

A Change Agent's Quest: Unlocking the Mystery of Whole System Change

By Peggy Holman

I am on a quest to unlock the mystery of consistently achieving whole system change. For me, it is the key to creating a better world.

My first experience with whole system change was an extraordinary success. It was 1988 and I was the Software Development Manager for a cellular phone company, U S WEST NewVector Group (NVG). The pace was intense, spirits ran high, NVG was an exciting and fun place to be. After all, we were inventing a whole new industry. When the company was about three years old, our new VP of Finance took a fresh look at the numbers and made a startling discovery: we were retaining only about 48 percent of the customers who bought a mobile phone. That meant the company had to sell two phone lines for every one we'd keep. The industry term is *churn*, the rate at which phone lines turn over.

Reducing churn became the rallying cry. A cross-functional team, on which I represented Information Technologies (IT), was formed to "solve churn." Over several months we looked at how every aspect of the business affected this key indicator, making changes as we went. Ironically, while churn definitely dropped, we made so many changes along the way that no one knew which actions made the most difference. Later, we learned about measurement and discipline and got very good at not only getting results but also knowing what we did to achieve them. Ultimately, we concluded that churn was a quality issue. That was before I'd heard of total quality (TQ). Fortunately, someone in the group had heard about this idea and attracted a superb TQ consultant to join NVG. That's when things really took off.

After the first retreat in which company executives learned what embracing TQ would mean to them personally and to the organization, they spent the next nine months doing site visits, reading and discussing books on quality, and creating a plan for how to proceed. A key element of that plan was engaging the top 60 people in this 2,200-person company in training every employee in quality. That meant every director, vice president and the CEO each allocated at least eight full days over six months to prepare for and deliver several sessions of a two-day quality awareness overview. The rest of the employees got the message: this was important work.

Over the next 2 years, we changed the company. While it remained an innovative, high-energy, and fun place, we added knowledge, skills, and discipline that also made it profitable and produced the highest customer satisfaction and lowest churn rates in the industry for the rest of the company's existence.

What Makes for a Successful Change Effort?

Since I clearly knew what we had done to transform this organization, I left IT and became a TQ consultant. I was shocked when my next attempt to change a company flopped badly. After I picked myself up and asked, "What happened?" I began a search for the magic formula: What is

it that makes the difference between extraordinary, unimagined success and demoralizing failure? In other words:

What does it take to achieve whole system change, bringing people together to achieve some greater good in a business or in society at large?

With this question I started my search for a "unified field theory" of human systems. I borrowed the name from physics. According to Stephen Hawking, "The eventual goal of science is to provide a single theory that describes the whole universe."¹ That's what I wanted to find as it applied to people. Why? So that I could, with confidence, always repeat the experience of transformation that occurred at NewVector Group.

That search led me to the field of organization development (OD). I found several "large-group interventions" including future search, open space technology, and dialogue. The methods seemed to be distinguished by two common characteristics: they intelligently involved people in changing their workplaces and communities and they approached change systemically.

During this period I also learned about the work of Solomon Asch, who identified conditions for effective dialogue²:

- Perception of a shared world
- Perception that all are equally human
- Perception of an open dialogue

Asch's conditions profoundly influenced my consulting work. I proceeded with the assumption that anything could be learned without lecture; I just had to be sure Asch's conditions were present. This meant designs in which people discussed what the subject meant to them -- why it was worth the time. It meant offering new communication tools that put the emphasis on inquiring into each other's beliefs rather than advocating for one's own position. And it meant asking people to speak their heart-felt truths in front of their colleagues.

I learned that people reveled in their new-found freedom, moving from passive consumers of presentations to active learners pursuing their own paths to understanding. I discovered that the tools of dialogue enabled even the crustiest, most cynical of people to develop new understanding and appreciation for their colleagues. Many also found a deeper understanding of themselves. And I observed that when people changed, when their relationships changed, the likelihood of sustainable organizational change dramatically increased. What remained elusive for me was *consistently* creating the conditions in which people expressed their deepest thoughts and feelings about their work. Sometimes this happened, leading to catharsis and growth. Sometimes it did not. I knew that I had part of the equation for achieving change: personal

¹ He says a lot more on the subject: "It turns out to be very difficult to devise a theory to describe the universe all in one go. Instead, we break the problem up into bits and invent a number of partial theories...It may be that this approach is completely wrong. If everything in the universe depends on everything else in a fundamental way, it might be impossible to get close to a full solution by investigating parts of the problem in isolation." Hawking, Stephen. *A Brief History of Time*. New York: Bantam Books, 1998, pg. 10, 11.

² Weisbord, Marvin R., et. al., *Discovering Common Ground*. San Francisco: Berrett-Koehler Publishers, 1992, pg. 21-23.

involvement, connection with a larger purpose, and a chance to be heard. Until I could be confident people would choose to speak, I knew something was still eluding me.

I took my search for ways to achieve whole system change into other disciplines using the keys I'd uncovered so far: high-involvement, a systemic approach, and Asch's conditions. What I discovered was a diverse array of possibilities (see Approaches for Achieving Whole System Change). As I worked with my newly acquired knowledge, my own practice grew more effective. People began seeking me out when they wanted to involve people in changing their organizations. And some of that work took me out of the corporate world and into new realms: non-profits, government, communities, and loose-knit associations that make up an industry, such as journalism. Not surprisingly, I found the setting didn't matter; whatever the work, the keys were the same.

Approaches for Achieving Whole System Change³

The Change Handbook offers approaches to change that taken collectively are a powerful testament to a revolution-in-progress. What is truly revolutionary about them is their commitment to participation and systemic change. Particularly exciting is the emergence of these trends across many disciplines. While many methods have their roots in organization development, others bring rich traditions from community development, Total Quality, social science, system dynamics, the wisdom of indigenous cultures, and studies of intelligence, creativity, and the arts. Hundreds of examples around the world of dramatic and sustained increases in organization and community performance now exist. For GTE, Appreciative Inquiry was cited as the backbone of an award-winning change initiative that has unleashed the power of the front-line staff. At Brooklyn Technical High School, Real Time Strategic Change has supported curriculum redesign and faculty development in a unique partnership between principal and faculty. And in Hopkinton, Massachusetts, a Future Search conference helped a town of 9,000 overcome a tax-limiting referendum to provide double-digit school budget increases and create partnerships with local businesses to fund libraries, technology and teacher training.

METHOD (FIRST USE)

CREATOR(S)

1960s

Search Conference (1969)

Fred Emery, Eric Trist & Merrelyn Emery

1970s

Participative Design Workshop (1971)

Fred Emery

Scenario Thinking (1970s)

Pierre Wack and colleagues at Royal Dutch Shell

1980s

Future Search (1982)

Marvin Weisbord & Sandra Janoff

Whole-Scale™ Change (1982)

Paul D. Tolchinsky, Kathleen D. Dannemiller & Dannemiller Tyson Associates partners

Technology of Participation (1984)

Institute of Cultural Affairs (formerly The Ecumenical Institute)

³ *The Change Handbook*, edited by Peggy Holman, Tom Devane, and Steven Cady (Berrett-Koehler, 2007) The Change Handbook contains over 60 stories of stellar results from high-involvement, systemic change.

Dialogue (1985)
David Bohm
Open Space Technology (1985)
Harrison Owen
Appreciative Inquiry (1987)
David L Cooperrider, Suresh Srivastva & colleagues
1990s
The Conference Model® (1991)
Richard H. & Emily M. Axelrod
Real-Time Strategic ChangeSM (1994)
Robert W. Jacobs & Frank McKeown
The World Café (1995)
Juanita Brown, David Isaacs & colleagues

What I Learned

In addition to identifying a wide variety of approaches that could consistently produce results, I now had data to continue my search. By identifying what these approaches had in common I thought I could learn what it takes to consistently achieve whole system change. I found seven themes present in all the methods I researched:

Envisioning a meaningful purpose – something larger than themselves – compels people into action.

When people can envision themselves as part of something larger than themselves, they operate differently. The emphasis shifts from focusing on "why something can't be done" to "how can we make this happen?" There is a tangible difference in the atmosphere of organizations and communities that have made this shift – they feel alive with possibility and excitement.

The power of individual *contribution* is unleashed.

When people understand the whole system, when they see the possibility of meaningful intentions, when they feel their voice matters, they commit. While it doesn't happen every time, the potential for extraordinary accomplishment exists within each of these approaches.

The *whole person, head, heart and spirit, is engaged.*

Over the years, words such as "hands" or "heads" have become a way to count numbers of people in organizations. They reflect a focus on what is considered important – hands to do the manual work; heads to do the thinking work. These methods re-engage the whole person: hands for doing, heads for thinking, hearts for caring and spirits for achieving inspired results.

Knowledge and *wisdom* exist in the people in the organization or community.

This belief that the people in the system know best is a profound shift from the days of bringing in the outside "efficiency" expert with the answer. While several of these approaches rely on new ideas, not one of them presumes to have the answer. Instead, they engage people in the organization or community in making choices about what's best for them.

Information is co-created by members of the organization or community

What keeps the system whole over time is a commitment to collaborative meaning making, a profound shift from information provided on a "need to know" basis. When people share stories

of what is important to them and to the system, they are more connected to each other and make more informed decisions about their individual and collective actions.

The method creates a whole *systems view* among members of the organization or community.

Each method enables people to understand their system at a deeper level. They begin to see interconnections among departments, neighborhoods, processes or relationships. When this occurs, system members know better how to contribute and therefore make commitments that were previously unlikely. Because more people understand the whole system, they can make intelligent, informed contributions to substantive decisions.

Change is a process, not an event

While most methods involve a half-day to three-day event, the sum total of a transformational effort is *not* just one change event. While events help focus people’s attention, they are only one part of the change equation. Leaders – at all levels – of organizations and communities also need to focus on actively supporting the plans and improvements achieved during the event. Without such ongoing support, conditions may return to what they were before the event occurred.

Putting These Characteristics to Work

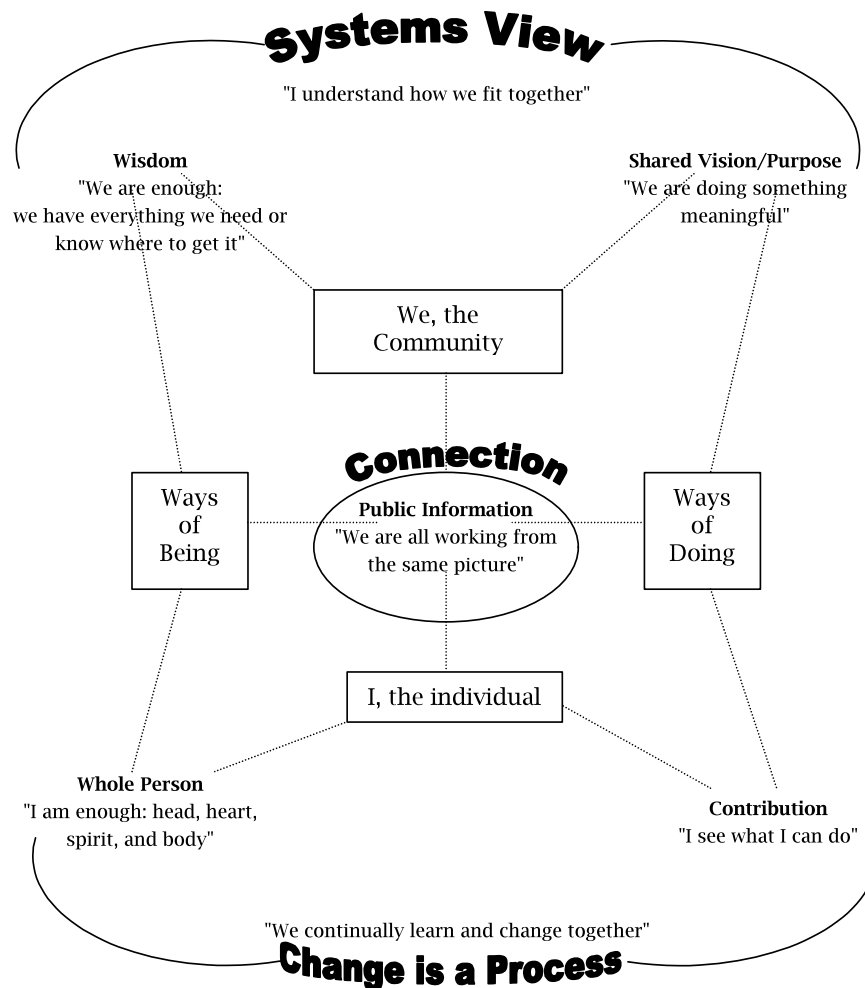
I could now describe what seemed to exist in successful approaches to whole system change. The elements formed an interrelated pattern, connecting the individual with the collective, and the inner being with the outer “doing” or work bounded by two key assumptions: a commitment to a systems view and change as an ongoing process the work of Large-Group Methods. I also had a wide variety of proven alternatives I could use with clients. But I wanted more. I wanted to know why these approaches worked so that I could consistently support clients achieve their highest aspirations in any situation. My next thought was to create a picture to help me understand how these characteristics related to one another. Are they all of equal importance? Are some the results of others? Which ones provide the greatest leverage? I figured understanding this would give me the key I was seeking.

On my way to building the picture, I looked at what was different in the assumptions of these change approaches. After all, such things as purpose and information are just there. What facilitates transformation are the beliefs about them from which we act.

Characteristic	Old think	New think
Purpose	Management owns	Shared ownership
Information	Need to know	Co-created
Contribution	I just do my job	What can I do?
Person	They just want my hands/head	I can be myself; who I am matters
Wisdom	Hire an expert	Among us, we have the knowledge and skills we need or know how to get it
System	I know my part and that's all I need to know	I understand how we fit together

Process	That was a nice event, now back to the real work	We continually learn and change together
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By visually describing "new think," I hoped to discover a larger message or pattern. When I was done, I realized I had drawn a compass. It was a great reminder that change can take me anywhere; I just need to choose the destination and establish the rules of the road. My effectiveness with the compass will determine the success of the trip.



The drawing describes a route to reliable whole system change in organizations, communities, and society.

A *Systems View* and *Change is a Process* bound the picture affirming the importance of establishing what, who, and how. Systemic and high-involvement change begins with two questions that help describe the system:

What is our purpose? By exploring this question both intellectually (What do we want to accomplish?) and emotionally (Why is it worth investing time and energy?), an image of a desired future begins to form and the shift to thinking systemically begins.

Who participates? Understanding the system requires knowing who is involved: who affects it, who cares about it, who holds responsibility for its health and well-being.

Having established a preliminary systems view, we can choose a process that suits our needs. Culture--both current and desired--plays an important role in making that choice. This is true because implicit in any process are the operating assumptions that guide it. How the approach deals with the current culture's assumptions will help shape its impact.

Public Information is the crossroads, the connection of the individual and the community and of being and doing. I have observed amazing results when people co-create a multifaceted picture of their world for the first time. In addition, I have been struck by the central role of public information. It sustains the systems view and renews the process of learning and change. Remove it and fundamental connections are severed. I am convinced that effective communication sustains us. The illustration shows why: it ties the whole system together.

The "compass points"—beliefs about *wisdom, purpose, personal wholeness, and contribution*—shape culture. This is a graphic reminder that successful change depends on the attitudes we hold about our ways of being and ways of doing, individually and as a community. It is the successful weaving together of these elements that distinguishes the approaches that consistently succeed.

Humbled by this realization, I remain determined to understand what it takes to create the conditions where these elements always emerge. I am convinced it requires a shift from a mechanical (follow these steps) to an organic (support what is called forth) way of working. For me, Asch still holds the key because I see being and doing, community and individual implicit in his work. His conditions are like the magnet in the compass—unseen and utterly vital. When they are present, “new think” occurs. Indeed, after working with his conditions for several years, I believe Asch actually uncovered the conditions for trust. And I speculate that as trust grows, the conditions become "normal" forming the basis of loving community.

What draws people to act from Asch's conditions? I think the conclusion of my quest lies in this answer. To continue testing this belief, three questions guide my work:

- * Are we spending time understanding what we collectively aspire to? (Shared world)
- * Does every individual identify what is personally meaningful to them? (Equally human)
- * Is there room for all voices? (Open dialogue)

I have been highly successful in increasing the energy, commitment and effectiveness of organizations with these questions when all voices choose to speak. Consistently calling forth that choice remains the mystery in my quest.

If these questions attract you, I invite you to join my quest. You don't need to wait for a whole system change effort to begin. The next time you have an activity or meeting to plan, ask about purpose and participation and choose your approach to the task using the questions inspired by Asch. And let me know how it goes. Together, perhaps we can uncover a unified field theory of human systems.

Peggy Holman consults with organizations to strengthen their impact through high involvement and a whole-systems perspective. Her expertise in Open Space Technology, Appreciative Inquiry and Dialogue are integral to her work because she believes in their great promise to unleash the human spirit for individual and collective good. The second edition of her book, The Change Handbook (Berrett-Koehler, 2007), co-edited with Tom Devane and Steven Cady, has been warmly received as an aid to people wishing to increase the impact of their organizations and communities. Peggy can be reached at 425-746-6274 or peggy@opencirclecompany.com.