Susan Donnan

Susan Donnan is a consultant with over 25 years of diverse business experience in change and transition management. Her current interest is in whole system transformation with an Appreciative Inquiry underpinning. She has worked worldwide and is currently an internal change agent for Airbus.
Contact: sdonnan@metavolution.com

David Shaked

is a strength-based change consultant experienced in business improvement methodologies and strategic planning within large corporates in the US, Europe and Middle-East. David uses AI and other strength-based methodologies with improvement approaches such as Lean Thinking and Six Sigma.
Contact: david@almond-insight.com
                  www.almond-insight.com

Measuring the Impact of Appreciative Inquiry in the Private Sector

ABSTRACT

What happens after an AI summit or workshop? How can we harness the energy, enthusiasm and hope generated in summits and workshops to implement and sustain change and transformation? How do we measure success and how do we know that we are on our way? We found clear themes in a set of success stories from around the world with companies of different sizes and in different industries.

What drew us to this topic?

Our journey towards this issue of *AI Practitioner* began almost a year ago. Our professional experiences to date have been in the private sector which tends to be focused on the outcomes of new ideas and proposed initiatives. The organisations we are familiar with normally ask their consultants (both internal and external) and employees to 'show us the money'. In other words, to demonstrate with clarity how taking a certain path will result in measurable benefits. This is normally done by demonstrating the cause-and-effect link between a proposed route and the desired change. We do it by analysing organisational data, providing relevant case studies from other organisations or using various approaches to evaluations. Our clients' focus is on asking for a 'proof' that AI works and is potentially superior to other approaches in yielding results – especially financial results. This focus has been particularly emphasised during the recent financial and economic crisis when organisational investments of any kind had to be scrutinised even more stringently.

Our interest in the results of AI interventions was coupled with our curiosity about the progress of AI initiatives after the 'dream' phase. We wanted to know what happened in an organisation after the inquiry into high moments, strengths and wishes, and after the dream vision was created. We wondered how organisations start their journey towards implementation and later on sustain their dreams and make them into everyday reality. We also wondered how organisations know they are on the a positive path and when their dreams have been fulfilled. What were their leading indicators (i.e. the first few signs) and outcome measures (the measures taken after the fact)? We knew that the existing literature in AI covered, in depth, the methodology, underlying principles, the approach to the inquiry and the first few steps. For example, we regularly see the 5D model used, providing detailed descriptions of the actions taken in the first few Ds (Define, Discover and Dream) with fewer details about what happened next, in the Design and in particular the Destiny phases. Our

Creative role-playing in Belgium

experience gave us the confidence that using an appreciative approach to start change initiatives would generate a lot of hope and high energy as well as aspiration for change. Less certain for us is whether these early indicators of success can then be nurtured into a longer term sustainable and measurable change. Can we just rely on the energy that was unleashed in the inquiry or does that energy need the support of other tools and approaches to yield the hoped-for outcomes? AI teaches us that change begins with the first questions, but it doesn't teach us much about what happens after the inquiry, the workshop or the summit.

We see our work as change facilitators like conductors trying to create great music with the existing talents in the organisation. We know that many things have to be 'orchestrated' in order to create a great performance, to be able to repeat it afterwards and even create the capacity to improve over time. We wanted to make sure that our readers have access to ideas to help them support their organisations through the implementation, Delivery or Destiny phases. We know that showing tangible results can greatly help the next cycle of inquiry and the longer term transition towards having an appreciative and strength-focused culture. To increase organisational capacity to change we have to deepen the knowledge of those who have been touched by the AI process and expand the circle of people whom we touch so that a belief in the change can be established to help it become real.

Finally, we were curious to find out if measures and the way they are used in organisations today are aligned with AI principles and can support our initiatives, or whether we need to adjust our use of them for greater success.

We reviewed many great articles for this edition and we probably missed many other good ones. The articles we chose offered, in our opinion, unique insights into the key question of what happened after the inquiry and in particular in the longer term. They also cover many strong leading and lagging indicators for the success of the work that was done. Many of them feature unique and innovative applications of AI which offer us, AI practitioners, the opportunity to stretch our own understanding of AI and its principles beyond the well-known 5D model.

Articles in this issue

From Crisis to Global Competitiveness: Learning from a Spectacular Journey, Denmark
Henrik Kongsbak describes a success story of how a manufacturing facility for medical devices in Denmark transformed itself from being unwanted and destined for closure, to Most Wanted, and then to Best in Class over a three year period using Appreciative Inquiry together with Lean. This story powerfully illustrates the positive and simultaneous principles, when the consultant helped the client re-frame from what they wanted less of, to what they truly wanted. It also teaches us much about sustaining momentum for change in the face of uncertainty, as it was two years before the facility was awarded the manufacturing of a new product.

Building a Cohesive Team at ING, Belgium
The back office of a large bank in Belgium experienced low employee morale as a result of significant changes including relocation, centralisation and new work procedures. Leaders in the organisation had tried every possible approach

We see our work as change facilitators like conductors trying to create great music with the existing talents in the organisation. We know that many things have to be 'orchestrated' in order to create a great performance, to be able to repeat it afterwards and even create the capacity to improve over time.

to improve team spirit without success. Katia van Belle shows us how AI brought together this team and created a team spirit that was sustained over the challenging period of the financial crisis during 2008–2009. The new appreciative culture gives the team the capacity to deal with difficulties and to get unstuck by themselves.

Generating Leadership Possibilities: An AI Way for Developing HR Change Leadership, India

How can we tap into the immense capacity to change within a group of well experienced, yet jaded, human resources (HR) professionals and why is this crucial to the success of our change initiatives? This article covers the work of R. Sanker, Hardik Shah and Wasundhara Joshi at a large steel mill in India. They show us an innovative approach to AI that tapped into the individual capacity to change and linked it to the organisational desire for transformation, yielding fantastic results. Many HR teams within organisations face relentless criticism for their failure to drive change, resulting in continued struggle and negative self-beliefs. Changing the HR leaders' beliefs can be a powerful lever for sustainable organisational change. We are reminded of the standard in-flight instructions asking us all to put the oxygen mask on ourselves first, before aiding others around us.

Appreciative Auditing, The Netherlands

Those of us in organisations who have been audited know that it can be a negative and unpleasant experience which leaves us no further ahead. Annet van de Wetering pioneered an appreciative approach to auditing with the Zaans Medical Center in the Netherlands over a period of five years (2005–2010). The auditors were hospital workers themselves, initially auditing procedures at the departmental level. The scope of appreciative auditing has now been expanded to cover end-to-end processes across multiple departments, allowing the hospital to address cross-functional opportunities for improvement. People at Zaans Medical are now looking forward to these audits because they perceive them as fun, safe and meaningful. Appreciative auditing has helped transform Zaans Medical into a learning organisation as auditors learn about the best practices of other departments during their audits and they bring that knowledge back to their own departments.

SOARing for Sustainability: Longitudinal Organizational Efforts Applying Appreciative Inquiry, USA

Gina Hinrichs shares with us her longitudinal experience applying the SOAR framework for strategic planning at EarthCo. This article beautifully illustrates the leading and lagging indicators of success as they appear in the framework of Strengths, Opportunities, Aspirations and Results. Throughout the inquiry process, Gina could see indicators of success even at the earliest stages of the process. She also repeated the SOAR process regularly over a few years, each year building on and amplifying the success of previous years. As a result, the organisation has built an internal capacity to continue to change, implemented a new business model called 'glocalisation' and gained alignment between globally developed strategy and actual implementations in each business unit. This work has contributed to a stellar financial performance.

Unleashing Potential through Appreciative Inquiry, Canada

Advanced Measurements (AMI) is a small technology company specialising in the energy industry. Mike King and Fanny Tamegnon share AMI's journey with

From the article *Unleashing Potential through Appreciative Inquiry*, Canada
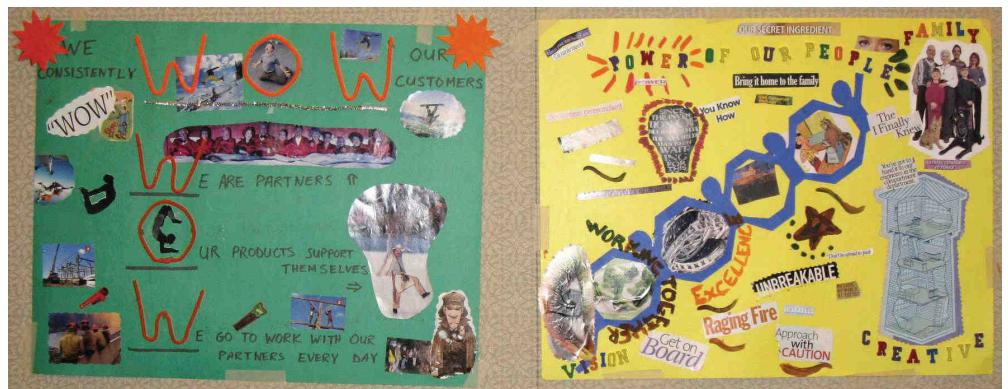
Appreciative Inquiry, starting in 2009. After just one year, tangible and intangible results were achieved in their three areas of focus: exceptional customer experiences, unleashing the potential in people and prolific market presence. Fanny attributes their success to the team of 'vision keepers', the follow-up of summit outcomes as in any other project, and the regular documentation and communication of results using 'AI secret agents'.

Successful Adaptation of Appreciative Inquiry in Academic Medicine, USA
The application of Appreciative Inquiry has unique challenges in the health care environment. Hospitals are high pressure 24/7 work environments where effective teamwork can make a difference between life and death. Members of the medical community are by nature scientific, placing great emphasis on evidence-based practices. This article describes how the UVA Health System have innovatively adapted Appreciative Inquiry to work with physicians, nurses and medical technicians who were initially uncomfortable with AI and its qualitative, narrative and unpredictable nature. Their journey began in 2006 with the use of AI to reinvigorate those involved with their Graduate Medical Education programs, where burnt-out physicians remembered the meaning that brought them to academic medicine. This effort led to grassroot projects to re-energize staff and to improve efficiency. The UVA Center for Appreciative Practice (UVA-CAP) was created in 2009 to continue the efforts and expand the use of AI to large-scale work. Their dream is for UVA-CAP to become a resource for other health systems interested in using Appreciative Inquiry to achieve positive change.

A Strength-based Approach to Metrics, Scorecards and Performance Reviews
Most organisations around the world have implemented some kind of performance metrics or scorecards. The management practice is to regularly review the actual results against the targets, identify the gaps and plan actions to bridge them. The traditional conversations around measurements are coming from a deficit and problem-solving perspective and focus around negative deviations (amber or red indicators) rather than the positive deviations (green indicators). In some cases, this has led to turf wars or covering up of problems until it is no longer possible to hide them. David Shaked presents ways of applying Appreciative Inquiry principles to measurements and their review process to change the nature of conversations in organisations, leading to different insights, actions and results. He makes suggestions about where to start, depending on where the organisation finds itself currently.

Engaging HR leadership in India

What did our articles teach us?

Our articles cover large global businesses in the manufacturing, finance and health care from Europe, North America and India. We also have one article covering a small business in Canada. We noticed common themes regardless of the size and nature of the organisation.

It is possible and useful to measure and track:

• where conversations take place, how often, with whom and the topic

• small improvements

• visible key performance metrics

• where courage shows up and autonomous groups form

• where management behaviour has changed

• different ways of connecting to better deliver outcomes

• and finally, the length of time and depth of use and impact of a new appreciative approach

Early indicators of success include confidence, energy, hope, commitment, relationships, accountability, alignment, trust and empowerment, which are difficult to measure, but can be 'felt', 'noticed', or captured in anecdotal stories.

These early indicators of success need to be nurtured and supported. By defining and implementing projects, allocating time and resources and making changes to leadership behaviours (e.g. letting go of control, keeping an honest dialogue with employees, working on the self etc.), we support the change. Documenting and making progress visible to all, and celebrating successes by recognizing and rewarding the relevant teams and individuals further help embed the change.

The tangible outcome measures tend to be lagging indicators. We have to be patient and trust that they will come as long as we have positive indicators that tell us we are moving in the right direction.

As the use of Appreciative Inquiry around the world becomes more mature over time, practitioners are becoming more innovative in the use of AI and in combining AI with classical management practices such as project management, Lean and Six Sigma, quality, auditing and balanced scorecard. The operative phrase is 'AI and …' rather than 'AI instead of …'.

A key success factor for change is the involvement and the participation of the whole system at the unit of change (e.g. a team, a plant, a hospital or a business unit). Success at one level of the organisation can lead to adaptation of AI and success at a larger organisational unit. Measurements at one level can impact other levels of the system.

Some practitioners strongly believe in the chaotic emergent nature of change and others work on establishing rigorous project management frameworks. Both are useful. Our articles show that the emergent approach works well at the individual or small team levels while larger unit or whole system levels require more structured approaches.

Organisations are living systems that must constantly adapt to their changing environments for long-term success. The AI process starts the change with the first questions. However, the work of real change happens in the Delivery phase between summits. Repeating the AI process regularly supports and expands the visions and the ambitions. Defining and collecting measurements of success throughout the process is critical to the sustainability of the change.

What have we learned from our exploration of this topic?

Although we are delighted with our collection of articles on measuring the impact of AI, we initially had difficulties finding contributors. Our struggle led us to two insights:

Large-scale change often involves partnership between external and internal consultants.

The external consultants have the privilege of being involved with the setting up, definition and the first few phases (up to and sometimes including Design). Although change happens throughout the process, the internal consultants then face the challenge of following up and ensuring the real longer term change occurs.

We have identified the need for external consultants to continue supporting the critical phase of Delivery by providing 'shadow consulting' and/or coaching to the internal consultants. Periodic follow-up with the internal consultants and the change leadership can also help the organisation reflect on their success so far, where they are now, and to boost their energy and appetite for change.

Another key role of the external consultant is to help build sufficient internal capacity to teach and facilitate AI so that the organisation's change journey is strength-based and delivery of results is assured. Although consultants are typically called to work on a specific challenge, focusing on developing an appreciative learning culture brings greater success in organisational performance than focusing on simply completing a task.

AI and other organizational development (OD) practitioners are still weak at measuring the impact of their interventions

We tend to avoid measuring the impact altogether. Some of us also have negative beliefs that measurements are deficit-based and that numeric/quantitative data is not very useful in the context of narratives. These beliefs are not helpful; it is time we re-frame them. Measuring can be difficult but in order to gain the widespread acceptance and credibility of AI and other OD interventions, we ought to give this area more thinking and planning and become more skilful at it. One way of achieving this is by using the strengths of other methodologies, as well as existing resources, that have and can offer the relevant expertise.

Call for action – join us in this quest

Editing this special issue of AI Practitioner has been a great learning experience for both of us. We believe that we have just scratched the surface of an important topic. If you have enjoyed reading the articles that we have collected from around the globe, tell us what you like and what you find valuable. If you share our passion for this topic, join us in our quest and let us know your questions and what you would like to contribute. Let us know if you believe, like us, that more can be written and explored about measurement. If you would be interested in a follow-up, we would be happy to work on another issue in the future.

Back to Table of Contents

International Journal of Appreciative Inquiry

Inside:

International Journal of Appreciative Inquiry

Inside continued:

IAPG Contacts and AI Practitioner Subscription Information

International Advisory Practitioners Group IAPG

Members of the International Advisory Practitioners Group working with AIP to bring AI stories to a wider audience

Druba Acharya, Nepal

Gervase Bushe, Canada

Sue Derby, Canada

Sara Inés Gómez, Colombia

Lena Holmberg, Sweden

Joep de Jong, Netherlands

Dorothy Liebig, Germany

John Loty, Australia

Sue James, Australia

Maureen McKenna, Canada

Liz Mellish, Canada

Dayle Obrien, Australia

Jan Reed, United Kingdom

Catriona Rogers, Hong Kong

Daniel K. Saint, United States

Marge Schiller, United States

Jackie Stavros, United States

Bridget Woods, South Africa

Jacqueline Wong, Singapore

Margaret Wright, United Kingdom

AIP Subscriptions
Individuals
NGOS, students and community groups
Small organisations
University/Research Institutes
Large organisations
http://www.aipractitioner.com/subscriptions

Back Issues and Articles
http://www.aipractitioner.com/issues
http://www.aipractitioner.com/articles

Change of subscriber details
http://www.aipractitioner.com/customer/account/login/

Publication Advertising/Sponsorship
For the advertising rates, contact Anne Radford.

Disclaimer: Views and opinions of the writers do not necessarily reflect those of the publisher. Every effort is made to ensure accuracy but all details are subject to alteration. No responsibility can be accepted for any inaccuracies.

Purpose of AI Practitioner
This publication is for people interested in making the world a better place using positive relational approaches to change such as Appreciative Inquiry.

The publication is distributed quarterly: February, May, August and November.

AI Practitioner Editor/Publisher
The editor/publisher is Anne Radford. She is based in London and can be reached at editor@aipractitioner.com