

AI SUMMIT TOOLBOX *guide*

PRE-SUMMIT: CREATING SAFE, APPRECIATIVE SPACES

THECHANGELAB
FROM THE MICHELLEMCQUAID GROUP

WHERE TO BEGIN?

Researchers suggest that in order to relinquish control and allow a system to dance with its environment and support emergent change, we need to begin by creating a safe container for novel information to be appreciatively shared across the whole system so that the disturbance can be welcomed. Thus, in order for an AI Summit to work, the first step is to create a safe, appreciative space to enable a positive disruption to take place.

By affirming the past, present and potential strengths of your system, and understanding what gives it life – health, vitality, and excellence – appreciation enables you to increase the value of what works well. The good news is that in order to exist every system already works to some degree, so instead of fueling a downward spiral of fear, blame, and shame that can often be sparked by organizational inquiries, appreciative spaces enable an upward spiral of confidence, curiosity, and hope that is grounded in the reality of the strengths the systems has to build upon.

Appreciative spaces disrupt, but they do so by bringing together diverse people who care and focus them on opportunities for something better and more meaningful. They create a welcoming environment that opens the way to discover what wants to emerge, even when the starting place may be: “Given all that has happened, what is possible now?” And they provide the psychological safety for people to share their truth, to honor their dreams, and to face the unknown together in ways that support the systems’ growth, resilience, and ability to flourish.

This is why during the define phase of an AI Summit it’s essential to create a safe, appreciative space that invites the whole system into a conversation together.

How can you pull this off?

WHOSE SUPPORT DO YOU NEED?

In order to create a safe, appreciative space, systems preparing for an AI Summit typically begin by:

- Selecting a champion who is passionate about the initiative, influential with decision makers, driven to get things done and able to provide post-Summit support.
- Establishing sponsors (typically one to three people) from the leadership team who have the authority to make key decisions in relation to the AI Summit, provide financial and other resources, give visible and enthusiastic support to the process and outcomes, and use their influence to ensure its success.

The champion and sponsors usually work together (and often draw on the expertise on an external consultant such as yourself) to gain a good understanding of:

- The AI Summit process and the importance of the whole system participating.
- The generative, task-focused nature of what will unfold.
- The goal of finding common ground around shared passions for which people are willing to take responsibility.
- The need to support people to self-organize and take action.

The AI Summit Toolbox Introduction guide can be a good resource to share with them and our book The Change Blueprint (available from June 2018) has more.

"The sobering question that has to be asked and honestly answered is: 'Are we truly committed to and invested in soliciting this feedback and engaging our stakeholders in the future of our organization, whatever that is? Are we committed to engaging their energy, ideas, passion, and souls?'" - ***Julie Reiter, Clarke AI Summit***

If an AI Summit is deemed to be a good fit, the sponsors and champion then need to agree on a clear, strategic focus for the AI Summit that clarifies the desired change agenda by answering questions such as:

- What do we really want from this AI Summit?
- What are the ultimate hopes and aspirations for our stakeholders?
- What will success look like?

For example, the U.S. Dairy Industry agreed on "building a sustainable dairy industry." Schuberg Philis, a Dutch technology company, agreed on "extending partnerships with all stakeholders." Fairmount Santrol, a US mining company, agreed on "harnessing the innovation capacity of sustainability." And Loreto Mandeville Toorak, an Australian school, agreed on "introducing positive education practices across our school."

Finally, once the strategic focus has been agreed, the champion and sponsors usually select an AI Summit steering committee or planning team who were representative of stakeholders across the system who care and "ARE IN" – those with authority, resources, expertise, information, and need. We have found that for an AI Summit of up to 200 people, a steering committee of six to eight people is ideal, but generally, the larger the Summit, the larger the steering committee.

HOW WILL YOU BRING PEOPLE TOGETHER?

Creating a safe, appreciative space begins with how the steering committee works together as they make choices to shape the AI Summit. Like a good host, planning and finding ways for them to flourish and grow through this process lays the foundations for the creation of a positive disruption. Take time to help them to connect with each other, to be heard by each other and to create an experience for the rest of the system they are truly proud of. Generally the steering committee is brought together for a one-day or a series of shorter workshops to achieve the steps below. We urge you not to skip or rush this part of this process as this is where change begins – typically the planning on a one-day AI Summit takes six to twelve weeks.

1. EDUCATE PARTICIPANTS ON APPRECIATIVE INQUIRY

In order to support an AI Summit, it's essential that your steering committee have some understanding of the how and why appreciative inquiry approaches work.

It's essential that your steering committee understand how complex, dynamic systems and the people within them flourish and why the ultimate goal of an AI Summit is to create a positive disruption that connects people in new ways around their shared hopes and enables them to self-organize and take responsibility for making things happen in ways that are good for them and good for others. It is also important for them to learn about appreciative inquiry and how an AI Summit works so they can make informed and intelligent decisions and help educate others across your system.

2. AGREE A BOLD, GENERATIVE TOPIC

The topic selected for your AI Summit should be so bold and generative that just talking about it with a diverse representation of the system is enough to touch people's hearts and start changing the way people think and act.

As words create worlds, your topic has the power to move your system to the edge of chaos, put life back into a system that has become frozen, overcome resistance by addressing difficult topics indirectly, and provide positive and compelling new images of possibility. A well-crafted topic has two key qualities:

- It allows people to look at problems in a new way and see new opportunities for action.
- It is compelling enough that people want to act on the new ideas the image generates.

It is reasonable to expect considerable dialogue and deliberation over particular words or phrases chosen for the AI Summit topic, so allow space for people to sit with the suggested topic if needed. Be in no doubt that choosing the AI Summit topic is fateful and will set in motion the disruption that follows because human systems move in the direction of what they most frequently and deeply ask questions about. It affects what people see and do. It shapes their relationships and realities. It lays the foundation for a positive disruption to occur by focusing a system on what it wants to grow, rather than what it wants to avoid.

Generative topics are often found by inviting steering committee members to use the following two questions to interview each other (the more diverse the pairs for this exercise the better):

- What factors give life to this organization when it is and has been most alive, successful, and effective?
- What possibilities, expressed and latent, provide opportunities for more vital, successful, and effective (vision-and-values congruent) forms of organization around the strategic focus for this AI Summit?

Then have people share their findings by writing up the insights that give life to the system and that are strategically and humanly important to it on post-it notes and group these into common themes.

David Cooperrider and Lindsay Goodwin suggest that you can ensure your change efforts have the best liftoff by "pre-framing" a bold, generative topic choice that represents an epic opportunity inspired by urgent optimism. As the steering committee reviews the emergent themes from their interviews ask:

- What do we most want to create around the strategic focus?
- What has our rich history prepared us for, and what is the world calling for?
- What is an opportunity so compelling and strategically significant that the call feels epic, filled with meaning, value and significance, and hence urgent optimism?

Gervase Bushe suggests that systems in the pre-identity stage (in which the majority of members do not identify with the system) are generally best served by an inquiry into the ideal given the group's responsibilities, goals, and environment, while those in the post-identity stage (in which the majority of members do identify with the system) are generally best served by a more focused inquiry around increasing the system's competence and capacity.

When you have shared your answers prepare some draft topic statements and run them through the following checks:

- Does this topic capture the core issue those sponsoring the change are interested in?
- Does this topic focus the system's attention away from the issues themselves and toward the exploration of images that are novel, meaningful, and kindle hope for what it wants to grow in the future (i.e. British Airways decided instead of inquiring about "why customers lose their baggage" to ask about "Exceptional Arrival Experiences")?

Does this topic draw on the explicit or conceptual metaphors used by people to describe what is happening in the system (i.e. the city of Cleveland, one of the most polluted cities in America, decided to try and create a greener economy, their first AI Summit topic was: "Creating an economic engine to empower a green city on a blue lake.")?

- Does this topic challenge polarities, paradoxes, and either/or thinking that seem to be keeping the system stuck (i.e. sustainable development)?
- Does this topic capture the interest and energy of those people who need to be engaged in the change?
- Does the wording of this topic have the ability to touch people's hearts and spirits so that it captures the interest and energy of those people who need to be engaged in the change?

It is also worth remembering that the need to create appreciative spaces doesn't mean that AI Summits can't honestly address the shadow sides or problems that a system may be facing. A helpful example to consider when framing your topic may be that of a municipal healthcare department. They first felt the need to inquire into "absenteeism" and why 5 to 10 percent of their nursing workforce was missing on any given day and how they could fix this problem, but it wasn't until this framing was flipped to inquire into why 90 to 95 percent of the workforce was reliably coming to work and how people's commitment could be supported that they established a bold generative topic, and following the summit achieve a drop of 27 percent in absenteeism over a period of six months. Reframing this topic focused the system's attention away from the issue itself and toward the exploration of an image that was meaningful and kindled hope for what it wants to grow in the future.

3. DESIGN THE AI SUMMIT

Provide opportunities for individual expression and creativity around new information so that self-organization can emerge and people can make change happen.

When people believe in what they're doing they're internally motivated, they're naturally creative and want to contribute, and they want to belong and feel part of a community. This is why self-organization can work so well in organizations: it engages people around a cause and allows their hearts and minds to find ways forward.

Scientists explain that self-organization occurs when a living system exchanges information with its environment and willingly uses that information to adapt to changed conditions. While this process sounds straightforward, it's important to remember that true dialogue is often inherently messy. It involves differences, confusions, conflicts, and fantasies that generate paradox and creative destruction in order to generate new possibilities. The good news is that when this diverse interplay is characterized by playful give and take, in a respectful environment, where there is a genuine feeling of community and trust, conflicted systems do what only they can do — self-organize to new and higher levels of complexity that are more in harmony with each other, their environment, and their own inner needs.

This is why Peggy Holman believes creative interactions that enable individual expression and connection are at the heart of fostering emergence, because by expressing and sharing their differences people realize that they are all connected — their hearts start to open to each other and they discover the seeds of what might be. She writes: "Order is accessible when diverse people facing intractable challenges uncover and implement ideas that none could have predicted or accomplished on their own. Emergence can't be forced—but it can be fostered."

Thus, designing the flow of an AI Summit event is all about creating opportunities for individual expression, connection, and self-organization. This is achieved by:

- Agreeing on the flow of speakers. Often this is simply the host and facilitator but in some systems subject matter experts or representatives from other organizations with an important message to share are used to support the topic, provided it doesn't overboard and turn a working session into a presentation.
- Selecting the discovery, dream, design, and destiny activities that will guide participants in an engaging, energizing, and effective experience to enable them to build diverse and authentic connections. Give careful consideration to the mix of individual, small-group, and plenary activities and how people's brains perform at their best (i.e. most people's energy moves in a wave of ninety minute to two-hour cycles). See the best practice examples provided in this toolkit for inspiration, but feel free to adapt them as needed for your system.
- Checking timings for your kick off, conclusion, and breaks. Select a start and finish time that will maximize your chance of attendees being present, whilst being realistic about the activities you want to get through. Be realistic about how much time you need to provide for refreshment breaks as moving 100+ people in and out of a room and getting them all watered and fed can take a while.

Then put these elements into a draft agenda and see how your AI Summit looks. How long will it need to be? The examples in this AI Summit toolbox were created for a one-day AI Summit, typically, however, AI Summits are two to three days in length depending on how many people are involved (i.e. the more people present, the more time was needed for sharing and reporting back in activities), the topic being undertaken (i.e. the newer or more complex the Summit topic, the more helpful it was to add speakers to create a common understanding the group could build upon), and how far self-organized teams needed to progress while already gathered (i.e. the more established these teams needed to be before they left the Summit, the more time they needed for the destiny phase together).

If it is impossible to pull the system together for this length of time, multiple mini-Summits spread over weeks or months can also work, or a pre-work and/or a post-work sequence can be another effective way to break up the 6-D cycle. Sometimes we have run discovery and dream on one day and then design and destiny on a second day. Sometimes we have run discovery, dream, and design during one-day and then followed up later with the destiny steps as the system has been ready.

There is no wrong way to design an AI Summit, only what is right for your system. Just make sure you are allowing enough time for people to have the conversations and make the connections that will allow generative opportunities to emerge.

4. INVITE PARTICIPANTS FROM ACROSS YOUR SYSTEM

The topic selected for your AI Summit should be so bold and generative that just talking about it with a diverse representation of the system is enough to touch people's hearts and start changing the way people think and act.

Inviting the whole system into an appreciative conversation is a decision that makes many leaders nervous if this has not previously been done in their organization, but the willingness to create connections across different stakeholders is one of the key mechanisms for creating a positive disruption that supports systemic flourishing. The most successful AI Summits invite those who care and "ARE IN" – those with authority, resources, expertise, information, and need – across different stakeholder groups (i.e. customers, vendors, non-profit organizations, researchers, neighbors, industry partners and associations, regulators and government bodies, media, etc.) and levels of seniority to stimulate new knowledge and new connections. This includes inviting the cynics and detractors to ensure the doubts people have are given a voice. With a shared intention and more eyes, ears, hearts, minds, and hands involved researchers have found that there is more of a chance of emergent change occurring.

Start by asking members of your steering committee to map out the stakeholders across your system. Then have them assign what percentage of seats should be allocated to each group - typically AI Summit events range from fifty people to 1000 people or more, with 70-80 percent of these people being internal stakeholders and the other 20-30 percent external stakeholders. Once this has been agreed, steering committee members can start adding people's names ready for invitations to be issued.

5. SECURE YOUR VENUE

Find a venue for the AI Summit where people can feel safe, be easily engaged and maintain their energy throughout the day.

Try to select a venue people can easily reach and where people will want to spend a day connecting, sharing, and creating together in. For example, natural light and good ventilation help people to remain engaged and energized. Typically, participants are seated at tables of six to allow group activities to move quickly in a one-day AI Summit, so ensure your desired seating configuration will work.

Check that catering is available to make it easy for people's brains and bodies to flourish. For example, sugary and fried foods should be kept to a minimum – particularly at afternoon tea when people's energy tends to slump.

Ensure your staging and audio-visual resources will make it easy for everyone to engage. For example, think about the needs of any participants whose sight, hearing, or physical movements may be challenging. Typically, you will need a projector with sound, a screen, and at least two hand-held microphones on the day.

6. CREATE A COMMUNICATIONS PLAN

Ensure people across the system – both those attending and those unable to attend — remained curious and confident about what is unfolding and their invitation to be part of the change that is happening up to and beyond the AI Summit event.

From sending out invitations to reporting on the outcomes and the progress and impact post-Summit of the agreed changes, an AI Summit is an opportunity for ongoing communication. The more people see, hear, and touch an idea the more comfortable we become with it, and the less threatening it is. In fact, Professor Adam Grant suggests liking continues to increase as people are exposed to an idea between ten and twenty times with additional exposure still useful for more complex ideas (although try to keep them short and mixed with other ideas, to help maintain people's curiosity). And Harvard Professor John Kotter found change agents typically under-communicate their visions by a factor of ten.

Map out a calendar of all your pre-Summit communications and use all the different communication channels your system typically engages in to deliver your messages. This may include emails, newsletters, media articles, meetings, events, videos, websites, intranets or online internal chat tools, posters, postcards, SMS messages, and any other vehicles the system could leverage. For example, at Hunter Douglas the organizing team decided to wear buttons that said: "Ask Me About Focus 2000" (which was the name of their AI Summit).

7. MANAGE THE LOGISTICS

As with any event, the more people you invite to the table, the more details you will need to weave into the design process and organize in advance so that the work during the summit can be self-managed and run as smoothly as possible.

Once your AI Summit topic has been selected, your guest list finalized, the venue secured and your communications are mapped you're ready to start sending out the invitations and managing the logistics that are part of any large-scale event. For example:

- **Confirm Guests** – RSVPs will need to be gathered and monitored to ensure you have the desired mix of participants in the room for your AI Summit. As people confirm make sure they have all the details they need to be at the right location, at the right time and in the right frame of mind for the AI Summit. We recommend reconfirming all of this information at least 48 hours prior to the AI Summit.
- **Prepare A Seating Plan & Name Badges** – Create a mix-max seating plan (that makes use of the power of improbable pairs by seating people next to each other who represent opposite extremes) of tables of six people so a representation of the system is at each table can be prepared to ensure truly generative conversations are possible. Prepare name badges that can be provided on arrival with people's table numbers noted on them to make it easy for people to find their seats and meet each other.
- **Create A Participant Guide, Facilitator's Agenda & Slides** – Create a detailed participant guide, facilitator's agenda, and slides to ensure your AI Summit design is smoothly executed. See the best practice examples and check lists provided to help you as needed.
- **Confirm Speakers** – Make sure that your facilitator/s and any speakers have the AI Summit details in their diaries, share the facilitator's agenda and any other details that will help them deliver what you require.
- Finalize Recording & Reporting - Agree how the AI Summit event proceedings will be documented and whether a graphic recorder or videographer will be used, or if the artifacts produced (i.e. written stories, the positive core, images of dreams, lists of priorities, photos of prototypes, and written aspiration statements and volunteer names) will simply be gathered for the final report.
- **Secure Required Resource**s – Source the required stationary, boards, design kits, and creativity tools (see the suggested shopping list). Print out participant guides for each guest, and any templates or other materials that will be needed to support the activities you have chosen for your AI Summit.
- **Set Up The Venue** – Ensure the venue is set up with seating requirements, audiovisual equipment and anything else you need to ensure people feel welcomed and safe throughout the AI Summit.

8. PREPARE POST-SUMMIT SUPPORT

Put in place plans, resources, and support for the generative actions of post-Summit teams and ensure leaders are ready to take on the role of compassionate coaches.

Once the AI Summit event is complete, the goal of the drum phase is to embed appreciative intelligence within a system so that people's ability to seek out generative information, create generative connections, and continuously self-organize to amplify and magnify their strengths supplies productive energy that enables the system to realize its expanding potential and flourish. This means ensuring that people understand and can use the skills they have acquired during the preceding AI Summit phases, so that the system can continue dancing to the rhythm of emergent change.

The first daunting post-Summit task is sorting through the hundreds of research artifacts from the discovery, dream, design, and destiny phases and curating and summarizing them in a respectful and meaningful way. While AI Summits reports vary depending on a system's preferred norms and means of communication, it is important that a summary is circulated as quickly as possible to everyone in the system – not just those who attended – and that this communication includes a clear outline of the next steps to be taken.

The next challenge is usually finding ways to support the champions and the teams who have volunteered to take their aspirations forward, many of whom needed additional information, guidance, training, resources, and new members. For systems that have not previously explicitly taught and/or endorsed self-organization practices, more structure and support is often needed to help the opportunity teams understand how to flourish as they continue working together. For systems that already encourage self-organization, the primary requirement is often connecting the opportunity teams to existing methods of communication, tracking and reporting.

Generally a champion and sponsors are needed to connect, communicate, and support the drum phase. These may be the same pre-Summit people, or this can be an opportunity for others to step into these roles.

Again, there is no right way to execute the drum phase, there is what is right for the system and the people in it. However, researchers caution that the drum phase often runs the risk of becoming a project with rigid deadlines and return on investments, and while both are important in most systems to maintain appreciative vitality, you'll need to structure the drum phase in a way that will keep the dialogue, energy and momentum alive (see the Post-Summit Guide for more).

"The intention is not to develop a project with a beginning, a middle, and an end, but to create a new way of thinking, learning, communicating, working, and innovating that becomes so embedded into the organization it changes the culture." - ***Molly McGuigan and C.J. Murphy***

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.