

AI SUMMIT TOOLBOX *guide*

INTRODUCTION: IS AN AI SUMMIT RIGHT FOR YOU?

THECHANGELAB
FROM THE MICHELLEMCQUAID GROUP

If I hadn't seen it with my own eyes I would never have believed it was possible. Our normally very serious, quiet, and reserved – some might even say dour — chief financial officer was bouncing up and down on his chair, arm waving eagerly in the air like an excited child desperate for the teacher to call on him so that he could share his discovery. And he wasn't alone.

As I turned to look around the Grand Hyatt Ballroom where 400 of our most senior leaders had gathered alongside our clients, employees and business partners, I could see people's hands shooting up all around the room. There was suddenly a palpable sense of excitement, possibility, and energy radiating across this group of usually staunchly pessimistic accountants.

What was happening? As the brand director for PricewaterhouseCoopers, one of the world's largest accounting and professional services firms, I'd persuaded my leadership team to invest in an Appreciative Inquiry (AI) Summit to conduct our annual strategic planning session. Usually a closed-door affair just for the partners of the firm, with the help of Professor David Cooperrider, one of the world's leaders in this large-group change approach, we'd convinced them to open the doors and invite our whole system – clients, employees, and partners – into the room to co-create our future. It was a radically different approach from anything we had ever done before, and as the day of our AI Summit approached the leadership team's nerves had been fraught.

On my way to the Grand Hyatt that morning, I'd received several panicked telephone calls from leaders fearing I was about to embarrass them in front of their clients. Then I arrived to find a roomful of nervous employees wondering why on Earth our leaders would want to hear their ideas. This was not the way most meetings ran in our workplace. When I finally went backstage I found David, who had flown in to help facilitate the event, sitting in the wings nervously jiggling his legs and telling me he just wanted to live quietly in the woods and write books.

And then we started. Within minutes, the dull old ballroom was transformed as people began moving to the edge of their chairs, drawn into unusually human conversations by the questions they were being prompted to ask each other. Job titles, stereotypes, and preconceived ideas about each other dropped away as they started to see the incredible mix of strengths, hopes and experiences they each brought to their work. As they discovered that their worlds were more similar than different, within a matter of hours the deeply ingrained silos and "not my responsibility" mindsets that usually divided the firm started breaking down as people generously offered to share resources and provide support to realize opportunities that would help the organization be of better service to its clients and employees. By the end of the day our most challenging cynics had become committed supporters of the process.

Twelve months later, for the first time in the history of the firm an independent study found that we had finally managed to achieve brand differentiation from our competitors. In a market crowded with technical experts who promised to fix an organization's greatest fears, we had come to be recognized as the people who could help organizations realize their greatest hopes.

HOW DO LIVING SYSTEMS FLOURISH?

As a passionate advocate of creating positive changes in living systems, after spending more than a decade trying to improve people's behavior in large organizations around the world, it became increasingly clear to me how rarely our change efforts worked. After partnering with sixty diverse leadership teams with varied challenges, cultures, and resources, I noticed again and again how the deficit-based, mechanistic approaches that were frequently used in change processes could sometimes secure short-term compliance, but rarely ever resulted in a long-term commitment to the desired behaviors.

The problem was that as soon as leaders considered the problem "solved" and moved on, most people went back to behaving as they had before the change effort commenced. Of course, these observations were not unique to me or to the organizations with whom I was working, but a reflection of the long-standing management misunderstanding that people were somehow like machines whose behavior could be controlled.

"Our costly attempts at organizational and social change have mostly failed because we made two mistakes. We tried to change individual behaviors, and we used linear approaches of goal setting, measurement, and accountability. Logically, it all made good sense. Individual behaviors caused problems. Complex problems need to be broken into chunks and then designated as tasks to specific individuals or teams. If everyone knew they would be held accountable for results, they'd be motivated to do the work. And change would happen."***- Margaret Wheatley***

Despite our long-held Newtonian beliefs that we live in a clockwork world where change and disturbances signal trouble, since the 1960s researchers have found that fluctuation and change are an essential part of the process by which order is created in a living system. Take a moment to think of your own life and the times you've personally found yourself at the edge of chaos, and you'll notice that by the end you've emerged changed and often grown stronger. But how often have you ever experienced growth during phases of equilibrium?

Unfortunately disequilibrium, loss of control, and surprise tend to be experiences that most human systems try to avoid or control for fear that change will exhaust people's energy and leave them at risk of entropy where the system breaks down. But scientists have discovered, that what distinguishes a living system from a mechanical system is its ability to learn. Everything that is alive partners with its environment in a continuous exchange of energy and information that enables it to reorganize into different forms and develop new capacities that ultimately make it more resourceful, adaptive, and resilient, rather than rigid and stable.

While this process may sound threatening if stability, not growth, is the goal, it's important to remember that living systems change in order to preserve themselves and that being at the edge of chaos - the state between order and disorder where the components of the system are no longer locked into place, yet the system has not dissolved entirely - is a necessary condition to awaken creativity. As Peggy Holman – an award-winning researcher and practitioner on creating "whole systems" change — explains every system contains the following forces constantly interacting and mutually influencing each other:

- A drive for coherence (i.e. our longing for meaning and purpose).
- Occasional disruptions that disturb the status quo (i.e. new information from our environment, like a vocal cynic or an unexpected opportunity).
- A drive for differentiation (i.e. our hunger for freedom and authenticity).

Thus systems scientist, Erich Jantsch, encourages us to adopt a new role of "equilibrium busters" who recognize that order is never imposed from the top down, but emerges as elements of a system share new information and work together to find coherence and differentiation. No longer required to be the guards of change trying to maintain control, this gives us the opportunity to become compassionate coaches of disruption who consciously nourish and provoke a system's capacity for emergent growth.

CAN YOU BE A COMPASSIONATE COACH OF DISRUPTION?

Disrupting compassionately is an aikido strategy that grows people's capacity to deal with difference, upheaval, and conflict by empowering them with comfort, strength, and courage. For example, Nelson Mandela, Mohandas Gandhi, and Dr. Martin Luther King Jr. are powerful examples of what it means to be a leader who is a compassionate coach of disruption. Although the systems they faced were complex and often hostile, their strategies for creating disruption were compassionate, applied with clear intention and commitment. They enabled people to feel safe enough to liberate their voices and speak their truth, they connected people even while differentiating what mattered to each of them, and they opened people up to new facets of what they were facing by helping them to see the system as a whole in all of its complexity so that they could discern meaningful aspects of what needed to change. And they changed their worlds. Such is the power of compassion to positively disrupt a system.

"Left to self-organize in what looks like a mess with no apparent order, agents interacting in a system can produce not anarchy, but creative new outcomes that none of them ever dreamed of… The price is an inability to know the final destination or to be in control of the journey." ***- Ralph Stacey***

Peggy suggests that there are three activities you can invest in to be a compassionate coach of disruption and enable emergent change:

- Create a safe container – an intangible yet real space like an AI Summit - for novel information to be appreciatively shared across the whole system so the disturbance can be welcomed.
- Provide opportunities for individual expression and connection, so self-organization can take place around the actions people are passionate about and willing to take responsibility for in order to be of service to others.
- Reflect together by regularly stepping out of the flow of activity to seek feedback, sense the larger patterns that are taking shape, and find meaning and coherence in the system.

WHY MIGHT AN AI SUMMIT HELP A SYSTEM FLOURISH?

An AI Summit is a large group-planning, designing, and implementation meeting whose function is to discover what gives “life” to a living system when it is at its most effective, alive, and capable. It is a generative process that unites a whole system by enabling surprising configurations and connections of people's hopes and strengths and igniting self-organization to deliver agreed actions with speed, dexterity, and collaboration rarely seen in most systems.

"AI leads to transformational change when it addresses or creates enough disruption to evoke self-organizing processes that are focused on what is widely desired. Self-organizing processes are channeled in useful ways by, amongst other things, increasing the richness of social networks so that like-minded and motivated people find each other and are encouraged to ‘make something happen.’ ***- Gervase Bushe***

Typically used to bring together 100 to 1,000 or more internal and external stakeholders, at first glance it's impossible to appreciate the power this simple approach can have until you sit in a room and watch it unfold. For example, the level of positive energy, trust, hope, excitement, commitment, and accountability an AI Summit builds has enabled:

- The growth of the United Nations Global Compact for sustainability from 1,500 to 8,000 of the world's largest corporations – a 433% growth rate.
- Energy improvements across the state of Massachusetts that have resulted in nearly $9 billion worth of benefits for residents and businesses.
- The improbable collaboration of the world's religious leaders to unite more than 7 million people of different faiths to help build a better world.
- Transformational business outcomes, such as those experienced by Nutrimental Foods where within one year absenteeism decreased 300 percent, sales increased 27 percent, and productivity increased 23 percent.

Underpinned by the social constructionist premise that human systems move in the direction of what they most deeply, rigorously, and persistently ask questions about, and by the strengths-management philosophy that people learn little about excellence by studying failure, an AI Summit is a generative process that unites a whole system in a macro-management approach. By enabling surprising configurations and connections of people's hopes and strengths, AI Summits ignite self-organization to deliver agreed actions with speed, dexterity, and collaboration rarely seen in most systems.

Traditionally taught as a 4-D cycle, emerging research suggests that transformational AI Summits invest in a 6-D cycle that includes:



WHEN MIGHT AN AI SUMMIT WORK WELL?

Appreciative inquiry researcher and practitioner, Frank Barrett suggests that an AI Summit is best suited for situations where organizations have any of the following intentions to: accelerate planning, decision-making, and innovation; radically shift, inspire, or generate new visions for future organizational action; forge mergers, alliances, and partnerships across entire systems; or design or build momentum for a new organization or a new initiative.

Researchers caution however, that while living systems can be positively disturbed with a reasonable expectation of progress, this seldom conforms to the straight path that we might wish. While self-organization and emergence do tend towards order rather than randomness, they do so in their own unique ways and are incredibly sensitive to the system's initial conditions. As the Sufi's warn us: "You think that because you understand 'one' that you must, therefore, understand that one and one make two. But you forget that you must also understand 'and.'"

We've found there are three clear system dependencies likely to impact the ability of an AI Summit to positively disrupt a system and enable flourishing. Before you move forward with your Summit – and move your system to the edge of chaos – as a compassionate coach of disruption you will need to take the time to determine if an AI summit is right for your system by gauging:

1. WHAT IS THE CURRENT STATE OF THE SYSTEM?

Is the system currently in a dysfunctional state where people are feeling less engaged, less connected, and lack the presence of psychological safety, making them more defensive and focused on self-protection and self-preservation? Or is it closer to an extraordinary state where people are seen feeling safe, connected, and engaged, making them more open and equally concerned about both their own and other people's interests and wellbeing? Where it sits on this continuum can have a significant impact on the Summit and its results.

Use the following questions to gain a sense of the current state of your system:

Dysfunctional ***Extraordinary***

Never					**Sometimes**					**Consistently**
-5					**0**					**+5**
○	○	○	○	○	○	○	○	○	○	○
What is the current state of the system?										
1. Do people interact with each other in appreciative ways?										
2. Do people feel psychologically safe to take risks and challenge each other?										
3. Is this system having a positive impact on the people it serves?										

If your answers trend towards "never" it's important to consider that when a system is in a very dysfunctional state an AI Summit is likely to be met with great suspicion and skepticism. Without context for the introduction of a positive disruption and groundwork to begin building a genuine culture of appreciation and psychological safety, the use of an AI Summit risks creating a negative disruption because it is seen as a diversionary tactic by management or as a means to silence criticism. If you decide to proceed with an AI Summit it's important to clearly communicate why this approach is being taken and reassure people it is not an attempt to stifle honest conversation about the current challenges but to create space for a more generative dialogue of possible changes.

If your answers trend towards “sometimes”, consider that when a system is moving towards a more functional state, using an AI Summit to create a safe container to explore the untapped or trapped potential that lies within can unleash renewed energy and creativity as it helps the system to appreciate and build upon its shared strengths. In fact, researchers suggest that the discovery phase of an AI Summit for a system at this stage of dysfunction is likely to have a more significant impact than for a system at the extraordinary end of the continuum because people will find the experience surprising, positive, and exciting in contrast to their normal world.

If your answers trend towards “consistently”, consider that when a system is functioning in an extraordinary state and is vibrant and full of life due to people’s extensive and expansive connections and daily participation in generative conversations, it is important to consider whether an AI Summit will really add any benefit. Researchers note that any process that promotes transformation in an organization has to be counter-cultural to the organization in which it is used, so when an appreciating dynamic is already well established an AI Summit may create less positive disruption and be less potent.

2. IS THE SYSTEM OPEN TO GENERATIVITY?

Opportunities for generativity – the processes and capacities to help people see things in new ways – are essential if an AI Summit is to influence how people think and the decisions and actions they might take over time to transform a system's culture. As appealing as this may sound, it is important to note that generativity can be surprising, messy, bumpy, and create tensions. Being open to generativity requires a system to get comfortably uncomfortable as it embraces uncertainty and surrenders its quest for predictability. This will require the system to have the courage to be open to challenging questions and conversations and the willingness to support what emerges post-Summit.

Use the following questions to gain a sense of if your system is open to generativity:

Dysfunctional ***Extraordinary***

Never					**Sometimes**					**Consistently**
-5					**0**					**+5**
●	●	○	○	○	○	○	○	○	○	○
Is the system open to generativity?										
4. Is there the willingness to invest in generative topics and generative questions?										
5. Is there the courage to have generative conversations across the system?										
6. Are leaders willing to support and resource generative actions post-Summit?										

AI Summits help to enable transformational change when they create a positive disruption that evokes generative images, questions and conversations about shared opportunities, and challenges that mobilize people's passion and willingness to take responsibility for agreed, generative actions across a system. If you find your system has the courage and capacity for generativity then an AI Summit is likely to be a good fit. If you discover your system is not ready to be generative we recommend piloting Appreciative Inquiry approaches in small teams to build confidence in this approach, prior to investing in an AI Summit.

3. WILL THE SYSTEM SUPPORT SELF-ORGANIZATION?

The reality is that a living system maintains itself and grows stronger only as it encourages greater amounts of individual freedom. While this can be a frightening proposition for leaders who have grown up believing that they can control and predict a system - despite all the evidence to the contrary - rather than autonomy, people's drive for coherence and belonging mean that in this densely interconnected world order emerges without the need for control.

Use the following questions to gain a sense of if your system will support self-organization:

Dysfunctional ***Extraordinary***

Never					**Sometimes**					**Consistently**
-5					**0**					**+5**
●	●	○	○	○	○	○	○	○	○	○
Will the system support self-organization?										
7. Is there a clear vision and agreed values to guide people's choices?										
8. Are self-organized teams already encouraged and supported in this system?										
9. Is this system willing to explicitly support self-organized teams post-Summit?										

If your answers trend towards "never" it is important to consider that encouraging self-organization in a system used to a command-and-control approach could result in people feeling anxious and pushing back because they feel ill-equipped and unsupported to work together in this way. Additionally, if you system is not ready – so self-organization is sought but then throttled back with excessive control because leaders really "know the answers" and just wanted superficial buy-in from people – the risk is that you may poison the system. Again, you may want to begin by piloting Appreciative Inquiry approaches in small teams to build confidence in the practices of self-organization, prior to investing in an AI Summit.

If your answers trend towards "sometimes" or "consistently" then an AI Summit is a great way to increase the richness of social networks, so that like-minded and motivated people can find each other and are encouraged to work together to "make something happen."

HOW DO YOU MAKE AN AI SUMMIT HAPPEN?

Despite our illusions of control when it comes to trying to change a system, what we have learned is that the future can't be predicted, but it can be envisioned and brought lovingly into being. This is because there is a natural gap between understanding and implementation, and while AI Summits can lead us to the edge of what analysis can do and point beyond to the possibilities, in the end, it is the human spirit that will determine what is done. This means letting go of the need to control, and instead, strategically, profoundly, madly letting go and learning to dance with the system.

"Living successfully in a world of systems requires more than our ability to calculate or plan, it requires our full humanity: our vision and our morality, our rationality and our intuition, our interconnection and our self-organization, our willingness to participate flat-out and our courage to respond to feedback, and our growth and our resilience." ***- Donella Meadows***

As a result while the 6-D cycle offers familiar steps you can follow in planning an AI Summit, every system executes the dance a little differently. The planning you will undertake, the topic you will choose, the people you will invite, the activities you will prioritize, the time you will invest and the post-Summit process you will support should be unique in order to meet the needs of your system. What we can provide are best practice examples and checklists to help you design the dance steps that are likely to work best for the people you are compassionately disrupting.

While most systems heavily invest their AI Summit efforts and resources in the actual event, our evidence-based tip is to ensure you spend as much energy and provide as much support to the define and drum stages. When these phases are done well, living systems have a tendency to do what they do best and flourish.

We humbly offer the following AI Summit resources with the acknowledgment that while we continue to discover a tremendous amount about how the world works, it is not nearly enough to fully comprehend all that is unfolding. Our knowledge is impressive; our ignorance is even more so. It is our heartfelt hope that these findings provide another step toward improving our understanding of human and systemic flourishing so that we can learn to dance together.

NEED MORE HELP?

AI SUMMIT COACHING

Creating change can be hard, which is why we don't want you to struggle through this process alone. If you find you need a little extra help why not draw on the expertise of one of our AI Summit coaches? You can have either:

AI SUMMIT COACHING POWERSHOT

One-hour, one-off, one-on-one coaching session in person or by Skype to ask us all the AI Summit questions you have and get additional advice, insights and resources tailored for your unique needs. We'll review any AI Summit materials you have prior to the call, record the call for you so you can revisit it as many times as you want and provide you with our written recommendations.

AI SUMMIT COACHING PACKAGE

4 x one-hour coaching sessions for you, your sponsors or your entire steering committee to help you plan, deliver and drum in the results of your AI Summit. These sessions are spaced to suit your needs and include any AI Summit training, advice, reviews and resources you may need. We'll be with you at every step of your AI Summit process so you can be the change champion your system needs.

For AI Summit coaching options please contact ***chelle@michellemcquid.com*** and let us know what you need.