

USING REAL TIME STRATEGIC CHANGE FOR STRATEGY IMPLEMENTATION

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ABSTRACT

There is no question that some form of strategic planning is key to an organization's future performance. However, there are several challenges to implementing this type of planning in an organization. Large group interventions are one set of methods for addressing these challenges. This paper outlines the key characteristics behind different types of large group interventions. In addition, it describes the framework for creating a Real Time Strategic Change intervention and the necessary elements for using this approach in your organization.

THE CHALLENGES OF STRATEGIC PLANNING

Strategic planning implies planning for the long-term. In many organizations, the time frame associated with this type of planning is from three to five years into the future. Due to this timeframe, there are several challenges associated with long-range planning. These include: creating a plan that is breakthrough in its orientation rather than "more of the same," getting all stakeholders to commit to the organization's strategies and to follow through on implementation of critical activities, and decreasing cycle time in the planning process.

In today's world, organizations cannot afford these challenges. To survive, they must be able to quickly create, deploy, and implement breakthrough strategies that help them to continually anticipate and meet current and future customer requirements. In doing so, they must be able to align all internal and external resources around the plan. This sort of orientation necessitates approaches to strategic planning that involve all employees and stakeholders in the planning process and a planning process that can occur within a shortened time frame.

LARGE GROUP INTERVENTIONS

Over the past 20 years, a number of large group intervention techniques have emerged that more quickly effect large-scale change. As such, they have been effective tools in dealing with some of the issues associated with strategic planning. These intervention techniques include: Future Search Conferences, Real Time Strategic Change, ICA (Institute of Cultural Affairs) Strategic Planning

process, The Conference Model, Fast Cycle Full Participation Work Design, Real Time Work Design, Participative Design, Simu-Real, Work-outs, and Open Space Technology. As summarized in the book, *Large Group Interventions*, by Barbara Benedict Bunker and Billie Alban, these approaches allow organizations to involve anywhere from 30 to hundreds, if not a few thousand, individuals in working together to accomplish a common outcome. They may come together for a single day or multiple days or events. In the process of working collaboratively, the organization can more quickly achieve what Kathleen Dannemiller has coined “one heart and one mind”—a key factor in organizational alignment.

These approaches have several defining characteristics. They are best used when:

- Time is of the essence.
- The issue is complex.
- The purpose of the intervention is clear.
- There is committed and involved leadership.
- Benefits can be reaped from stakeholder involvement and ownership.
- A design team that is representative of the whole is engaged to develop the content and process pieces of the intervention as well as its follow-up, support, and communications plan.
- Real work occurs during the event.

Large group interventions have been used successfully in diverse industries, including transportation (Amtrak, United Airlines), hospitality (Marriott), automotive (Ford Motor Company), financial services (World Bank, Bank of Montreal), health care (Inova Health System) and chemicals (DuPont).

LARGE GROUP THEORY

Large group interventions are grounded in large group theory. Small group theory and large group theory are not the same—they are based on different psychological processes and have different issues attached to them. There are four dynamics of large group interventions that can arise, as presented by Benedict Bunker and Alban. They are:

1. The dilemma of voice (amount of individual airtime and the feeling of being heard),
2. The dilemma of structure (amount needed to manage anxiety in the room and active individual participation),
3. The egocentric dilemma (each person acting as though his or her reality is the only true reality), and
4. Affect contagion (experiencing and expressing feelings because one feels them vicariously in others).

Before using the methods listed here, it is critical that one become knowledgeable in large group theory, the unique dynamics of large groups, and the specific steps behind the intervention.

REAL TIME STRATEGIC CHANGE

Real Time Strategic Change is one type of large group intervention. Kathleen Dannemiller developed it with Chuck Tyson, Al Davenport, and Bruce Gibb in work done at Ford Motor Company. More recently this method has been enhanced by Robert Jacobs as described in his 1994 book titled *Real Time Strategic Change*.

This approach is highly structured and organized. Events are grounded in giving participants a common database of information from which to work. Event design, although customized around a specific issue, is based on Dick Beckhard and Reuben Harris's change formula (as revised by Kathy Dannemiller) for diagnosing and planning a significant change.

$$\text{Change} = (\text{Dissatisfaction})(\text{Vision})(\text{First Steps}) > \text{Resistance}$$

Change is given the opportunity to occur when three elements are in place simultaneously: dissatisfaction with the present situation, a compelling vision of how the change will create a better future, and first steps for reaching the vision. If any of these elements is missing or collectively they are less powerful than the resistance to the change, then change will not take place. Thus the first part of an intervention focuses on creating a common database and the foundation for the dissatisfaction. Following that, the intervention moves to creating a future that is far more desirable than that which caused the dissatisfaction. It ends with participants ferreting out the steps that are necessary for moving the organization and themselves forward.

Critical to the Real Time Strategic Change approach is logistics management. A logistics team, with its logistics czar, is created during the design process. The team's role behind-the-scenes and during the event is to manage all details around the intervention including such items as event location, table arrangements and assignments, audio-visual needs, restroom and meal accommodations, handouts, and materials. All activities must be seamlessly connected and flow effortlessly from one to the other so that participants can focus on the work at hand.

At least one outside facilitator and one or more internal consultants work with the design team prior to and during the actual event. Their role prior to the intervention is to guide the design team in creating the goal for the event and an agenda that will achieve it based on the change formula described earlier. During the intervention, they ensure that the event flows as planned and that segues occur between the various activities. This includes restructuring the agenda real-time, if needed, based on the outcome of the activities that occur and managing the dynamics of the group.

EXAMPLE 1: USE IN STRATEGIC PLANNING

The School of Business within a small, privately held university decided to develop its first ever strategic plan. Because of the dynamics of an academic setting, a 16-member committee was selected to conduct an internal and external environmental assessment (including scenario development) and create the long-range plan for the organization. Once the committee completed this portion of its work, it elected to conduct a Real Time Strategic Change event. The goal of this event was to “elicit feedback and input from all members of the school on the committee’s work to date and to develop the first annual plan based on the proposed long range plan.” It invited all full and part-time faculty and administrative support to a one-day event; over 95 percent participation was achieved during this summertime meeting. The event not only met its stated goal but also achieved the level of alignment needed by the school to develop and carry out the activities needed to accomplish the first year of the plan.

EXAMPLE 2: USE IN STRATEGIC PLANNING

The Board of Directors of a 7000 member professional association had spent several months creating a new long-term plan in order to better position the organization for the future. A Real Time Strategic Change event was held with chapter leaders (primarily chapter presidents and president-elects) from across the association; attendance was voluntary. Over 100 individuals came to the two-day meeting, the first day of which was the large group event. The goal of the event was to “reach consensus on the business plan strategies for 2000—making modifications and enhancements as we go through the meeting—and to provide you tools that allow you to communicate to your members specifics of how the new ‘association’ is serving your membership and how you as a leader can contribute easily and economically to the association’s growth and prosperity.” As a result of the meeting, the Board and the paid administrative staff were able to implement a plan that reflected the feedback of its constituents.

CONCLUSION

Strategic planning carries with it many inherent challenges. These include the amount of time required to develop, deploy and implement the plan as well as align people around its breakthrough strategies.

There are a variety of large group intervention methods that can assist organizations in addressing these challenges. These methods require the active support and involvement of senior management in order to be successful. In addition, they require the use of a design team to develop the “what” and “how” of the specific event based on a clearly defined goal statement. The benefit of these methods is that they create the alignment required in a short period of time for organizations to achieve the agility necessitated by today’s competitive marketplace.

REFERENCES

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Note: Books and materials, as well as training classes exist for the large group intervention methods mentioned in this paper. Many are outlined in the Benedict Bunker and Alban resource.

BIOGRAPHY

Lori L. Silverman is the owner of Partners for Progress, a management consulting firm dedicated to helping organizations achieve and maintain a sustainable competitive advantage. She is also the co-author of *Critical SHIFT: The Future of Quality in Organizational Performance* and *Stories Trainers Tell: 55 Ready-to-Use Stories to Make Training Stick*. For additional free articles check out www.partnersforprogress.com and www.sayitwithastory.com

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