

# AI Practitioner

*The international journal of AI best practice*

## CONTENTS

1 Introduction

4 About our Contributors

### **PART 1: ESTABLISHING RELATIONAL CONTEXT**

6 Secrets to initiating and contracting for Successful Large Inquiries (1)

9 Secrets to initiating and contracting... (2)

13 Demystifying the AI Planning Process: Letting the Client Lead

17 Coming Alongside: Learning from Ambiguity and Creative Tension in the Early Phases of Consultancy-Client Engagement

### **PART 2: EMERGENCE, COMPLEXITY AND CHAOS**

22 Secrets To Initiating And Contracting... (3)

27 Emergent Change Strategy at the BBC: Living AI During Client Contracting

34 Using Whatever Emerged: Infusing AI through the Contracting Process

### **PART 3: TACKLING MAJOR SOCIAL ISSUES**

38 Progressive Definition within Complex Systems: Lessons from the YWCA

43 Creative Definition as an Antidote for Skepticism: Building up Guyana's Positive Change Wave

46 About the August 2006 Issue: Expanding Organizational Practices: Lessons from Therapeutic Conversations

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## Getting Started: Secrets to Initiating and Contracting for Successful Large Inquiries

**Bernard J Mohr and Stephen P Fitzgerald, Guest Editors**

### Making Great Movies - An Invitation

AI success stories in print are constructions – retroactive tales most often told from the vantage of the consultant(s) engaged in the inquiry. Like all good stories, they selectively focus our attention, stir our passions, and ignite our imaginations. And they unfold in a series of seemingly sequential acts called “Discovery, Dream, Design, and Destiny.” The images of these stories flicker brilliantly in our minds’ eye. Thus absorbed, we rarely reflect on the complex collaboration among dozens and even hundreds of people that precede the first image being projected on any screen. Their names roll in credits at the end, but their orderly arrangement reveals little of the dense web of expertise, interactions, negotiations, deals, and creative syntheses that made the film and the story possible.

We are especially enthralled with blockbuster stories of large-scale appreciative inquiries, yet in this issue we wonder - what happens on the backlot long before the curtain first goes up? In such large inquiries, is this work of Definition or even pre-Definition ever completed once and for all – or is it ongoing? What really creates the agreement to ‘green light’ a larger and more complex inquiry? And does it take just one decision, or are there many along the way? Who does what, with whom, and how during this mysterious period of contact development, relationship building, mutual education, offer crafting, exploratory dialogues at various levels, preliminary proposal writing, site visits, and pilot projects. What are the images that guide the choices we do and don’t make, and the questions that we do and don’t ask, in “getting started,” and how fateful are they?

In this issue, we seek to illuminate this typically hidden-from-view “tilling of the relational soil,” or “coming alongside” – not because we want to add more technique to the field, but rather because we want to begin the process of sharing the here-to-fore unpublished ideas,

activities, skills, and thought processes associated with *Initiating and Contracting for Successful Large Inquiries*. Our hope is that by making these more visible, the scope, impact, and efficacy of the work within our growing, global AI community will be amplified. Although you'll find many practical ideas and tips to help you successfully launch large inquiries, we invite you to join us as we go behind the scenes to reveal rich stories of beginnings that may surprise you!

### Lights, Camera: Inquiry!

Our 'film' is an ensemble piece with a series of actors telling their exciting tales of large inquiry development. To help make sense of this diversity, the six stories and three conversations that comprise the whole are arranged in three interrelated parts:

*Part 1 Establishing Relational Context:* Discover and delight in the myriad ways in which relationships that generate and support large-scale inquiries are established and cultivated. This part begins with our conversation with Diana Whitney, who shares her own appreciations of being the change we want to be *during the contracting process itself* in the case of her early work at Smith-Kline and then later at British Airways, Hunter-Douglas and GTE. Next, our conversation with Ron Fry further deepens our understanding of the opportunistic moments that arise in the early stages of dialogue with the client, as Ron describes the Roadway Express, U.S. Navy, and Greater Houston (Texas) Mental health inquiries. Gayle Lantz then helps to *Demystify the AI Planning Process by Letting the Client Lead*, highlighting the importance of early successes as well as the contribution of visionary leadership and the client's desire for change. Then, hold on to your popcorn as Peter Shepherd and Alexandra Stubbings take us on a tour de force exploration of deep space reflected in their heartfelt experiences of *Coming Alongside* their client's assumptions, expectations and fantasies!

*Part 2. Emergence, Complexity, and Chaos:* With the thrilling conclusion of Part 1, you begin to get the idea that no, we are NOT in AI 'Kansas' any more! That sets the stage for Part 2, in which we discover that post-modern tales are not linear progressions. Here the plot thickens and diversifies as creative actors experiment in AI's budding avant-garde, eschewing linear progression to boldly go beyond the familiar comfort of our 4- and 5-D AI models in highly complex, emergent systems.

Part 2 begins with Penny Williamson and Tony Suchman's nearly magical story of what may be the most incredible 'unplanned' large system inquiry ever! Ralph Stacey's approach to complexity theory thoroughly guided this adventure, in contrast to more traditional approaches to organization development. Next, in her passionate presentation of what must be one of the world's largest inquiries, *Emergent Change Strategy at the BBC: Living AI During Client Contracting*, Mee-Yan Cheung-Judge incisively explores how AI values and principles were used during the contracting phase to demonstrate the power of the approach as part of the ownership management strategy, particularly by encouraging the client to participate fully in co-constructing the process of change. Lonnie Weiss then shows us how to *Infuse AI through the Contracting Process by Using Whatever Emerged*. Lonnie explores how partnership, flexibility and opportunism allowed the building of momentum and the infusing of AI even before the initiative began!

*Part 3. Tackling Major Social Issues:* Now we add in a major plot twist - getting started with

deeply contentious social issues and diverse relationships in highly complex systems. Like all great blockbusters, this one ends with a vision of hope for our collective future – of the possibility of getting started with large-scale inquiries that facilitate national and global change!

Colette Herrick, Sallie Lee, Cheri Torres and Wendy White combine their insights and powerful learnings as they share the struggle and joys of *Progressive Definition within Complex Systems: Lessons from the YWCA*. They focused on how Definition is never finished but rather very much a part of the work from conception to implementation!

The issue's finale is Jen Hetzel Silbert's *Creative Definition as an Antidote for Skepticism: Building up Guyana's Positive Change Wave*. Jen brilliantly portrays the challenge of the sponsor's initial skepticism that the nation, known for historically violent racial clashes, could embrace a strength-based, participatory approach to peace-building and community/nation development. Jen's story of turning deeply rooted concerns of inter-ethnic violence into an affirmative topic that expanded an original scope of work into unforeseen opportunities is breathtaking.

### **The Blockbuster "Buzz"**

Blockbusters generate "buzz" – exciting word of mouth that spreads spontaneously as people share their personal favorite highlights from the movie, swap interpretations, marvel at the special effects, and try to make sense of complex story lines. We hope the exciting stories in this issue spark such buzz in our AI community and lead to creative innovations and experiments in large inquiries.

*Bernard J. Mohr and Stephen P. Fitzgerald*  
Guest editors, May 2006



The Summit: Steve Fitzgerald at 13,000 feet on Cirque Peak in the eastern Sierra Nevada, California.