Unlocking Collective Potential

by Jon Berghoff

There is little dispute that human civilization evolves not incrementally but through evolutionary leaps.

Our transition from an agrarian society to an industrialized society came with radical shifts in beliefs, technological advances, and standards of living. The same was true with the Information Age—new possibilities, new paradigms, new problems, and new opportunities leapt into view.

Today, we stand at the edge of a new reality, one that many are marking as a moment of disorder, disruption, and even despair. While the future is certain to be uncertain, specific trends are revealing the need for critical, even revolutionary changes - especially in how we lead.

If you believe there's another way to lead—if you sense, from a place of deep knowing, that a new capacity is needed from us, this invitation is for you. **If you wonder, like I do, about what's really possible when we unlock the wisdom within those we serve, then you and I are on the same path.**

Our teachers have been warning us of this moment.

Gary Hamel, author of *The Future of Management*, points out that the way we manage and innovate has been long overdue for its own radical innovation. Our industrial approaches to organizing leave the resources of teams, organizations, and whole industries untapped.

Frederic Laloux, a pioneering thought leader and author of *Reinventing Organizations*, points to the need for an evolutionary leap in how we organize in companies and communities.

Deborah Rozman, CEO of the HeartMath Institute (a leading research organization on the intelligence of the heart), points to our dramatic need to unlock levels of wisdom, intuition, creativity, and relational capacity never before realized.

In light of this need, the next questions seem clear:

> *What beliefs, values, and models must die, and what needs to be born?*

> *Who will be the change agents to bring these new paradigms to companies and communities all around the world?*

> *What tools will arise, enabling this new breed of change agent to unlock collective wisdom at speed and scale?*

Today, we are seeing some of the most advanced organizations, management, and leadership practices are leveraging these questions, and the principles that emerge in response, to enable large-scale transformations.

Here's just a few of the complex, high-stakes environments we've seen a whole new approach to

leadership, at work:

- Leading the U.S. Navy through a 260-person, whole-system planning summit to drive efficiencies, resulting in over 30 pilot projects and millions in savings
- Facilitating a future visioning dialog with 500 CEOs at the United Nations (UN) Global Summit, that, according to scholar John Ruggie from Harvard, led the UN Global Compact to become the world's largest and most widely embraced corporate citizenship initiative with 13,000 corporate participants
- Partnering with TEDx Traverse City to re-imagine the TEDx experience in ways that deeply engage the audience
- Helping the self-driving division of BMW unlock collective intelligence across brilliant teams of engineers
- Facilitating large groups at Facebook through complex collaborations among scientists, engineers, and researchers from around the world
- Leading in the design and facilitation of the 4th Global Forum for Business as An Agent of World Benefit, where 400 global leaders, researchers, NGOs, and students from over 35 countries came to Case Western Reserve University to celebrate, create, and accelerate innovations aimed at solving the 17 United Nations Sustainable Development Goals

There are three governing principles for unlocking the potential of a group.

1. Inquiry as Intervention
2. Life-Giving Conversations
3. Experience of Wholeness

Principle 1: Inquiry as Intervention

"In the twenty-first century, knowing all the answers won't distinguish someone's intelligence – rather, the ability to ask all the right questions will be the mark of true genius."
~DR. JOHN KELLY III, IBM

The Power of Openness to Other Perspectives

Peter Senge's pioneering research and work on learning organizations and the importance of systems thinking as a critical discipline, reveals that one of the five critical factors in becoming a learning organization—an organization that is ultimately prepared to continually shape its own future in the face of complexity, change, and uncertain challenges—is the ability for members to evolve their own mental models. What does this mean in practical terms? In Senge's words, it's the ability to tilt the balance in our thinking and our conversations away from rigidly holding our perspectives toward an openness to alternative perspectives. Or, more simply put, it is the ability to balance "inquiry & advocacy."

The groundbreaking research from Marcial Losada and Barbara Fredericton have also confirmed this, when studying teams that perform at various levels. A leading indicator of high performing teams is the measured balance between inquiry and advocacy. In other words, it's crucial to train ourselves to be

as open to new perspectives as we are interested in convincing others of our firmly held beliefs and opinions.

Our work in the field has shown this to be true time and again. Organizations, teams, and groups who are authentically curious consistently perform at high functioning levels. Consider this question: Are you, and those you work with, willing to step into your next conversations with a willingness to be influenced, just as much as you are aiming to influence? If so, this happens with both inquiry and advocacy or is it really just inquiry which connects back to your first principle.

Today at XCHANGE, we hold the Theory U model of evolutionary social change as a guiding compass for our work. The Theory U Model, created by Otto Scharmer, asks us to "imagine a leap from our current Self to our emerging future Self. We are facing that threshold, gap, chasm, or abyss on all levels of scale: as individuals, groups, organizations, and as a global community. The question is, how can we activate our deeper levels of humanity in order to bridge and cross that divide?" [1] Theory U invites us to discover that when we see the world through the eyes of others we eventually connect to the present moment so deeply that we can begin to connect to the future as it is seeking to emerge.

With all the mounting evidence, why does it still remain difficult, even abnormal, for leaders to invite openness, inquiry, and the space to pause and listen? Why is it that managers consistently struggle to bring back the childlike curiosity, wonder, and humility to see anew?

Simple. Our egos, and our training, are clinging to old definitions of management and leadership - that managers should know what to do, where to go. If we are willing to accept that a new model for leadership is seeking to be born, we must start here, and be willing to tilt the scale towards inquiry.

A Story of Exponential Systemic Impact

In 2004, Professors David Cooperrider and Ron Fry of the Weatherhead School of Management at Case Western Reserve University (CWRU) proposed a powerful question about business as a force for good in the world:

> *Where might we search for, uncover, and ultimately help spread stories of businesses who have aligned their purpose with the most pressing problems and opportunities for solutions for a flourishing future of economic, social and environmental thriving?*

Little did they know that their first question would be so fateful, it would eventually lead to the launch of the Aim2Flourish (A2F) initiative in 2015, based in the Fowler Center for Business as An Agent of World Benefit at CWRU.

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[1] *The Essentials of Theory U: Core Principles and Applications*, March 2018, Otto Scharmer

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In partnership with the United Nations (UN), A2F became the world's first higher education curriculum aimed at lifting the global story of business from best in the world to best for the world. Using Appreciative Inquiry, students search for and interview leaders of businesses who have created innovations that are supporting any of the 17 Sustainable Development Goals.

Today, Aim2Flourish proudly serves 400+ professors around the world, 6,200+ community members, 60 countries in our global community, 2,100+ business schools reached through participating education networks, and over 1,250 published Global Goals innovation stories. The power in the very first question asked, along with the gravitational pull of such a transcendent purpose, have led to what most would consider to be an exponential growth of this initiative since the June 2015 launch.

What was it about the first question that David and Ron posed that made it so powerful? Why is it that, once again, sparking collective curiosity became a tipping point capability?

The questions we ask are fateful. Questions work like a lens,
immediately changing how we see the world, even before the answers arrive.

While we continue to learn about the power of inquiry, maybe the most important discovery is this:

Inquiry, when appreciative in nature, is the most potent source of intervention,
in any human system—team, organization, or community.

Consider this discovery, that the questions we ask are fateful. Questions work like a lens, immediately changing how we see the world, even before the answers arrive. In this light, we see an emerging capability that leaders are being called to develop—the ability to ask the questions that bring out the best in an organization.

Principle 2: Life-Giving Conversations

"Look deep into nature, and then you will understand everything better."
~ALBERT EINSTEIN

A Lesson From Mother Earth

What if it's true, as organizational "future hacker" Bix Bickson suggests, that the DNA of any organizational culture lies inside of the conversations we have with each other? Creator of the SOAR framework (a positive approach to inquiry into strengths, opportunities, aspirations, and results for strategic conversations and planning), and XCHANGE Senior Appreciative Inquiry Strategist Dr. Jacqueline Stavros, has inspired hundreds of organizational transformations over the last 20 years through strategic conversations that are appreciative, inquiry-based, and life-giving (www.soar-strategy.com).

As Jackie reveals in her most recent bestselling book, *Conversations Worth Having: Using Appreciative Inquiry to Fuel Productive and Meaningful Engagement*, the primary points of leverage for creating change are the conver-sations we have. Conversations lie at the heart of how we interact and impact

others. As David Cooperrider says in the book "our organizational lives and the lives of others flourish or flounder one conversation at a time" (p.3). And of course, the fastest way to shift our conversations is through the questions we ask, both individually and systemically. Knowing this, we owe it to each other to become precision engineers of questions that lead to "life-giving" conversations that impact an environment to work for all.

As champions of Appreciative Inquiry as an "operating system" around the globe, XCHANGE has had a privileged vantage point within organizations and communities that are choosing a strengths-based approach to conversation design. In 2017, our facilitators led in the design and facilitation of over 125 large group collaborations, with a total of over 25,000 individual conversations toward positive transformations happening within and across these organizational and community efforts. The measurable trajectory of outcomes—including the rapid shaping or creating of shared values, co-created visions, strategic initiatives, or highly focused solution designs—has been an astonishing affirmation that human beings are yearning for conversations that give life to them as individuals, and to their teams and organizations.

In nature, life grows toward the sun. This is known as the Heliotropic Effect. What we are witnessing in organizations every day is the parallel expression of this living system principle—people are magnetically attracted, instantly energized, and creatively unleashed, when the conversations are designed to be "life-giving."

Four Naturally Life Giving Types of Questions

As conversation designers, engineers, and architects, we are continuously asking ourselves which questions bring out our best, most naturally, effectively and rapidly. At XCHANGE, the following list of four 'question types' represent some of the most common questions that form the beginnings of our large group collaboration work.

- **Purpose Questions**—Questions that invite us to connect to a deeper meaning, purpose, or fulfillment in general, or in relation to the meeting, event or task at hand.

    Why is this important? To you? To us? To the world?

    Why are we here?

    Why does this (work/project/task/team) matter?

Purpose Question Design & Facilitation Tips:

1. We begin nearly every engagement with a purpose question. The power of connecting first with the individual and collective "why," often brings a sense of meaning, fulfillment, and higher ground to the rest of the work we do.

2. Consider how valuable it is, for the members of a team, organization, or community to be meaningfully connecting over a purpose question, vs. the alternative where a leader, manager, or key executive is trying to convince everybody "why this matters."

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- **Moments of Excellence Questions**—Questions that invite us to explore moments when we were at our best, either in general or in relation to the meeting, event, or task at hand.

    > *When is a story, a real example, of a time where we thrived? What was happening? What did you, others, and/or the organization contribute to this moment?*

    > *What is an example that embodies when we have been at our best?*

    > *When was the time when we excelled, as it relates to _____?*

Moments of Excellence Question Design & Facilitation Tips:

1. It is very common for change efforts with groups to give the impression that we are changing because what we have done in the past is of no value. Moments of Excellence stories help us to reframe that our past is instead a source of wisdom, inspiration, and rich in learnings for our future.

2. Moments of Excellence stories shift the systemic communication mode from what is often "diagnostic" and based in constant "negotiation" to "dialogic" and based in co-shaping a new "narrative." This honors the learnings from Tom White, former executive for GTE, where pioneering large-scale change efforts were led with Appreciative Inquiry. Tom describes organizational culture as "the stories we tell about ourselves and our organization and then forget they are stories."

3. A Moment of Excellence story can be framed around any task or topic. If an organization wants to improve the sales process, we can inquire into moments when our sales process was thriving. If we want to improve _____, what happens if we inquire into when we've been exceptional at _____, or, where we've seen other organizations who are exceptional at _____.

- **Continuity Questions**—Questions that invite us to uncover and clarify the strengths, values, or qualities of a system that we value the most. These are a way of honoring the strengths that, no matter how we change or evolve, will be nurtured, protected, and built upon as we shape a new future.

    > *What are all the qualities of our organization/team/community, processes, systems, products, etc. or general ways of operating that have contributed to our success in the past?*

    > *No matter how we change or evolve, what qualities do we want to honor, preserve or protect, no matter where we go in the future?*

    > *When we reflect on our "moments of excellence," what qualities do we see that we consistently brought to these moments?*

Continuity Question Design & Facilitation Tips:

1. Mapping out the "core strengths" can be one of the most exhilarating and life giving conversations for a group. Keep in mind that these strengths can be referred to as "values," "guiding

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principles," "guiding strengths," or any other label that best serves.

2. Notice in our third sample question above, that a continuity question can explicitly build upon "moment of excellence" stories. We can study the success factors of our moments when we are at our best, to identify those qualities that we want to continue into the future.

3. Be sure to give time, not only for responses to a continuity question, but for a group to search for themes/patterns /and the commonalities, so that the collective strengths can move from being implicit to clearly communicated and explicit.

● **Future Image Questions**—Questions that invite us to see or stand in the future we most desire.

> *It is five years from today and we have just awoken from a long sleep. As you look around, you see the organization/community that you have always wished and dreamed for. What is happening? How is the group different? What have we accomplished that gives you the greatest sense of pride, meaning, and fulfillment?*

> *Imagine five years from today, our organization has won an award for _____. What is being said about us? What are our customers, key partners, employees, and others saying about us?*

Future Image Question Design & Facilitation Tips:

1. Jim Ludema, an Appreciative Inquiry consultant of 20+ years, teaches that organizations have a "dominant storyline" that shapes their perceptions and determines their patterns of action. When we invite group storytelling about the future, we not only ignite the human spirit of curiosity and creativity, but more importantly, we engender widespread support and care for the future of the organization. As we've learned from Margaret Wheatley, people "support what they create."

2. Co-creating shared visions is not about "common ground," finding what ideas are in common, but rather "higher ground," the ideas and possibilities that excite, inspire and compel action. When we lead strategic planning summits, it is important to not only assess "market value" (what is the potential for financial gain?), but "affinity value" (why do you like this idea? Does it excite you and call you to action? Will it inspire pride in you, the organization and key stakeholders) of a proposed strategy. This ensures that strategic decisions reflect both the organizational potential and the motivation to move ideas forward. [2]

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[2] *The Appreciative Inquiry Summit: An Emerging Methodology for Whole System Positive Change*, Diana Whitney, Ph.D., David L. Cooperrider, Ph.D.

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3. When inviting groups to co-create shared visions of the future, invite the most creative, expressive possibilities for how the future is presented. Future cover stories of leading publications, award ceremonies, future skits/enactments, multi-dimensional representations of customer or organizational experiences, just to name a few. From physicians to factory workers to German engineers, we've learned to stop being surprised at how universally people desire to creatively express their hopes for the future.

For the curious minded, two other types of questions that we did not explore here are "Design Questions" where we take future images and prototype actionable initiatives, and "Action/Commitment Questions" where we invite individual and collective action, towards shared possibilities that emerge in prior conversations.

Principle 3: The Experience of Wholeness

"If there is one thing I've learned in my years on this planet, it's that the happiest and most fulfilled people I've known are those who devoted themselves to something bigger and more profound than merely their own self-interest."
~JOHN GLENN

A Story of Unlocking Collective Intelligence

On February 21st, 2016, Lyell Clarke, CEO of Clarke, kicked off a whole-system appreciative inquiry strategic planning summit. He stood on a stage in front of 300 stakeholders, including all Clarke employees, customers, suppliers, researchers, and even a local group of high school students to bring in the voices of future generations.

To be clear, Lyell wasn't delivering a traditional presentation, speech, or mandate for the future of the organization. Instead, he presented a provocative, powerful invitation, via one question: How might we in this room, together, co-create the possibility for a bigger, braver, and bolder future that brings the Heart of Clarke to the world?

If anybody had any doubt as to whether or not systemic approaches to transformation can work, they only need to look at what happened the last time Clarke chose to bring Appreciative Inquiry in at the level of the whole system. At their 2012 Summit, focused on Accelerating Sustainability, a number of visions for the future organically emerged and strengthened, including

1. 50% reduction in waste

2. 25% reduction in carbon footprint and most audaciously

3. a headquarters of the future designed to LEED standards.

What happened? As of today, waste has been reduced by 64%, with 80% of all waste reused or recycled. The 264 tons of waste previously going to landfills has been reduced to 4 tons. Carbon footprint goals were achieved, using lower impact and electric vehicles, saving over $750K in operating costs in the process. Last, the grand idea that many admitted they thought would never

happen—a headquarters of the future—became a reality within two years. The new HQ boasts open spaces, natural light, generates an excess of power through solar panels, and regenerates the surrounding natural ecosystems.

Given the high impact shared visions that came of the 2012 Clarke Summit, it's not a surprise that the following three aspirations emerged during their 2016 Summit, focused on becoming "Bigger, Braver, Bolder" as an organization:

1. Share the Heart of Clarke with the World

2. Become the Voice of the Industry

3. Become an Agent of World Health Benefit

These emergent ideas led to rapid collective action. First, the company as a whole chose to donate 1% of revenues, not profits, from its next generation products and services to environmental organizations around the world. Next, within 6 months of the summit, Clarke was invited to testify before the U.S. Congress on how to better control Zika Virus. Finally, also within 6 months, Clarke sent 45 two-person crews to Miami Dade, to help stop transmission of Zika. Clarke's efforts contributed to this becoming the first time in history that local transmission of Zika was eradicated.

Unlike the long-held images of leadership as a heroic figure, Lyell, along with the support of Julie Reiter, VP of HR and Sustainable Development at Clarke, have long been modeling the redefinition of leadership toward a collective capacity versus an individual capacity. This is a key trend that Nick Petrie, Senior Faculty member with the Center for Creative Leadership outlined in his 2014 report on Future Trends in Leadership:

> *If leadership is thought of as a shared process, rather than an individual skill set, senior executives must consider the best way to help leadership flourish in their organizations. Leadership spread throughout a network of people is more likely to flourish when certain "conditions" support it, including:*
>
> - *open flows of information*
> - *flexible hierarchies*
> - *distributed resources*
> - *distributed decision-making*
> - *loosening of centralized controls*

While some organizations have been courageously attempting to shift toward these types of conditions, our observation is that organizations like Clarke, who thrive in this shift, are embodying a cultural ingredient often visible to the organizational charts, processes, structures, and practices that the rest of us can see. This ingredient is the experience of wholeness.

Wholeness happens when we invite either the entire organization/team/ community into the room, or get the "whole story" into the room, by ensuring representation of every possible voice is included in the process.

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Through our work with Appreciative Inquiry, the experience of whole ness has consistently turned tension into positive excitement, skepticism into collaboration, and indifference into inspired collective action. When we ask clients what happens when the whole system is in the room, the answers often include:

- It evokes trust. When everyone is there you don't have to feel suspicious about what the others will do – there are no others.
- It lets people see and experience a purpose greater than their own or their department's.
- You get the sense that you are connected to a goodness that comes from the power of the whole. You realize you really need one another.
- It satisfies the human need to be part of a larger community. It taps into our tribal consciousness. You feel like you belong
- It establishes credibility in the outcomes. When everyone is part of the decision you know it will stick. Public commitments engender responsibility.
- New norms form quickly. You start to value relationships and getting the "whole story."[3]
- People transcend the " I " and become a "We." What's common becomes apparent.
- It eliminates false assumptions about other people and other groups. When you get to know someone you realize they aren't exactly what you imagined them to be. You develop compassion for different people instead of judgements.

So, how do we practically design for the "experience of wholeness" to happen when we really want to unlock collective capability in any team of any size or type? From physics to psychology to research on high performing teams, there are some simple but powerful clues.

Our Answer to Google's 'Project Aristotle' Findings: Connection & Inclusion

In 2012, Google embarked on a research project, code named "Project Aristotle," to find out what leads to a high performing team. After extensive research, the conclusion they arrived at was that high performing teams created an atmosphere of "psychological safety." Psychological safety, as Harvard Professor Amy Edmonson wrote in 1999, describes "a team climate characterized by interpersonal trust and mutual respect in which people are comfortable being themselves."

What we've learned at XCHANGE is that we can actually choreograph group conversations, or what we call "conversational structure design," so that psychological safety is accelerated. How do we do this? The answer is shockingly simple, but takes a little planning to execute on. Through every conversation we facilitate, we maintain a conscious awareness of how we are inviting "connection and inclusion" from one conversation to the next.

To start, we make sure that as groups work through life-giving conversa-tions, that we start with pairs or small groups, before we slowly move into medium sized or larger group conversations. Second, we ensure we are diver-sifying and mixing who is connecting with whom, in order to enable inclusion. Inclusion is often avoided for natural but unfortunate reasons - we stick with people like us (or who we like), we silo ourselves in our department, or even worse, it may be "us against them," even though we are on the same team.

[3] pg. 2, *The Appreciative Inquiry Summit: An Emerging Methodology for Whole System Positive Change*, Diana Whitney, Ph.D., David L. Cooperrider, Ph.D.

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Connection and inclusion honors the inherent desire for any group to experience the power of wholeness. Our belief is that every person walks into a room, group, or organization and wonders the same thing—can I be myself and still fit in here? What we've found is that designing group conversations to honor as many diverse connections as possible can accelerate this feeling of belonging. David Boehm, physicist and philosopher, reminds us that the root of the word "whole" means "healthy." When we facilitate connection and inclusion, we break down silos, we enable strengths to touch strengths, and we unlock new combinations of capabilities.

Remember that in practice, wholeness starts with ensuring that we bring as many voices as possible into our life-giving conversations. But wholeness, and the experience of connection and inclusion, often isn't experienced until we help these diverse voices to see and hear each other—eye to eye, heart to heart.

Time for an Evolutionary Leap

At each stage of human evolution—from the agrarian age to the industrial age to the information age, there have been radical changes in technology, power structures, belief systems, and how we organize and collaborate in groups. The collective disengagement and lack of meaning in the workplace, and eroding faith in our institutions (education, healthcare, and the government just to name a few) represent a possibility that we are due for another evolutionary leap.

I believe the collective pain that we feel is actually positive. It's a signal that something new is seeking to be born. For those looking to lead and manage into the future, we are called to courageously leap away from knowing, away from commanding and controlling, and away from separating work and humanity.

It's an evolutionary leap toward opening our minds by embracing inquiry, opening our hearts by seeing through the eyes of each other, and ultimately opening to the possibility that we can participate in shaping the future we most want. We can be at our collective best, when we connect and include the unique gifts and strengths of more and more voices.

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