

Whole Systems Change through Appreciative Inquiry

**ORGANIZATIONAL CHANGE: Think Vision, Strategic  
Action Planning, Implementation and Process:**

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## **Built to Last Vision Model**

### **Core Ideology: Two Parts**

1. **Core Values**—e.g., Merck, 1930's
  - Corporate social responsibility
  - Unequivocal excellence in all aspects of the company
  - Science-based innovation
  - Honesty and integrity
  - Profit, but profit from work that benefits humanity
2. **Core Purpose**—e.g., Merck

To preserve and improve human life.

#### Other examples:

- To solve unsolved problems innovatively—3M
- To make people happy—Walt Disney
- To make technical contributions for the advancement and welfare of humanity—Hewlett-Packard
- To give unlimited opportunity to women—Mary Kay

### **Envisioned Future: Two Parts in Original Model**

1. **BHAG: Big Hairy Audacious Goal**—e.g., Merck

To transform this company from a chemical manufacturer into one of the preeminent drug-making companies in the world, with a research capability that rivals any major university.

2. **Vivid Descriptions:** e.g., Merck

With the tools we have supplied, science will be advanced, knowledge increased, and human life win ever a greater freedom from suffering and disease...We pledge our every aid that this enterprise shall merit the faith we have in it. Let your light so shine – that those who seek the Truth, that those who toil that this world may be a better place to live in, that those who hold aloft that torch of Science and Knowledge through these social and economic dark ages, shall take new courage and feel their hands supported.

However, there is a newer alternative to the BHAG and Vivid Descriptions in the form of Appreciative Inquiry propositions about our ideal or preferred future. AI was in its early stages of development when Built to Last was published, but is now one of the most dynamic approaches to creating and articulating innovative, bold futures for organizations.

## **Creating Positive Change for the Future...Attaining and Sustaining Your Ideal Organization!**

### **Why is change both advisable and inevitable for your organization?**

Organizations that become wildly successful continually ask themselves such questions as "Where are we today and where do we want to be tomorrow?", "What could we become at our very best?" and "What would it take to move us far ahead of all the others?".... they are not afraid to *dream* nor are they afraid to *act* on their dreams. They create *bold* new *visions* for the *future* based on a solid foundation of *values* and *teamwork*, and they create definitive *strategic actions* to make their visions become *reality*. This course will focus on learning and applying the newest organizational change concepts for creating a bold vision for the future and the strategic actions that will make that vision become reality, or put another way, to effectively move from where we are today to where we want to be in the future. That is change at its best!

In our rapidly *changing* world, organizations that develop an effective ongoing *strategic thinking, planning and action* process will have a significant advantage. They will continually *optimize their success* through *positive strategic change*, especially compared to those organizations that conduct "business as usual" until they are forced to change by circumstances they can't control, essentially letting themselves be blown about by the "winds of change". Strategic-thinking organizations see *new trends* coming, they prepare for them and they often turn them into a *competitive advantage* through positive change. Those that don't usually are forced to play "catch-up", which often isn't possible. The strategic change process you will learn in this course can, and should be, used repeatedly to continually move your organization toward the collective vision of its ideal, of what it can become at its very *best*.

### **How often should an organization go through a change planning exercise?**

Change processes should be planned and implemented whenever an organization needs to reposition itself, internally and/or externally, to optimize its effectiveness within the environment within which it operates or wishes to operate. Thus, there is no stock answer as to how often an organization should consider and plan change. Constantly scanning the internal and external environments for opportunities and challenges will provide the answers as to when change is appropos. It should also be recognized that planned change can range from very small change in one unit or area of an organization to major change across a whole organization such as might result from an organization's strategic planning exercise.

At this point, a brief consideration of strategic planning is necessary. It is one of the most frequently engaged in processes in organizations, but is too frequently unsuccessful in implementation and subsequent results. It should be about visualizing and implementing

effective change that puts the organization in the best positioning possible. There is an old concept that strategic planning should be done on some sort of a multi-year cycle, every five years often being recommended. However, this concept is usually ineffective. It assumes that a good strategic plan will be relevant for many years after it is designed, and it implies that between strategic plans you don't need to think strategically... just follow the plan. The reality is that the world of both challenges and opportunities changes very quickly, that you must continually think strategically and that you must continually adjust your strategic plan to plan real change that capitalizes on these arising opportunities and that effectively deals with new challenges.

I would recommend that organizations hold a strategic planning retreat each year as a means to re-emphasize, update, and bring sharp focus to your vision and strategic action plans for change, and to serve as a team-building event, a rallying point. Secondly, I would also recommend that the whole organization learn to think strategically by considering briefly at each staff meeting your strategic actions, your progress on them, and whether any changes have occurred in your environment that can positively or negatively affect your organizational strategy. And thirdly, not all change that is necessary in organizations will clearly relate directly to the organization's strategic plan. However, whatever potential changes present themselves that can create increased effectiveness, these should be considered when they arise.

### **Recommendations:**

Use organizational change processes:

- that are positive, ongoing, and promote innovative thinking,
- that involve in some way, at minimum, the whole organizational team,
- that build on strengths, ...develops bold images of what the organization could become at its best, ...creates your ideal organizational design for the future, ....and focuses on both action and implementation plans so that your vision will become reality,
- and that focus on values and people as your foundation.

## The Process of Developing Sustainable Change

There is no set process... the process should be customized to the needs of each individual organization. However, there is a sequence to the various phases of one general process that I use frequently in organizations that can often be utilized with significant advantage over traditional approaches. The core organizational philosophy that I use in my work in developing change is Appreciative Inquiry, and was developed by David Cooperrider. It has four phases called Discovery, Dream, Design and Destiny.

The **Discovery phase** is about the best of what is now... when you and your organization are at their best, your peak experiences, the times when everything "clicks". This is the positive core on which to build for the future.

The **Dream phase** is about the best of what could be... imagining all of the possibilities of what your organization could be at its best, its most ideal. What are all of the ways you could transform the practice to move it toward the ideal? This phase is very imaginative brainstorming at its best.

This **Design phase** is about designing what your organization for the future will actually be... taking all of the possibilities and deciding what the best combination of core strengths, peak performances and future possibilities will be. The design should be bold and inspire people to action.

The **Destiny phase** is about a committed, inspired team of people together making the new design for the future become reality. It is everyone taking responsibility for making things happen. For this phase, you will describe what your team needs to do in terms of real actions to create your new destiny. Then, plan how you will implement these actions.

**Note:** There are many excellent whole systems approaches to change that can be utilized by those leading change. I like Appreciative Inquiry because of its positivity, its flexibility, robustness and philosophy, its fit with my style and personality, and the results I obtain using it. However, I also keep learning from and about other methodologies, and have no illusions about one method being the "be all and end all" of organizational change methodologies. My recommendation...find a method that works well in your hands and fits you well, become an expert in using it effectively and in customizing it to differing circumstances, and never cease to keep learning and looking for yet better methods.

**Kotter's Eight Steps for Successful Large-Scale Change:**  
(John Kotter, Leading Change, 1996)

- 1. Establish a Sense of Urgency**
- 2. Creating the Guiding Coalition**
- 3. Developing a Vision and Strategy**
- 4. Communicating the Change Vision**
- 5. Empowering Employees for Broad-Based Action**
- 6. Generating Short-term Wins**
- 7. Consolidating Gains and Producing More Wins**
- 8. Anchoring New Approaches in the Culture**

**Think about:**

- How do whole systems organizational change approaches, particularly Appreciative Inquiry, support this eight step process?
- What is the distinction between change and organizational complexity?
- What are the differences between leaders and managers?
- Change will happen! Thus, we need to pay attention to Kotter's eight steps!

(An example of the **Built to Last** vision model using AI propositions in place of vivid descriptions and BHAG statements.)

## The Academy of Cosmetic Dentistry

### "Our Vision"

#### Core Ideology

1. *Core Values: We are committed to...*

- Valuing people above all else
- Leading in setting standards of excellence
- Sharing knowledge and experience
- Progressive and creative ideas and actions
- Networking widely with other organizations
- Celebrating successes

2. *Core Purpose:*

"To unlock imagination and inspire creativity"

#### Our Envisioned Future

*These seven statements define what we will become at our best:*

- Above all, we value people and do everything possible to create an environment where camaraderie and friendships flourish, where there is an open and generous sharing of knowledge, and where anyone who wants to participate can do so.
- We inspire and transform people both personally and professionally.
- We effectively present to the public and our peers the value of the Academy's credentialing programs and the educational programs of the Academy in supporting the highest standard of care for patients.
- We continually celebrate the success and contributions of our members, e.g., in obtaining credentials, in serving as board members or officers, in serving on committees or in other volunteer capacities, and in providing humanitarian services.
- We develop mutually beneficial relationships with other organizations.
- All decisions and efforts by the Academy's leaders are made with two questions always at the forefront: "How can we do it better?" and "How can we best serve our members?"
- "We shamelessly steal good ideas wherever we find them."