

MSOD 618 Post Session Reflection Paper

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February 10, 2019

I had the opportunity to spend two days in an Appreciative Inquiry (AI) workshop with members of the leadership team of Carlson Wagon-Lit Travel Costa Rica (CWT). I was part of a four-person Pepperdine consulting team that included Sara Strueby, Lisa Marin Hirsch, and Amber Reimer. Jeff McCollum was our team advisor. During Day One of the workshop, I spent the entire day with the client. Seated next to me on one side was Dan Cato, senior site director for CWT. From the first moment I met him, Dan struck me as driven and very disciplined, intense, and quite a go-getter. He arrived at the workshop an hour and a half early, sat at the table by himself, and was busy on his laptop answering emails and viewing reports when I went up to him to introduce myself. He warmed up quickly, however, and began to relax as we chatted about family and I shared some of my professional background as an operations director. Seated on the other side of me was one of his direct reports and business analysts, Glenda Peace. Glenda had arrived after Dan and appeared more at ease straightaway, full of smiles and warmth, and eager to engage and learn more about AI. During the morning breakouts, Glenda and I worked together as a dyad and, through that experience, we got to know each other and form connections relating to family, culture, art and music, office politics, and personalities.

The first test of trust between the client and the Pepperdine consulting group came toward the close of the Day One session when we discussed logistical details for Day Two. Embedded in the mission statement which Dan and Glenda had developed in a previous Define workshop, was the phrase, “empower all team members, at all levels to identify and share improvement opportunities and best practices.” When we reviewed who would be participating in the client site session, we learned it would be about ten people, mostly Dan’s leadership team and a few of their direct reports. However, not all of the levels in the organization would

be represented, including the consultants who make up the majority of the employees at the site. When we asked Dan and Glenda why consultants were not included, they both appeared caught off-guard by the question, at a loss of words at first, and became somewhat defensive in their response. Our question struck a nerve, and we weren't entirely sure why that was. Aware of the potential risk of having our mutual trust and goodwill erode, I pushed forward anyway and asked Dan if he might consider including one or two consultants for the session. He paused and looked at Glenda, and soon both heads nodded in agreement. Glenda promised to reach out to invite two consultants to join. At that moment I was appreciative of the trust Dan, and Glenda showed us. I acknowledged that and thanked them both.

Dan also shared that his perspective had shifted throughout the day. He came into the session looking for answers and consulting advice about developing an effective strategy for becoming a world-class operation. By the end of the day, however, Dan was willing to engage more of his employees in dialog about what a world-class operation means and looks like. He was honest about where he felt some discomfort in the AI process and, by sharing that openly with us, we were able to connect on a deeper and more personal level and share with him that we would be co-creating this together and to trust the process.

The next test occurred on the following morning when I pulled Dan aside before we got started and asked him if he would consider recusing himself from directly participating in the creation of the possibility statements with his team. Because of his positional authority as the "big boss" and his strong personality, his voice would carry a lot of influence and power that could interfere with the co-creation activity of his team. He paused to consider my request and reluctantly agreed to abide, showing a strength of character, humility, and trust. Again, I acknowledged and thanked him.

At the start of the session, Dan kicked things off with a few brief opening remarks and set the tone for the day. He then stood back and observed, occasionally leaving the room and returning for periods at a time. When we got toward the end of the session during the Dream phase, I invited Dan to join in and participate fully, which he did eagerly. He confessed how challenging it was for him to remain silent throughout the day but acknowledged how important it was for him to sit back and listen to what had emerged from the team. A few members of the group also voiced their appreciation for being given the opportunity to co-create on their own. After the close of the session, both Dan and Glenda expressed gratitude for the experience over the two days and for what the team was able to accomplish in such a short period. It was clear they derived value from both sessions and would continue moving forward with AI discussions within their organization.

For me, the client engagement felt energizing and empowering. Instead of feeling the pressure of coming into a meeting with answers and solutions, I focused on creating the container for the client to engage in meaningful dialog. By emptying my mind of expectations to perform a certain way, I was able to be present to witness firsthand how powerful dialog and relationships can be when the focus is on strengths and possibilities. It also allowed me to be spontaneous as a facilitator and to deviate from the planned format at apposite moments. For example, at one point during the session, the group energy was low. They had been sitting for a long time and we were losing their attention. When it was my turn to facilitate, I made them stand up and power walk around the room twice and had them stretch and breathe. Later, when I sensed the group getting themselves stuck on a task, I decided to “freestyle” it by introducing an unscheduled team activity. The participants were struggling trying to collapse two possibility statements into one. They got into their own heads overthinking the statement. I was

suddenly inspired to have them push away the tables and to form a tight circle. I invited them to use their own words to describe their possibility statement in such a way that an eight-year-old child could understand and get excited about it. I wasn't sure if that would work. By forcing them to use simpler words and speaking plainly, it created an immediate, stronger emotional connection to what the entire group believed about themselves—that is, that they are a family who cares about each other and their customers. This turned out to be a powerful insight that did not go unnoticed by the group, especially Dan, who made a point of underscoring how important family is as a value in their organizational culture.

As for feedback, I received many positive comments from the clients and the consulting team. One area for me to think about going forward when I facilitate is to be aware that I can sound patronizing at times by being didactic and instructive in my role instead of encouraging more discussion. I will make an effort to avoid that in the future.

Regarding my professional point of view, I came into this practicum with lots of questions and concerns about AI and leave it fully embracing this approach and philosophy. Having experienced large group sessions such as the AI workshop, Open Space Technology, and World Café, I am convinced of the power of dialog and the co-creation of sense-making. I am eager to integrate these dialogic models into my practice and to find more opportunities for them in future engagements.