

Theory of Process Session #5: 5.18.20

Sharing Applications: Rob, David, Hubert



GLEN EXCHANGE

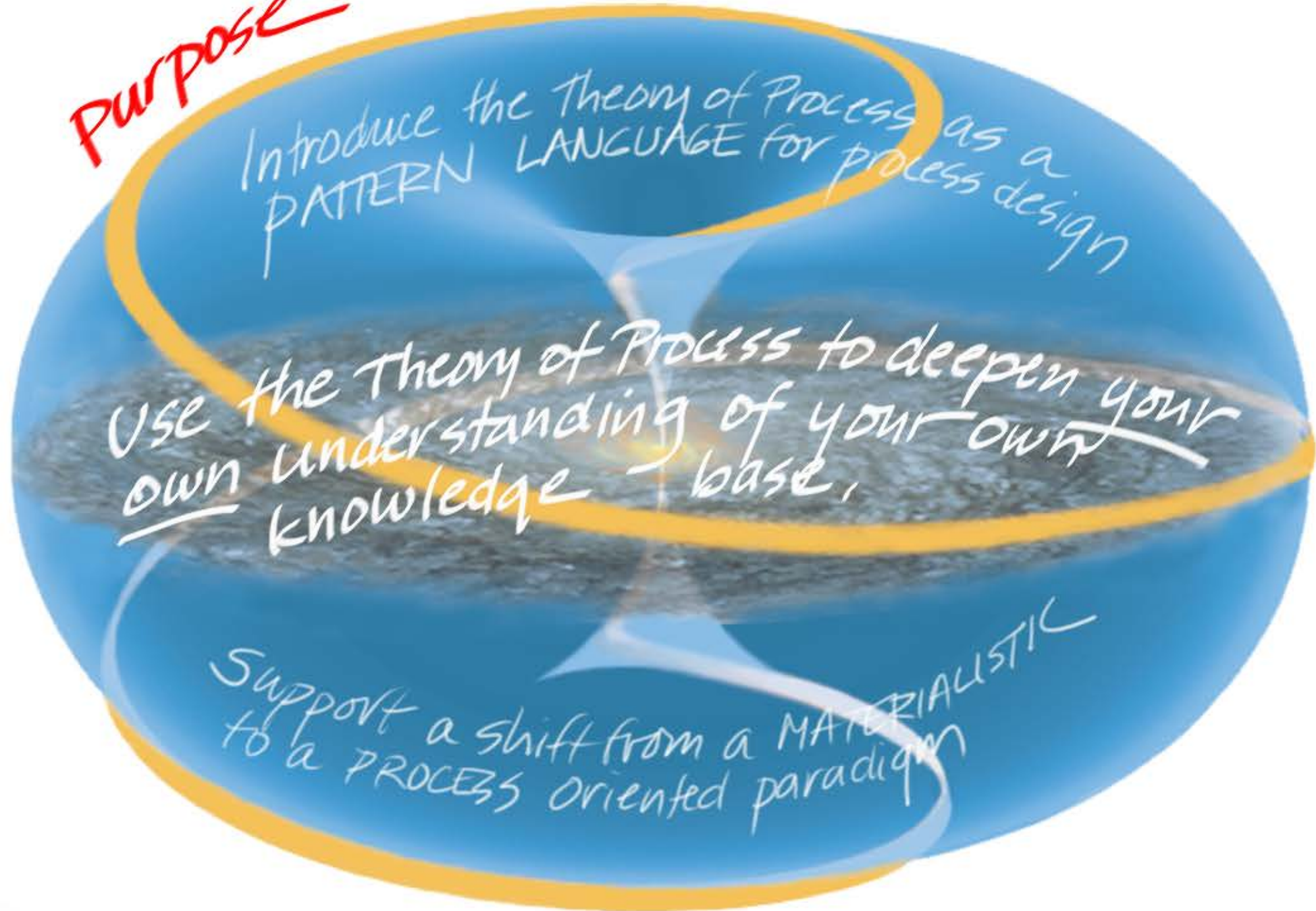
5/18/2020

EXPLORING the THEORY of PROCESS - Session 5

Agenda

8:30	<ul style="list-style-type: none">● ORIENT● CHECK-IN → Strategy Process
8:50	<ul style="list-style-type: none">● ROB & TOP for STRATEGY
9:20	<ul style="list-style-type: none">● TEAM PERF. APPLICATION
9:30	Break
9:40	<ul style="list-style-type: none">● CONSULTING WITH HUBERTZ
10:20	<ul style="list-style-type: none">● TAKEAWAYS
10:30	ADJOURN

Purpose



Go Around

With what organizations have you recently led a strategic planning process?

Can you point to a challenge that you experienced leading that process.

Thanks!

Rob • Hospital in N. Calif.

- Momentum on change

Ahil • Non-profit Sr. Services

- Follow-up / remember

Mary • Long time... Didn't want to: Water District citizen process

- Attendance drop Stakeholders too trusting

Hubert • Retail Bus.

- Corona Company sold / turn around!

Joram • Orthodontic Clinic (effective covid response)

- Clinical ldr. had tough time w/ ORKR's
- Telecoms / Innov. training
- Priorities shifted. Playbook to handle it TOP to

By Mail / Zoom Remote Training

Markus • Food Bank / Vienna

- Deep in operations / no meta-level
- Team bldg. instead. Unlearning

Phil • Covid Recovery for Deloitte

- shift to private companies
- How work w/ other countries innov. lead

Mathias • Alliance

- Leadership change. Project to project
- 6R. Explanatory video.
- VIZ. Couldn't talk about whole process

Ann • 3 clients

- My colleague. CEO's taking responsibility
- Wants to be EXPERT

Keenan • Haven't - in the system / microarchitectural guild.

- Pervasive leadership 100% responsibility
- Shift from core group theory even playing field

CULTURE

Katja • Auto Supplier

- Short term sighted. Save costs, etc.
- 3-5 yrs. plastics: have to plan.
- People on Bd. not same. won't talk to others.

Heiko • IT Manufact. Company

- Long term develop mental process
- another TOP down process
- Mediate TOP down to creative space.
- Keep stakeholders happy
- >>> Roadmap

John • Down do this

- Org. governance. value
- Founders lost in VISION swan
- ? ? ?

Bob • X not recent. I critique.. Advise

David • A&E Firm

- Convergence in space

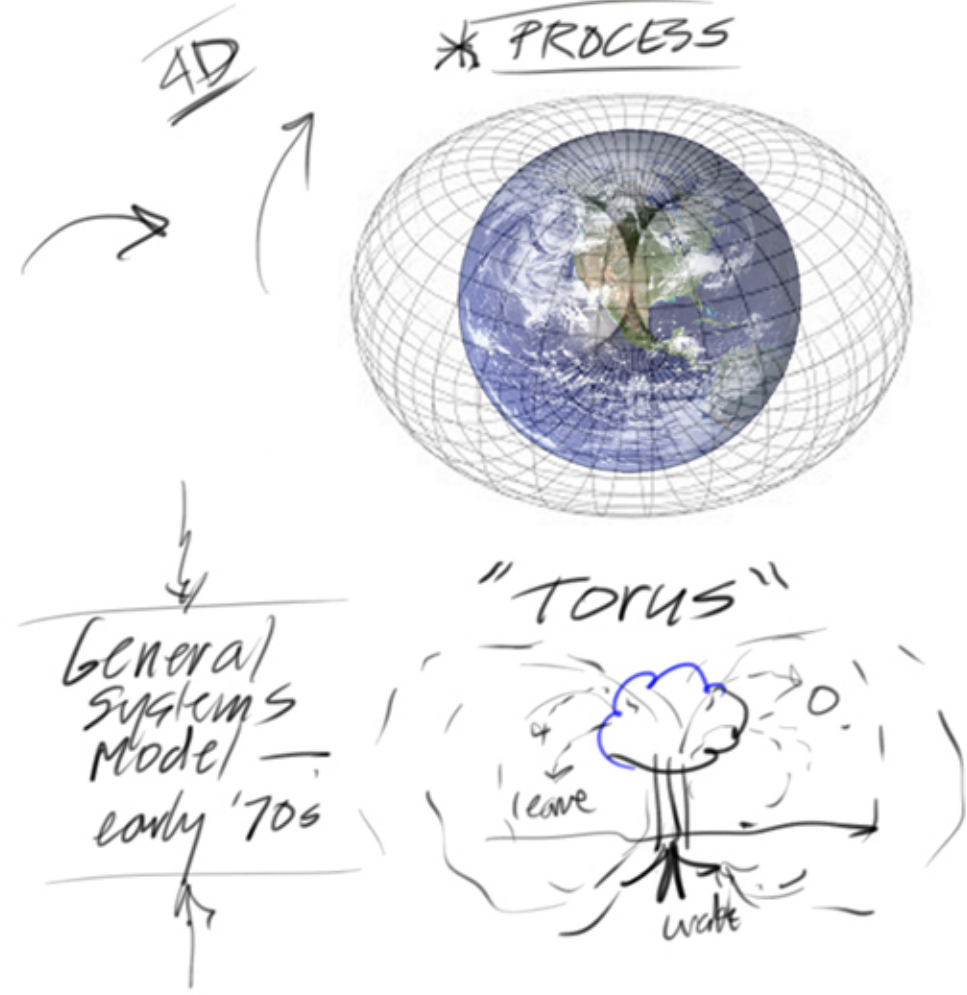
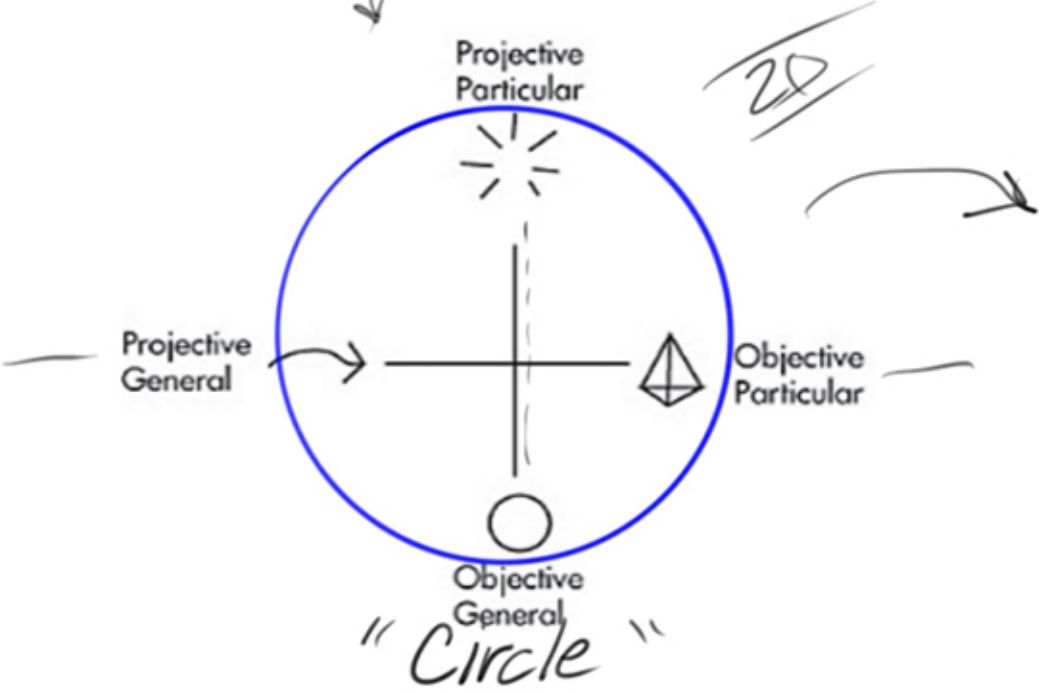
TOP4-2

Toroidal Cosmology ~ A Universal Archetype

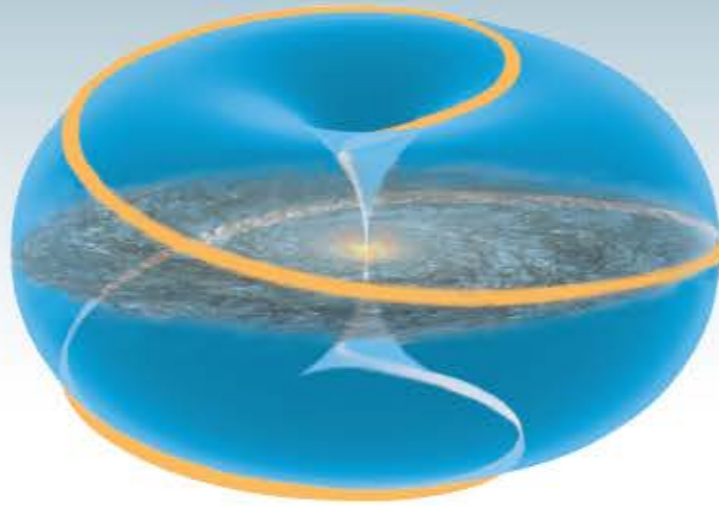
UNDERSTANDING WHOLENESS



* PROCESS



TOP 5-3



THE REFLEXIVE UNIVERSE

Stage Number
Power
Kingdom

LEVEL

I
• PURPOSE
• BEING
1. Potential
Light



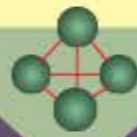
II
• CHARGE
• SUBSTANCE
2. Binding
Forces



III
• CONCEPTS
• FORM
3. Identity
Atoms



IV
• OBJECTS
• FORMED
SUBSTANCE
4. Combination
Molecules



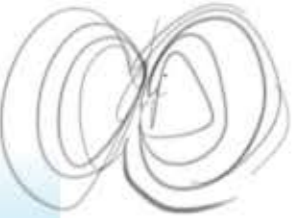
5. Growth
Plants



6. Mobility
Animals



7. Dominion
Humans & ?



sequencing

Keyboard

INVOLUNTARY STAGES

THE TURN

VOLUNTARY STAGES

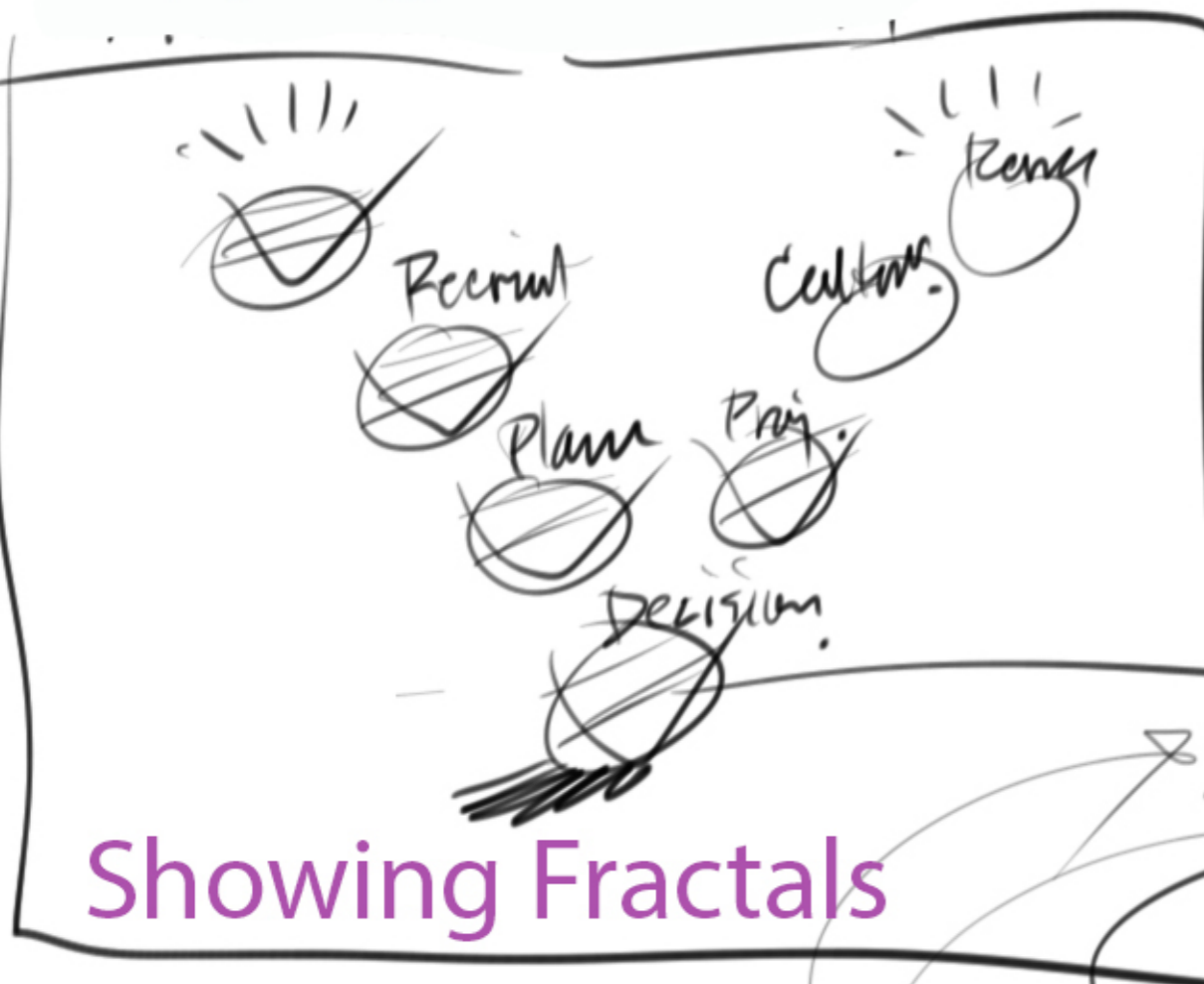
Attention

Energy

Info.

Org.

Mapping Problems



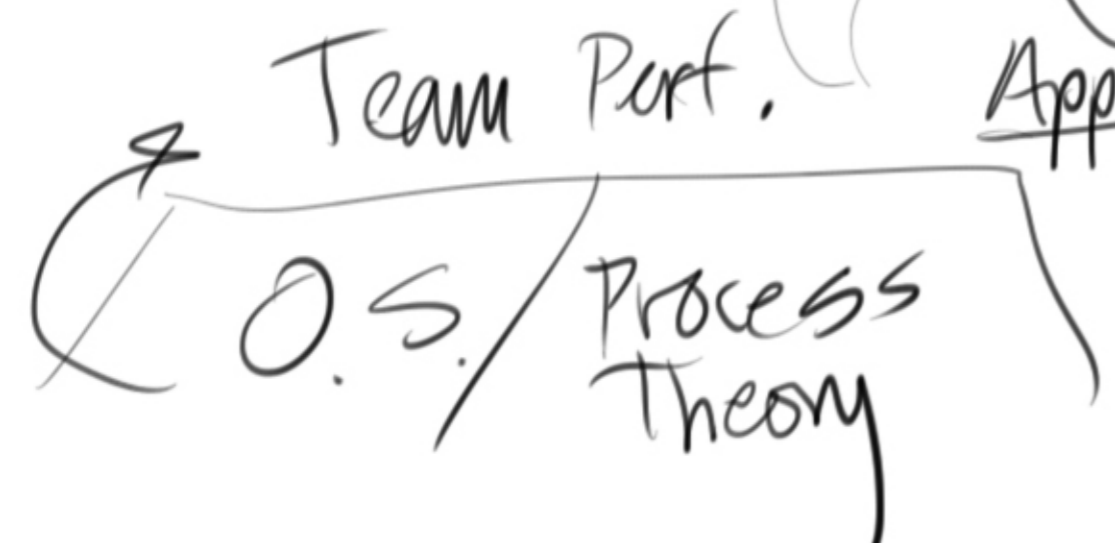
Showing Nesting



client



Showing 3D Dynamics



Rob's Process

The Growth Management River TripSM

Planning Team
Orientation

Measure Progress
& Update

1. DESCRIBE
The Relevant
Environment

*Customer-Centered
Strategic Business Planning,
Simplified.*

5. INTEGRATE
With Operations

2. CONCLUDE
About Our
Situation

4. CREATE
Action Plans

3. COMMIT
To a Future
Direction



PREPARATION
"Focus the Planning"



MEETING
"Consensus on Strategy"



FOLLOW THROUGH
"Implementation on Time"



Theory of Process Example

The Growth Management Process for Strategic Business Planning

Participant's View

1. Orientation

- Process: Agree to develop or update a plan, and the process time frame.
- Participant: Agreement to participate and put meeting dates on calendar.

2. DESCRIBE the Relevant Environment

- Process: Select business issues to address and gather relevant information.
- Participant: Several hours searching for and sorting information.

3. CONCLUDE About Our Situation

- Process: Meeting to outline market, customer and product realistic scenarios.
- Participant: Facing real constraints of the current business environment.

4. COMMIT to A Future Direction

- Process: Management team consensus on strategic business objectives.
- Participant: Making tough tradeoff decisions, giving up “favorite ideas.”
- “Making the turn” is never easy but comes with a sense of achievement.

5. CREATE Action Plans

- Process: One strategic objective at a time, sequence next steps to implement.
- Participant: With others in the organization, focus onto only one objective.

6. INTEGRATE with Operations

- Process: Access human, technology and financial resources to invest in growth.
- Participant: Offer leadership and guidance to those who control the resources.

7. Measure Progress & Update Plans

- Process: Establish routines for reviewing implementation progress.
- Participant: Live the new business direction and maintain awareness of changes in the business and the external business environment.

TOPS-4

Rob's Growth Management Process — Now RIVER JOURNEYS

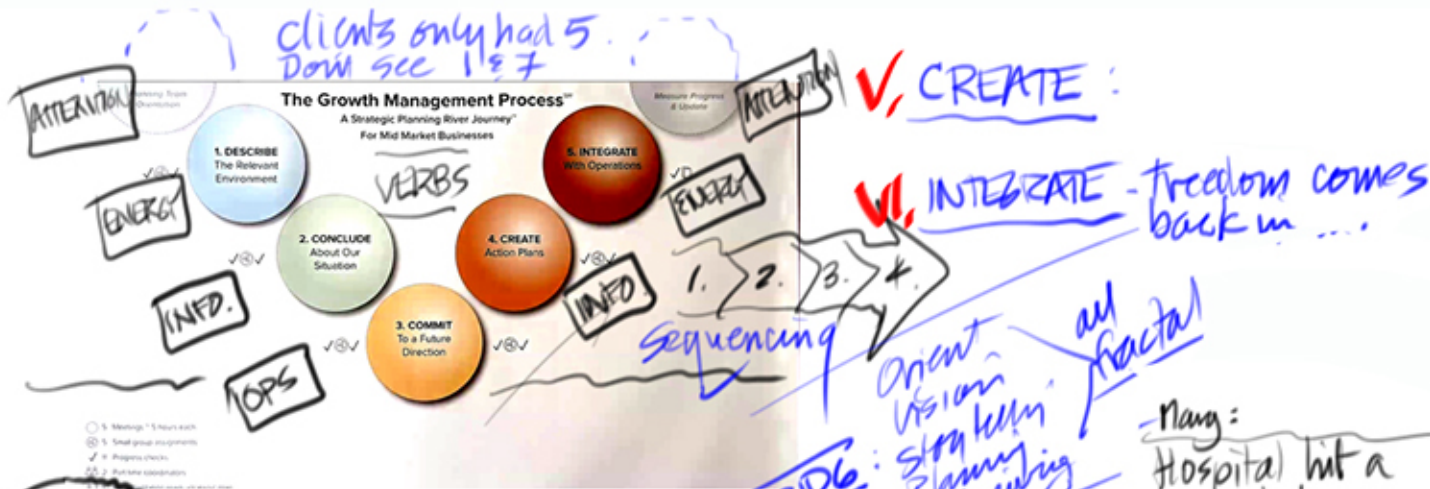
MKT. STRATEGY
need Org. Strategy

Father
Loren Smith
me.

Research

- What processes being used?
- A. Young Seminar

Growth Mgmt. Processes
7 Phases



✓ CREATE:
✓ INTEGRATE - freedom comes back in ...

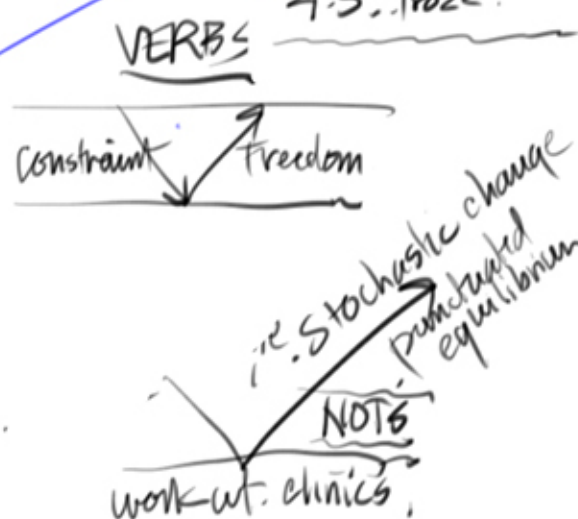
VOCAB. NOT USEFUL

ATTENTION: "Dev. a fndn. for change."

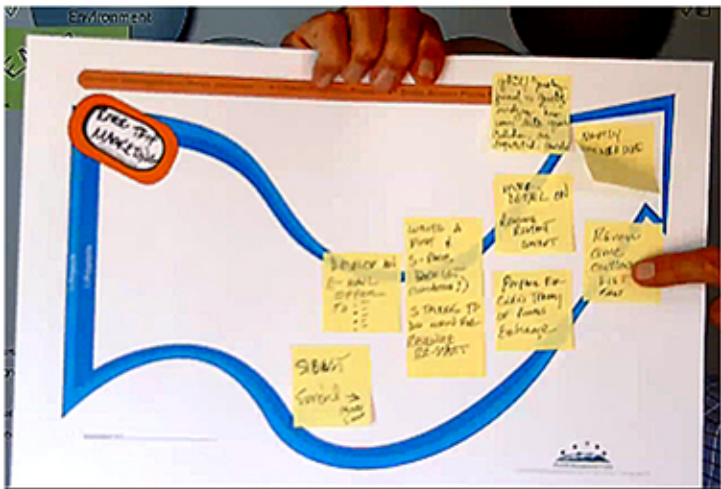
ENERGY "starts team building."
1/3 Australia - higher. Ed. issues than care about.

INFO. Situation Analysis Imperatives.

OPS Life Cycle of a bus. double-down on after. one remark can change things. AHA Making CHOICES.



Man: Hospital hit a wall between 4-5. Froze.

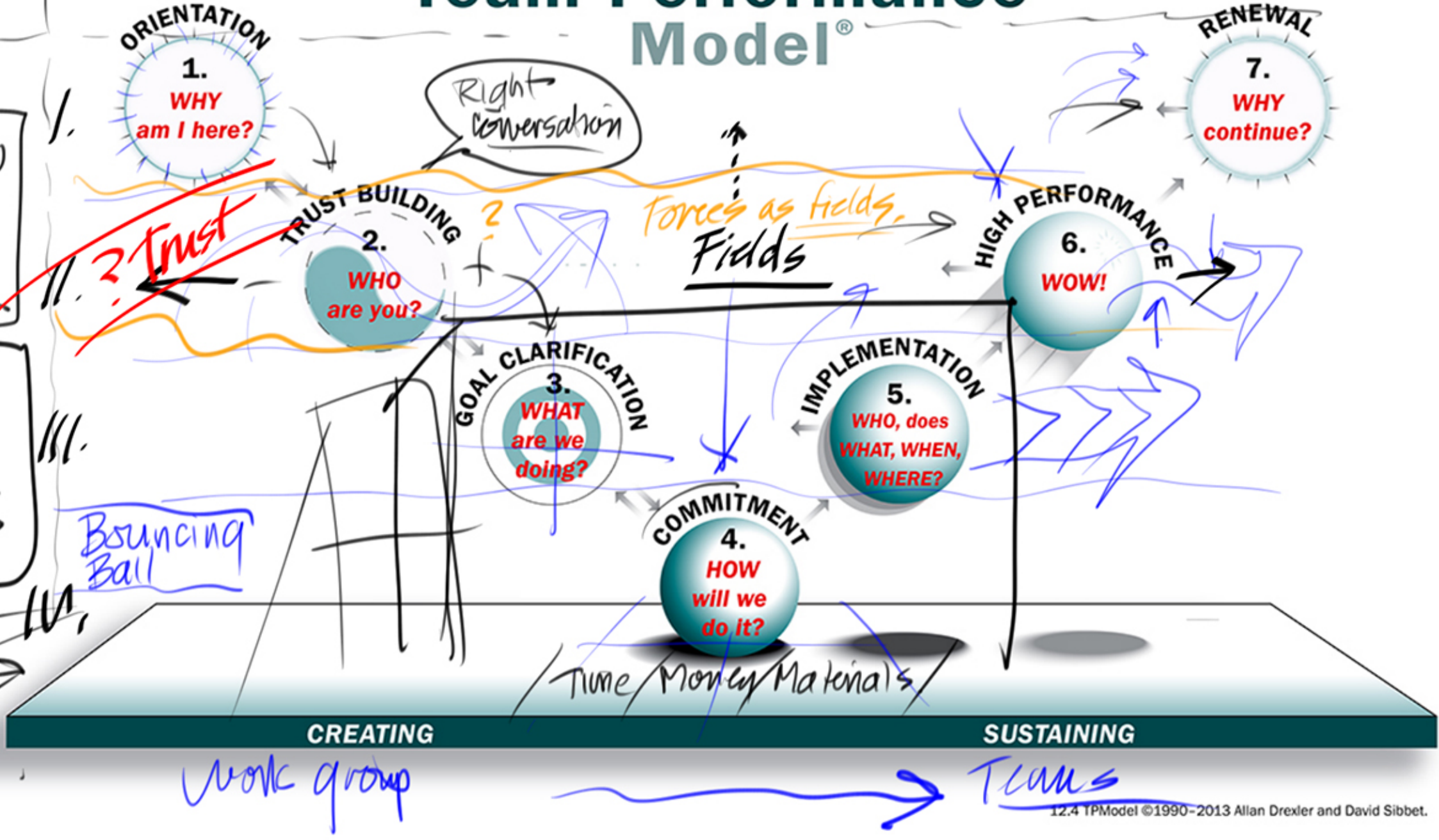
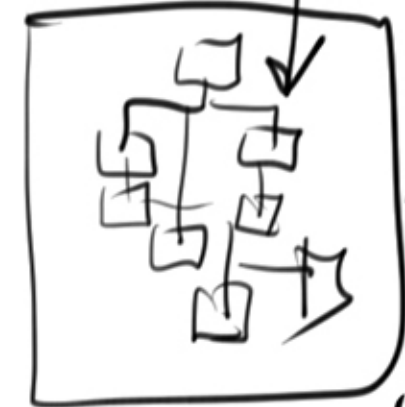


TOPS

DREXLER/SIBBET

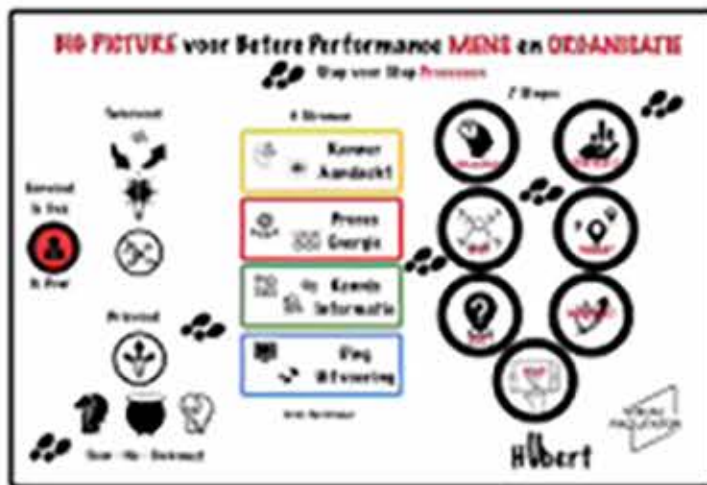
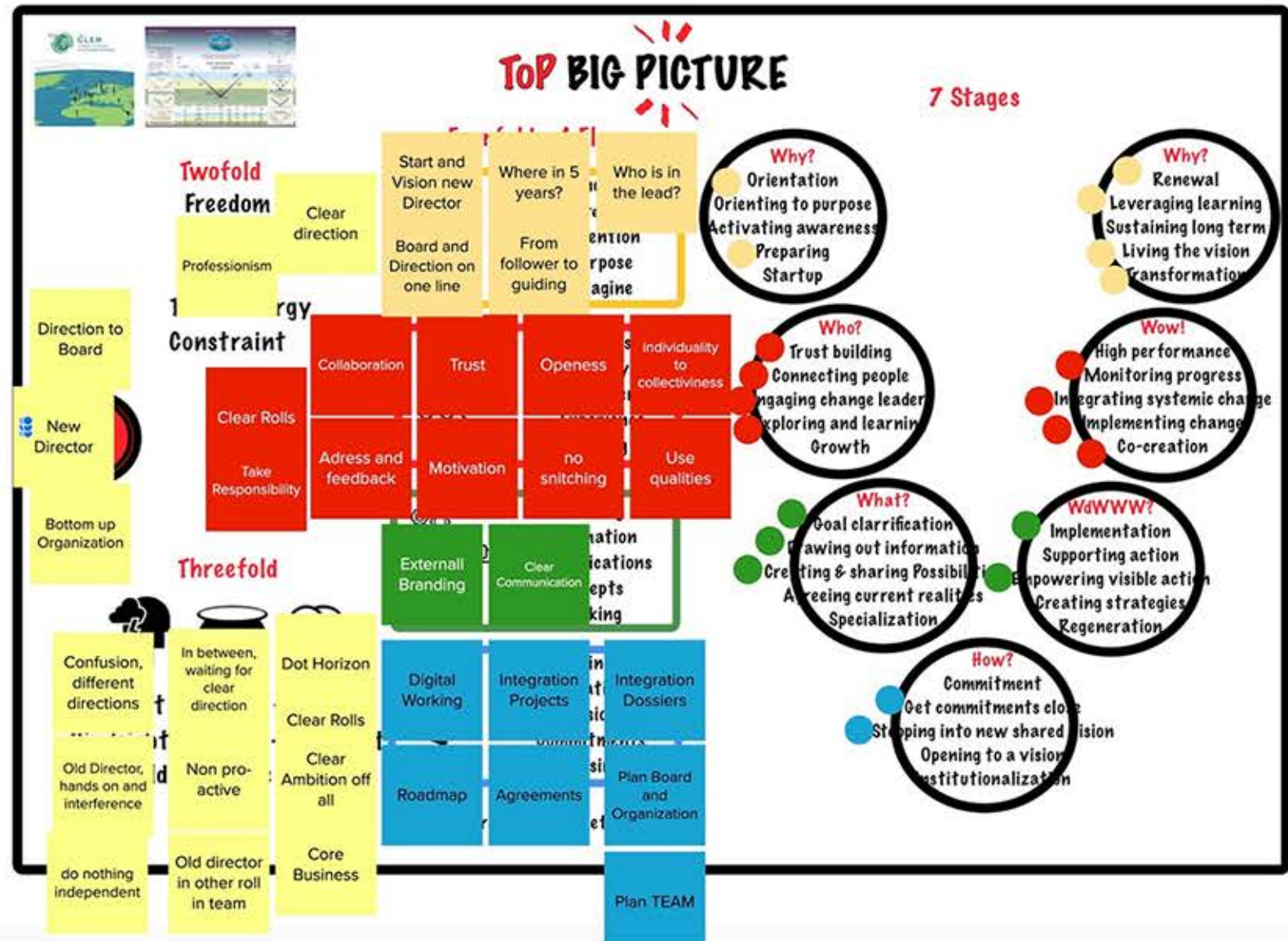
Team Performance Model®

1980



Hubert's Process

STRATEGIE ↔ MENSEN ↔ ACTIVITEITEN



Integrating factors from five models and mapping interview data on 7 stages

ARC OF PROCESS REVIEW COMMENTS

Kennan Salinero : Interesting - this maps directly to TheoryU.

Markus Engelberger, Austria, 2013 : Thank you for THIS perspective on teambuilding :)

Joran Oppelt : "We must tell a new story."

Mary Gelinias : In a public process meeting of about 100 people, one group asked , "What are WE going to do about this?" instead of pointing to the BOD of the water district and saying , "What are YOU going to do about this?"

Joran Oppelt : Mary, that's great! That means the group is moving toward EMPATHY. Which, for me, is the goal of ALL the work.

Mary Gelinias : Wonderful interpretation. Thanks, Joran.

David Sibbet : You could see EMPATHY as the stage six phase.

John Schinnerer : An "abrupt" turn is congruent with punctuated equilibrium theory of change (vs. some smooth or linear type model).

Kennan Salinero : Yes. Stochastic change.

Markus Engelberger, Austria, 2013 : The essence of strategy is to decide what NOT to do :)

Joran Oppelt : Has anyone else experienced that "the turn" doesn't always conveniently happen at Stage 3? Sometimes, for us, it happens very early, and sometimes for a good number of the organization it's very late stage and sometimes even after the work is done!

David Sibbet : Yes..the music isn't the keyboard!!

COMMENTS FOR ROB

Hubert de Groot : Great Rob!!!

Katja C Weinstock : very practical guidance. Great how flexible we can employ this model. Thx Rob

Philip Bakelaar : I had a very successful experience with this model teaching event planning, moving from aspirations to the feeling you want then the information you need, then making operational choices.

Mary Gelinias : Thanks, Phil. Makes good sense to me!

John Schinnerer : Without trust (actual team, vs. people hired to simulate being a team) performance and interest in renewal is going to be limited...

Joran Oppelt : John, I'd like to hear more about "actual team, vs. people hired to simulate being a team." Too frequently, I think we're brought in to serve as a "fractional" team that is tasked with the infection of trust, performance, etc. How do we (quickly and easily) "inoculate" the org's team for renewal?

John Schinnerer : Yeah or we're brought in to fix a "problem" that is actually lack of trust but the client thinks it's something else...big rich topic!

COMMENTS FOR HUBERT

Joran Oppelt : Yes. Hubert's Bouncing Balls! Sounds like a TV show.

Heiko Veit : *ROFL*

Markus Engelberger, Austria, 2013 : ;)

Heiko Veit : Hubert: This is a wonderful process and a super inspiring work!!!

Mary Gelinias : Bravo, Hubert!

Philip Bakelaar : A wonderful integration visual, thanks. Hoping this is in our materials in the GLEN website for this discussion. Prezi might also work nicely

Rob Eskridge : Prezi is perfect for this

Mathias : AMAZING, Amazing value in this session!!!!

Heiko Veit : Hubert's process or "walkthrough" with the client and using it as a sequencing and interview model!

Philip Bakelaar : I appreciate the varied applications possible and the way Hubert has overlapped them in his integrated model

John Schinnerer : Will take a while to digest all this...

Joran Oppelt : Deeper clarity around the process and how it maps onto the RIDG model. Great work, everyone!

John Schinnerer : Thanks Rob & Hubert for your contributions!

Katja C Weinstock : Good examples for practical use. Very inspiring how to lead customers through the process - sequence is key!

Heiko Veit : The Background information on strategic planning gave more underlying information for strategic planning

Hubert de Groot : Great sharing and seeing each other, passion

Mary Gelinias : Thank you, David, Rob, and Hubert. Wonderful learning today. Many thanks for a new insight about how "fields" fits with the ToP and the Team Performance Model. Love it. Thanks for the inspiration.

TAKEAWAYS

Mathias : BYE FOR TODAY!!

Rob Eskridge : Takeaway: Rob, be schizophrenic > client's vocabulary is one persona, keeping the theory of process top of mind in the other persona.

Heiko Veit : How easy it is to follow based upon the abstract ideas of the ToP, Ä¶

bobhorn : TRUST will be one of the biggest themes for the next two years at all levels— personal to global

Ann Bylfors : Love Hubert's energy and joyful attitude. And the question about trust stuck with me. Why do I trust?

Markus Engelberger, Austria, 2013 : Thank you for sharing your experience. MY key take away is an affirmation that there is ONE simple process beneath tons of things. And that it is up to us to TRANSLATE the process into a language the clients really resonate with

Kennan Salinero : My own mapping onto what I know or am grappling with:

1. To allow the vision and best hopes of the leadership to keep being invited in, to keep the space open at the top
2. Dragon Dreaming, to dissolve individual vision and create group vision
3. Removing the 'target on the back' of leadership, which can make that role brittle, by creating fractal ownership and buy-in and
4. How to create where each individual is seen, owns the vision, and fits in - to have that buy-in (and shared vision).

Kennan Salinero to David Sibbet: Can this also include Berkana Institute's Two Loop model for different institutional stages and rebirth?

Joran Oppelt : Googling Dragon Dreaming now. Thanks, Kennan! |

