unified strategy, mission, leadership and values. After the Barford Conference, Fred Emery, Merrelyn Emery, Eric Trist and others facilitated hundreds of Search Conferences in North America, Australia and elsewhere over the years. The Search Conference also inspired the later development of Future Search (Weisbord, 1987; Weisbord and Janoff, 1995); the work of Dannemiller Tyson Associates in developing interactive strategic planning and real time work design; and real time strategic change (Jacobs, 1994).

Recent examples of well known US companies using large-group methods are: Marriott Hotels who have used them to embed quality methods into the company worldwide; the Ford Motor Company using large-group interventions as part of their successful strategy to turn around their business; Boeing using the methodology to plan and build the 777 in record time. In the UK the approach has been used very successfully in the Employment Service.

Each of the four approaches I shall describe offers a generic model. None of these approaches is merely an event. The event is only a stage in a much longer process for bringing about change preceding and following the event.

### **Future Search**

The Future Search Conference is a method developed by Marvin Weisbord in the 1980s for involving a wide range of interdependent "stakeholders" in an organisation or community in working together to build a picture of the desired future they want and plan to bring it about. A typical Future Search Conference gets 30 to 70 (ideally 64) people into one large room for 16 hours work spread over three days (two overnights).

Participants from all levels are selected to represent eight carefully chosen stakeholder groups. The approach departs from top-down meetings or consultation. Its purpose is to enable the stakeholders to take responsibility for co-creating their desired future and planning to bring it about.

At its very simplest the Future Search design is:

- past - where we have been;
- present - where we are;
- future - what we want;
- action - how we get there.

Certain basics underly the design of a Future Search Conference. These are:

- "whole system" in the room;
- global exploration before local action;
- future focus and common ground;
- self-management and responsibility.

Fundamental to the approach are: representation of all those who have a stake in the outcome, have key data to contribute and who will play a crucial part in implementation; creating together the big picture and an understanding of it before deciding and planning action; focussing on the desired state and what is agreed rather than problems and conflicts which are relatively unproductive and sap energy; and finally people managing themselves and taking individual responsibility. All these enhance the chances of successful outcomes.

The generic design has five main stages:

**1 Review the past:** milestones in global society, self and our organisation or community. Individual work, then everyone writes on huge wall chart.

Stakeholder groups identify trends and patterns.

**2 Explore the present:** stakeholder groups identify trends affecting our future; identify priorities, what we are doing about them and what we need to do; what we are doing that we are proud of and what we are sorry about.

**3 Create ideal future scenarios:** mixed groups prepare an ideal future for the organisation or community and dramatise it to the whole conference, presenting the future as if they were there.

**4 Identify common ground:** mixed groups and then the whole conference identify the common ground future (all agreed), ways to work towards it (projects) and unresolved differences ("not agreed" list).

**5 Make action plans - cooperating and taking individual responsibility:** stakeholder and volunteer groups make plans to bring about the common ground future, steps they will actually take and report back to the conference.

The basic methodology is as follows.

### **Before the conference**

- The event is carefully planned by a steering committee of eight to ten people representing the stakeholders.
- Great care goes into ensuring participants represent a broad spectrum of viewpoints.
- The purpose of the event is clearly defined.
- Top leaders' backing and their agreement to be there only as full-time participants and support whatever outcomes emerge are secured.
- Three to six months lead time.

### **During the conference**

- People work in eight groups of eight (hence the ideal number of 64 participants), either stakeholder groups or mixed groups as appropriate.
- There is a mixture of work done individually, work done in groups or work done in the whole group (not always in that order).
- Large wall spaces covered in white paper or created by cutting up the charts of groups are used for the work of the whole group. Self-adhesive coloured dots enable people to vote on priorities.
- There is a high degree of self-managed learning and planning; groups facilitate themselves, everyone taking turns as discussion leader, time-keeper, recorder and reporter.
- Two facilitators run the event as a whole, managing task and time boundaries, handling large group process issues, avoiding creating dependency and counter-dependency, not getting involved with small groups or with content issues.
- Administrators provide the small groups with briefing papers, worksheets and take care of logistics.
- There are no top management or expert lecturers - top managers or experts are included as participants; no training sessions.
- The focus is on common ground and shared desired future; differences are acknowledged but not worked on.
- The focus is also on discovery, learning and cooperating rather than hierarchy, power, conflict, passivity, adversarial behaviour and dependency.
- Everyone takes individual responsibility for planning action to bring about the desired future.

**Certain groundrules** need to be accepted by the conference. These are:

- all ideas are valid - respecting everyone's truth;
- everything on flip charts;
- listen to each other;
- observe time frames;
- seek common ground and action - not problems and conflicts.

**Among essential conditions for success** are the full-time attendance of all participants, healthy meeting conditions and taking public responsibility for follow-up.

My experience of the methodology is that it is excellent in helping people learn that they can cope with a mass of complex and confusing data, making sense of it by trusting the right-hand, intuitive part of the brain. Particularly through dramatising the future (in stage 3 of the conference design) they learn to bring to bear all their creative, not only rational, faculties. And people experience and learn how to cope with the "roller-coaster" of their feelings at various stages of the process of getting on board, facing the complex mess that seems outside their control, owning up to what they are doing and want to do, becoming energised and excited by their vision, and finally realistically planning what they will do. People also learn a great deal about diversity and difference. Working productively with people who are different breaks down stereotypes and encourages respect. They find that constructive outcomes and much learning are the result of listening to each other, accepting that everyone's opinion is valid and focussing on common ground rather than problems and conflicts. I think people are usually surprised that whilst conflicts and differences are expressed and not avoided, there is a huge amount of common ground. That is enough to enable people to move forward in constructive action planning. The methodology also maximises the chance that people will take responsibility and not engage in dependency and counter-dependency perhaps because everyone is encouraged to actively contribute from the very start and take a turn in facilitating their group.

Future Search is firmly limited to about 70 people. That is the maximum number that, in the experience of the co-creators (Marvin Weisbord and Sandra Janoff), works well. So what about the people who were not involved? Catering to their needs has to be a major issue for the Action Planning stage. Alternatively additional or parallel Future Search Conferences can be held.

Future Search seems to be an excellent approach to use in a community or an organisation where leaders are prepared to co-create with other stakeholders. It is particularly suited to creating sustainable development plans for Local Agenda 21[1]. It has been widely used in the USA, Canada, Australia and Scandinavia (Weisbord, 1987).

## **Open Space Technology**

As I have only experienced this approach at professional and personal development conferences, not yet for a business purpose except in my own version of it, I asked my friend, Martin Leith to write this section for me. Here is his account.



Open Space Technology (OST) was developed in 1984 by Harrison Owen, an American organisational consultant. It is a method for organising a self-managed meeting or conference, the programme of which is created by the participants themselves. The method enables people to create and manage an agenda of workshops, discussion groups and other sessions in which they discuss the things that really matter to them, explore issues and opportunities and find new ways forward. An Open Space conference has no invited speakers, just one facilitator who explains the procedure and facilitates the plenary sessions. Although OST tends to be regarded as a meeting-management method, its principles can be applied to create a whole new way for people to work together in organisations.

Most Open Space conferences take place over one, two or three days. A typical one-day conference would have four Open Space timeslots, for example 10.00 to 11.30, 11.30 to 13.00, 14.00 to 15.30 and 15.30 to 17.00, each with a number of different sessions taking place in parallel.

The approach is suitable for any size of group. Twelve is probably the minimum number of people, and the capacity of the venue is the only factor that limits the maximum group size. An Open Space conference with 500 participants would not be unusual.

### **When to use Open Space Technology**

OST is a highly effective method for surfacing people's heartfelt concerns, exploring strategic issues and opportunities, promoting discussion and decision making, developing action plans with a high degree of ownership, and transforming a group of disparate people into a vibrant community. The method should be considered whenever a project involves high levels of complexity, diversity and conflict and decisions need to be made quickly.

### **Principles**

- Provide the absolute minimum of structure and control.
- Participants are encouraged to display passion and responsibility.
- Participants self-manage everything except the plenary sessions, including the development of the agenda, the Open Space sessions and the production of the session reports.
- "Whoever comes is the right person": even if only one person shows up at a session, this will be exactly the right person to do the work that needs to be done.
- "Whenever it starts is the right time": if a session starts earlier or later than the advertised time, that is OK. No one need get impatient or feel anxious.
- "Whatever happens is the only thing that could happen": in other words, let go of expectations.
- "When it's over, it's over": if everything has been said, move on.

- If a participant is in a session and is not giving or receiving anything useful, they should use "The law of two feet" to move to wherever a worthwhile contribution can be made.

## **Methodology**

- Potential participants receive an invitation that shows the title of the conference. This should be neither too general nor too specific, for example: *What are the issues and opportunities facing the XYZ Corporation?*
- People arrive at the venue and take their seats in the plenary room. The chairs are arranged in a circle to indicate that everyone is a leader.
- The facilitator welcomes people and explains the Open Space principles and procedure.
- Participants offer as many sessions as they wish. Those offering sessions prepare a handwritten poster, make a brief announcement to the whole group and tape the poster to one of the walls. This wall becomes the conference agenda. A meeting space is booked by taking a Post-it Note from a matrix showing times and places and attaching it to the poster ([Figure 1](#)).
- The "marketplace" commences. Everyone signs up for the sessions they wish to attend.
- The Open Space sessions take place. One participant in each session takes notes and produces a written report using the computers and printers located in the "News Room". One copy of each report is taped to the wall under the banner "Breaking News" to create a conference newspaper.
- The conference closes with a plenary session during which participants return to the circle, reflect on their experiences and share them with the others. Sometimes participants get together before this final session to prioritise actions arising from the different sessions and form self-managing project teams.
- As people leave the conference they are handed a copy of all the session reports.
- In the weeks and months following the conference individuals, project teams and informal groups carry out the agreed actions and keep everyone informed about progress.

## **Results delivered**

- people's *genuine concerns* are identified;
- *creative and relevant ideas* are developed;
- *concrete action plans* are specified and committed to;
- *on-going self-managed teams* are established;

- *productive working relationships* are created;
- *new behaviours* are practised and become the norm.

Open Space Technology has been used successfully in most parts of the world. European organisations employing the method include Dutch Railways, Guinness, ICI, Prudential Assurance and Shell. Despite a long and growing list of success stories, Open Space Technology should never be regarded as an easy option. It should not even be considered if anyone wants to exercise control, when the answer is already known or when the achievement of a specific outcome is essential. But for those who are willing to step into the unknown and allow the unexpected to happen, Open Space has the potential to produce breakthrough results.

This concludes the first part of this article. Part II, appearing in the next issue, will describe Real Time Strategic Change and Search Conferences and draw some conclusions.

### Note

1 At the Earth Summit in Rio de Janeiro in June 1992, world leaders signed a global environment and development action plan called Agenda 21. Over two-thirds of this plan required the commitment and cooperation of local authorities to implement. Each local authority was encouraged to create its own sustainable development strategy, through local participation, known as its Local Agenda 21.

Figure 1 Open space matrix

TIME	PLACE →	Plenary Room	Seminar Room 1	Seminar Room 2	Seminar Room 3	Seminar Room 4	Lounge	Bar	Terrace	Garden
0900	Opening plenary									
1000	Open Space Sessions (1)									
1130	Open Space Sessions (2)									
1300	Lunch (Restaurant)									
1400	Open Space Sessions (3)									
1530	Open Space Sessions (4)		Post-it Note Wall	1550 Room 2						
1700	Closing plenary									

Figure 1 Open space matrix

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# Creating the futures we desire - getting the whole system into the room: part II

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## **Abstract**

For our organizations to flourish, they need to engage the intelligence, creativity and energy of the whole workforce and involve all stakeholders. One way of doing this is to use whole system approaches to planning and implementing change and what have come to be known as large group methods. This article, the second of two parts, describes two further well-tried methods: real time strategic change and search conferences. It also compares the four methods outlined in the two articles and draws conclusions.

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## **Introduction**

This is the second and final part of a two-part article about whole system approaches to planning and implementing strategic change. The processes commonly used have come to be known as large group interventions. The first part described the benefits of using these approaches and two of these processes: future search and open space technology. The second part outlines real time strategic change and search conferences, makes some comparisons between these four approaches and shares with you some of the conclusions about their use.

## **Real time strategic change (RTSC)**

Real time strategic change (RTSC) was developed by Kathie Dannemiller and Robert Jacobs in the 1980s. Dannemiller Tyson Associates and Robert Jacobs and Frank McKeown of 5 oceans are among leading exponents of RTSC in the USA and Vista Consulting in the UK. Real time strategic change is "a principle based approach to fundamental, organisation wide, rapid, sustainable change" (Jacobs, 1994).

The underlying principles are:

- 1 Treat current reality as a key driver.** A continuous focus on the simultaneous and sometimes conflicting realities which exist in the internal and external environments.
- 2 Work in real time.** Simultaneous planning and implementation of individual, group and organisation or community-wide changes. "Real time' means working through real issues, with real people affected by them and getting real results" (Jacobs, 1994).

**3 Create a common database.** A common understanding of strategic issues informs the discretion of people at all levels so that they can make wise decisions individually and collectively.

**4 Create a preferred future.** A collective "image of potential" for the future forms the basis for action today. A compelling representation of what better will look and feel like is created by participants.

**5 Create community.** Foster an environment where individuals come together as part of something larger than themselves that they created and believe in.

**6 Foster empowerment and inclusion.** Engage the entire organisation in ways that lead to ownership of and commitment to a shared purpose and future direction and the actions needed to get there. This includes fostering ownership of the process, content and outcomes.

As well as these six principles, the RTSC approach is based on open systems theory which translates into a whole system focus. A second all-encompassing notion is to continually pursue and clarify purpose and desired outcomes. The whole system focus means involving the whole system (or a critical mass). Thus a microcosm of the system designs the overall change effort and microcosms of participants design key initiatives. Everyone who needs to make changes happen is involved.

Among the key characteristics of RTSC are:

**1 There is no limit to the numbers of participants** - 2,200 people took part in an event held at Ford and 500 to 5,000 people took part in events at Boeing.

**2 There is great emphasis on events being only part of a chain of initiatives to bring about change in how the organisation does business.** RTSC is not just big events. The work with top management and other levels of formal and informal leadership, design work and planning are as important a part of the change process as the events themselves. Apart from events, change efforts are made up of initiatives such as benchmarking, work design, local implementation of action plans and leadership development to support and sustain the changes.

**3 Whereas future search is clearly for the purpose of "co-creation", RTSC can include both "consulting" and "co-creating"** (see later in this article). Often there are some issues which are not "up for grabs" or fall outside the parameters of the effort. When this is the case a critical piece of the work to be done by the leadership and design teams is exploring and defining exactly where the system boundaries lie and what issues are under discussion. The RTSC approach encourages leaders to undertake a change effort as much in the preferred future mode as possible. This means that norms and processes around authority, decision making and accountability are developed during a change effort, so becoming the preferred way of doing business in the future. Leaders choose carefully how much or how little to include others in decisions of various sorts, understanding the longer-term ramifications of precedents set via those choices and via the processes used for making such choices. Senior management may be more willing to take the risk with a system-wide RTSC effort because of the flexibility and customisation possible in how power is shared in the organisation.

An example of this can be found in the design shown in [Table I](#) illustrating how strategy can be developed.

**4 There is no generic design as the processes of each change effort are designed to fit each organisation situation.** Each event is different and tailored to the unique purpose and circumstances.

**5 Events are designed by design teams usually consisting of ten to 30 diverse people who are a microcosm of the system as defined.** One of the first tasks of the design team is to define the purpose of any initiative within the change effort. Design teams partner with the organisation's leadership team to make good decisions for a change effort, which have broad based ownership and support. A logistics team handle all the administration and logistics before and during events.

**6 During an event designed to align the organisation, a critical mass of the organisation will be in the room as full-time participants.** People outside the organisation such as customers, industry experts, or representatives of other companies who have been trying to transform themselves may be invited to come in to contribute. The emphasis is on involving key stakeholders in a change effort. The people who are needed to contribute to "building a common database", deciding strategy and need to plan and implement system-wide action are the ones who become involved.

**7 Much of the work is done in small groups of eight** ("max mix", i.e. tables representing the widest mix of participants). The usual process is that people first work individually; then as a group and then one of the group reports back to the whole conference. The "max mix" tables are self-managed.

**8 There is an effort to build and embed the capability for transformation within the organisation during a change effort.** This is an important hallmark of success for an RTSC initiative.

**9 The consciousness for the change effort has to be how the organisation wants to operate in the future.** An underlying theme of RTSC is to design and use processes that the organisation wants to be an everyday part of its future.

There is a myriad of possibilities for events to focus on issues such as: process re-design; organisation culture; company mergers; diversity; re-engineering and strategy. [Table I](#) is a generic design for an imaginary event, which focuses on developing the organisation strategy and planning to implement it.

When many people assemble, it is an exciting experience. A huge amount of energy is generated. Much time and energy needs to be spent working with the leadership during the whole change effort to educate and support them (a two-way process for clients and consultants). This will enable them, in turn, to lead the creation and support of a preferred future for the organisation. They have to show they really mean to change the way they do business. This requires their really hearing what they are being told, really showing they have heard it and making changes that convince other participants. If they fail to do this, they will sabotage the whole endeavour. Also their behaviour as members of "max mix" tables will matter enormously, e.g. senior people not dominating. The scale of the event also requires very detailed planning, very well structured and designed processes and impeccable organisation. It also requires flexibility. Daily reviews are carried out and these may require a complete overnight change in the design. In addition to formal daily

reviews, corrections in "real time" are a regular part of an RTSC effort. As well as two facilitators, a logistics manager is needed and a team of logistics staff who keep the participants' tables supplied with briefings, worksheets, review forms, etc. A variety of methods are used including individual work, group work and whole group work. Participants at tables of eight each get a turn at discussion leading, time keeping, recording on flip charts and presenting.

The RTSC approach helps clarify the power, authority and decision-making infrastructure of an organisation so that the most appropriate people are making decisions for all the right reasons. RTSC will best suit the organisation, which has a preferred future that is a good fit with the six principles of RTSC. It will suit an organisation that wants to involve very large numbers of people; wishes a very much tailor-made design and prefers perhaps to include elements of "involve and consult" as well as "co-create". The latter seems to represent the ultimate in letting go of and sharing control. For example, it can give top management the key role in formulating strategy and reformulating it in response to the common database that is co-created by all participants.

### **Search conferences**

The search conference, the original method developed in the 1950s, offers an alternative. Fred Emery and his partner Merrelyn Emery still practise from Australia and Bob Rehm and Nancy Cebula, working out of the USA, are among leading exponents (Emery and Purser, 1996).

**Two key principles underpin the search conference.** The first is the democratic design principle. An organisation designed according to the democratic design principle locates responsibility for control and co-ordination with the people doing the work, to the greatest extent possible. The bureaucratic principle locates responsibility for control and co-ordination of work one level above where the work occurs. The second principle is open systems theory. In a search conference people experience a learning community in which they systematically explore their entire environment. The purpose is to actively plan so that they are both responding to and changing their environment as they go. It means being actively adaptive - developing the system's capacity to be a community that continuously learns from and changes its environment. A system can reduce turbulence by changing the conditions that surround it and by influencing their direction. To become adaptive, a system needs to make sure there is alignment between its own desirable future and the desirable future it has for the world (see [Figure 1](#)).

The key features of this approach are as follows:

- 1 The system is clearly defined and only system members are in the room** - not members of its environment. Only those people who are responsible for changing the system are included. Data from outside the system can be sought beforehand. It is not considered necessary to get the whole system into the room.
- 2 Optimally there are only 20 to 40 participants**, i.e. the number of people who can readily engage together in face to face dialogue.
- 3 Search conference is a large group method and the basic building block is the whole group.** Sometimes for the sake of expediency small mixed groups of



eight are used to analyse data or brainstorm ideas on behalf of the large group. However, basically, the search conference is a large group self managing process from beginning to end.

**4 All work is done in the whole group or in the small groups** - none individually. There is great emphasis on all work being done openly and displayed publicly on flip charts.

**5 Because numbers are smaller, the conference is not timed to the minute and the programme is separated broadly into thirds, spread over three days:** one-third changes in the world (environment); one-third our system; one-third strategy and action planning. The reasoning behind these thirds is Emery's open systems thinking theory which suggests that for a plan to succeed, the system and environment need to be directly correlated with one another. Thus the search conference starts by exploring the turbulent field to agree on desirable and probable future worlds; then work can proceed on developing the most desirable system and action planning in such a way as to be adaptive (directly correlated) with the environment.

**6 Because of the smaller size, working in whole group and more flexible time frames, the conference feels more relaxed, free flowing and less structured.**

**7 The approach need not involve the whole system and could be used for several levels of management or a team.** Search conference is not a whole system event, as defined by other methods. It is an open system method - system in environment.

The biggest difference, apart from the relatively smaller numbers who participate compared with other methods, is the model shown in [Figure 1](#).

Within the boundaries of this environment, system and action planning funnel, each search conference needs to be carefully designed for the client and managed "on the run".

The search conference is the middle part of an overall three-part process consisting of pre-planning, the search conference event itself and implementation. It is in the implementation phase that large numbers of people can be involved. How this is done will make or break the intervention - whether it is done in a participative, democratic way or a bureaucratic way, using the standard committee format that tends to frustrate people (Emery and Purser, 1996).

Four conditions are fundamental to the method:

**1 Openness.** A climate of openness and absence of manipulation is created partly by displaying all work on chart paper. It is assumed that differences in opinion are healthy and mutual learning follows from sharing different experiences and perceptions.

**2 We are all humans with the same human concerns.** When people see that the behaviours and motives of others are similar to their own, they can admit that they can learn from each other. If anyone acts as expert or talks down to others, mutual

learning is reduced. People discover their similarities through sharing ideals about their desirable future world and system. These ideals transcend gender, race, status and age.

**3 We all live in the same world.** The rule is that all perceptions are valid. Building together a shared picture of the changing world helps establish the validity of the notion that we all live in the same world and forms a shared context for planning and action.

**4 Trust.** Trust develops when people experience an open learning environment, appreciate we are all humans with similar concerns, and live in the same real world. This trust strengthens and deepens interpersonal relations, and increases the probability of mutual learning and networking.

Though expressed differently these conditions and their consequences echo the experience of real time management development, future search and real time strategic change.

The search conference may better suit a situation where the organisation's leaders prefer what feels like a lower risk entry into large group interventions; where they would be more comfortable with smaller numbers; do not consider it essential to involve the whole system; and would prefer the less structured, more fluid process that is possible with a smaller scale event. This might better suit the style of some facilitators.

### **Comparing the four approaches**

It may help in comparing the four methods I have described to look at the five modes for creating a shared vision described by Peter Senge's colleague Bryan Smith in the *Fifth Discipline Fieldbook* (Senge, 1994) ([Table II](#)).

As Martin Leith points out in his *Guide to Large Group Interventions* (Leith, 1997), these five modes can be applied differently to policy, vision, strategy and planning. Real time strategic change involves and engages people through an appropriate mixture of "consult" and "co-create". Its effectiveness depends upon contributions to strategy being evidently taken on board there and then by top management. This is the consultation part. There are also significant elements of co-creation especially in creating a common database and in planning implementation. Open space, future search and search conference are firmly in co-create mode.

### **Conclusions**

Among my conclusions are, that for large group methods to be effective you need:

- **a robust model** like the empowerment model used in real time management development (Nixon, 1996, 1998). I would argue that open space, future search and search conference use the same model each time, while RTSC develops a unique model for each application.
- **carefully thought out underlying principles** which are made explicit and contracted with the client.
- **appropriate processes** that reduce dependency, conflict and task avoidance and encourage partnership, learning and taking individual responsibility.

- **simple techniques** (e.g. lots of wall space, huge sheets of white paper to cover them, scissors and tape, coloured self adhesive dots) that fit large scale working.

**Learning by "osmosis"** What characterises these approaches, in common with real time management development (Nixon, 1996, 1998) is that people learn by "osmosis" a new way of working. Without even talking about it, by using large group methods, they learn about:

- the value of involving the whole system;
- how to become a learning, self-adaptive organisation;
- the benefits of self-managed work groups;
- how distributed work groups can contribute creatively to major strategic change;
- how to handle complexity and chaos;
- how to accept the fluctuating emotions involved in changing and learning;
- the importance of valuing and respecting difference if the benefits of conflict are to be fully exploited.

Afterwards the organisation will never be the same again. It is not just an event. It is a whole new way of doing business.

You, the facilitator, need to be true to yourself. You have to be really clear about who you are and who you can be. Therefore, in addition to matching the methodology to your client's needs, you must decide what approach fits your values, beliefs, needs and style. But you may need to push out of your current "comfort zone". Perhaps you first need to apprentice yourself to experienced practitioners or get one to work with you. With experience you may develop your own methodology, drawing what you need from different methods. Or you may decide to adhere to one of the proven methods. Whatever you do, it is being clear about the principles that matters. It is important that you think these out and articulate them clearly. You also have to learn to let go of outcomes completely. We talk about leaving the ego at the door - tricky, but being client centred is demanding enough without other competing needs getting in the way.

If you acquaint yourself with these approaches, I predict that all your work will be affected. You will be influenced by the principles, by whole system and open systems thinking, by the ground rules and by the techniques. I doubt your work will ever be the same again - and you will be open to the opportunity to offer the approach to your organisation if and when it becomes ready, instead of being limited (as I was) by your own ignorance or fear. You will be able to encourage them to take a brave new step if it is appropriate and wise. Also you will be getting involved in the quest for communities of all kinds to find a more human way of working together in the world.

I am convinced that the time has come for these methods to be widely used in bringing about system wide strategic change. They need to be part of the toolkit of tomorrow's company - and yours - and of the way we bring about our desired futures in the world without wasteful and sometimes violent conflict.

**Table I** Real time strategic change generic design – broad outline

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***Getting started***

Welcome and purpose, logistics, roles, guidelines, self-introductions, climate building

***Building a common database***

View from leadership team: challenge and opportunities, strengths and weaknesses, vision for the future, key strategies

Organisation diagnosis: what you are glad, sad and mad about

Expert input

View from customer perspective

Presentations from other organisations who have followed a similar path

“Valentines” (i.e. “continue to do” and “do differently” feedback)

from group to group: receiving and responding to feedback positively

Reviewing organisation norms – how we have done things until now and identifying priorities for change

***Reviewing organisation strategy***

Revisiting leadership team’s strategy

Giving feedback on the strategy

Leadership review strategy overnight

Leadership present revised strategy and get further feedback before finalising

***Planning action***

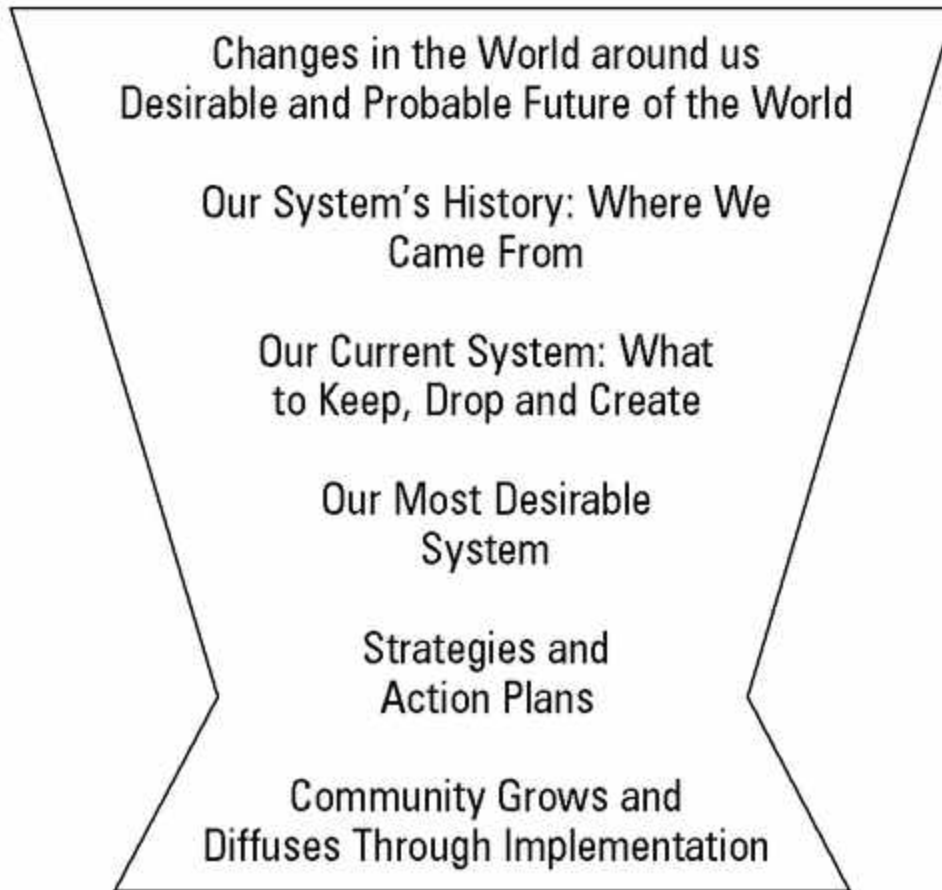
Planning system-wide action

Back home planning

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**Table I** Real time strategic change generic design - broad outline

**Figure 1** Search conference design: the open systems "funnel"



*Figure 1* Search conference design: the open systems "funnel"

**Table II** Bryan Smith's continuum

<i>Modes for creating a shared vision</i>	Tell	Sell	Text	Consult	Co-create
	Requires compliance	Seeks buy-in	Invites reactions	Requests contributions	Create together

**Table II** Bryan Smith's continuum

**References and further reading**

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