

Foreword to The Appreciative Inquiry Summit by James Ludema, Diana Whitney, Bernard Mohr, and Thomas Griffin. Berrett-Kohler Publications, 2003

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David L. Cooperrider

Excuse my overflowing excitement for this book.

Just recently I was part of an extraordinary Appreciative Inquiry Summit—exactly the kind this book is all about—with one of the largest trucking companies in America. It was a whole system strategic planning meeting, not just with the top ten executives of the company but with over 300 truck drivers, dock workers, senior executives, teamsters, managers and customers coming together across all boundaries to co-create their business plan. A Forbes business writer surprised Roadway by asking if she could participate in the three-day event. The “AI Summit” would engage and involve every kind of stakeholder at the Winston-Salem North Carolina terminal and she, Joanne Gordon of Forbes, had never seen anything like it. We explained to Joanne how Roadway was doing something nobody else in the industry was doing and how Roadway had already successfully piloted AI Summits at five of their 300 terminals around the country. It was part of their “Breakthrough Leadership Program” designed by the Weatherhead School of Management at Case Western Reserve University.

Prior to the summit the Forbes journalist was quite convinced that the session was going to be some kind of large-group “cheerleading” or “therapy” session—not the real thing of joint business planning. She even talked about it that way. So she arrived at the summit asking tough, skeptical questions. Here are the opening lines in the feature story she later wrote:

“Teamsters and managers writing business plans together? This is how James Staley hopes to save Roadway Express from Consolidated Freightways’ fate. It was a scene not often seen in the history of labor-management relations”.

As the article unfolded, the reporter’s skepticism began to soften. She even sounded shocked at the level of business capability and passion demonstrated, for example, by the dock workers and drivers. It was clearly hard for this writer to let go of preconceptions (for example: how can a large group of hundreds come together to do the real business planning?) but, fortunately, she was involved first-hand. She then wrote descriptively about what she saw:

“A team of short-haul drivers came up with 12 cost-cutting and revenue-generating ideas. One of the most ambitious: Have each of the 32 drivers in Winston-Salem deliver just one more customer order each hour. Using management data, the drivers calculated the 288 additional daily shipments, at average revenue of \$212 each and with a 6% margin, would generate just about \$1 million a year of operating profit”.

Still cautious however, she offered her view that improvements of this kind were “unlikely”. But the gloomy prediction was soon shattered. At its’ analyst meeting several

months later on January 22, 2003, Roadway Corporation reported that revenues for the sixteen weeks constituting the Company's fourth quarter were \$1,074,110,000, up 25.7% when compared to revenues of \$854,640,000 for the same period the last year. For the fourth quarter of 2002, the Company reported income from continuing operations of \$25,923,000, or \$1.37 per share (diluted), compared to income from continuing operations of \$13,477,000, or \$0.72 per share (diluted), for the fourth quarter of 2001. Operating ratios improved significantly and, according to later analysis, the employee driven "W&I" improvements translated into an additional \$17 million dollars in additional revenue for the year and \$7 million annual profit. This exciting breakthrough was a result of the combined efforts across all 300 terminals of the 27,000 employee system. But here is the telling fact: of the top 5 terminals leading the company in the gains, *all* were sites that had worked as organizational effectiveness sites using AI in one way or another, and three of the top five sites leading the company had in fact held large scale AI Summits, just like the kind this book writes about. While still in its early phases the emerging impact appears enormous.

The AI Summit is the most business-relevant, powerful, and humanly significant way of bringing people together I have ever been part of and this book, for the first time, outlines in the most practical way, how to design, guide, and lead an AI Summit. Everything you need is right here: the stories, the models, the design templates, the guidelines, and key concepts. Most important, however, this volume conveys a special spirit. The time is right, say Jim Ludema, Diana Whitney, and Bernard Mohr for celebrating what human beings are capable of together and for advancing "the positive revolution in change".

Part of my overflowing excitement for this book comes also from years of knowing and collaborating with each of the authors. Not only are they individually each first rate human beings, but they live what they write about and have put their ideas to the test in large and small corporations, in communities, and with international organizations working on global issues of environmental sustainability, peace, and human health. When I look back on high point moments in my professional life, so many of them have been with the very authors of this volume. With Diana Whitney there were high-wire moments of daring creativity with GTE and with the worldwide effort to help lift up something like a UN among the world's diverse religions—the "United Religions Initiative". With Jim Ludema there was the very privileged place of serving as his dissertation chairman when he built his seminal theory about the role of hope, inspiration, and joy in human systems change. With Bernard Mohr there were weeks spent together creating and recreating the successful large group designs for the First International Conference on Appreciative Inquiry held in Baltimore; it was held just weeks after 9-11 and helped give birth to a worldwide appreciative inquiry searching for exemplar stories of "Business as an Agent of World Benefit".

So I know it first hand: this book has a special strength and integrity to it. It emerges through the combined talents of three people who many would agree are among the best in the rapidly growing field of appreciative, strength-based approaches to inquiry and change.

Jim, Diana, and Bernard have written a wonderfully clear book that should soon be in the libraries of anyone interested not only in appreciative inquiry but any kind of strategic planning. As the story of Roadway Express and many others shared in this volume

demonstrate, the AI Summit can have a tremendous impact. But more than that, at least for me, it is a method that consistently brings out the very best in human beings and continuously expands my sense of hope. When people experience the *wholeness* of the systems they live and work in—when we have the courage and trust to bring together people at every level to connect to the “positive core” of their past, present, and future capacities combined—something magical happens.

This book will help your business. The AI Summit is not difficult. All it takes is a real belief in the collective human capacity and a desire to challenge conventional patterns of planning that continue to fragment and isolate us from one another. As the authors attest the AI Summit—bringing 100s of people together interactively for three to four days—requires at least a little dose of courage.

A CEO I recently worked with at first rolled his eyes at the idea of a 500 person organizational summit. But he explored the idea further by talking to other people who had experience with the approach. Six months later the company did their first AI Summit and his comment to me at the end, with a twinkle in his eye, was: “I don’t know what all the fuss was about”.

Enjoy this book. Let it help you reduce “the fuss”. And then experience how appreciation, inquiry, and the power of wholeness combine to bring out the best in organizational and human capacity.

David L. Cooperrider
Weatherhead School of Management
Case Western Reserve University
Cleveland Ohio