Visual Consulting Exchange #3 — Clarifying Vision, Goals, & Approach

September 8, 2017 9-11:00am PST

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David Sibbet

Gisela Wendling

Phil Bakelaar

Mary Gelinas

John Schinnerer

Karen Buckley

Marco Ceretti

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PDF report from GLEN

VISUAL CONSULTING session #3 Clarifying vision, GOALS & APPROACH

GLEN Exchange: 9/8/17

Third in a series

VISUAL CONSULTING
DESIGNING & LEADING CHANGE
DAVID SIBBET & GISELA WENDLING PhD
BOLD STEPS

AGENDA FOCUS: Clarifying Vision, Goals & Approach in a Change Process

9:00 Review desired outcomes & agenda

9:05 Checkin: Current condition, **example of one "theory of change" you hold in your work**.

9:30 Review Change Challenge #3: reflections on the characteristics indicated in the current model

10:00 Exchange Round 1: **What practices do you favor in dealing with resistance to change once a process is underway**

10:30 Exchange Round 2: **What methods do you use to help clients become aware of their assumptions about change?**

CHECK-IN

Gisela: In Liminal Pathways Model
crucible moment — Inner Dynamics — Outer Structure
Outer falls apart — necessary chaos.
transf. Images / metaphores
waking up

Bassam / Traveling in Saudi Arabia
Current → Future
Problem? How describe
VISION
Performance Indicator
Start with end
- Visualize in advance
- Effect WORK/MIND/BELIEFS
- Changes. Frame/Focus
- Questions
SOLUTIONS.

John: Sociocracy Governing Group.
How many psych does it take to screw in light bulb.
Doesn't matter. Light bulb has to WANT to change.
WANT TO —

Karen: Difficult Mother died.
Agree w. Bassam.
Must also recognize
→ WHATS WORKING w. same vitality
→ Listen for whats emerging
→ Structure conversation
→ Compelling view of future) Future
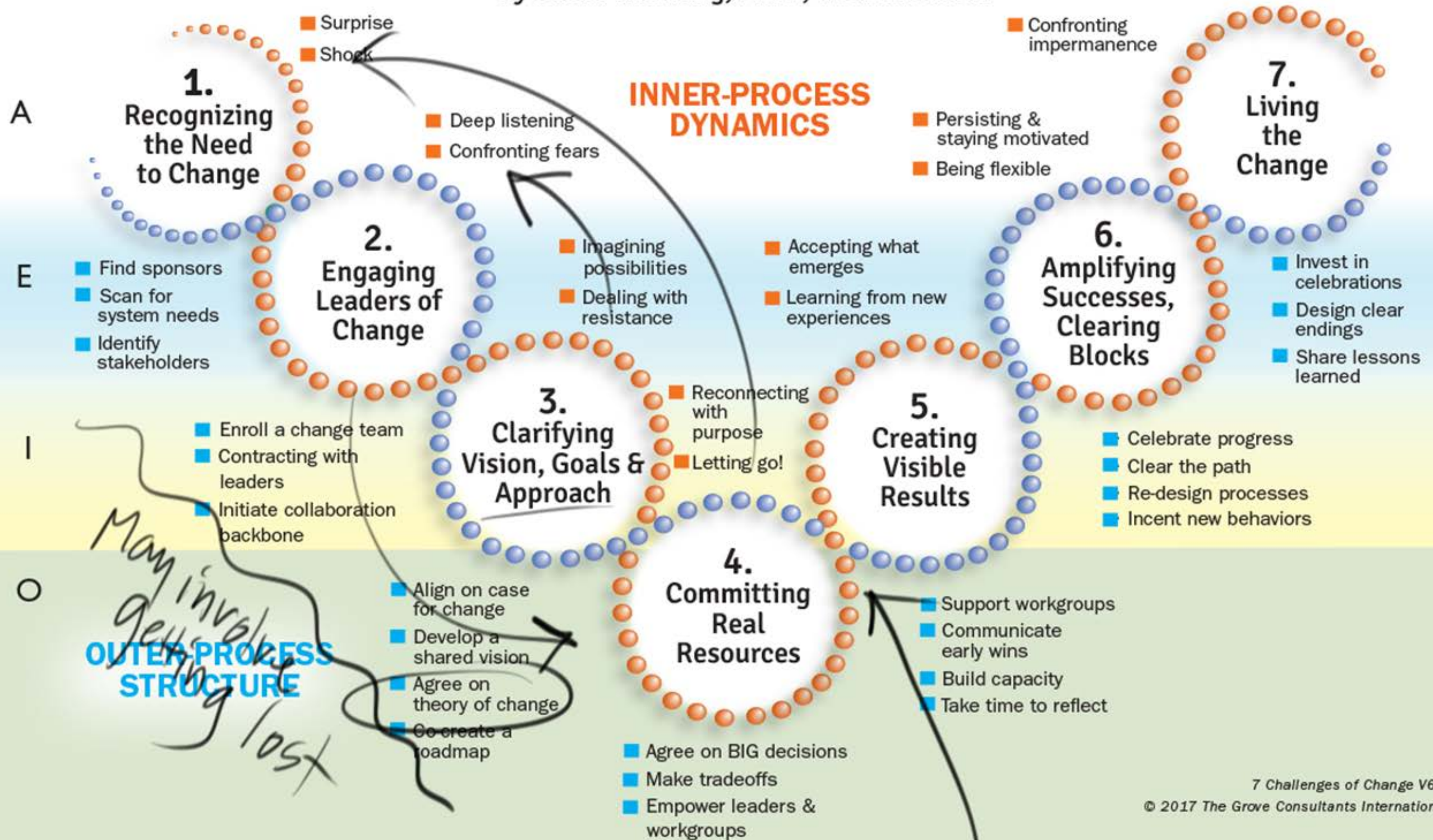→ Importance of CHAOS..
W/o - no change.

Joy. National, Global? couldn't sleep.
About Whole Systems...whole system needs to be heard.
Conversations Represent the System
where/what/why -
Involvement in every stage.
Keep my bias out.

David Informal Leaders. Persistent.
Gatekeepers. Tipping Point Karen Hansey FAITH

Marco: 7PM/Fri → Party!
Kotter theory: .....steps.
Switch Tools & mind.
Chip & Dan
Body

Phil: Dodged Irene!
in N.J. Starting school.
90 yr mother.. aware of
Johnathan Paul: Emotional fields
Limbic fields.

Mary: In Denver (Fives.
IAPD Conference.
climate: tired but good. Inspiring
If clients CONNECT w. change personally -- & feel SAFE they will move.
→ IA: Change you want is the change you start w.
→ People support wt they help create.
→ change → Make it EXPLICIT

7 CHALLENGES of CHANGE™

by Gisela Wendling, Ph.D., & David Sibbet

INNER-PROCESS DYNAMICS

OUTER-PROCESS STRUCTURE

A

1. Recognizing the Need to Change
- Surprise
- Shock

E
- Find sponsors
- Scan for system needs
- Identify stakeholders

2. Engaging Leaders of Change
- Deep listening
- Confronting fears

I
- Enroll a change team
- Contracting with leaders
- Initiate collaboration backbone

3. Clarifying Vision, Goals & Approach
- Imagining possibilities
- Dealing with resistance

O
- Align on case for change
- Develop a shared vision
- Agree on theory of change
- Co-create a roadmap

4. Committing Real Resources
- Reconnecting with purpose
- Letting go!
- Agree on BIG decisions
- Make tradeoffs
- Empower leaders & workgroups

5. Creating Visible Results
- Accepting what emerges
- Learning from new experiences
- Support workgroups
- Communicate early wins
- Build capacity
- Take time to reflect

6. Amplifying Successes, Clearing Blocks
- Persisting & staying motivated
- Being flexible
- Celebrate progress
- Clear the path
- Re-design processes
- Incent new behaviors

7. Living the Change
- Confronting impermanence
- Invest in celebrations
- Design clear endings
- Share lessons learned

May involve deleting lost

Not linear. Like a dance.

Transition Models Here.

7 Challenges of Change V6.0
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FELT SENSE Gendlin
Listen so deeply inside, Implicit direction where life moves forward.

Inspiring Image
Both Individual & collective

Dialogic Approach - lean into ?'s & the Unknown. Images emerge.

- Imagining possibilities
- Dealing with resistance

Understand   Engage   Constant

STARTING POINT - COMMON LANGUAGE

* Here is where we enter liminal stage.
Can be like a tunnel

Sharing
Designing to
Clarifying
Vision, Goals &
Approach
(to change)

missing
Unearthing
long held
assumptions

- Depth of internal engagement/reordering shapes future change
- Connect wt. profound CARE

(works hand in hand wt. mind part).

Move into the UNKNOWN

- ENGAGING = (is it deep enough)
mind Internal listening collective

Process of going from individual to collect.

Provisional Shared Narrative.

WHO IS THE MAP FOR?

Needs to OWN the MAP

CLIENT
Change experience map

CONSULTANT
(use model to design)
Need to offer a map — so much emotion need a Frame Normal

Diagnostic

collective words

- Align on case for change
- Develop a shared vision
- Agree on theory of change
- Co-create a roadmap

If X then y.

Convert Vision.

- Who is at the table & role?
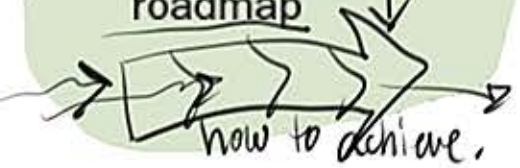
- Guiding Process Principles.
(collab./educational/transparent).

- Why do they care? What's in it for them?

- AGENDA of change. 1. today→future
2.
3.
4.
List.

- Understand key behaviors @ stake in the change.
(agility: concrete behaviors.

Clear frame allowing chaos

- Holding a CONTAINER for the work
(Hold for them until ready)

"EXCAVATE"
Guided VISUALIZATION
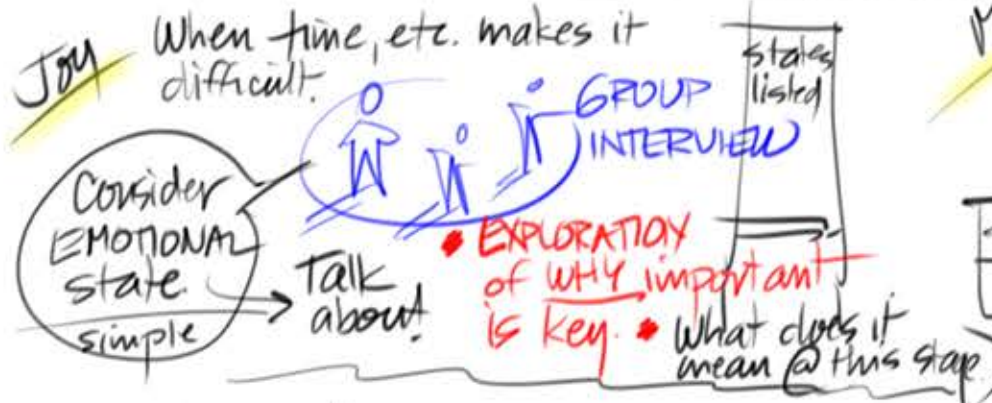Going within
Looking for artifacts

Design Team customizes Process Map

Bring in after Client develops own map.
TIMING key.

how to achieve.

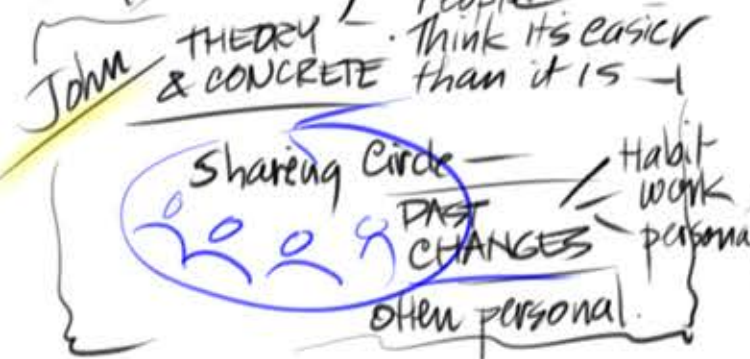VC-4

What methods do you use to help clients become aware of their own assumptions about change?

Karen: If we don't people will disengage. etc

Resisting?
In way of Success

Key Mgmt

• Transition Success factors S.Sheets

David
Change Formula

$$D \times V \times A > Resistance$$

→ Roadmap

• Strengths/dimensions
• Challenges

Bassam: Difficult: we always struggle. It's not concrete. Culture?

MIDDLE PASSAGE
missing...

BRIDGES
Transition Model.
Ending   New Begin
Role of Leader in each phase
Transition

Drivers of change
Work both analytically & intuitive ly.

Envir scan   Trends Assumption Imperatives

Data

Imperatives:

Joy: When time, etc. makes it difficult.

GROUP INTERVIEW
states listed

Consider EMOTIONAL state. simple

→ Talk about!

• EXPLORATION of WHY important is key. •
• What does it mean @ this stage.

Mary: these are models for Transitions.
(Maybe later)

Parts

If we do X. Then what? because......

Scott's model.

After sharing, back to abstract.
Are we going in the direction we want.

Global Data Base

(This surfaces implicit beliefs)

Guda: Assumptions are about thinking

What are the Ways in.

John: THEORY & CONCRETE

People.
Think it's easier than it is →

Sharing Circle —
PAST CHANGES
often personal.

Habit work personal

Bassam: Start w/ some journey & during journey talk about know.

Do we talk just at one stage?

Talk @ every stage.
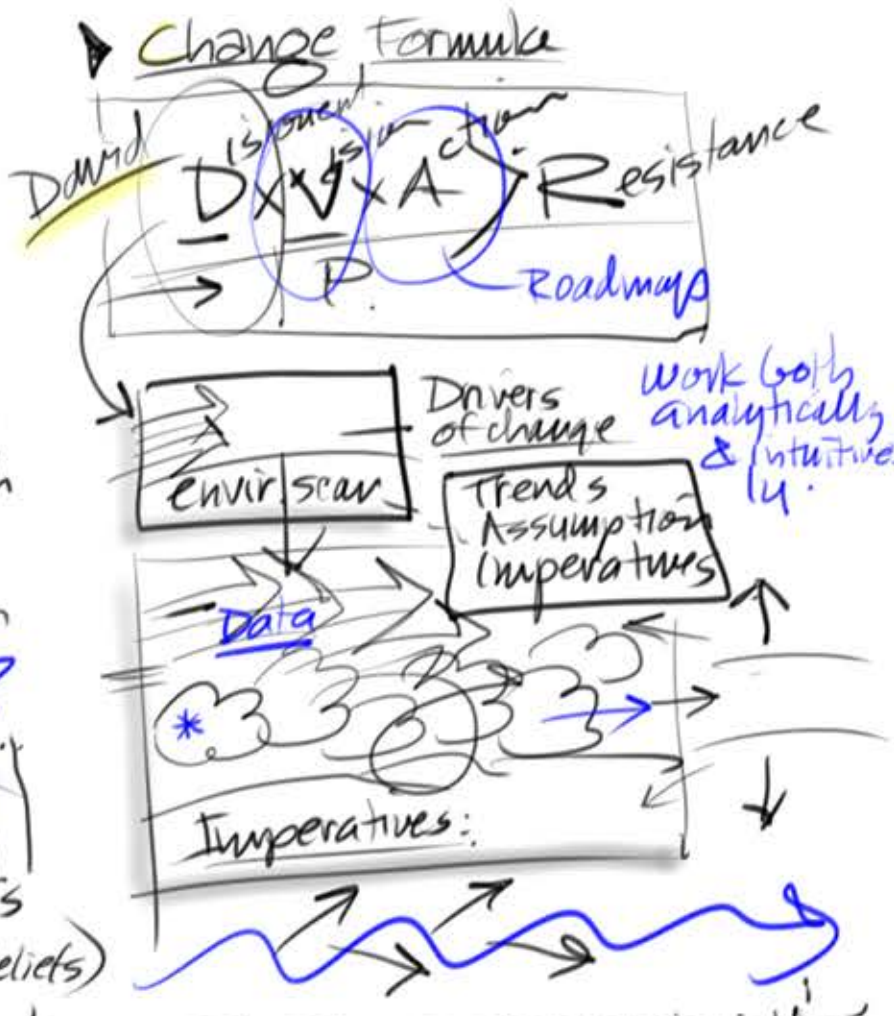
METAPHORE Exercise in visioning

OUR ORG is like a .....

metaphor.

Dig into metaphor visually. How do they change?

TAKEAWAYS

Mary
Watching my discomfort wt. how others describing challenges me.

Bassam
Change is a mystery. Have to track it down

Phil
Paradox — how much common & also so unique & grounded.

Joy
Reminder of role assumptions play — all through. EXCAVATING around assumptions

John
Lot coming up. Personally — struck by Broad commonality & abundance of details in how we do it

Hanging Down really know! Reassuring

Gisela
WOW! Experiencing resistance to change; & value of reinforcing familiar when changing a lot
change is Fundamental experience of being human

Across Cultures!

David
Groupness — depth.

Shaken in basic assumptions. Embrace of paradox.

Visual Consulting Exchange #3 CHAT: Clarifying Vision, Goals & Approach

September 8, 2017

Philip Bakelaar: Great questions, Bassam. How might we, how can we…I also use "I wonder what would happen if…"

David Sibbet: Is the theory that people who see a solution will move toward it automatically?

Marco Ceretti: I would say not automatically, while a clear-vivid-inspirational solution is a key to move people to change

Karen Buckley: David - my answer is no because any of us can see a solution, be painfully aware of a "problem", envision a compelling future and still stay with the familiar and known. What is our role as consultants in increasing the motivation for change - whether intensifying the pain or the compelling possibilities.

Philip Bakelaar: Joy that reminds me of structuration theory, the way group and individuals and systems have mutual influence

Philip Bakelaar: **The Righteous Mind: Why Good People Are Divided by Politics and Religion** by Jonathan Haidt
https://www.amazon.com/dp/B0052FF7YM/ref=dp-kindle-redirect?_encoding=UTF8&btkr=1

Marco Ceretti: **SWITCH: How to change things when change is hard** by Heath Chip, Heath Dan
https://www.amazon.it/Switch-change-things-when-hard-ebook/dp/B005TKD512/ref=sr_1_2?ie=UTF8&qid=1504888311&sr=8-2&keywords=switch+by+heath

Philip Bakelaar: The elephant and rider image appears in The Righteous Mind and also Haidt's book **The Happiness Hypothesis**
http://www.happinesshypothesis.com/

John Schinnerer: That's ...to change a light bulb: not "screw in"... :-)

Philip Bakelaar: I am noticing that in 7 challenges model the emergence is maybe earlier than in Theory U, or is Theory U part of circle 3

Philip Bakelaar: Imagining possibilities is where generative images might be relevant in opening new possibilities

Philip Bakelaar: The need to surface and examine, make explicit, the implicit metaphors that are already present, and what others might be useful

Karen Buckley: I appreciate Gisela's question: What are transformational images that can guide, anchor, and capture the spirit of change?

John Schinnerer: Resistance for one example can arise everywhere in this model (or any other).

Karen Buckley: Emergence occurs continually as readiness builds.

Philip Bakelaar: This is such a crucial stage because it sets the direction of future action

John Schinnerer: And, agility is necessary in case the first pass on this does not work out and adaptation is necessary.

Philip Bakelaar: Mary asks about who is at the table, reminds me of Habermas Ideal Speech Situation https://en.wikipedia.org/wiki/Ideal_speech_situation

Mary Gelinas: Thanks, Phil. I'll check this out.

John Schinnerer: That is, it's all an experiment...lead, do, measure, back to lead.

Philip Bakelaar: Marco mention of behavioral changes reminds me of a book I have used with local congregations facing change and conflict. It argues for explicit covenants about how to behave together https://www.amazon.com/Behavioral-Covenants-Congregations-Handbook-Differences/dp/1566992095

Philip Bakelaar: Trojan horse for chaos…great generative image!

Philip Bakelaar: Clarifying strikes me as more resonant with diagnostic OD, playing to the Idea of an objective existing reality we have to discover; but certainly it has a dialogic dimension with the group engagement

Mary Gelinas: This makes sense to me, Philip. Perhaps a more appropriate terms might be discovering, creating, discovering?

Philip Bakelaar: Maybe it is agreeing on a provisional shared narrative and generative image / metaphor for moving forward

Philip Bakelaar: Yes, I am spending time thinking about the difference between diagnostic and dialogic OD, whether we are co-creating or discovering a pre-existing

Marco Ceretti: instead of "Clarifying" another option is "Sharing" that conveys the idea of communicating, understanding and engaging at the end

John Schinnerer: We say "picture forming" for the generation of a collective narrative or image of what we are dealing with. Sharing is a process, not an outcome. So sharing would be part of a process to generate the external outcomes that are wanted.

Karen Buckley: In this stage the deeper the chaos and internal reordering on both the individual and system levels in order to create a new future rather than repeating the past,

Philip Bakelaar: I am wondering if the crucible sets bounds or constraints for the possibilities, for instance, if I am working with a major corporation, they are not likely "allowed" by the corporate structure to turn into an animal shelter or something totally outside of the existing context. Are there boundaries to the emergences, and if so where do they come from?

Karen Buckley: Philip I agree the boundaries are important to consider depending in the organizational constraints

Philip Bakelaar: So the crucible is one thing in terms of a process, but the map is something maybe about what is in bound to work on or not; I am reminded of Carver Governance for nonprofits, where executive directors are given "bowls" to work within by their boards
                     http://www.carvergovernance.com/model.htm

Philip Bakelaar: One last thought about possibilities: I think of Peter Senge and shared vision; stories of corporations that have discovered new work through the passions of a worker; there is a McDonald's Scandinavia story about executive who was going to leave over environmental issues, but they found a common way to use his passion to a shared vision of McDonalds as more environmental.

Philip Bakelaar: Aware of assumptions about change: taking time for people to tell stories about their experiences with change, dialogue around those stories asking probing questions

John Schinnerer: Surfacing and implementing "possibilities" can be built into an organization - encouraged and normal; or, built out of it - discouraged and aberrant.

John Schinnerer: Sharing experiences of change - what went well, what didn't, what would have been better.

Philip Bakelaar: Here is Bridges model
https://wmbridges.com/featured/articles/transition-as-the-way-through/

Karen Buckley: I find bringing up the transition model and asking the concrete questions I asked is essential early on to get them into the change - I then bring it back in at each "crucible" point.

Philip Bakelaar: I'm hoping we can explore at some point the assumption of "goodness" of emergence; I spend a lot of time thinking about moral deliberation, how do we assume that emergence is good; how do we in this field define good. Thanks

John Schinnerer: I like that question...ethics, etc. and what is "good" or "better"
And if you write that book...who will be unafraid to buy it?