

“AI” Appreciative Inquiry

A Positive Revolution in Change

With
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&
David Cooperrider



Time to Re-think Human Organization and Change



Global Context of Change

- ❖ Guiding Images of the Future

End of Apartheid

- ❖ Power of Conversation

No Limits to Cooperation—value nets, complimentary partnerships, combining competition and cooperation

A Positive Revolution in Change Research

- ❖ Positive Psychology Movement

“Whole System” Excellence—agility, speed, accelerated learning, execution and follow through; reality of SCALE

Sustainable Design: Sustainability as the 21st Century Business Opportunity?



New Horizons in Appreciative Inquiry Business as an Agent of World Benefit June, 24th 2004 at the UN

“Let us choose to unite the power of markets with the strengths of universal ideals...let us choose to reconcile the creative forces of private entrepreneurship with the needs of the disadvantaged and the requirements of future generations”

UN Secretary General
Kofi Annan



Peter Drucker...an interview we did with him on his book “The Next Society”



“The task of leadership is to create an alignment of strengths, making our weaknesses irrelevant”.

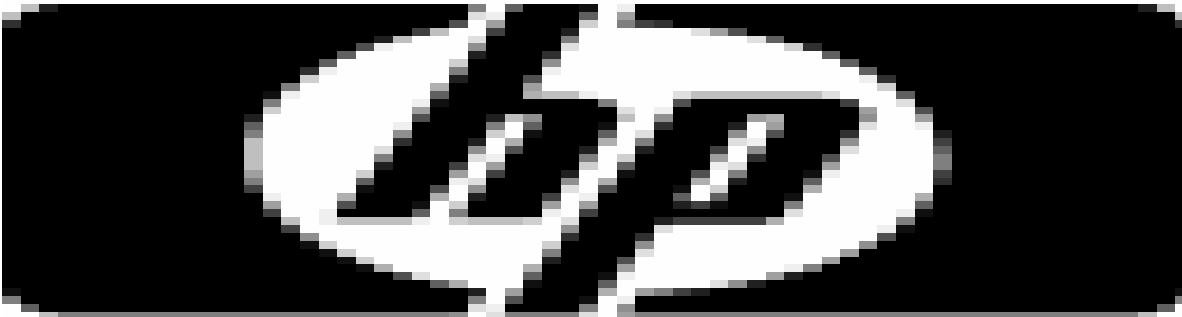
Could it Be...Catalyzing Change Might Be *All* About Strengths?



- Why would strength connected to *strength...create change?*
- ❖ Its often been said that strengths perform, but how about the idea that strengths do more than perform, they transform?
- ❖ What would it mean to create an entire change theory around strengths?



YRC Worldwide



Parker

i m v e n t



Lets Get Into It Now...

Principles of “AI”



- ❖ Constructionist Principle
- ❖ Principle of Simultaneity
- ❖ Open Book “Poetic Principle”
 - ❖ Anticipatory Principle
 - ❖ Positive Principle

Opening Inquiry

- ❖ Questions for Discovery –
 1. individual reflection first
 2. Conversation (pairs)



What Calls/Attracts You Here?



A. What attracted you to this Monterey workshop?
How does your interest in Appreciative Inquiry
connect to your work, or these times we are
living in?

B. “The times in my life I feel the most energized
and vital are...”



1. Story From Your Experience:
A career “highpoint” in leading positive change or creating innovation?
 - a. Share the most memorable parts of the initiative, including challenges and innovations and stages.
 - b. Reflect on: “root causes of success”
 - c. You...what were your 3 best qualities, or experienced strengths?

2. When do people feel most passionate? Signature strengths?



A. Your observations and experiences—

When do people feel most passionate and connected at your organization? Can you share an example: “a hot team”, great innovation, entrepreneurial spirit?

B. Your Organization’s Signature Strengths

(continuity question): assuming your corporation will change in the future, *what are those best qualities—distinctive capacities, signature strengths, assets, etc --* that you would want to keep or build upon, even as the system moves into a new and changing future?

- ❖ An example of those strengths in action?

#3. Images of the Future (Your Organization in 2016)

❖ We wake up...it is 2016...what do you see that is new, different, changed, better?

❖ I will be most proud of my organization in 2016 when...?



Starting AI Interview

(dialogue in pairs)



- ❖ A-->B (20 min)
- ❖ B-->A (20 min)
- ❖ Spirit of discovery
- ❖ Take brief notes
- ❖ At the end.. summary & thanks
- ❖ Return @

Pioneering Research Across Many Fields...

An Emerging Vocabulary of
“Positive Change”



Science of Human Strengths



Six categories of character strengths or virtues

- Wisdom & Knowledge – creativity, curiosity, perspective
- Courage – persistence, bravery, **integrity**
- Humanity – love, **kindness**, emotional intelligence
- Justice – Citizenship, **responsibility**, fairness, leadership
- Temperance – **forgiveness**, **humility-modesty**, self-control
- Transcendence – appreciation, **purpose** hope, humor, spirituality

Source: Peterson & Seligman (2004)



Science of Human Strengths

What Good Are Positive Emotions?

- Broaden-and-Build Theory
- The Emotion of Elevation
- Upward Spiral as Change Model
- High Quality Connections

Positive Image → Positive Action

- Positive Health Studies
- Pygmalion in Education
- Rise and Fall of Cultures

Words Create Worlds

- Inner Dialogue Research
- Media Studies/ Social Construction
- Affirmative Capacity and Leadership
- Implications for Organizations?

Positive Emotions Broaden Thought-Action Repertoires



- Joy.....play, innovate
- Interest.....expansive, explore
- Contentment.....savor, integrate
- Love.....connect, relate



Empirical Support for “Broaden and Build” Theory of Change

Three “Revolutionary” Contributions:

1. **Broaden Attention and Thinking**

(Fredrickson & Branigan, 2002; Waugh & Fredrickson, in prep)

2. **Undo Lingering Negative Emotional Arousal**

(Fredrickson & Levenson, 1998; Fredrickson, Mancuso, Branigan & Tugade, 2000)

3. **Fuel Resilient Coping, Like Immune System**

(Fredrickson, Tugade, Waugh & Larkin, 2002; Tugade & Fredrickson, 2002)

Empirical Support



Over time, Positive Emotions:

- Prevent depression

(Fredrickson, Tugade, Waugh, & Larkin, 2002)

- Build optimism, and resilience, and elevated relationships of benefit (Fredrickson, Tugade, Waugh, & Larkin, 2002; Haight 2003)

- Trigger Upward Spirals to Increase Well-being

(Fredrickson & Joiner, 2002; Tugade & Fredrickson, 2002)



William James' interest: moments of extraordinary positive experience—and how these too can be cultivated to ignite “explosive” change:

- ❖ Emotional occasions, especially violent ones, are extremely potent in precipitating mental rearrangements. The sudden and explosive ways in which jealousy, guilt, fear, remorse, or anger can seize upon one are known to everybody. Hope, happiness, security, resolve, emotions characteristic of conversion, however, can be equally explosive. And emotions that come in this explosive way seldom leave things as they found them (James, 1902, p. 163-164).

William James



- ❖ James went on to say that what we truly need is much more understanding about the kind of change that happens when things are *“hot and alive within us, and where everything has to re-crystallize about it”* (James, 1902, p. 162).

Quick conversation...



- ❖ What areas—Pygmalion, inner dialogue, “what good are positive emotions”, rise and fall of cultures, affirmative capability—are most interesting to you?
- ❖ Other research? An experience for your life?

Form Groups

2+2+2=6...return



Introduce your partners vis-à-vis your interviews—share highlights....

Everyone listen for patterns/insights in three areas:

1. High Point Stories : And Analysis
Root Causes of Success?
2. Continuity themes : *Things Best, To Keep , Signature Strengths*
3. Images of the Future: Key Visions

PATTERNS/THEMES

return



HIGH POINTS

CONTINUITY

FUTURE: 2016

Share patterns—
PLUS one of the
illustrative high
point *stories*



What Does All This Mean for Our Work With Organizational Change?

What Good Are Positive Emotions?

- Broaden-and-Build Theory
- The Emotion of Elevation
- Upward Spiral as Change Model

Positive Image → Positive Action

- Positive Health Studies
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For Us It Began to Raise New Awareness the Deficit Theory of Change... Pervasive.

- ❖ Identify problem
- ❖ Conduct root cause analysis
- ❖ Brainstorm solutions and analyze
- ❖ Develop action plans/intervention

Most schools, companies, families and organizations function on an unwritten rule...

“Let’s fix what’s wrong and let the strengths take care of themselves”

--Gallop Poll

Metaphor: Organizations are problems to be solved



Overuse of *Deficit-Based* Management

Unintended Consequences & the Point of Diminishing Returns

- ❖ Fragmentation
- ❖ Few New Images of Possibility
- ❖ Exhaustion
- ❖ “The Experts Must Know” ... Dependence and Hierarchy
- ❖ Spirals in Deficit Vocabularies
- ❖ Closed Door Meetings
- ❖ Disempowering Climate
- ❖ Anti-innovation

Most schools, companies, families and organizations function on an unwritten rule... “Let’s fix what’s wrong and let the strengths take care of themselves”

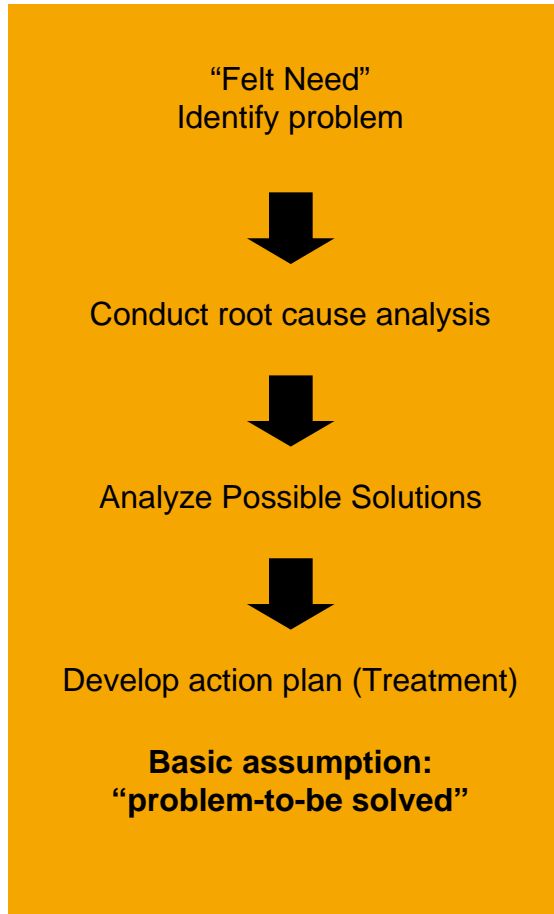
--Gallop Poll

“The signal accomplishment of the industrial age was the notion of continuous improvement. It remains the secular religion of most managers... has reached the point of diminishing returns in incremental improvement programs.”

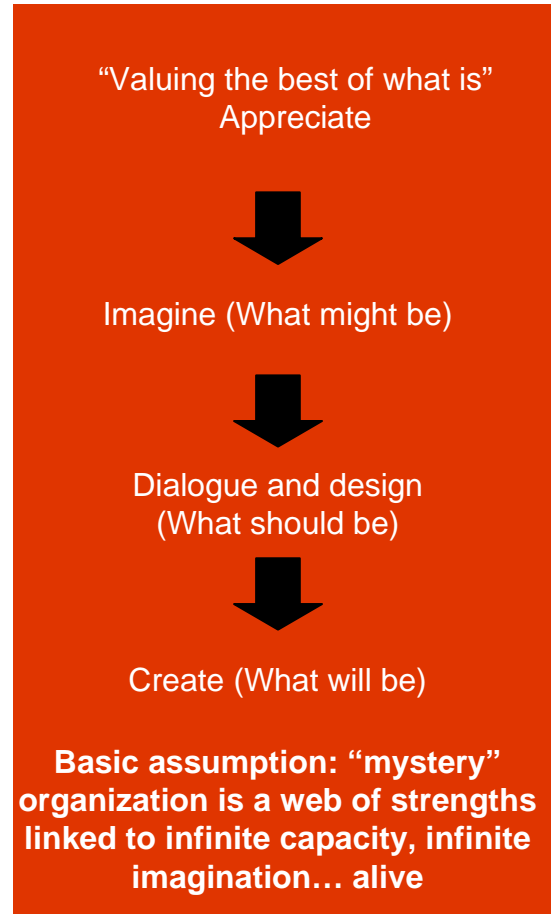
*– Gary Hamel, *Leading The Revolution**

PROBLEM ANALYTIC CHANGE VS. APPRECIATIVE INQUIRY

Problem solving (deficit based change)



Appreciative inquiry (strength based innovation)



Basic Assumptions

- What we focus on becomes our reality
- Reality is created in the moment, and there are multiple realities
- In every ongoing team/group/organisation . . . Something(s) work
- People have more confidence and comfort to journey to the future (the unknown) when they carry forward parts of the past (the known)
- The mode and language of inquiry effects the org. being observed

Appreciative Inquiry is a Shift



“No problem can be solved from the same level of consciousness that created it. We must learn to see the world anew.”

“There are only two ways to live your life. One is as though nothing is a miracle. The other is as though everything is a miracle.”

– Albert Einstein



Ap-pre'ci-ate, v.,

1. Valuing ...

- The act of recognizing the best in people and the world around us;
- Affirming past and present strengths, successes, and potentials;
- To perceive those things that give life (health, vitality, and excellence) to living systems.

2. To increase in value, e.g. the economy has appreciated in value.

- Synonyms: ***valuing, prizing, esteeming, and honoring.***



In-quire' (kwir), v.,

1. The act of exploration and discovery.
2. To ask questions; to be open to seeing new potentials and possibilities.
 - Synonyms: ***discovery, search, study and systematic exploration.***

What would *you* call it? (all these things taken together)



- ❖ Achievements
- ❖ Strategic opportunities
- ❖ Technical assets
- ❖ Innovations
- ❖ Elevated thoughts
- ❖ Best practices
- ❖ Positive emotions
- ❖ Financial assets
- ❖ Value created
- ❖ Economic and social investments
- ❖ Tacit Wisdom
- ❖ Core competency
- ❖ Visions of possibility
- ❖ Reputation and brand
- ❖ Vital traditions
- ❖ Positive macrotrends
- ❖ Social capital
- ❖ Strengths: business ecosystem e.g. strengths suppliers, partners, customers

The “Positive Core”

AI systematically and collaboratively creates a knowledge link between the entire enterprise and the life-generating core of past, present, *and* future capacities and opportunities..... this ignites change!



Everyone's Part of
the
"Inner Circle of
Strategy"

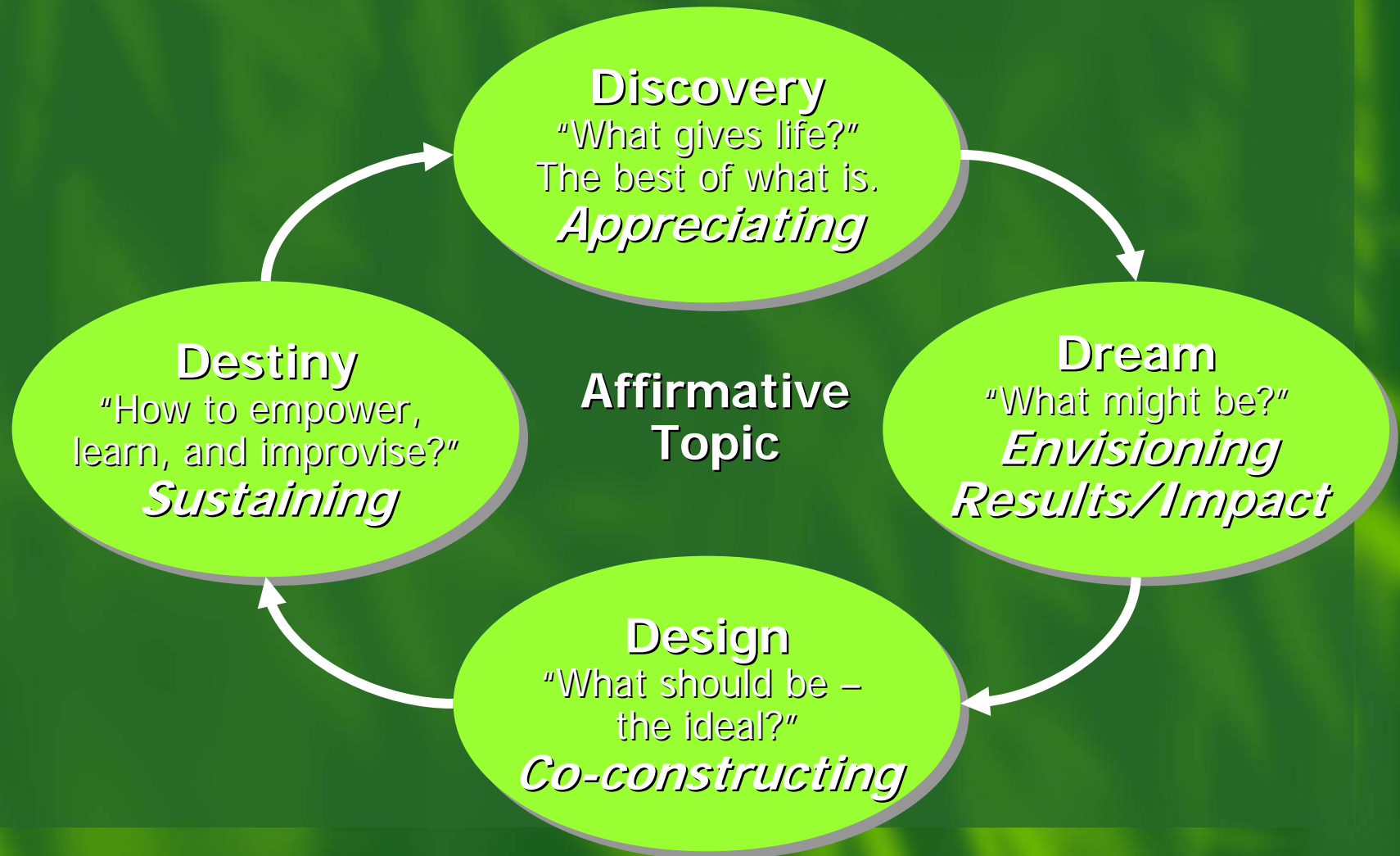
Management
Techniques
from the Best
Damn Ship
in the Navy



IT'S YOUR SHIP

Captain D. Michael Abrashoff
former commander, USS *Bentold*

The AI 4-D Model





Topic Choice: A Fateful Act

- ❖ Organizations move in the direction of what they study.
- ❖ Questions we ask determine what we find. . .
- ❖ Process choice point: Who does topic choice: executive team; core team; or “whole system?”

Best Way to Build High Engagement and Enthusiasm?



- ❖ Do an organization survey of **low morale**?
- ❖ Magnify and learn from moment of **highest** engagement & enthusiasm?



Topic Creation: Recent Examples



Transformational Merger Synergy

Revolutionary Customer Response

Magnetic Work Environment

Outstanding Arrival Experiences

Sustainable Value Creation

Optimizing Margins

Creating an Epidemic of Health

“Lightning Fast Consensus”



Topic Creation: Examples

Service that Exceeds Expectations
(patients and their families)

Liberating Collaboration

Revolutionary Customer Response

Magnetic Work Environment

Outstanding Arrival Experiences

Business Social Entrepreneurship

Optimizing Margins

Empowering & Enlightened Leadership

“Lightning Fast Consensus”

Ecologically Restorative Production



Topic Choice

- ❖ Human systems move in the direction of what they most frequently and persistently ask questions about.

What you study, GROWS

Groups return at _____

Craft 2-3 Transformational Topics



1. Draw upon earlier work: high points, continuity question, images of the future
2. Create 2-3 Topics— topics that could move and transform organizations toward the visions and ideals we hold.
3. Good Topics are: bold, desired, spark learning, have energizing words, sometimes bring opposites together, strategic value for the business, generative potential.

Genius is Creating the Question



“What would the universe look like if I were riding on the end of a light beam at the speed of light?”

– Albert Einstein

The Art of the Question in Leadership and Change



- ❖ What's the biggest problem here?
- ❖ Why did I have to be born in such a troubled family?
- ❖ Why do you blow it so often?
- ❖ Why do we still have those problems?
- ❖ What possibilities exist that we have not yet considered?
- ❖ What's the smallest change that could make the biggest impact?
- ❖ What solutions would have us both win?



The Encyclopedia of Positive Questions

- ◆ A Craft That Can Change Everything
- ◆ Consider the Shifts...

What New Questions?

From a Study Customer
Dissatisfaction and Complaints



Magnetic Connections



Preface:

In the physical world, all matter is held together by the pull between opposite electric charges. Likewise, successful companies are magnetic-- people connect in new and innovative ways; suppliers and customers are pulled together and become seamless edge-to-edge organizations. Communities of interest form and are pulled together by shared values. Knowledge networks form as catalysts for innovation and creativity.

Magnetic Connections (continued)



- A. Think of a time when you felt “magnetically” connected to your client, your colleagues, and your community ... connected in a way that the force was so strong that it could not be broken. What was that experience? What did it feel like?
- B. As you look into the future, describe how you see us connected to our customers and our colleagues — in ways that are so strong that we are seen as inseparable business partners.

Allstate Insurance



Revolutionary Partnerships

- ❖ *The mark of a revolutionary partnership is doing things radically different together. Not only different, but quicker, with a common focus, leveraging each other's diverse strength. Also, establishing new ways of doing business that are based on trust, mutual respect and a shared vision.*

- ❖ **Think of a time when you were part of a revolutionary partnership, a time in your life – at work, or in your personal or community life, when you not only met the other person(s) half way, but met and exceeded needs on both sides. Describe the situation in detail.**
 - **What made it feel radically different?**
 - **Who was involved?**
 - **How did you interact differently?**
 - **What were the outcomes and benefits you experienced?**

The Surprise of Friendship!



- ❖ *One could say a key task in life is to discover and define our life purpose, and then accomplish it to the best of our ability.*
- ❖ Can you share a story of a moment, or the period of time, where **clarity about life purpose** emerged for you. For example, a moment where your calling happened, where there was an important awakening or teaching, where there was a special experience or event, or where you received some guiding vision?



Engagement and Positive Energy



❖ Preface

- ❖ Organizations work best when they are vibrant, alive and fun. You know, when the "joint is jumping!" You can sense that the spirit of the organization is vital and healthy and that people feel pride in their work. Everyone builds on each other's successes, a positive can do attitude is infectious and the glow of success is shared. What's more, this positive energy is appreciated and celebrated so it deepens and lasts.

Engagement & Energy



- A.** Tell me about a time when you experienced positive energy that was infectious. What was the situation? What created the positive energy? How did it feel to be a part of it? What did you learn?
- B.** If positive energy were the flame of the organization, how would you spark it? How would you fuel it to keep it burning bright?



There is no such thing as a *Neutral* question!

Groups

Crafting the Question return



- ❖ Choose one of your Topics → the Ai question (s): 3 PARTS
 - I. Positive Preface—it is a topic intro.
 - A. A question to *evoke a story* from persons history
 - B. A question to evoke/help give voice to their best *images of future*
 - return...

We Live in the Worlds Our Questions Create

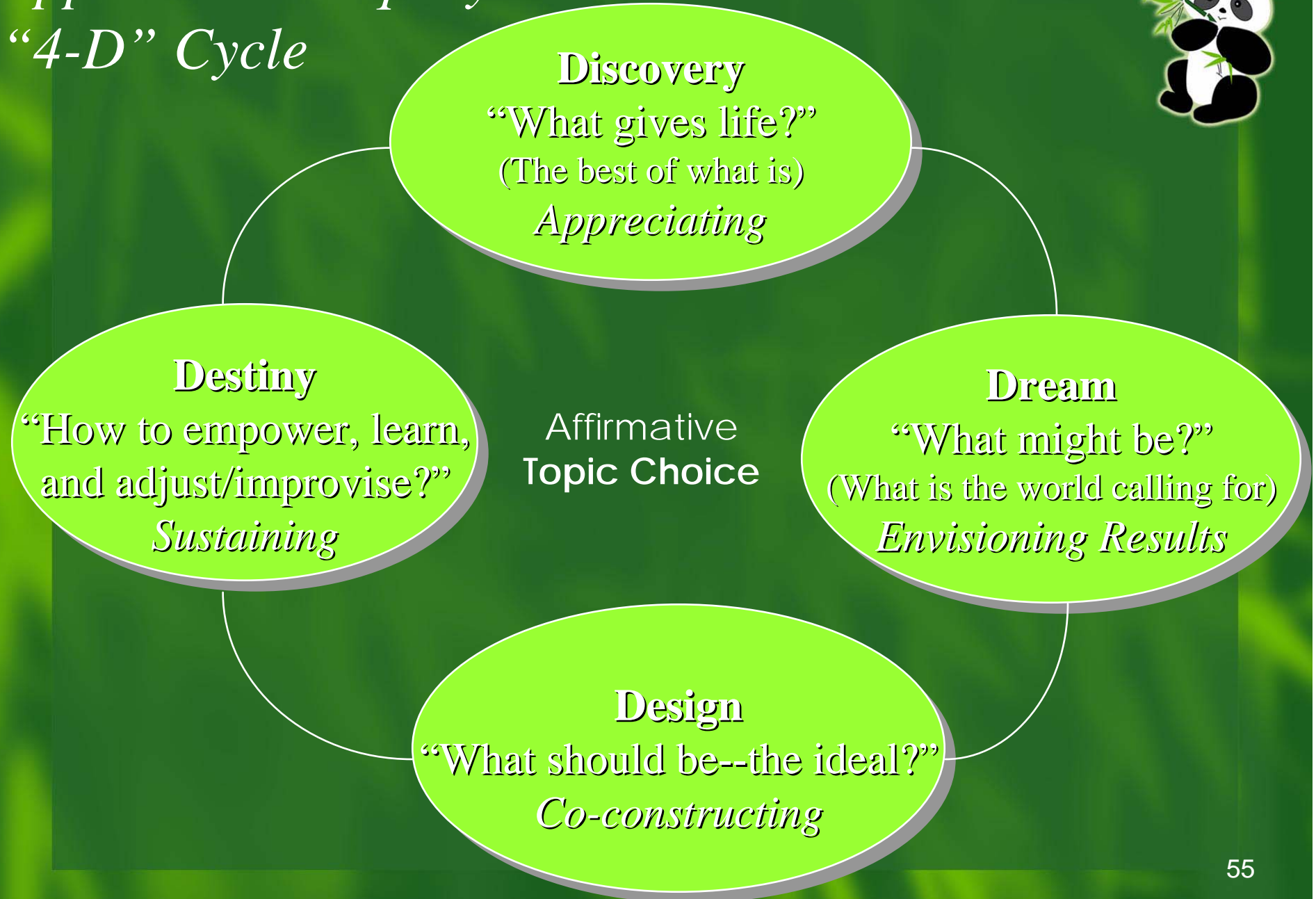


Be patient ... and try to love the questions themselves. Live the questions now. Perhaps you will then gradually, without noticing it, live along some distant day into the answer.

– Rainer Maria Rilke

Appreciative Inquiry

“4-D” Cycle





Today

- ❖ The “AI” Summit Method
 - ❖ Case stories & results
 - ❖ Yellow Roadway, United Nations (with BP, Vodofone, Novartis, Nokia, Goldman Sachs, Ericcson), Fairmount Minerals, Nutrimental Foods, etc.
- ❖ Dream and Design phases (IDEO)



The AI *Organization Summit Method*

Increasing positive capacity
through large group methods

4 Common Approaches to Change



- ❖ Top Down Strategies
- ❖ Bottom Up Strategies
- ❖ Representative Cross-Section Strategies
- ❖ Pilot Strategies
- ❖ Back Room



Typical Results

- ❖ Less Informed and Ultimately Less Effective Change Efforts
- ❖ A Few Try to Convince Many That Change is Needed
- ❖ Partial Responsibility Mindset
- ❖ Change Occurs Sequentially
- ❖ Change is Perceived as a Disruption of “Real Work”



Typical Results (cont)

- ❖ Pace of Change is Too Slow
- ❖ Substantial Change in Part or Modest Change in an Entire Organization
- ❖ Breakdown at Implementation

Dream & Design

The AI “Organization Summit”:



- ◆ **“Whole System” in the Room**
- ◆ **Task is Clear...**
- ◆ **Future Focus & Continuity Search**
- ◆ **Self-Management and Dialogue**
- ◆ **Narrative Rich & Inter-generational**
- ◆ **From Common Ground to Inspired Action**
- ◆ **3-Day event/100 to 1000 Participants**
- ◆ **Uncommon Action/Follow Through**

Nutritional Foods

From Internal Empowerment to Societal Change Leadership



- ❖ Rodrigo Loures
- ❖ Commitment to Human Development and Empowerment
- ❖ 600 % Increase in Profitability
- ❖ 75 % Decrease in Absenteeism
- ❖ Appointment to President Lula's Economic and Social Council
- ❖ 2003 B.A.W.B. Conference on Sustainability Indicators—1200 People at the Conferences
- ❖ World Business Academy Award
- ❖ Top 100 Companies in Brazil
- ❖ Leadership with peace-building
- ❖ Key Puzzle: Is there a directionality to BAWB (e.g. Urie Bronfrenbrenner's ecology of human development?)

Everyone is fully engaged in the success of Roadway and committed to the success of each other



Why Does Experience of Wholeness...



- ❖ Bring out the best in human beings?

 - ❖ Propel innovation?

 - ❖ New life?

 - ❖ Eclipse old patterns?

 - ❖ So easy?

Roadway Express : 65 Ai Summits: Energized, Unified



- ❖ Recently Featured in Fast Company and Forbes.
- ❖ Stock Prices rise--\$14 to \$41 per share
- ❖ From 300 to Zero Grievances, e.g. Akron Terminal
- ❖ Powerful Product Innovations, e.g. Manhattan Project
- ❖ New Culture of Leadership
- ❖ Powerful Learning Partnerships: Alcoa, Boeing, Cisco, Harley-Davidson, US Navy.

Roadway Has Done 65 Appreciative Inquiry Summits
10,000 People Engaged

Why Engagement of the Client System? The Business Case



- ❖ Approaches to competitive advantage:
 - Low price – less than 60 days
 - Operational/technical expertise – less than 3 years
 - Fully engaged employees (people think and act like owners) – **more than 7 years**

Corporate Merger of Strength with Appreciative Inquiry

Scenes From a \$8 Billion Dollar Merger Integration Summit



YELLOW!

YES WE CAN!



YRC Worldwide

Gallop Study: 1.7 Million Employees



“I have the opportunity to do what I do best”

- ❖ What percentage of people do you think - 1.7 million people from 101 companies - strongly agreed that they are empowered to do what they do best in their work and company?
- ❖ The wealth of unrealized capacity is enormous - people are dying to be tapped on the shoulder and asked for more engagement in the strategic issues of the day - like the Navy example.

AI “4-D” Cycle



Appreciative Inquiry Summit Method at the **UN Global Compact** With 500 CEOs and Civil Society Leaders



Results:



Vision of 100,000 Companies by 2015

- ❖ 20 major financial companies pledged to begin integrating social, environmental and governance issues into investment analysis and decision-making--representing \$6 trillion in assets
- ❖ 10 stock exchanges pledged that they will embark on a Global Compact awareness-raising campaign with their listed companies.
- ❖ Aspen Institute's TIP—millions of young managers
- ❖ Integration of principles: operations, strategies, cultures, supply chains, products and services;
- ❖ 43 local networks—grow deeply woven local roots
- ❖ Corporate social responsibility is going to grow and grow and grow!

Examples Emerging Stories



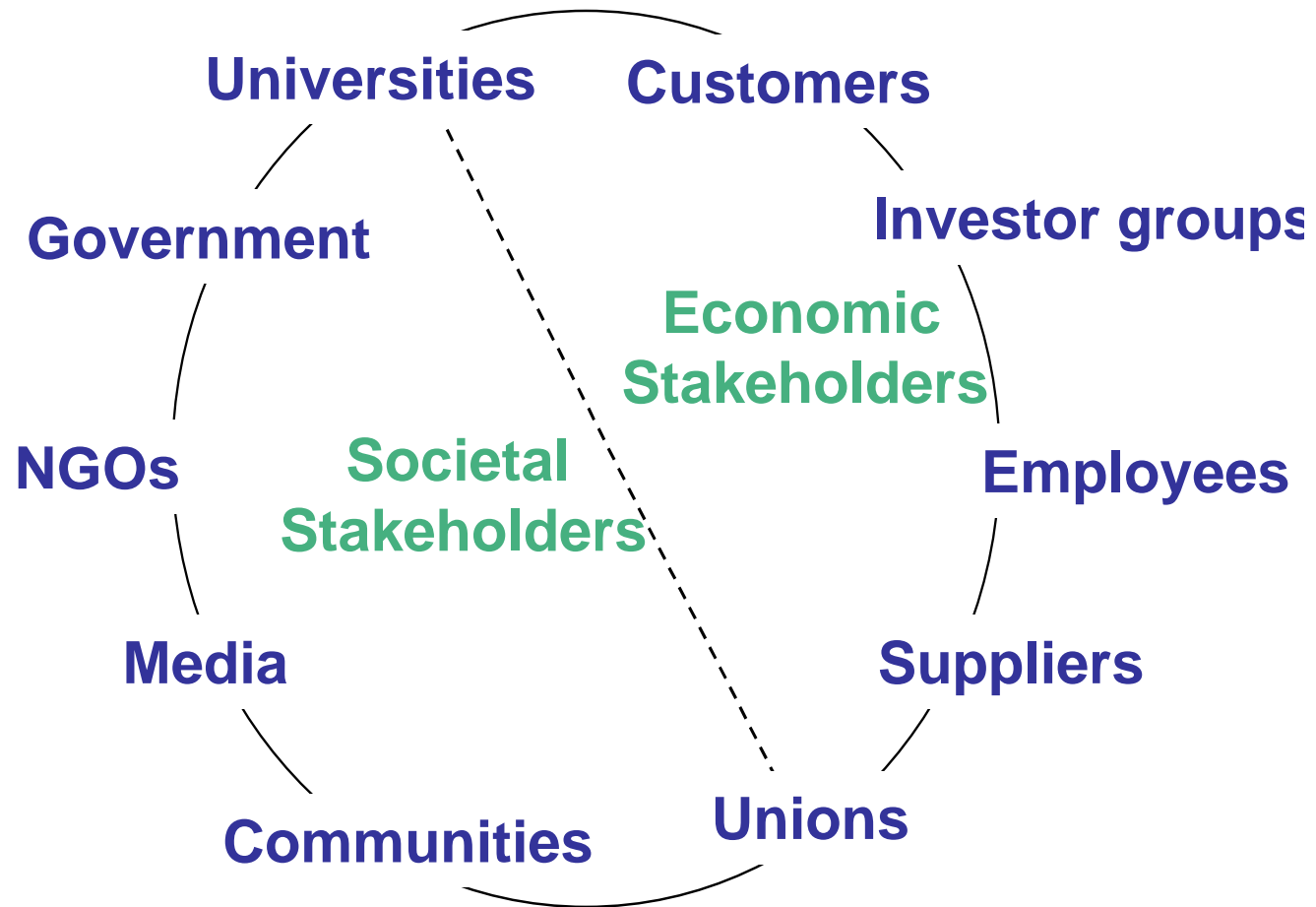
**“Every Social And Global Issue
Is a Business Opportunity” –Peter Drucker
Example: Business as a Force for Peace in Rwanda**

**“Doing Good *Out There* Builds
Good Business *In Here*”
Example: Green Mountain Coffee**

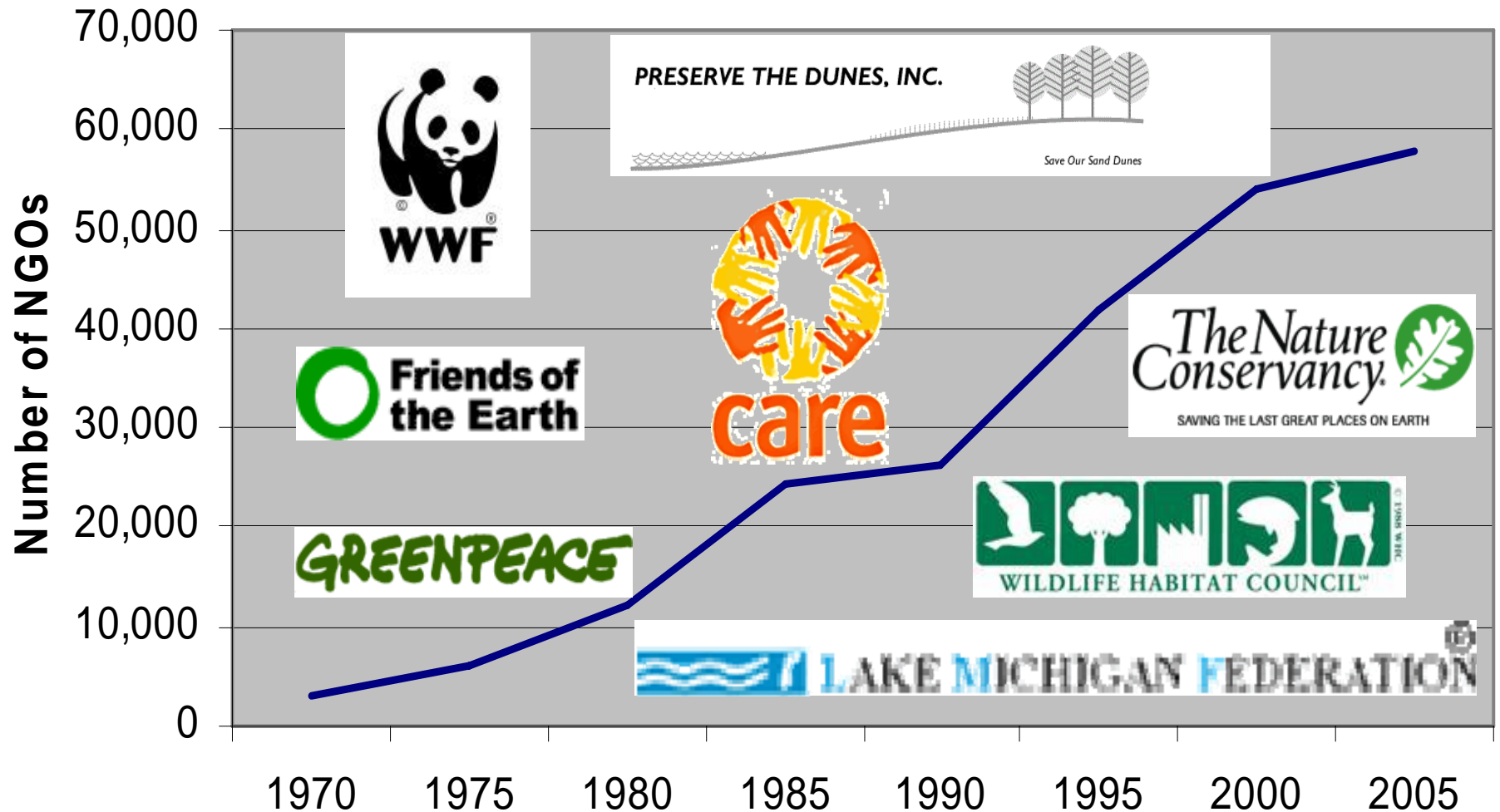
**“Within Our Sphere of Influence”
Novartis Story**

**Wealth
As “Well Being”
Example: Nutrimental Foods
Brazil and Roadway Trucking**

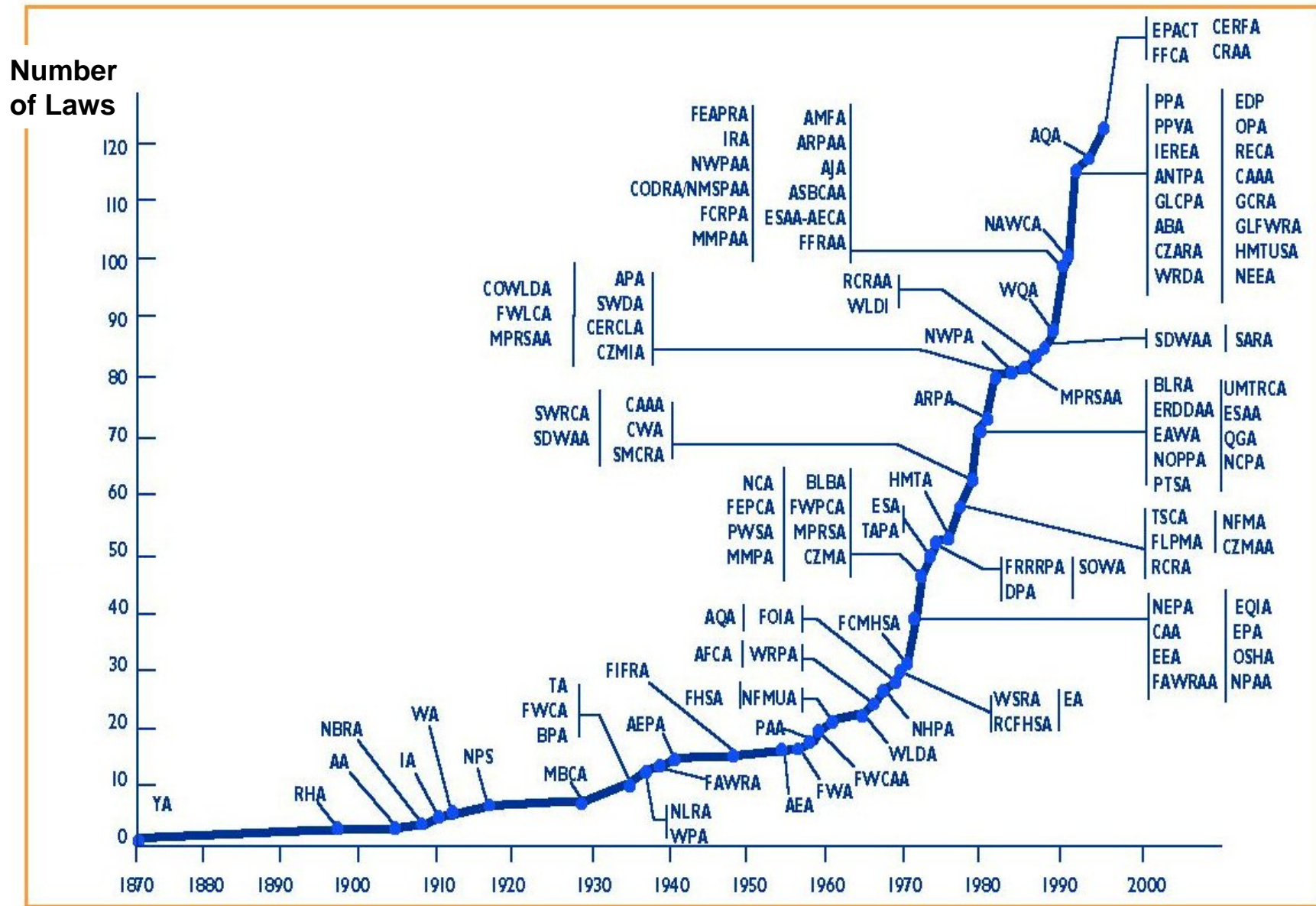
Why is this moving so quickly? Stakeholders are now a powerful force in business



Growth of Non-Governmental Organizations (NGOs)—and instant world wide web information



Environmental regulations



Source: US EPA

Definition of sustainability

“Meeting the needs of the present without compromising the ability of future generations to meet their own needs”

Brundtland Commission, 1987

*“A business approach to creating long-term shareholder value by embracing opportunities and risks deriving from **economic**, **environmental**, and **social** developments”*

The Dow Jones Sustainability Group Index,



DO GOOD.
do well.

Case's Partnerships Locally
Fairmount Minerals
Committed to
Sustainable Development

University Connected as Partner Fairmount Continues to Prosper

