

People Process Focus Groups EYe on the Transition

(City)
(Date)
Facilitator Guide

“Good organizations know how to preserve the core of
what they do best.
Preserving the right things is key.
Letting go of other things is the next step.”

David L. Cooperrider, Ph.D
Appreciative Inquiry*

- Appreciative Inquiry asks ALL people to take deep inventory of their personal and team passions, recount events and times they had the most success, and then compile those compelling features into a system for positive change.

Notes to facilitator:

- Consider conducting the session at an off-site location.
- Ask Counseling Team Leaders to nominate a representative from each level in each tree, to ensure that there is adequate participation.
- Please consider including representation from ESS and Practice support in the focus groups.
- A group of no larger than 16 is an optimal size to ensure that the session is conducted within the 3 ½ hour time, and that all feedback is heard.

I. Session Objectives

Facilitator Instructions:

Welcome and Opening Remarks (Maureen/Dan)

Objectives of today's session:

1. Preserving the core of what we do best and letting go of other things.
2. Building a better (best) working environment for all of us.
3. Sharing with HR Leadership, the People Merger Integration Teams and our Leadership ideas that will help us to become a “breakthrough magnet” organization.
 - Continuity Search—knowing and remembering times when our culture, values and identity made us proud to be IBMX and inquiring into those strengths that we want to be part of our new culture.
 - Opportunities—we know in some ways we have stumbled in the recent past. We also know we can learn from those times and not only try to do things better in the future, but to use this information to help us know what we want what we don't want.
4. We want to engage you now to help us become as clear as possible about the future organization we want to build and create. This is important. While we want to find out what we can do right now to move forward in a positive way, we also need to get your perspective on building the future state People Processes.

(5 minutes)

II. Initial Large Group Discussion

Facilitator Instructions:

This is a large group dialogue which will help us set the context for the Inquiry questions that follow in the next section.

The responses need to be documented on flip charts. While our primary objective for the session is to capture ideas about people processes as we move forward, we need to spend some initial time on how people perspectives and attitudes are TODAY.

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- As you walk around the hallways or work on your engagements, what are some of the things you are hearing about how people are feeling and thinking?

DO NOT move into the next question too quickly. The above conversation will take up most of the allocated time for this section, and you do not want the audience to be forced to think of the positive, before they are ready. (Also, however, do not spend any more than the 40 minutes on the above question.)

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- Do you have examples of positive dialogue? Please share with us.

(50 minutes)

III. Inquiry Questions

A. Interviews

Facilitator Instructions:

5 minutes to set up, 40 minutes for interviews

- We are going to ask you to answer some important questions and we are going to give you some time to reflect on them. Remember, we are moving to build a very clear picture of what we need to look like to be the “best” and become a magnet for us to stay and others to join us.

- Facilitators read the questions.*
 1. “Think back to when you were offered a position at IBMX and you decided to say “yes.” What were some of the attributes that attracted and excited you? How did we differentiate ourselves when compared to other organizations you considered? What set us apart and made the difference for you?”
 2. We as individuals and as a firm have had our ups and downs, peaks and valleys, high points and low points. Tell a story about a time that stands out as a high point for you. A time when you felt energized, fulfilled and most effective.
 3. Good organizations know how to preserve the core of what they do best. Preserving the right things is key. Letting go of other things is the next step. In relationship to building the kind of organization you want to be a part of, what are those things we have done best?

- You are going to interview each other. We are going to give you an interview guide with the questions we just went over. There is a bit more detail and guidance included. Know that it is likely you will learn more if you interview someone you don’t know well. You want to have the spirit of discovery. When it’s your turn to interview - take notes, capture the highlights. Get the story. If you need to enhance or add questions to get the story, please do so.

9:25-10:10am

1:55-2:40pm

- We will then debrief as a large group. You will be asked to share the highlights of the stories from your interview summary.
You will have a total of 40 minutes, 20 minutes to be interviewed, 20 minutes to be the interviewer.

Facilitator: Please alert the group when 20 minutes is up.

B. Large Group Report Out

Each pair takes turns reporting out the highlights of their interviews, while the key elements are captured on flipcharts..

There should be 3 flipcharts available, with the question theme written on top of each:

Question Themes:

1. The Difference that Made the Difference
2. Energizing Highpoints
3. Best People Processes

(60 minutes)

IV. Final Large Group Discussion

Facilitator Instructions:

*The final dialogue occurs in a large group,
hand out stickers/Stars to everyone.*

ASK: A “magnet organization” is one you are most attracted to, one you want to stay at longer term and one you want to invite others to join. 10 is the kind of organization that is most magnetic to you.

1. On a scale of 1-10 (1 = least magnetic, 10 = most magnetic), from your personal perspective where was Ernst & Young when you joined, and where is IBMX today?

Need to have 1-10 scale drawn on board/wall/.

Need 2 colors of pre-coded stickers/stars 2 As, 2 Bs, 2 Cs, 2 Ds....

1 color = where we are today

2nd color = where EY was when I joined

People should indicate on sticker/star their rating of IBMX was when they joined, and where IBMX is today. The alpha codes will allow tracking the gap for each participant.

2. In the new IBMX what does your “10” look like? Be specific. Be clear.

Record answers, get detail and specifics as people respond.

3. What is the smallest and fastest step (action, decision, initiative) we could take that would make the biggest impact?

Record answers, get details and specifics as people respond.

(50 minutes)