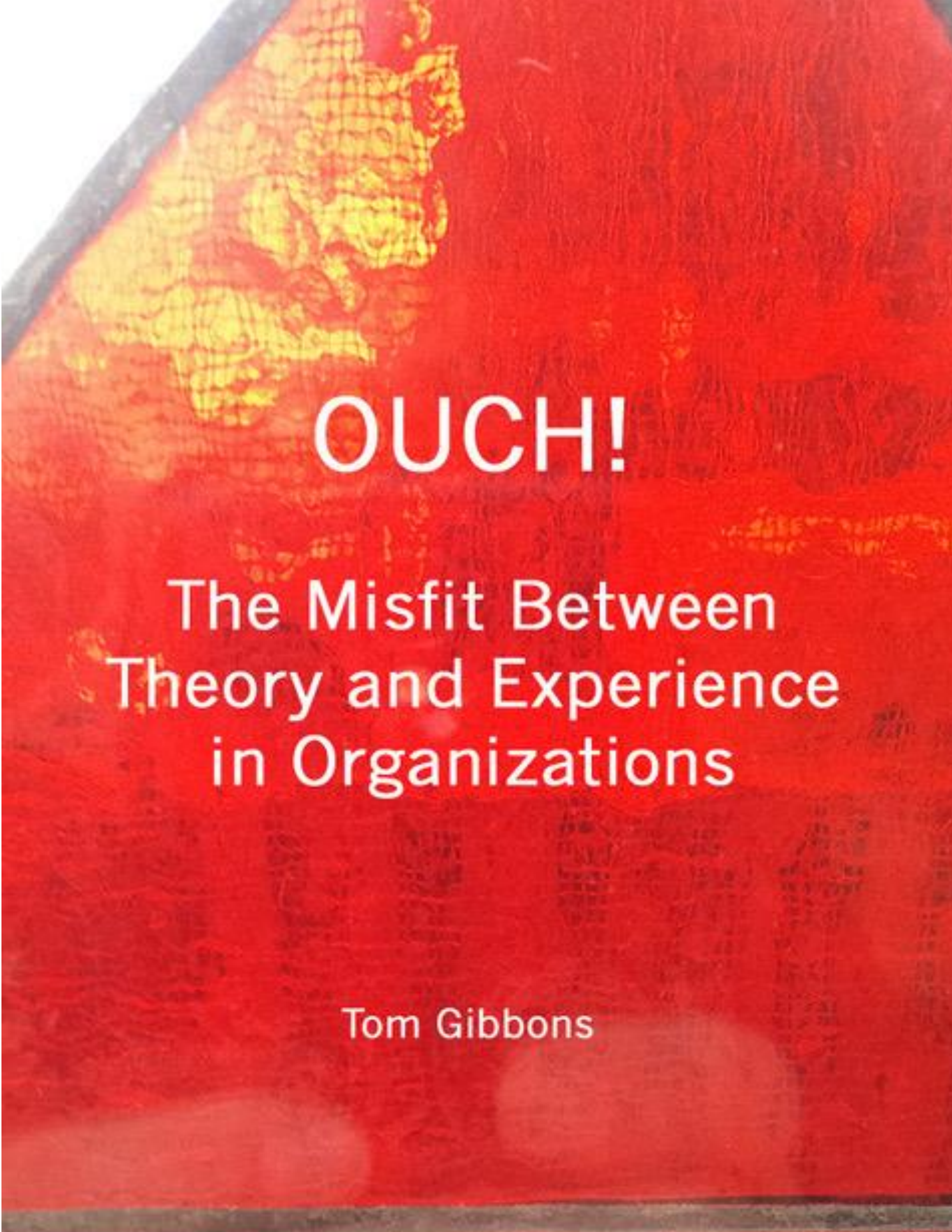

OUCH!

The Misfit Between Theory and Experience in Organizations

Tom Gibbons

OUCH! The Misfit Between Theory and Experience in Organizations

The Author

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This e-Book was originally blogged into existence over a period of about 18 months. The e-Book is a compilation of those blog posts as written. If you would like to comment on any of the posts you can find the original posts starting here.

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OUCH! The Misfit Between Theory and Experience in Organizations – Introduction

As an excited and enthusiastic newly promoted production supervisor I arrived at my very first budget meeting. It was late in the year and snow was deep outside but inside the ice cream factory we were planning for the New Year. Not quite knowing what to expect at this meeting I only came armed with my experiences of running a piece of ice cream making machinery for the last couple of years. I was prepared to mostly listen and learn and I remember how cool I thought it was to now be part of planning what would transpire over the next year.

The numbers! Oh geez, the numbers! How many numbers could it actually take to figure out how this place was supposed to run! It seemed like it was an endless amount! But what did I know. My ears perked up when I heard the projected numbers for production of ice cream since that was MY area and I knew what those numbers meant. I also knew that if the weather was hot in the spring you needed a lot of ice cream and if it was cold you needed less. And spring weather seemed to affect the whole year. After all, I had been asked to work a lot of overtime running that machine last year because of a hot spring. The year before it was cold and not much overtime was to be had.

So as I saw the projected production numbers it didn't take long to figure out the expectation was for a hot spring. Hmmmm, don't new supervisors get into trouble if they don't meet production numbers I thought?

So I asked a question. "*Why don't we create two budgets; one for a hot spring and another for a cold spring and then whatever we get we can go by that budget?*"

Lucky for me it seems new supervisors ask a lot of these crazy questions so I was not chastised; just more or less ignored and we ended up with a budget for a hot spring. Well it wasn't hot and through that spring, summer and fall there was an awful lot of angst in our plant.

That was over 30 years ago and I really don't think much has changed in organizations; not just ice cream factories but all organizations.

We want certainty in our organizations, and we want individuals with power to deliver this certainty.

OUCH!

This however is <u>not</u> our experience of actually being in organizations. We don't experience certainty and no one, no matter how much power, delivers it. But it is what we say we want, it is how we design the processes of our organizations, it is how we measure success and it is how we value our own contributions. It is how we typically understand organizations and it seems, no matter how much misfit there is between this and our real experience of actually being in organizations, we continue to do the same things.

It's like we have a very bad fitting pair of shoes and every day we just put them on again and suffer the consequences.

A really, really big OUCH!

So now, after quite a long time of being in and thinking about organizations I am convinced that most of what we formally do in organizations and how we formally understand them is deeply, deeply flawed.

I also am convinced that this is a flaw in expectation and intent, not one of content. By this I mean the expectations and intent of certainty, and power delivering that certainty, are the flaw and it is this flaw upon which most of what we formally do in organizations is based. I do not think the actual content; the conversations and interactions we have within those formal activities are flawed, it is the expectations and intentions we have for them that is.

It is this mismatch, this OUCH! that causes much of what we say we most dislike about organizations. And it seems we do not have, or don't want to have other ways of understanding and being in our organizations.

This is what *OUCH! The Misfit Between Theory and Experience in Organizations* is about. Finding different ways to understand and be in the organizations in which we work. At very fundamental levels. In ways that make much of what we formally do now in organizations irrelevant, at least from an expectation and intention perspective. Not from an interaction perspective.

Discussion and comment points for this post:

1. What is your biggest OUCH! in your organization?

OUCH! What's the Purpose of This?

A number of years ago I began a writing project that was called *The Power of Uncertainty*. I wrote quite a bit of content and yet something seemed to be missing for me. The premise of that writing was similar to what OUCH! is about; the problematic nature of the typical way we understand and thus formally act in organizations, and the problematic way we understand the individual within organizations.

I had interacted with lots of people on this topic plus wrote a number of blog posts with this focus and I realized that the interactions tended toward the more practical and the blog posts tended toward the more academic. The interactions focused more on the real day-to-day experiences people had while the blog posts focused more on explaining the ideas underlying our understanding of those experiences. The same pattern extended to the work I did with people; I could either just do stuff or explain why I was doing stuff.

I discovered sometimes you're just better off doing stuff than explaining it!

I also discovered that it helps to have coherence in what you do and how you do it. One of the most fundamental ideas behind OUCH! is that nothing, <u>nothing</u> happens in organizations outside of the interactions we have. So if I was going to engage in this writing project I should have as many interactions as I could. When the idea of blogging this book came along it seemed to fit on a number of levels:

- The potential for lots of interaction.
- Lots of this interaction would be emergent and unplanned.
- Adaptation would occur based on these interactions.
- While there was a sense of knowing what the intent of this work was about I could not be certain what that intent would actually look like as it progressed.
- While I had a good idea of the messages I wanted to put out there, how people responded to those ideas, including ideas and applications of their own was very unpredictable.

This format seems to be very coherent with what I (hopefully to become a we) am trying to do here. It's also not very comfortable. Uncertainty and interaction quite often are not very comfortable. But uncertainty and interaction is what we do and experience every single day in our (organizational) lives.

So here we are.

And what are my intentions with this work? I have 6 primary intentions at this point:

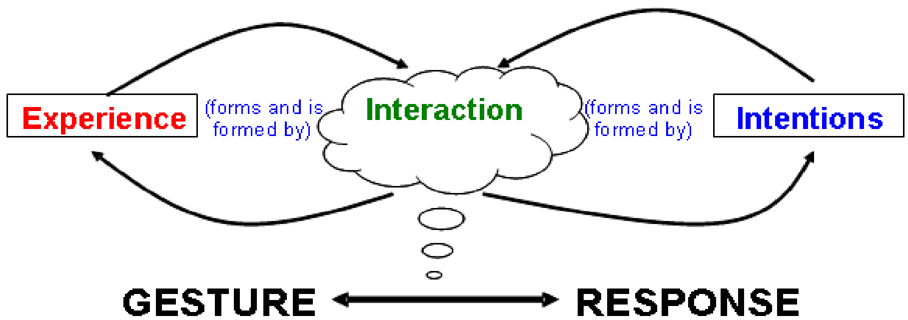
1. To illustrate that what we experience in organizations is not the typical way we understand organizations.
2. To illustrate that most organization theory and thus formal practice supports a drive for certainty as well as seeing the individual as a discreet and separate entity distinct from the contexts they experience; and that this theory does not match our experience.
3. To illustrate a way of thinking about and understanding organizations that balances social

construction with psychology and how this balance can affect our view of the individual in organizations.

4. To enable people to use our interaction model intuitively and within their interactions to help make sense of their work experiences.
5. To have the word OUCH! gain usage and meaning to capture the misfit between theory and experience in organizations.
6. By doing the above, to reduce the amount of blame, guilt and shame we generate and are exposed to in organizations.

OUCH! Interaction Model – The Left Loop

One of the foundations of this work and one of the important means of illustrating the misfit between organization theory and our experience of being in organizations is what we call our interaction model. It is what we use to understand our own organizational experience as well as how we do our own consulting work. In the next few posts we'll focus on the main parts of this model and provide a brief overview of these parts. Then we'll start to use this model to look at how it illustrates our experience of being in an organization and what happens to it when we engage in a lot of the formal things we do as part of our organizational lives. What happens to this model when the drive for certainty and seeing the individual as discreet and separate from the context in which they are in is overlaid?



One quick step back as an illustration. Remember that first budget meeting I went to over 30 years ago? It was an **interaction**; lots of **gestures and responses**. I had limited **experience** with these types of meetings but brought what **experience** I did have with me. My primary **intention** coming into that meeting was to listen and learn. As the meeting progressed I also ended up with an **intention** of not being stuck with production volume numbers that might not be reached due to cold weather! I added to the **interaction** with my question about doing two budgets. My **gesture** was **responded** to by more or less ignoring it.

Lots more could be said about that meeting and this model but enough for now. It will be much more interesting using this model with all of our experiences as these posts emerge. For now, and over the next few posts let's look briefly at the different, main parts of the model.

The Left Loop

This is the part of the model that is comprised of **experience** and **interaction** and the connections between the two. **Experience** exists in the past and **interaction** exists in the present. The upper arrow, from **experience** to **interaction** represents the dynamic of bringing all of our past **experiences** to bear on a present **interaction**. The lower arrow, from **interaction** to **experience** represents the dynamic of the influence of present **interaction** on our understanding and meaning of past **experience**.

The upper arrow represents part of the tremendous complexity we bring to any interaction we have. The lower arrow represents the possibility for change.

It also means our experience, in terms of understanding and meaning is not static! The past; experience, in terms of understanding and meaning is not etched in stone, it can change. This is represented by the term 'forms and is formed by' in the middle of the left loop.

Taken as a whole, the left loop represents patterns, typically patterns of interaction that provide us with a personal history constructed over the span of our lives. Over time these patterns can become quite stable both at individual and group levels.

So in terms of individuals and organizations this left loop can represent things like:

- Culture
- Values
- Group dynamics
- Personal, individual preferences
- Interpersonal relationships
- Power dynamics
- Policy and procedure

And many other repetitive activities that just seem to happen without much thought or consideration. Or critical analysis.

There are two really critical things about this left loop:

1. **The patterns represented by this loop are part of a process that is constantly emerging yet also has stability.**
2. **The possibility for change in these patterns exists in the form of different interactions.**

We will be digging into this a lot more but for now just think about how something like culture gets talked about in your organization. Typically it will get described as some kind of 'thing', something you should be able to find somewhere and identify like other things such as desks or computers.

This has huge implications when we consider something like culture 'change' and I would suggest it is one of the most significant reasons why so many culture change initiatives fail so painfully.

The same can be said of individual preference, including personality preference. In the model above individual preference is seen as learned, repetitive patterns of interaction, subject to change through different interactions. It is not an innate thing we possess but a socially constructed pattern based on experience and interaction.

Back to that budget meeting and the left hand loop. The experience of most people in that room would have been that you budgeted for lots of ice cream to be needed. After all, that's what gave you the most profit at the end of the year. So a question that threw this pattern into question was easily ignored by those in power and also by me, with little experience and confidence to justify that question. A variable, such as weather was best ignored.

OUCH!

And there are many, many things just about as uncontrollable as the weather in organizations that the drive for certainty requires to be ignored.

Discussion and comment points for this post:

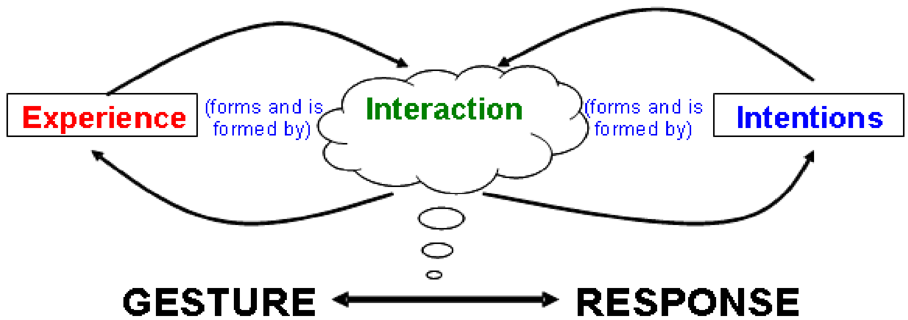
1. Your experiences of how culture is defined and talked about in your organization would be good to hear.
2. What kind of things just more or less happen in your organization because they are a comfortable pattern, and not given much critical analysis?
3. What would happen if you did apply some critical analysis to those things?

OUCH! Interaction Model – The Right Loop

The last post looked at the left loop of the interaction model below. The left loop is typically the easiest to observe in terms of what goes on in organizations because it represents observable behavior.

The Right Loop

This post is taking a brief look at the right loop, comprised of **intention** and **interaction** and the connections between the two.



With the right loop interaction exists in the present and intention exists in the future, albeit at times not very far into the future! The upper arrow from intention to interaction represents the dynamic of bringing all our future intentions to bear on a present interaction. The lower arrow represents the influence of current interaction on our understanding and meaning of future intentions.

So the arrows in both the left and right loops represent very similar things conceptually, but play out very differently in the course of our day-to-day interactions.

Like the upper arrow in the left loop the upper arrow in the right loop represents part of the tremendous complexity we bring to any interaction we have. The right loop lower arrow however is different than the left loop lower arrow. It represents the dynamic of **adaptation**.

Interestingly, it is this arrow that is one of the most compromised dynamics with typical theories of organization, leadership and change and we'll be looking at why as we delve into actual examples.

Taken as a whole the right loop represents movement forward. It is important to note here that this movement forward is not necessarily planned. It may be but in terms of the model planning is not a given and this is important. We move forward regardless of whether or not our intentions are planned and conscious or unplanned and unconscious. It is simply what we do.

Nevertheless in terms of individuals and organizations the right loop can represent things like:

- Vision
- Strategy
- Projections
- Budgets
- Performance targets

And many other things that describe an intention for some time in the future.

Like the left loop there are a couple of really critical things about the right loop:

1. The adaptations represented by this loop are part of a process that is constantly emerging yet also has stability.
2. The primary drivers of adaptation in this loop are the interactions we have, not the intentions we have.

Ok, that second point may seem a little extreme and may even seem to throw into question the importance of things like vision or strategy but as with the left loop we'll be digging into this deeper with real examples.

For now consider if you have ever seen any of those 5 bullet points above actually play out or happen exactly as intended? My guess is no. My experience is no! And the reason those things noted above are adapted is that we start to do them, we interact with people and information and things change. It is our interactions that drive adaptation.

I would also say that it is our interactions that primarily form our intentions in the first place.

A quick visit back to that budget meeting from 30+ years ago. Everyone in that room would have said their intention was to come up with a solid and workable budget for the ice cream plant. If we did a good job not much, if any adaptations to the budget should occur. In order to do a good job we had to look at as many controllable variables as possible and plan to control them. There was never a stated intention to create a budget that would proceed to cause a lot of angst and stress for the remainder of the year. But that is what happened

The problem was the process of budgeting had little or no room for interaction that was uncontrollable, like the weather.

OUCH!

A budget is loaded with a drive for certainty and there are a lot more uncontrollable variables than just the weather out there!

Discussion and comment points for this post:

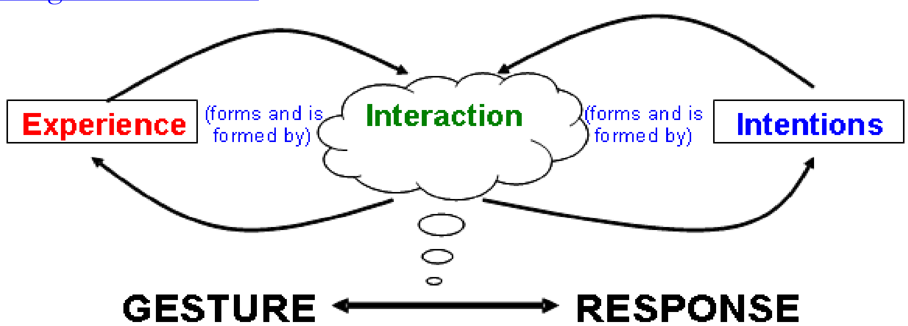
1. Where have you seen variables that seem uncontrollable be ignored in planning scenarios?
2. The drive for certainty is often translated into something like 'doing a good job of planning' in organizations. Have you ever seen people labeled as failures for not being able to plan well enough even though the main cause was uncontrollable variables?

OUCH! Interaction Model – Gesture and Response

The last two posts have looked at the left and right loops of the interaction model below. This post jumps a little deeper into the actual interaction itself and focuses on the gesture and response part of the model.

Gesture and Response

A lot of the background and foundation for the gesture and response part of the interaction model is the work of George Herbert Mead.



The gesture represents some kind of action (very often verbal in organizations, but may be written or otherwise) that someone makes to other(s). The response is an action that occurs as a result of that gesture. Mead used the term 'conversation of gestures' to illustrate verbal interaction between people. Another very important point Mead made about this was that **the gesture does not have meaning until the response occurs**.

Most of our models of leadership in organizations do their very best to ignore the words in bold above.

Interestingly as I was writing this post I received an email announcing a conference and the conference will have a focus on the work of Mead. In the announcement was a quote from a book that I really like and it seems to make sense to just add that quote in here in terms of a little deeper understanding of the gesture and response part of the model.

> *"What Mead is proposing is a different way of thinking about everyday social interaction, not as observers of experience but rather as participants in experience, the nature of which is self-organising sense-making. He is drawing attention to what we are doing every day in all our actions and arguing that we have developed the habit of ignoring it. How could this be possible? How could we become so blind to something so obvious? Mead's argument is quite simply that we have developed the habit of regarding the present as something apart from the future and the past. It has become a habit of thought for us to think ourselves as also being apart from our experience as the present movement of time."*

The book is *The Emergence of Leadership: Linking Self-Organization and Ethics* by Douglas Griffin.

The gesture and response part of the interaction model represents the dynamics of interaction, firmly rooted in the present. What the quote above is saying is that we seem to ignore the importance of our day-to-day, minute-to-minute interactions. While this may sound a little extreme I think it is quite accurate.

In organizations we have largely transferred the importance of our interactions to the formal processes of those organizations. Things like performance management programs, budgeting, strategy meetings, role descriptions, and high potential programs and pretty much every formalized program and process we have designed to make our organizations 'run'.

Most organization theory and formal practice make one small change to the gesture and response diagram above. They remove the arrowhead that points to the left.

Removing that little arrowhead facing left has HUGE implications, **HUGE!**

Have you ever sat in a meeting developing a vision statement and spent hours and hours (sometimes even days) wordsmithing it? It's because the arrowhead facing left is being ignored, both within the group doing the work, and the way that group thinks about those outside of the group. When the arrowhead facing left is removed it means the gesture is assumed to be so 'perfect' that the response from others is predictable and uniform.

Again, we'll be digging deeper into this as we move along here with real examples of formal practice where this left facing arrowhead is ignored.

In the first post the comment was made:

We want certainty in our organizations, and we want individuals with power to deliver this certainty.

The interaction model as a whole illustrates the process of our actual experience in organizations. The comment above does not. This means the formal processes we use in organizations and which are founded on typical organization theory alter, change, ignore, work against or refute the model above.

And it's really hard work to do that!

Work that you and I do that when it comes right down to it does more to create blame, guilt and shame than add any other kind of value to our organizational lives.

Perhaps that can be changed.

So let's jump into looking at some of the formal processes we work with in organizations and put them under a really critical light.

Discussion and comment points for this post:

1. When the left pointing arrow head is removed, the diagram would represent the common sender/receiver model of communication. When have you seen the sender/receiver model of communication break down?
2. Do you agree that we have transferred the <u>importance</u> of our interactions to the formal processes in our organizations?

3. What is the blame, guilt and shame situation like in your organization?

OUCH! Performance Management

Hey, why not start with the 'low hanging fruit'!

Is there anyone out there that just loves the performance management system in their organization? Is there anyone out there that even likes it? No one that I've heard from in the past few decades!

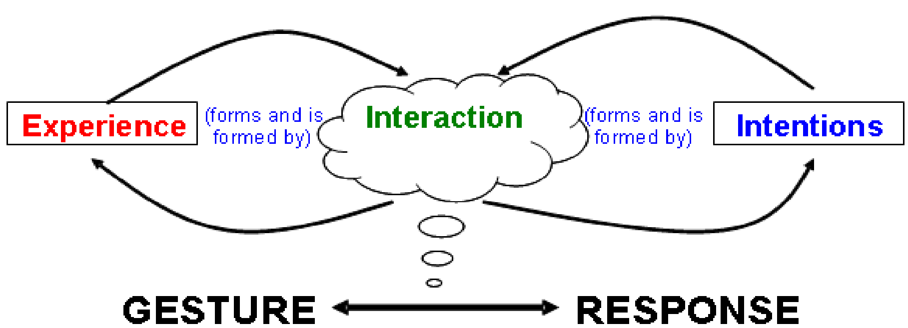
I'm quite convinced that if every performance management system in existence simply stopped being used tomorrow there would be next to no impact on the performance of organizations. My guess is that most people reading this would agree. I would also guess that most people reading this will still actively participate in some kind of performance management system in the next year.

It's very important to ask the question why we have performance management systems if there is more or less general agreement that they do very little to actually 'manage' performance. We'll look at perhaps the bigger question of whether or not managing performance is even possible at all in a later post...

If we go back to the premise upon which most organization theory is built – ***We want certainty in our organizations, and we want individuals with power to deliver this certainty*** – then the idea of a performance management system makes all kinds of sense. Especially if you also do two things to the interaction model:

1. Ignore the lower arrow in the right loop.
2. Ignore the left facing arrow in the gesture and response dynamic.

Note that doing these two things is almost mandatory in order for the statement in bold above to hold up.



If you want certainty and think someone in power can deliver that certainty then having some kind of system with the intention of managing performance to deliver on that certainty not only makes sense, it is a REQUIREMENT in organizations.

In terms of the interaction model the person in power (let's say a manager) has the **intention** of helping (causing, creating, motivating, demanding, coaching...) their managee's to higher levels of performance. Those higher levels of performance will increase the certainty that the manager's area of responsibility (let's say department) meet the goals of this department. The manager needs to and should be able to deliver on these higher levels of certainty (i.e. meet the departments performance requirements) because the manager has legitimate power and this power should deliver certainty.

So the manager needs to **interact** with their managee's in order to accomplish this. The lower arrow in the right loop (which represents adaptation) does not exist since the manager's **intention** of creating higher performance levels is the only way certainty can be delivered. This intention should not and cannot change. No matter what happens in the **interactions** with managee's this **intention** should and cannot change so the lower arrow does not exist in any meaningful sense.

With this level of clarity of **intention** the formal **interaction** between the manager and the managee begins. If the manager's **gesture** is 'good' enough the managee's **response** will be to act to increase their performance and certainty is delivered in the form of the department reaching performance requirements. The outputs of this **interaction** are captured in some kind of accessible file for others to review, verify etc.

Everyone is very busy so the fewer of these formal interactions needed the more efficient the performance management system is. This means the manager's **gesture** needs to be really good in the formal performance management **interaction**.

The reason the left facing arrowhead in the **gesture** and **response** does not exist is that the **response** of the managee is irrelevant in any meaningful way with regard to delivering on the **intention**. The **response** is simply another 'thing' that has to be managed by the manager so the managee understands the **gesture** 'correctly'.

This is why there is almost an endless amount of content and training dealing with managing performance, and specifically managing the performance management 'meeting'. When you critically look at this content and training; the vast majority of it is focused on helping the manager be so good with their **gestures** in the meeting that the managee **responds** just how the manager wants them too.

When the foundation of understanding organizations is that certainty is deliverable by those with power then what is outlined above makes perfect sense.

OUCH!

And while we may more or less chuckle with this OUCH! there is a real dark side to this other than just the time we feel we waste in these meetings. When you look at what happens in this dynamic, if things do not go as planned, <u>someone has failed</u>, at a very real and personal level. Performance management systems are a breeding ground for blame, guilt and shame.

This is primarily because the <u>expectations</u> of a performance management system are based on our belief that certainty can be produced by those in power.

It's a good time to review a point made in the first post; the flaw here is in **expectation and intent, not one of content**. This is very important.

When I interact with people on the concepts of OUCH! and on the topic of performance management it is not uncommon that my gestures produce a response something like – 'So you're saying we shouldn't try and manage performance or just scrap our performance management system?' When someone responds like this and we dig a little deeper we often find that they think by questioning the expectation and intent of a performance management system, it also means you should question or scrap the content as well.

The content of these interactions may be very important and the idea of interacting about performance is critical, it is the expectations and intentions of the performance management system and the assumptions on which those lay which need serious questioning and yes, perhaps even to the point of scrapping them!

The pattern we will now follow is that the next post will focus a little bit on the theoretical ideology from which I question these formal organization processes and the post after that will focus on what can we actually do about these misfits, these OUCHs!

Discussion and comment points for this post:

1. What do you really think would happen if the performance management system in your organization stopped being used tomorrow?
2. Would your performance be compromised?
3. What are your general thoughts on the post above?

Performance Management – Every Interaction Matters

Quite a number of years ago I became very interested in complexity science as it applies to understanding organizations. I had worked with systems thinking principles for quite some time before that and it seemed like complexity science was another important step forward.

For me the beauty of systems thinking was that it emphasized that the connections between things were as important, or more important, than those things themselves. One of the ways these connections are represented in systems thinking is causal loop diagrams. If you've ever experienced systems thinking you most likely have experienced or drawn a causal loop diagram.

One of the things that for me always seemed to be somewhat of a mystery with a causal loop diagram was what was actually happening 'within' the connecting line in the diagram. Complexity science seemed to focus on that very thing!

Unbeknownst to me at the time however, was that this focus would eventually lead me away from systems thinking and even away from complexity science in some ways, but more on that later...

Enough theory for now; how does any of this have anything to do with performance management?

Of the many things we have learned from complexity science, two are important here:

1. **Small disturbances in a complex system MAY produce significant changes.**
2. **It is not possible to predict which disturbances may produce these changes or what these change will actually be. The changes are not unrecognizable, but they are unpredictable.**

Performance in organizations is very, very complex so those two lessons above should be taken seriously.

If we look at typical performance management systems, the system is considered to be designed well, and a manager is considered to be doing really good work if they have two or three formal interactions on the subject of performance with each of their managees each year. Most performance management systems are designed for one formal interaction; more is simply inefficient.

Of the actual number of interactions a manager has about performance, the formal performance management 'meeting' will represent a tiny percentage, probably less than 5%.

So if you were a gambler and you were betting on which interactions might actually affect performance, would you bet on the 5% from the performance management system or the 95% which make up all the other interactions about performance? Keep in mind those lessons above!

Seems simple doesn't it?

So why do we bet on the 5%? Let's not kid ourselves, the outputs of the performance management system defines our performance, defines elements of our compensation, dramatically influences our career opportunities and provides everyone that has access to those outputs, a picture of present and possible future performance. We are betting on the 5%.

We're betting on the 5% because we want certainty and we want people with power to deliver it. At least that is what organization theory says. Our experience says:

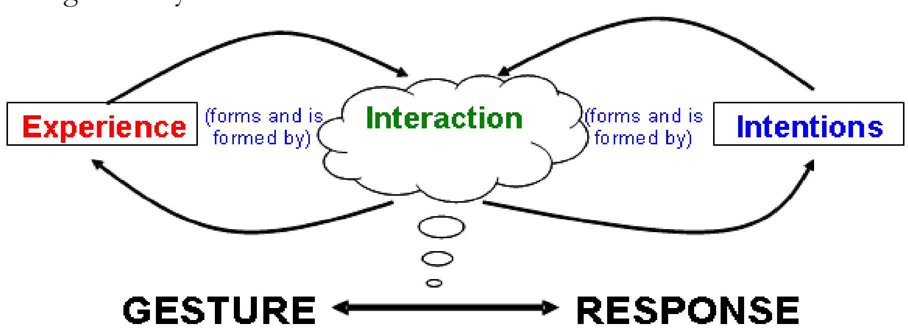
OUCH!

I often ask managers if their interactions about performance in the performance management meeting are different than what they have day-to-day about performance. Almost all of the time the answer is 'Yes'. And because of this the managee wonders what the heck is going on. 95% of the time the manager interacts about performance in one way and then in 5% they interact differently. And that 5% is deemed as really important! We all know it's a dance to check boxes, important boxes, but not boxes about performance.

The reason this post talks about complexity science is that we have good, hard science telling us that what we do in a performance management system has a very low probability of having impact on actual performance. We have very good, logical, and defensible reasons to dislike our performance management systems.

When it comes to performance in organizations, every interaction matters. For **<u>all</u>** of us, how we talk about performance at 10:00am on a Tuesday morning or 10:00pm on a Thursday night, or in the middle of a crisis defines our perspective on performance far more than a performance management system ever will. Yet what is described above says the interactions in the performance management system matter more. Because of this, our day-to-day interactions about performance tend to become invisible, often we don't even think of them as interactions about performance!

These two lessons from complexity science add back the lower arrow in the right loop and the left facing loop in the gesture and response. The two key elements that are eliminated by a formal performance management system.



When those are added back, the true complexity and dynamic of interactions about performance become important and real. And that is what we all experience when we deal with performance in our organizations. It is hard, messy, inspiring, depressing and uplifting. It is not a box to be checked.

The next post will focus on what can be done. What can be done in our organizations when we know the performance management system is likely not going to disappear any time soon? The post after that will focus on performance management system design and the one following that on getting rid of the system altogether.

Discussion and comment points for this post:

1. If you are familiar with complexity science do you have anything to add in terms of what it might say about performance management systems in organizations?
2. What do you think is the most important output of the performance management system in your organization?
3. What is the best, logical and defensible reason for the existence of a performance management system that you have, or have heard?

Reducing the OUCH! in Performance Management

There's a lot to be said here and tried here and I would guess that a lot of the things put forth in this post you may already do, or have considered doing. I hope so. Since a lot of what OUCH! is about is recognizing that we put a lot of effort into trying to make sense of the formal things we do in organizations when our actual experience says they make very little sense at all! That effort IS our actual experience of being in an organization.

This means part of this post is not about things that are new but legitimizing things we do now but more or less think we shouldn't or have been told we shouldn't.

As an example of this, some time ago I was working with an experienced middle manager who had just been to a fairly extensive course to help him be a better 'coach' in his role. A significant part of this course focused on performance coaching and how to conduct a good performance coaching session as part of the formal performance management system in the organization.

He was a good manager. He hated the performance management system (not sure if there is a significant correlation here or not!) so he was struggling to see the relevance of what he had just learned at the course, which he had enjoyed overall. He simply asked me *"What do you think of performance management systems?"* After some discussion about where this question might be coming from and all that we got to the heart of the matter.

The performance management system was not going to go away so he had to do something with it even though he knew it was more about checking boxes than performance. What we landed on that he could work with and made sense to him are listed below:

- The actual outputs of the performance management system were most important to the compensation system and the career/succession process. These things were important so for him to position his work in the performance management system as contributing to these two other things made that work much less onerous.
- There should be very little difference between the interactions he had daily about performance and the interaction he had in the formal system. What this meant to him was that what he was doing anyway, day-to-day about performance, was of primary importance and the actual formal meeting was nothing more than a confirmation of this. This consistency also dramatically shortened the formal 'meeting'.
- He could be open with his direct reports about what the real importance of the performance management system was (compensation, career/succession) so they could see the relevance of it as well. For him, he said this was quite freeing since he didn't feel like he, or his direct reports, had to play some role that made no sense to them.
- In his case (and in many others) the goal-setting part of performance and the performance evaluation part were supposed to occur at the same time (if there was such a thing as 'worst' practices this would be one!) so he split them up and did the performance evaluation part a couple of weeks before the formal meeting schedule and then just filled in the necessary boxes like the meetings had occurred at the same time. Again, the importance of no difference in this type of meeting and what happened day-to-day was critical.

At one point in our conversation he asked me *"Do you think it's ok to be doing this?"* That question is at the heart of OUCH! He was concerned if it was ok to make a system we all know is deeply flawed, work better. What would happen if he was 'caught'?

My response to him was *"Well you know better than I do what will happen to you if you're caught so you have to determine that risk, but my guess is that this is pretty much what you do anyway."* He thought about that for a bit and said *"Yeah, pretty much, but this makes it more obvious."* I said to him *"Well in this case I think more obvious is likely better, don't you?"* He agreed.

Over 20 years ago I had the task of designing the performance management system for the organization I was working in. In parallel I was also working with Dr. Edmund J. Freedburg around the concept of Self-Management (more on this in later posts).

When people came into the training for the performance management system the first thing they saw were two really big signs:

- NO SURPRISES!
- YOU DRIVE THIS SYSTEM!

For this post it's the NO SURPRISES that is relevant. The manager in the story above was different than many of the managers I experience in that he did, consciously and intentionally interact daily about performance with the people he worked with. It was not a shift for him to have NO SURPRISES in his day-to-day interactions and his formal one(s).

Before we had such a thing as a performance management system this was the norm. Now, the norm is that we are unconscious and unintentional about our day-to-day interactions about performance. We forget that we are interacting about performance all the time and then are surprised, shocked, angry, scared, confused when what we say about performance in the formal meeting is met with those very same responses!

So if your performance management system is not going away any time soon, and is one of the vast majority that has been described in the last few posts then perhaps a few of the points above can help. But the one key mantra you should repeat to yourself every day is:

NO SURPRISES!

It will make your day-to-day interactions about performance much more obvious whether that be good, bad or ugly!) and will make the formal performance management system work much better for you.

The next post will focus on performance management system design and the one after that on getting rid of it completely.

Discussion and comment points for this post:

1. How conscious are you of your interactions about performance?
2. How have you secretly 'tweaked' the performance management system to make it work better for you?

Reducing the OUCH! in Performance Management Design

If you have enough power, or perhaps enough bad luck you might be charged with designing a performance management system. Hopefully it's because you have enough power because the design of a performance management system that actually adds value has two very problematic elements:

1. The design will be contrary to established patterns of formal interaction so you will have a significant change process you will need to navigate. This is why you will need power.
2. Once the design is working well you won't need the performance management system any more. This however is why the system adds value; to performance!

In the last post I mentioned that I had the opportunity to design a performance management system some years ago. At the time I was the junior person in the HR/OD function and this was a task no one wanted, so being junior I got it. It felt at the time like I had a big dose of bad luck because I didn't want the task either and I certainly didn't have the power.

The wonderful good luck I had was that the company had no history with performance management systems. I had no clue what they 'should' be like and as mentioned in the last post I was working in parallel with Dr. Edmund J. Freedburg in the area of Self-Management. Back then I didn't know any better how lucky I was.

What Freedburg's work focused on was taking self-accountability for our performance.

Sounds simple but I would say it terms of organizational performance it is as radical a concept now as it was 20+ years ago. As I thought about the real purpose of a performance management system it seemed to make perfect sense that the purpose of the entire thing should be about driving self-accountability for our performance. When this becomes the purpose of your performance management system a lot of things happen design wise, the most important being (and as noted in the last post):

- **You drive this system!**

A few other key points that this purpose creates in terms of design:

- The link between the performance management system and the compensation and succession/career systems is decoupled.
- The planning and goal setting of performance is separated, time wise from the evaluation of performance.

These last two points are not all that radical and some companies do this now. It's the **You drive this system** that is very different.

If your purpose of the performance management system is to drive self-accountability of performance then the performance management system needs to be designed so the individual, not the individual's manager, drives the system.

In the system I designed, everyone, including the CEO had one identical performance objective:

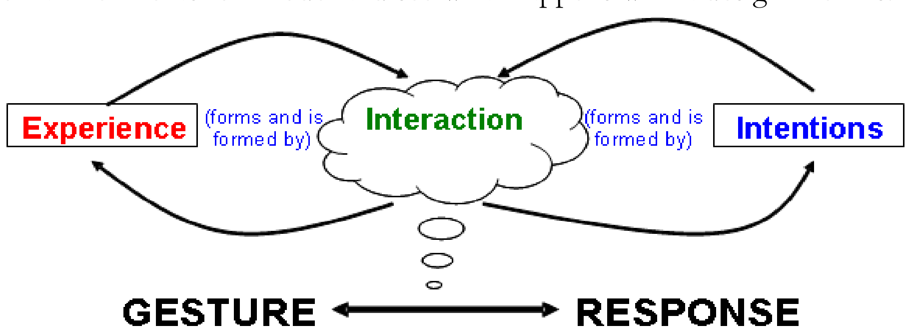
- Use of the performance management system.

In order to use the system, you, as an individual were accountable for the following:

- Scheduling your formal meetings with your manager (there were three of these each year, one for planning, one for a check in and one for evaluation).
- Setting your own goals and measurement process to track progress.
- Evaluation of your own performance and proof of the rigor of that evaluation by using the measurements established.

The idea was that if you were required to use the system then that system was going to make you accountable for your own performance. After all, whose performance is it anyway! If you are responsible for the design of a performance management system and make this one design change you will have a system that adds value; to performance. As you can imagine, you also have a big change ahead of you and your organization. **This is why you need power since self-accountability of performance is not a typical pattern of interaction in organizations, let alone designing it into systems and processes.**

Let's take a look at the interaction model and see what happens with a design like this.



Keep in mind, the model above is not an 'answer'; it is simply a model that reflects the reality of our experience in organizations. **As noted in previous posts the primary compromise of this model in typical performance management systems is the virtual elimination of the lower arrow in the right loop and the left facing arrowhead in the gesture response.** If you design a performance management system with the purpose of driving accountability for our own performance not only are the arrow and arrowhead added back in, the **formal** **interactions** in the system change significantly as well.

- The individual's **intentions** for their performance are the start point for the formal **interaction**.
- The manager is now the primary driver (if needed) of the bottom arrow in the right loop.
- The individual provides the initial and primary **gestures** and the manager's **responses** restore the left facing arrowhead.

What this means is that the formal interactions within a performance management system designed this way more closely match our real experience. It does not necessarily make the experience any easier or magically better, but it does make it much more real.

There is less OUCH!

You may now have a very important question; 'Did this performance management system actually work?'

Where it was used in the organization it worked very, very well. It did add value to performance. It was not however used globally throughout the organization primarily because people in power did not want to use it and I did not have the power to change that.

Where it was used we discovered that as the formal interactions changed, the day-to-day interactions focusing on performance changed as well, they became more intentional and conscious and eventually the formal interactions became more day-to-day. In our own department the actual 'system' began to seem irrelevant and because we had decoupled compensation, succession and career there really weren't many boxes to check that so often are part of a performance management system. Our department itself however had become different. Our interactions about performance were much more obvious and just like the manager in the last post's scenario, for us that was a good thing.

The point above about people in power not wanting to use the system will be looked at in future posts as it is a much broader topic than performance management systems.

One short story is relevant here though. As we tested out this new system within our HR function I went to my boss for one of our formal interactions with my list of goals and objectives; two of which were:

- To design the performance management system for the organization.
- To educate people how to use this system.

As part of our discussion he said *"I think you need a goal to be accountable for the implementation of this system as well."* We talked a little and I said *"If you can give me the legitimate power to fire the CEO if he doesn't use the system I will add that goal."* He thought for a bit and then smiled and said, *"I don't think you need that goal."*

I've never forgotten that interaction. It was a real discussion about performance, about realistic goals and about power in an organization. It was hard but there was no OUCH! If you are designing a performance management system, it needs to produce such discussions.

Discussion and comment points for this post:

1. What do you think is the real purpose of your performance management system?
2. What types of interactions does the formal performance management system in your organization create?
3. Who is accountable for performance in your organization? Does your performance management system model that?

Performance Management Systems – Let's Not Bother

The last post focused on performance management system design and the one before that focused on doing your best to make a performance management system tolerable if it wasn't going away any time soon. The ideas put forth in those posts will reduce the OUCH! but they cannot deal with the reality that exists in any of these systems.

The actual numbers of interactions about performance in these systems are so few that the probability of having any real impact on performance is incredibly small.

The logical (heck, even mathematical) choice would be to simply not bother at all!

Unfortunately, these systems have got so entwined with other systems and processes that it's just not that easy, to not bother at all. However, if you are in a position to actually play with getting rid of your performance management system, get some people together who know what they are doing in this area and ask the following question:

'What would be the impact if we got rid of our performance management system?'

Don't be at all surprised if no one says anything about an actual impact on performance! What will get surfaced though will be the other systems and processes that the performance management system does impact. Chances are the biggest one will be compensation. After that will be career/succession. Someone may mention termination/reorganization as well but that will be about it in terms of what really matters.

So if you want to get rid of your performance management system you need find other ways of interacting with people about those things. If you get that same group of people together that you asked the question above, it won't take long to get some good answers. And those answers will likely produce far more realistic interactions about compensation, career etc. than what is happening now if what is happening now is informed by the performance management system.

As an example let's look at compensation since often people will say the biggest impact of getting rid of the performance management system will be on the compensation system. And let's look at this as logically as we can.

First, base salary is not affected by the performance management system; it is informed by pay grades and comparisons. Let's say someone's base salary is $50,000.00. Where the performance management system is supposed to kick in is how much of a raise is someone going to get since most organizations say it is important to 'pay for performance'. In most organizations today you will be lucky, very lucky to be able to allocate someone a 10% raise (and even that is high). So at its simplest, if you have let's say 20 people at this pay grade and similar jobs the best performer will get a $5,000.00 raise and the worst performer will get nothing. Everyone else is somewhere between.

The actual money is almost, almost meaningless. And yet many people will say that the very complicated, time consuming performance management system is what justifies and brings equity to this almost meaningless monetary reward. They will say this will be the biggest impact if the performance management system is eliminated.

Do you really need a performance management system to justify and bring equity to a compensation process? Quite simply, NO. The same can be said for career, succession and any other process that might have been identified as being impacted by the elimination of the performance management system

Keep in mind, whether you have a performance management system or not people are going to get raises or not get raises, they are going to navigate a career and they are going to ask questions about their performance and people are going to evaluate their performance. So the interactions, the meaningful interactions about these topics are going to occur. You don't need a performance management system to deliver on this need. In fact it usually gets in the way of effective interactions on these very topics.

Why? Because the idea of a performance management system is founded on the theory that certainty can be delivered by those in power. And our experience everyday tells us this is not our reality. So almost everything that occurs as part of that system is viewed with cynicism and distrust. OUCH! oozes everywhere. It is very difficult to have realistic and effective interactions in that environment.

Solving the problem of finding ways to interact more realistically and effectively without a performance management system about performance, career, succession, evaluation, pay raises is not very complicated. Simply communicate that everyone has the right to have these types of interactions and set a timetable. Provide enough appropriate information to <u>everyone</u> for consistency and understanding parameters and capturing outputs (if needed) and away you go.

Some people will say that their managers won't have those conversations. Well they're not having them anyway, even if you do have a performance management system! The system is just hiding this fact and helping everyone to avoid this fact in the first place!

I am quite convinced, if performance management systems were simply eliminated tomorrow, no matter the size of the organization there would be a significant positive effect on accountability in organizations and probably a positive effect in overall performance as well.

However, until we let go of our assumption that certainty can be delivered by those with power, we'll probably still have them for quite some time.

Discussion and comment points for this post:

1. What do you think would happen if the performance management system was eliminated in your organization?
2. Have you worked in an organization that did not have a performance management system? How was performance 'managed'? Or did it need to be?

OUCH! Strategy

So we started with the low hanging fruit of performance management so why not jump right to the lofty hanging fruit of strategy!

A quick search of the term strategy (noun) turned up the following definitions:

- A plan of action or policy designed to achieve a major or overall aim.
- The art of planning and directing overall military operations and movements in a war or battle.
- A plan for military operations and movements during a war or battle.

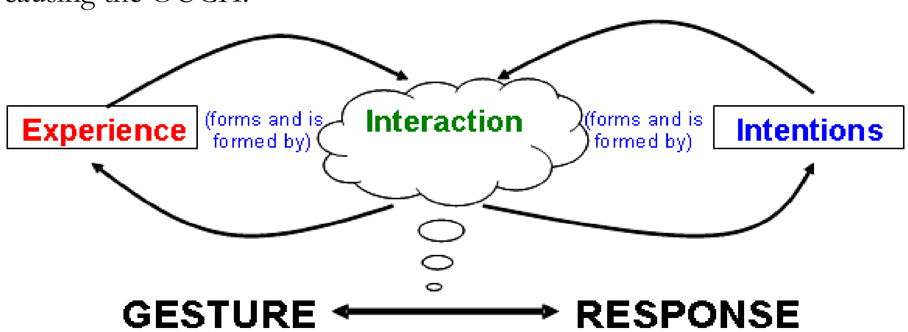
For the purpose of this work the first point above fits quite well and also the first four words of the second point; the art of planning. Strategy is a plan of forward movement, for an entire organization. I love strategy work; looking for all the dots of opportunity out there and trying to connect them with some coherent threads that tie it all together and make an imagined pathway seem possible. When that picture has a hint of clarity it is a beautiful thing I think.

I also think strategy has been compromised significantly and is now loaded with OUCH! The main reasons why:

1. **Strategy has become completely coupled with success.**
2. **Strategy has become equated to a destination, a result, rather than a process of movement.**
3. **Strategic plans stretch too far into the future and have too much detail.**

The Greek origin of the word stood for 'generalship'; again, the military links are numerous and continue today. Another interesting detail is that the whole idea of strategy and strategic plans in organizations was not common until the 1960's. What this means is that some of what would be considered the most successful organizations ever, reached that defined success without ever having a strategic plan as we know them today. Today, if you do not have a detailed strategic plan you are more or less deemed incompetent.

Let's take a look at the interaction model and see what gets compromised regarding typical strategic work; what is causing the OUCH!



What is really interesting is that our typical understanding and formal activity in strategy is not much different than performance management regarding what is compromised in the interaction model. It just plays out differently.

Like typical performance management systems there are two main compromises to the interaction model:

1. **The bottom arrow in the right loop is effectively ignored.**
2. **The left facing arrowhead in the gesture and response is effectively ignored.**

So what you end up with, in essence, is a giant, conceptual performance management system. You also end up with most of the same problems and compromises. It's just that since senior management does strategy it is deemed more important than performance management. No one asks the question, 'Should we get rid of our strategic planning process?'

Perhaps we should.

At least in terms of expectation and intentions, not the content of our interactions regarding strategy.

If we look at strategy through the interaction model the **intention** of the group working on an organizations strategy (typically the role of the most senior management) is to create a plan that will lead to organization success. **There is no other activity in organizations where the assumption that certainty can be delivered by those in power is stronger and more established than strategy**. After all, senior management has the most power so are best positioned to create certainty.

As the senior management group **interacts** regarding this **intention** (typically some kind of retreat) their role is to plan a pathway forward that leads to the organizations success, however that success may be defined. In order to deliver certainty the senior team must account for every variable that might get in the way of their plan and mitigate the effect of those variables.

Once the plan is in place it defines the actions of the organization for whatever length of time the plan spans (often 3-5 years). The bottom arrow in the right loop is effectively ignored since any adaptation to the **intention** would mean one of two things or both:

1. The definition of success has changed.
2. Senior management was incompetent in their original work with the strategic plan.

Neither of these two conclusions are at all comfortable but if you assume certainty can be delivered by those in power it's what you end up with and it's actually point number 2 we see most of. All this current content we now see about things like 'nimbleness', 'adaptability', 'flexibility' and so forth are not about the bottom arrow of the right loop, it is about managing that arrow away in any real sense. All most of that content is really saying is that you can never plan to mitigate all the variables but if you are good enough you can mitigate them when they do unexpectedly show up. If you do that you can still deliver certainty.

Once the strategic plan is in place the entire focus becomes implementation and this then becomes the **gesture** of senior management initially to 'communicate the strategy' and then this cascades down throughout the organization. The left facing arrowhead is not relevant in any real sense because the **gesture** is about the strategy and that strategy is leading to success. The only acceptable **response** is agreement. Any differing **response** is just something that has to be dealt with, typically by better **gestures** until the **response** is what is needed.

If you look back at what strategy was before what we have now it typically started with being excellent at what you did and this excellence enabled the organization to act on opportunities that surfaced, or were likely to surface, in the relatively near future. These opportunities were more or less local, especially compared to today. **The start point was excellence, the time frame was quite short and the opportunities were more opportunistic than planned**. Certainty was not assumed. If you think about this a little, it is why the military connections to the definitions of strategy make sense. If you were excellent and were able to act on the opportunities that surfaced you had a better chance of winning a battle.

Today, the start point is certainty, the time frame is long (typically 3-5 years) and the opportunities are planned. And if you don't deliver on those planned opportunities, you have failed on numerous fronts.

OUCH!

And yet, if you assume that certainty can be delivered by those in power, the strategic plans we have in place today make perfect sense; just like the performance management systems we have.

As with performance management, this does not mean we should just trash the idea of strategy. I actually think good and numerous interactions regarding strategy are likely more needed now in organizations than at any other time in history! The content of those interactions are critically important; the expectations and intentions we typically have of our current strategic work however, seriously misfit our experience.

As mentioned in earlier posts the next post(s) will focus a little bit on the theoretical ideology from which I question these formal organization processes and the posts after that will focus on what can we actually do about these misfits, these OUCH's!

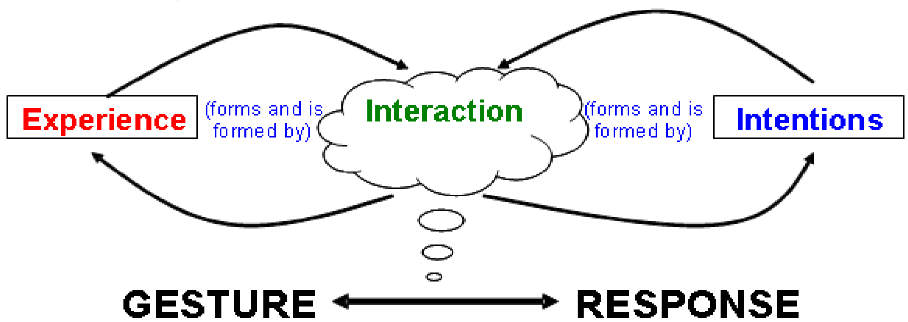
Discussion and comment points for this post:

1. What is your experience with strategy?
2. Do you know the strategic plan of your organization?
3. Have you ever worked in an organization that did not have a strategic plan? Tell us your story.

Strategy – More Interaction, More Uncertainty

Near the end of the last post I said that I thought good and numerous interactions regarding strategy are likely more needed now in organizations than at any other time in history. Quite simply, I think this to be true because at present we have access to more interactions than at any time in history. Interactions create complexity and strategy engages complexity.

There is an interesting paradox here however, one that is not resolvable. More interaction also means more uncertainty. So if we interact a lot for and about strategy we will be producing more of the very thing that good strategy is supposed to eliminate. At least in terms of how we typically understand 'good' strategy in current organization theory.



Let's look a little closer at the interaction model and specifically the gesture and response which describe the workings of our interactions. This particular part of the interaction model is based on the work of George Herbert Mead the American social psychologist.

Mead describes interaction between people as a 'conversation of gestures', a dynamic that is comprised of numerous gestures and responses where the dynamic **between** the gestures and responses creates meaning. In some ways, Mead was describing parts of systems thinking and complexity, in the realm of interaction, long before those two areas of focus were popularized!

If we move back up into the interaction model and look at the top arrows in both the left and right loops; they represent part of the complexity we as an individual bring to any interaction we may have. Basically we are bringing our entire past and intended future to bear on any present interaction. There is a lot of complexity and variability just waiting to happen in any interaction!

If we recall two of the key lessons learned from complexity science:

1. **Small disturbances in a complex system MAY produce significant changes.**
2. **It is not possible to predict which disturbances may produce these changes or what these changes will actually be. The changes are not unrecognizable, but they are unpredictable.**

The complexity from those top two arrows can be said to represent the 'disturbances' noted above. Since it is not possible to know specifically how any of these disturbances will surface or manifest themselves, interaction is firmly rooted in one key thing:

Uncertainty

We have good science that tells us that strategy work cannot produce certainty. However, as we typically understand it today, 'good' strategy is supposed to eliminate uncertainty. Interaction creates uncertainty. An irresolvable paradox. Typical organization theory **tries** to resolve this paradox primarily in one way:

Blame – you didn't do your strategy well enough or you didn't implement it well enough.

OUCH!

As noted before regarding performance management this does not mean we should just give up on strategy. It does mean we should give up on our expectations and intentions of what strategy should do.

In the last post I described strategy as *"…looking for all the dots of opportunity out there and trying to connect them with some coherent threads."* The reason interacting around strategy is so important is that now there are considerably more dots of both opportunity and danger so it is imperative that we engage with those dots in an effort to exercise some level of influence. Otherwise we are simply not actively even in the organizational game and it is better to play a game grounded in uncertainty rather than not play at all!

We and our organizations are some of those dots of opportunity and danger. We are going to move forward with all those other dots no matter what so it makes logical sense to consciously try to influence what is emerging rather than simply go with the flow and 'see what happens'.

This activity, this engagement to influence does not need to be burdened with the expectation of certainty. In fact, this engagement to influence is hindered by this expectation.

Discussion and comment points for this post:

1. Do you love strategy?
2. How do you define strategy?
3. Why are you a good strategic thinker?
4. Have you ever experienced the burden of certainty on your strategic work?

OUCH! in the Creative Tension Model

The creative tension model illustrates the basic idea of strategy as we typically understand and act on it today in organizations. In an earlier post we found common definitions for strategy:

- A plan of action or policy designed to achieve a major or overall aim.
- The art of planning and directing overall military operations and movements in a war or battle.
- A plan for military operations and movements during a war or battle.

It is only recently that strategy has become what it is in organizations and this is well represented by the creative tension model.

This model of strategy in organizations became popularized in the early 1990's through two very influential thinkers and their two extremely popular books. Robert Fritz and The Path of Least Resistance and Peter Senge and The Fifth Discipline. There are many other components to these works but for now, in the case of strategy, let's focus on this creative tension model.

There were two critical things that Fritz and Senge did with this model that was radically different than how strategy had historically played out:

1. They set the start point for strategy considerably farther into the future and this future was idealized as vision.
2. They defined the cause of human behavior as structures or systems.

These two points are today the mostly unquestioned foundation of strategy and organization theory regarding strategy. Basically:

You set a vision and then build the systems in your organization to reach it. According to this model, if your vision is true enough and the systems you create good enough, you should reach your vision.

This is a monstrous:

OUCH!

I don't know if Fritz or Senge anticipated the amount of OUCH! this model now produces but somehow I doubt it. Fritz's idea of the individual being the primary creative force in their life and Senge's idea of the learning organization I think are really important ideas, well worth striving for. But grounding these ideas in the assumption of certainty I think compromises those ideas significantly.
So where does the OUCH! come from?

The way this model is supposed to work is that you first define your vision, and this is something you really want, thus it is idealized. You then move back from this vision to current reality and this creates a (creative) tension since current reality is not the same as what you want, there is a distance between them. When this was actually illustrated often an elastic was used that was attached to the vision to show that if you wanted something enough (i.e. a true enough vision) then there was a strong and natural pull toward that vision. In order to let that pull do its work you needed to create structures or systems (point 2 above) in current reality that would <u>cause</u> behavior that would align with the vision and you would eventually reach that vision.

There is quite a lot that doesn't work out well here and we'll be looking at other points along the way here but for now let's look at four that directly relate to the two points above that create a lot of OUCH!, some fairly obvious and others not near as much. We're going to do this over two posts so we can keep these to reasonable length. This post will look at the first two of the four important problems below

1. When you create a vision in this model you create an **<u>idealized</u>** picture of the future. This makes determining the time frame to realize this vision extremely hard, if not impossible.
2. This idealized future may or may not be what 'you' really want.
3. Almost all organizations will have some version of the same vision, making the exercise either meaningless or a set up for failure.
4. Behavior is not caused by structures or systems as defined by this model.

To the first problem, when you ask a group to imagine their organization as they really want it to be; their vision, it is almost always really, really awesome. Even when you ask them to imagine some of the problems that might be associated with this vision they will also imagine ways that they deal with these things in this future state. Pretty much nothing sucks. No one has a vision of bankruptcy, vicious conflict, high turnover etc. The point of the exercise is to establish a real vision of what you want. Well, you want awesome stuff and you are imagining so there it becomes.

One problem here is that in order for this vision to actually happen, even with things going really well would require not just incredible focus and discipline on the part of the organization, it likely means changes on the part of your competitors, customers, society and others, all aligning with your vision. Even if we stay in imagining mode the time frame for this is probably years, if not lifetimes.

Yet, when you move back to current reality and begin to plan to create structures to make this vision happen, the time frame simply cannot be that long so the group puts together plans in a time frame that is still imagining, even though it's supposed to be reality.

In our current organizations there is no solution to this as long as strategy starts with an idealized picture of the future, a vision as we currently understand it.

To the second problem, when you ask a group what they really want, you will always get some version of what it is they are 'supposed' to want. In organizations it will be senior management creating this vision so the vision will be some version of what they are supposed to want for their organization. If you drop down even one level in the organization, this vision starts to lose meaning. This does not mean people don't see it as important but it has nowhere near the power and appeal it does for those that created it.

One of the key elements that is supposed to make this model so powerful, that being the creative tension pulling people toward the vision, dissipates very quickly as you move down the organization. This is not bad or wrong, it is simply that others in the organization have other things that they really want! Vision simply is not as all powerful in organizations as it is made out to be.

Surprisingly even the way the model works admits this, although not overtly. Those who create the vision are supposed to build structures or systems to cause behavior that aligns with the vision. If the vision was so powerful the creative tension built into it should be enough. It is only powerful enough it seems for those that create it.

When I worked with the creative tension model I did dozens and dozens of these vision sessions leading to building systems that would lead the team or organization to their vision. The problems above and the ones we will look at in the next post always arose and I adjusted and reworked how I looked at and worked with the various parts of the model numerous times to no avail.

I eventually had to look at the efficacy of the model or admit I wasn't good enough to make it work. The OUCH! in this model is that it pushes us toward the later, not the former.

Discussion and comment points for this post:

1. Have you ever felt like a failure because you couldn't or didn't achieve your vision?
2. Do you agree with Fritz and Senge that structures or systems are the cause of behavior?
3. If you have used this model, or some version of it, what is your experience?

OUCH! in the Creative Tension Model *Contd.*

In the last post we identified two key additions/changes to the thinking regarding strategy that were popularized by Robert Fritz and Peter Senge:

1. They set the start point for strategy considerably farther into the future and this future was idealized as vision.
2. They defined the cause of human behavior as structures or systems.

We also identified four problems associated with these changes:

1. When you create a vision in this model you create an **idealized** picture of the future. This makes determining the time frame to realize this vision extremely hard, if not impossible.
2. This idealized future may or may not be what 'you' really want.
3. Almost all organizations will have some version of the same vision, making the exercise either meaningless or a set up for failure.
4. Behavior is not caused by structures or systems as defined by this model.

The last post looked at the first two problems and this post looks at the last two.

As I mentioned in the last post I worked with this model for a number of years, doing dozens of strategy sessions beginning with vision. It is extremely energizing for a group to focus on vision. I clearly remember the passion of people and the emotional engagement that the group felt. Sometimes we would work late into the night getting that vision statement just right. There were passionate arguments about single words and what they meant and just as passionate arguments about the systems that would be created to reach this vision.

Keep in mind, with this model, vision, something you truly want is the driving force of energy that will draw you toward that vision. Then you have to design the systems in your organization in such a way that this energy, this creative tension can do its work and pull you toward your vision. If this is done correctly you reach your vision. **At its heart this model is founded on an assumption of certainty.**

Over time, working with this model it became evident that groups, especially senior teams all created some version of the same vision. Each vision described some description of success that included financial success (explicit or implied) and an upstanding method of accomplishing that. This is problem 3 above.

If everyone has mostly the same vision you could argue that none of them really mean much. Of course everyone wants to be successful, so what's the big deal about vision? However, I don't think this is the biggest OUCH!. The biggest OUCH! is that if everyone wants the same thing, not everyone is going to get it, in fact many, if not most will fail.

The creative tension model, almost by definition will result in blame, guilt and shame much more often than it will result in the actual realization of the vision so passionately created. And the primary reason for this monstrous OUCH! is that the model is founded on the assumption of certainty.

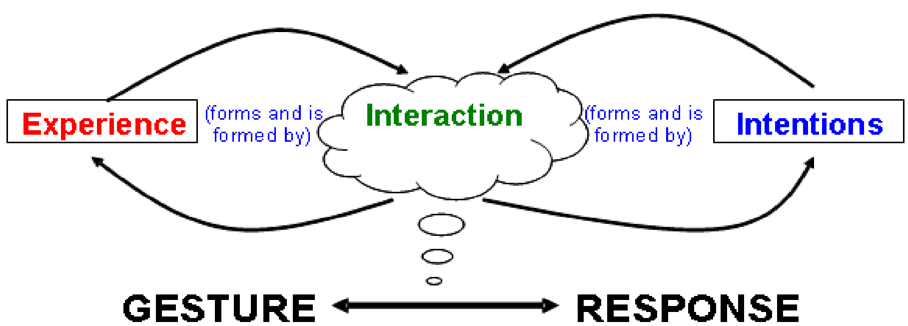
The idea of vision, creative tension, looking and changing current reality are all legitimate and important ideas and areas of focus. Base these ideas on an assumption of certainty and much of the value is severely constrained if not lost altogether.

The fourth point above is interesting I think and has been the source of numerous and passionate arguments. Given that, there is I think, ideologies at play and ideologies at some level are subjective so no amount of arguing resolves them....

The interaction model is based on ideologies and theories of social construction. These are relatively new theories of human behavior compared to psychological theories and if you click on the link you will immediately get a sense of this newness and the struggle to define what it is. Nevertheless I think the following definition 'works'.

Social construction maintains that human development is socially situated and knowledge is constructed through interaction with others.

Most current theories of understanding organizations are rooted in some version of psychological theory. Social construction and psychology are quite different in terms of how they understand human behavior.



Where the interaction model most clearly represents social construction are in the **gesture response** dynamic (George Herbert Mead) and the dynamic **'forms and is formed by'** in both the left and right loops. A lot of this is founded on the work of Ralph Stacey and the ideology of complex responsive processes (note: this link is to a rather long article from some time ago but I think it does a decent job of outlining the basics, especially the first part of the article).

Lots to go on about here but in terms of strategy, the creative tension model and point 4 above, one of the key things about the interaction model and social construction is the cause of human behavior. Without jumping way into the deep end of philosophy we can identify three types of relevant causality for human behavior when it comes to strategy:

1. Formative
2. Rational
3. Transformative

What Fritz and Senge popularized and what has now become almost unconsciously accepted in organization theory including strategy is formative causality. Basically formative causality says a structure or a system causes behavior. Most of nature is founded on formative causality (with one major exception!).

An easy way to think of formative causality is to think of an acorn. Within that acorn (which is the structure or system) is the form of an oak tree. If you plant the seed and nurture it you get an oak tree and nothing else, the result is built, or formed into the seed. What Fritz and Senge were saying was that if you built the right structures or systems you would get predictable behavior; behavior that would align with the vision and let creative tension do its work.

Rational causality is based on choice or the idea of free will which lands it squarely in the lap of us humans (the exception noted above). Rational causality says the cause of behavior is rooted in the choices we make. So even if a structure or system might influence our behavior it cannot be seen as the cause of our behavior. Cause and influence are two VERY different things.

The interaction model is primarily based on transformative causality.

Transformative causality is at the heart of social construction. Basically what it is saying is that the cause of human behavior is interaction. Choice, the hallmark of the human individual is seen as caused by interaction. Just let that sink in a bit because how you make sense of the world and organizations changes, radically, if you believe this to be true.

I do believe this to be true and I struggle almost every day with this. Everyone reading this has grown up and been 'socially constructed' to believe we live in an individually, choice created world, yet everyday our experience illustrates this is not so.

However, back to the problem at hand. The creative tension model is founded on formative causality, structures or systems. **This means rational and transformative causality only has the possibility of existing for those people that create the structures or systems that will cause the behavior for all the rest of us. Those at the top of our organizations.**

At this point it's not just OUCH!; **you should be royalty pissed off!**

Pissed off because the way we typically understand strategy means you have no choice (unless you have created the strategy), you are just a pawn in the game of those in power that are causing your behavior to march toward that all important vision.

You know this is simply not true!

The creative tension model which is the unquestioned foundation of strategy in organizations today collapses with a very simple look at causality of human behavior!

It's taken about a generation and one colossal economic collapse for this to be realized. The next post will look at what is beginning to take its place. It is even scarier! Then we'll look at what we, all of us can do about this OUCH!

Discussion and comment points for this post:

1. What do you think causes human behavior?
2. What do you think is the impact of most organizational visions being very similar?
3. Do you believe in shared vision?

OUCH! Character is the New Strategy

Some time ago I was meeting with someone after a very cool meeting with a small group of people and she asked me, *"Why do you think character is getting so much attention these days?"* I had never thought through my response before but what emerged was:

"Because strategy has failed."

It was one of those times where you think you've said something really important or completely stupid and you kind of hope the person you are with doesn't decide which, too quickly. It's also one of those times that illustrates transformative causality playing out during interaction, in this case between two people.

Since then I have thought quite a bit about that statement and while I might not state it quite the same now, I do think in essence it is true. In many ways it simply represents a common, almost inevitable outcome of founding typical organization theory on the assumption that certainty can be produced by those in power.

That outcome is when the theory (or more accurately the models, tools etc. that represent it) fail, blame is assigned to either:

1. The practitioner of the model or tool.
2. The model or tool being used.

The theory itself is rarely in the mix of being scrutinized.

Strategy however is a pretty big tool to be blamed.

In the last post I mentioned it took one colossal economic crash to begin to question strategy. That was 2008. There of course have been other economic crashes since strategy as we understand it became indisputable in organizations but none this large and none with current organization theory so firmly entrenched.

In 2008 thousands of businesses failed worldwide. None of those businesses had failure as a vision or as part of their strategic plan. In addition the majority of the thousands of senior people in those organizations had been educated or trained at western business schools and likely had been influenced by a popular business guru. These gurus, for the most part promote typical understanding and theory of organizations (they must, otherwise we would have different theory and understanding)!

As noted in point 1 above the typical pattern of behavior when a business fails is to point to the incompetence of the senior people (the practitioners of the tool of strategy) of that organization either strategically or in the implementation of their strategy. Either way the cause of failure is incompetence. In 2008 for this to be true, there had to be an epidemic of incompetence to a degree never before seen! It was highly problematic to blame so many people for being incompetent, especially if some of those people did their work in some of the most respected business institutions in the world!

In light of this you might think there would be some questioning of the theories on which organizations are thought to exist (including the theories of strategy). Unfortunately not much of that has happened in the past eight or so years. So what did happen that has allowed us to hold onto these theories founded in the assumption that power creates certainty?

1. Blame a relatively small number of people as the cause of the whole crash and label those people as 'bad'.
2. From there shift the focus of the cause of business failure to something much more subjective than incompetence.

That something has become character.

This is an interesting, convenient and I think scary development for sustaining faith in current organization theory, including strategic theory. Interesting because it is brilliant in its support of current theory, even though it is highly unlikely anyone or any group actually came up with the idea. It is a wonderful example of emergent, socially constructed meaning that could not have been predicted.

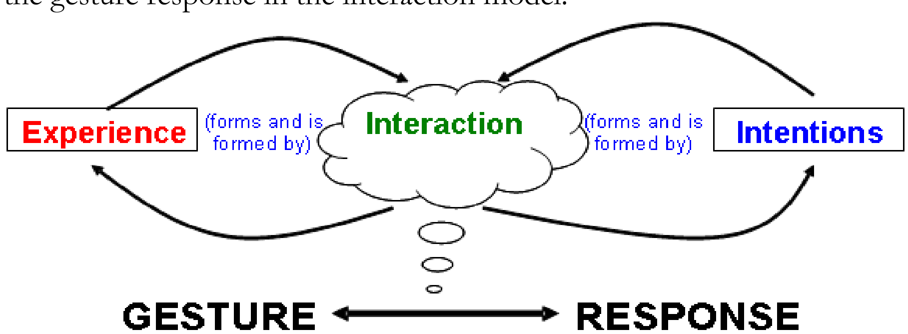
Convenient because once you shift to a more subjective means of supporting current theory, you no longer need as much objective evidence to prove that theory; enough power of whatever kind will suffice (i.e. gurus, business schools, and public opinion).

Scary for two main reasons. One, no longer is objective analysis of the viability of current theory nearly as important. Two, failure, which is almost guaranteed at some point if we believe that power produces certainty, now has a deeply personal cause.

No longer are you just incompetent if you fail, you have a flaw of character!

OUCH!

While we see this demand for character most clearly established at senior levels in organizations because of the power those people have the dynamic filters down throughout the entire organization. Remember this dynamic is caused by a belief that certainty can be created by those with power and this effectively eliminates the bottom right arrow of the right loop and the left facing arrowhead of the gesture response in the interaction model.



The bottom arrow in the right loop represents adaptation, the potential altering of intention through interaction. The left facing arrowhead is part of the dynamic of interaction where meaning (however difficult) emerges.

So let's put this together. We now have a subjective and very personal <u>cause</u> for the success of the strategy of the organization; character. Now success is even more personal, now publicly personal. If you are the senior people in an organization you have enough power that you should be able to create certainty; certain strategic success.

So when that group sets the strategy for the company they are now being judged to be both competent and of good character; good people.

The pressure is enormous and the last thing that group wants to hear from <u>anyone</u> is that the strategy needs real adaptation. The last thing they want to hear is a response from someone that questions their competence or goodness.

To be very blunt, for most people in organizations eliminating the bottom arrow in the right loop and the left facing arrowhead in the gesture response translates to:

'Do what you're told and keep your mouth shut!'

I sometimes think that this may be the cause of things like low engagement scores almost across the board in organizations, the dramatic increase in mental health issues in the workplace, escalating rates of turnover and so many other things that we say overtly or covertly that we so dislike about our organizations.

Perhaps we're just trying different ways to run from the OUCH!

As character becomes more established as a measure and cause of strategic success I don't think things will get much better.

I would be the first to say we need character in organizations, throughout the organization. Character as strategy, founded on the assumption power creates certainty is not character at all; it's simply another tool in the service of current organization theory.

The next posts will look at what we can do with this thing called strategy, at all levels of our organizations. Perhaps how we can reduce the OUCH! rather than run from it.

Discussion and comment points for this post:

1. Do you agree with the above?
2. What do you think is the impact of character in organizations?
3. Do you think character is in the service of creating certainty?

Strategy – An Individual Perspective

Most of us work within an organizational strategy that we had no involvement in creating. There is nothing wrong with this, it makes sense and most of us are quite happy to contribute to that strategy. It also means we are subject to the impacts of that strategy, good, bad or neutral and we have very little control over that as well. We also have very little control over the strategies of our organization's competitors, customers, governments and the myriad other things that are part of our organizational experience.

However we do have a fair bit of control over one of the most important things of our organizational experience – ourselves. Ok, that may sound an awful lot like complete rational causality but please just let it ride for now... transformative causality is important here too....

The really good thing with this situation is that we can take an individual perspective on strategy. What is even better is that individual perspective can be much more closely aligned with how strategy was treated and acted upon before it became so severely constrained by certainty. As we have noted in previous posts that approach was:

The start point was excellence, the time frame was quite short and the opportunities were more opportunistic than planned.

Another important point to remind ourselves of is that **certainty was not assumed**. I cannot overemphasize how important this is at an individual level. It gets us, as individuals out from under this heavy weight of certainty and it is only at an individual level that we have the actual power to make the choice to get out from under this weight.

In order to look a little closer at an individual perspective on strategy let's split the approach in bold above into its three components:

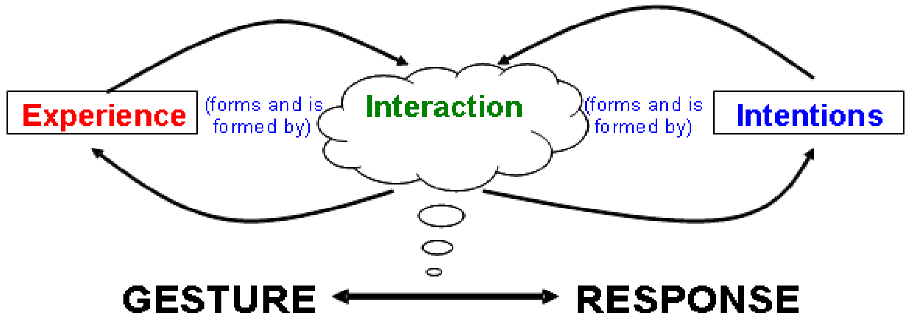
1. The start point is excellence.
2. The time frame is quite short.
3. Opportunities are more opportunistic than planned.

The start point is excellence

From an individual perspective strategy starts with excellence. Trying to be the very best we can be at what we do, regardless what that is. It's pretty simple, personal and individual if we don't burden the effort with certainty. It's nothing more than doing our best to become the very best we can be at whatever we do.

Historically this was the start point of strategy, so by choosing to do this we, as individuals are being strategic. **It's also the one thing we can do that we have the most control over that will buffer us against all the normal uncertainty in our organizational experience.**

Whatever tools or techniques we may need/want to strive for excellence should be accessed but be cautious that most of those existing techniques or tools will be founded on the idea that power creates certainty and the power you need is located in the tool! If we discard that assumption many techniques and tools have value. More than anything however, this is a choice, an important intention in the interaction model.



The time frame is quite short

Strategy is process of movement, it is interactive. If we choose an intention of excellence it feeds back into our interactions which means others are involved in that intention of excellence through our various gestures and responses. This keeps our intention centered in the present, a shorter time frame. We are then creating a pattern of behavior for ourselves (the left loop) that is informed by our intention of excellence. And since we are more focused and serious about our day-to-day interactions (our gestures and responses) than anything else we are smack dab in the middle of transformative causality.

Opportunities are more opportunistic than planned

With an intention of excellence seen as a process of movement driven through our day-to-day interactions opportunities WILL emerge, positive ones, negative ones and neutral ones. That is what transformative causality does. This is strategy at its best I think, the capacity to recognize the opportunities available and then choose which to act on. Interestingly, it is also at the individual level where strategy, understood like this is most possible. It is at an individual level where we can set aside the typical ways of understanding strategy and align it much more closely with our actual experiences.

Keep in mind that the above does not guarantee success, however defined. It does mean we are actively engaging with our day-to-day interactions and taking them seriously, informed by our intention of excellence. The entire interaction model will be at play, in all its paradoxes. It also means we are doing the one thing, the one thing we have the most control over that helps us accept and who knows, perhaps even thrive in the uncertainty we exist in.

There is much less OUCH!

Above I mentioned the use of tools and techniques to help us focus on an intention of excellence. I'm going to devote the next post to one conceptual, or thinking tool that I have found very valuable in re-establishing personal choice (rational causality) into our organizational experience which is so dominated by the assumption of formative causality. Then we will move onto strategy at group and organization levels.

Discussion and comment points for this post:

1. Much current content on individual strategy mimics the thinking of organizational strategy; set a distant goal and do not waver in your will to achieve it. Do you think this is a good approach to individual strategy?
2. What is your individual approach to strategy?

Individual Strategy – A Thinking Tool

The last post looked at an individual perspective on strategy with the start point being a focus on excellence. It was mentioned that technique or tools that enhanced this focus were worth accessing, with a caution to be wary of the assumption of certainty being embedded in the use of the technique or tool. This post is about a thinking tool that I have found of value in this area of individual strategy. I tend to gravitate to thinking tools as I find they are of benefit to me across numerous contexts. I can use them all the time! I also like thinking tools that are very simple to remember but carry significant meaning. For me, this 'tool'; model really, fits these criteria very well. In many ways it has influenced my view of organizations at a very fundamental level and made sense of my own personal experience in organizations. It also acknowledges rational causality (individual choice) <u>universally</u> within the realm of strategy and I think we are in dire need of that acknowledgement.

What typical thinking about strategy establishes, through its focus on formative causality as the cause of human behavior, is that those in power, those that create strategy are the only people whose behavior is caused by rational causality, individual choice. Those in power have the power to choose, and then they develop the structures and systems that will cause the rest of us to follow along, basically with no choice.

I see this to be extremely evident now in our almost fanatical focus on leadership, be it in organizations, politics, religion, sport; almost anything. We crave the hero or heroine leader who will light the way for us, to bring us to some version of the Promised Land through their leadership.

What this does is establish a very clear hierarchy which all of us are very familiar with in organizations:

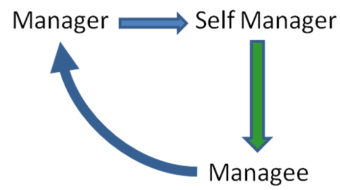
You can substitute different words such as leader/follower, coach/coachee, teacher/student or others. Since our focus here is organizations and strategy we will stick with manager and managee. There is nothing inherently problematic with the dynamic this model depicts. Until it gets overlaid with an assumption of certainty created by those in power through formative causality. When that happens, as it now has, almost unconsciously so, numerous problems surface, the most fundamental being that the managee is thought to exist in a world without individual choice. The person at the top of the model above holds all the power of choice; they are accountable for our performance, our careers, our engagement, our motivation, our compensation, our status, our vision, our success and eventually our perspective.

If you take even a cursory look at what 'competencies' exist for managers and leaders today, almost every one of those points noted just above will be included as what they need to 'cause' in and for their managees. The manager is supposed to create certainty for their managees. If you are at the bottom of the model above you don't really have to manage much at all, your manager is <u>supposed</u> to manage it all for you!

Subsequently we are seeing less and less self-management as we put our faith and trust in the assumption that those in power can create certainty for us.

And the more those in power fail at this (inevitably so) the more OUCH! we feel.

An individual perspective on strategy can alter this. An image Dr. Freedberg used to illustrate self-management was:



In this image the Self Manager and the Managee is the same person, **with the self-manager representing the very real equality that exists in terms of choice in organizations between those with more power than others.**

Basically the model represents a dynamic where the Manager **gestures** to the Self Manager, that part of us that critically assesses that **gesture** and then metaphorically passes this critical assessment and subsequent choices made about that **gesture** to the Managee who then acts on that choice which would then be a **response** to the Manager.

What Freedberg said was that this model was nothing more than a true picture of the dynamic of interaction between people of differing levels of legitimate power in organizations. Current organization theory and understanding asks us to eliminate the Self Manager, asks us to bury our belief that we have individual choice.

OUCH!

If we use this model, if we take it seriously all those accountabilities noted above are our own. We are ultimately accountable for our performance, our career, our engagement, our motivation, our compensation, our status, our vision, our success and perhaps most importantly our perspective. Of course others have influence on all of the above, important influence both enabling and constraining but they are not the CAUSE of the above. This is not some romantic or mystical call to 'reclaim' our right to choose. **It is simply what is!** An awful lot of OUCH! is created by trying to deny this 'what is', by trying to deny that we have individual choice. And when we do this, the storm of blame guilt and shame continues, of our own causing.

The start point for all of us to consciously and actively engage in this 'what is' is with an individual perspective on strategy. Beginning with a choice to focus on excellence, with a short term focus and to pursue the opportunities that emerge.

In other words to be individually strategic.

Discussion and comment points for this post:

1. Who do YOU think is accountable for all those things noted above?

2. If you are a manager of others do you have formal performance objectives/accountabilities for any of the above FOR your managees?
3. What do you think is the state of self-management in your organization?

Reducing OUCH! in Strategy

We've focused on a number of problems associated with the typical way strategy is understood in organizations. Let's take a look at how we might be able to reduce the OUCH! in organization strategy and we're going to do that over a couple of posts.

I don't think there is another area where the belief that power can create certainty is more entrenched than organization strategy. So reducing the OUCH! is a large task at an organization level. And since public perception mirrors how we understand organizations, reducing OUCH! in publicly owned organizations goes beyond the organization itself.

In earlier posts we focused on the creative tension model as the mostly unquestioned way of looking at strategy and how to make it work. Two key aspects of this model are critical in producing OUCH!:

1. The start point for strategy is far into the future and this future is idealized as vision.
2. The cause of human behavior is structures or systems.

Quite simply, the more that can be done to alter or eliminate these two aspects, the less OUCH! there will be. This tends to be easier said than done. The patterns of interaction that have created a belief that these two things are a necessary part of strategy are very well entrenched.

Nevertheless every day in organizations we try and avoid the OUCH! caused by the typical way strategy is understood so what will be suggested in these posts is not so much new, as making more obvious and acceptable what we <u>already</u> do.

To consider what might be done to alter or eliminate the two points above let's look at what really happens in organizations regarding strategy. After the retreat by senior management to create, or update the strategy for the organization, <u>very</u> typically:

1. The vision gets forgotten.
2. Emergent issues are dealt with by patterns of interaction that have been historically established.
3. <u>Significant</u> projects resulting from the strategy get acted upon through the allocation of considerable resources and become change projects.
4. Less significant projects resulting from the strategy get allocated to specific people with little resources and often fail or get put aside.

Pretty much, business as usual and even those significant projects coming from point 3 above are often painfully obvious as needing to be done anyway. Business as usual except now we feel guilty about not making something 'transformational' happen.

So what's the big deal with strategy you might ask? Good question.

There IS no big deal with strategy the way it is typically understood and acted upon in organizations today. It simply doesn't work any better than business as usual. There is no evidence indicating organizations are performing any better than at any other point in time, regardless of the lofty visions or well-crafted systems to achieve those visions.

Strategy without OUCH! exists in those four points above. What we now see as problematic actually IS strategy! In those four points above the 2 key aspects regarding how strategy is understood to work are altered or eliminated. It is also in those four points above where influence can be more effectively applied if we take those four points seriously. Let's adapt and look at those points and see what strategy might look like, where we might influence and how we can alter or eliminate the concepts of vision, structures and systems.

Forget about vision

It's almost hard to believe I typed that! After working with the idea of vision for more than a decade and then putting it aside for now another 15 years I am quite convinced that the idea of vision has very little impact on strategy. At least how vision is typically understood within strategy today.

If you forget about vision you no longer have an idealized future or destination; which is a good thing. You still need something in addition to those strategic projects to move forward with however. I think two things are effective and I gravitate more to the second one of these:

1. The mission of the organization.
2. The day-to-day 'intentions' of the organization.

By mission I mean what the organization is supposed to be doing. The idea of mission has been around for a long time and I think fits well with what strategy meant before being burdened by certainty. If the focus is to be excellent at what the organization is supposed to be doing, the organization will be better positioned to act on emergent opportunities. As well mission is applicable to everyone in the organization.

By day-to-day intentions I mean the overarching focus of what we do in our day-to-day interactions. This overarching focus should inform how we move forward and approach our interactions as well as be coherent with success, however defined, and how that success can be influenced. As an example, we have three intentions in our small organization:

- Building relationships to create opportunities.
- Differentiation in the marketplace.
- We need all of each of us.

We do not have a vision or a mission. We assume that by focusing on these three intentions as our interactions play out day-to-day, we can most effectively influence our success, in terms of how we define success (more on this in other posts). We assume that by focusing on these intentions we have an effective strategy.

What we do is an example, you may do something different. If you are trying to alter or eliminate the idea of an idealized vision and the problems associated with that in strategy, you need to have something that informs how movement forward is influenced, and can be applied, day-to-day by as many people in the organization as possible.

Whatever 'it' is, it needs to be applicable, practical and meaningful to as many people as possible when applied to their day-to-day interactions. 'It' is also a process of movement, something that gets discussed continually as different contexts emerge. There is never a set or final definition, simply further interaction about what 'it' might mean in the current context you are dealing with.

And when you really think about it, that's what we do in organizations now, shortly after the flip charts from the strategy session are rolled up and tucked away. What we don't do is take that 'what we do in organizations now' seriously and try to influence it in a conscious and obvious manner. We assume what is wrapped up in those flip charts will do it for us.

If we can legitimize this, if we can make it more obvious, more intentional, more day-to-day, a considerable amount of OUCH! disappears from our strategy work. It also gets more challenging; a good trade-off I think and what the next post will focus on.

Discussion and comment points for this post:

1. If the idea of vision was eliminated from organization strategy, what effect do you think it might have?
2. What strategically informs your day-to-day interactions?

Reducing OUCH! in Strategy *Contd.*

The last post focused on the first of four quite typical and normal things that happen once the organization strategy has been established or revisited:

1. The vision gets forgotten.
2. Emergent issues are dealt with by patterns of interaction that have been historically established.
3. Significant projects resulting from the strategy get acted upon through the allocation of considerable resources and become change projects.
4. Less significant projects resulting from the strategy get allocated to specific people with little resources and often fail or get put aside.

This post will look primarily at point 2. Points 3 and 4 more or less get folded into our look at point 2.

In the last post it was also noted that effective strategy, strategy without OUCH! exists in those four points above. We are not trying to avoid these four points in order to do 'good strategy', we are trying to make them more obvious and conscious and to take them seriously.

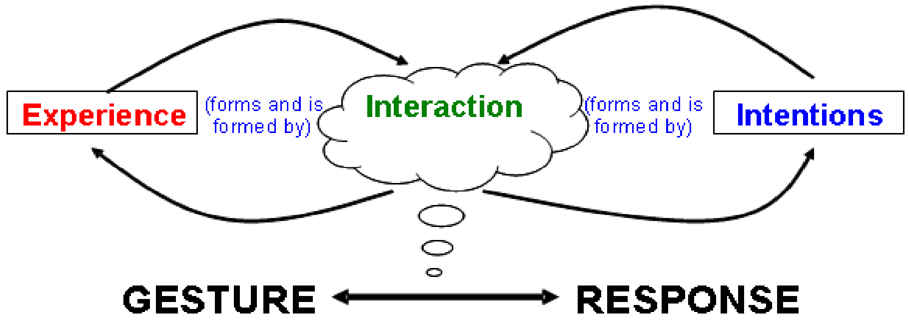
We have defined strategy as a plan of action or policy designed to achieve a major or overall aim. And also the art of that planning. We tend to think of plans as fairly static and consistent over periods of time. **In reality strategy is planning as a process of movement. To be strategic is to focus coherently on this process of movement, day by day within the organization.** This brings us to point 2, which is where senior people, because of their very real power can have the most influence. Both strategically for the competitiveness of the organization and within the organization itself.

I think that this area is where strategy is at its best and also the most challenging. Exactly where senior leadership should focus.

Influencing patterns of interaction to deal with emergent issues

In the interaction model the left loop represents patterns, typically patterns of interaction that are established over time and often become quite stable. The right loop represents movement forward. These two loops are linked by interaction, day in and day out. Since the left loop can become quite stable it can dramatically affect the right loop, keeping movement forward very similar to what has historically occurred in the left loop.

This is what the quote attributed to Peter Drucker – *"Culture eats strategy for breakfast"* – was describing. In terms of the interaction model what this means is that with no change in the day-to-day interactions people have, movement forward will mirror the past. If you want to be strategic, to influence the process of movement forward the focus is on interaction. This places the majority of strategic work firmly in the present, a major difference from the typical way strategy is currently understood.



You may have noticed that not much is being said about what is often described as the 'what' of strategy (the <u>specific</u> course of action a strategy should lay out for the organization) and how to determine what this specific course of action might be. There are two reasons for this:

1. The variability of specific plans of action (the what) is enormous and is not the focus of this work. If senior leadership requires specific help then they need to access that appropriately.
2. Today the static 'what' of strategy is much less important than a focus on emergent opportunities.

If we place the majority of strategic work in the present, on our interactions, the importance of mission or day-to-day intentions becomes clear. What these things become are the filters by which interaction can be passed, every interaction.

You may recall in the last post I noted the three day-to-day intentions we have in our small organization:

- Building relationships to create opportunities.
- Differentiation in the marketplace.
- We need all of each of us.

With each interaction, with each emergent opportunity we can ask ourselves how these intentions are informing what we choose to do, which one(s) may be more or less important in this situation, and our rationale for these choices.

This is strategy, centered in the present, focused on day-to-day interactions

Since context is so important there is neither a final and right answer to how those day-to-day intentions should play out nor a definitive answer what they mean. This then establishes the bottom arrow in the right loop and the left facing arrowhead in the gesture and response of the interaction model firmly as part of strategy. It is these two parts of the interaction model that typical understanding of strategy eliminates.

With this focus much of the OUCH! in strategy dissipates. Perhaps a better word is that the OUCH! is transformed. It will be transformed often into heated discussion, outright conflict, a need to think through the rationale of our choices using these filters and quite often defend that rationale. **The critical strategic role of senior leadership is to encourage and engage in those interactions.** Not just in their direct team but inside and outside the organization; daily!

In essence, strategy **IS** these interactions.

Reducing OUCH! does not mean everyone is happy and things are wonderful. It does not mean success is guaranteed. What it does mean is that strategy work becomes much more real, interactive and present. It becomes challenging in a very real sense.

Consider what this means for senior leadership, the people considered most responsible for organization strategy. The way strategy is now understood mostly eliminates the interactive nature of strategy for senior leaders as noted in earlier posts. They set the strategy and move to implementation. Any challenge to the strategy or response other than agreement is highly problematic.

Without the constraints of certainty in strategy work, interaction, with all its challenges becomes the norm.

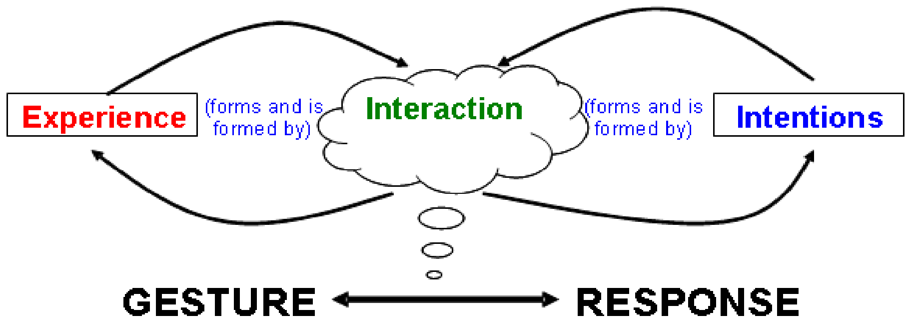
I wonder what that might look like? I wonder what character might look like? I also wonder if we're so used to the OUCH! in strategy and the benefits it provides that our current patterns of interaction are so established that we're simply happy to keep things as they are?

Discussion and comment points for this post:

1. What do you think strategy like this would look like?
2. In many ways, strategy like this would require higher levels of self-management throughout the organization (see this post). Do you think current understanding of strategy has compromised levels of self-management?
3. Could your organization accept an approach to strategy as described above?

Strategy and Power

Power gets a fair bit of attention in organizational literature. Power gets talked about a lot, typically in the abstract. However, one of the things current and typical understanding of strategy tends to create is very little meaningful day-to-day **interactions** regarding power. When you eliminate the bottom arrow of the right loop and the left facing arrowhead of the gesture and response in the interaction model, interaction about power becomes severely constrained.



So power, one of the most complex, influential and meaningful experiences of organizational life tends to be hidden from our daily interactions, even though its impact is felt daily.

Day-to-day as it plays out for all of us we simply don't talk much about power in organizations! We don't talk about how power is being used or why. We don't talk about how it is allocated, its impact or even if we, as individuals have power at all. The impact of this when it comes to strategy is significant. Perhaps more significant than we can imagine.

For the purpose of this work the following definitions of power are being used:

1. The capacity or ability to direct or influence the behavior of others or the course of events.
2. The ability to do something or act in a particular way, especially as a faculty or quality.

Types of power that are often seen as relevant within organizations and which focus on the first definition above are listed below:

- Legitimate
- Reward
- Coercive
- Expert
- Referent

Legitimate is the power that exists in a position or role in an organization. **Reward** is power that enables someone to reward another. **Coercive** is power that enables someone to punish another. **Expert** is power based on accepted knowledge or experience in a certain area. **Referent** is power based on some type of valued subjective affiliation with a person.

All of these types of power are relevant and important. When interaction about these types of power is constrained something interesting happens. Two of the types of power noted above tend to be seen by people in the organization as most prevalent.

Legitimate and coercive

In earlier posts it was noted that when the bottom arrow of the right loop and the left facing arrowhead of the gesture and response are eliminated, strategy, for everyone that hasn't been involved in its creation translates to:

Do what you're told and keep your mouth shut!

This is the worst of legitimate and coercive power. Yet if we are constrained in talking about power this is what many people seem to think is happening in terms of power in their organization.

OUCH!

It's not hard to imagine the impact this has for those of us who have not had a hand in creating the strategy for the organization. It also takes an awful lot of energy, time and effort for those that did create the strategy to try and overcome this impact. Keep in mind this dynamic is created by the way we typically understand strategy and organizations in general. As a result, this dynamic is seen almost as a normal pattern in organizations and one that naturally must be dealt with or 'managed'.

This is one of the reasons I think there is so much content and interest being generated regarding things like leader authenticity, openness, emotional intelligence and so much more. And also why so many senior leaders see this content and interest as more or less a waste of time, even though they may not be able to effectively articulate why.

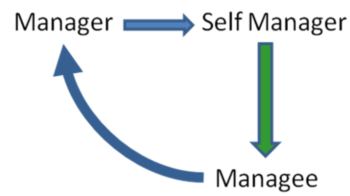
The reason why is that these concepts such as authenticity are supposed to overcome the very worst of the application of power and they cannot do this. On their own, things like authenticity are of course valuable. But applied as a 'technique' to overcome the impact of the worst applications of power their value is not only gone, but everyone knows it's a technique rather than a genuine attempt.

It's almost insulting!

Perhaps the most damaging part of all this OUCH! is that it is accepted as normal in organizations! In the absence of interaction regarding power, people tend to think leaders primarily are using legitimate and coercive power in order to move strategy forward. And leaders think they must overcome resistance to moving strategy forward by creating systems and structures which should cause this resistance to disappear. Neither this perspective on power nor the approach to deal with this perspective may actually exist, but it tends to be a very common and problematic pattern of interaction and understanding in our organizational experience.

It is not easy to deal with this, to reduce the OUCH! As long as we believe that power can create certainty the interaction model is compromised so that day-to-day interactions regarding power are very problematic and thus avoided. To change this, do we start by changing the belief that power can create certainty or by taking a leap into bringing forward interaction and conversations about power?

I think we're probably better off starting with the latter since the real power of leadership can help initiate these conversations and perhaps more importantly these conversations acknowledge the second definition of power noted above; **the ability to do something or act in a particular way, especially as a faculty or quality.**



This definition is a representation of the model of self-management illustrated by Dr. Freedberg and focused on power. It illustrates an additional type of power that each of us possesses; **choice**.

Keep in mind, the typical way strategy is seen to be implemented; through formative causality, dismisses this type of power! When we acknowledge that choice is present for all of us, conversations regarding power begin to make a lot more sense, especially when it comes to strategy in organizations.

It is actually a little hard to imagine what conversations about power might 'be' like in organizations, especially when it comes to strategy. So let's pose that question for the comments and discussion part of this post.

Discussion and comment points for this post:

1. What do you think conversations about power, focused on strategy or its implementation would be like in organizations if our understanding of strategy was altered to be more in line with the previous posts?

Strategy – Random Thoughts to Wrap Up

This is the last post in the series on strategy and over the course of writing the last 10 posts it seems/feels like some things are left unsaid (but aren't they always)! Additionally, over the time it has taken to write these posts I have had the chance to interact with quite a lot of people on the entire topic of OUCH! and strategy specifically. This has been really good and has informed not only the writing but added to the experience of writing these posts as well.

It has also been a challenge writing these posts. I knew that my perspective/ideology on organizations was not typical yet it matched and made sense of my experiences of being in and working with people in organizations. Taking this personal understanding and trying to put it down in a coherent fashion was challenging. More challenging than I expected actually! Especially since strategy is so complex, so laden with power and so entrenched in typical theory and understanding of how strategy is supposed to work. I imagine some of the challenge also comes from my own desire or hope for certainty, even though this is one of the primary things I don't believe in or think is possible in organizations!

One of the things that tends to happen when I interact with people about OUCH! or what it is challenging and questioning is that people tend to respond in what I would call an algorithmic or if/then kind of way. As an example people will respond, or seem to conclude 'Well if he's challenging strategy then he must think it's no good/not necessary' or 'If he's challenging performance management then he must think we might as well not try and manage performance'.

I actually rarely get asked if I think strategy or performance management is necessary or needed however!

That I think these things are not necessary or needed seems to be a conclusion that people quite often come to. Why this might be the case I'm not sure but my sense is that this is representative of the typical way we understand organizations. That being if you think the current 'answer' or 'solution' is a problem, then you must have a different answer or solution.

If I was asked this question though my response would be **'I do think these things are necessary and needed, that they are happening all the time in our day-to-day interactions and it is these interactions that are most important!'**

So the rest of this post will focus on a few 'things' that often get caught up in that if/then response.
Vision. I have no problem with the concept of vision. I think it can be a powerful and motivating energy. I simply don't think you need vision to do good strategy work. In fact I think it gets in the way of recognizing emerging opportunities. Vision, that idealized view of the future is a hope, not a certainty and when freed from the burden of certainty helps hope to stay present, for all of us.

Creative tension. Fritz and Senge described creative tension as an energy that would draw you toward your vision. If your vision was clear enough this energy would put things in front of you that would help you get there. I really think this energy is more in line with the concept of synchronicity as originally described by Carl Jung. Jung defined synchronicity as an *"acausal connecting principle"* or *"temporally coincident occurrences of acausal events"*. We've all experienced synchronicity when something happens that we didn't expect but is related in some way to other things that are happening to us at the time.

The important thing with synchronicity is that these occurrences are not planned and are connected by personal meaning. With the idea of creative tension these 'occurrences' which were supposed to occur to help us reach our vision were treated as being planned for by a clear enough vision and connected to that vision, not by meaning but by result. Creative tension is treated a tool for strategy and simply cannot live up to the expectations of what that tool was supposed to do. If creative tension does exist and I believe it does as synchronicity, it fits best as helping us recognize emergent opportunities and is more connected to day-to-day intentions than vision.

Causality. In the past posts I distinguish between cause and influence as it relates to human behavior. For me there is one cause and multiple influences of human behavior. I land on transformative causality; our interactions cause our behavior. This cause is founded on the theories of social construction and as such my perspective on the cause of human behavior is an ideology, not a fact. Your thinking may be founded on a different ideology.

Nevertheless, while I land on transformative as the cause of human behavior I do not discount the significance of the **INFLUENCE** other types of causality have on human behavior. Systems and structures (formative causality) and choice (rational causality) have dramatic influence on our behavior and it is important to pay attention to these influences.

What is important to me in this area is how you think human behavior is caused. This will be a major contributor to what you do with the power you have to affect behavior. Since the typical way of understanding strategy is based on formative causality, leaders use their power primarily to design systems and structures that are supposed to cause behavior for the rest of the organization.

If individual choice (rational causality) is the cause of behavior then leaders will primarily use their power to communicate the logic and rational reasons for their decisions regarding strategy. It would be assumed these reasons will be effective enough so others get on board and choose to act to support that strategy.

If interaction (transformational causality) is the cause of behavior then leaders use their power to initiate as many interactions as possible with people to discuss strategy and stay open to the responses they get which may produce adaptations to that strategy.

Certainly all of the above need to be done. The question is where do you want your **primary** focus to be and why? Currently there is very little thought or interaction about this. We default to formative causality since that is how we typically understand organizations. OUCH!

Discussion and comment points for this post:

1. Are there other concepts, words, perspectives that have been in the previous posts on strategy you would like to question, disagree with, or ask for further explanation?
2. Do these posts on strategy resonate with your actual experience of strategy in your organization?

OUCH! Learning and Development

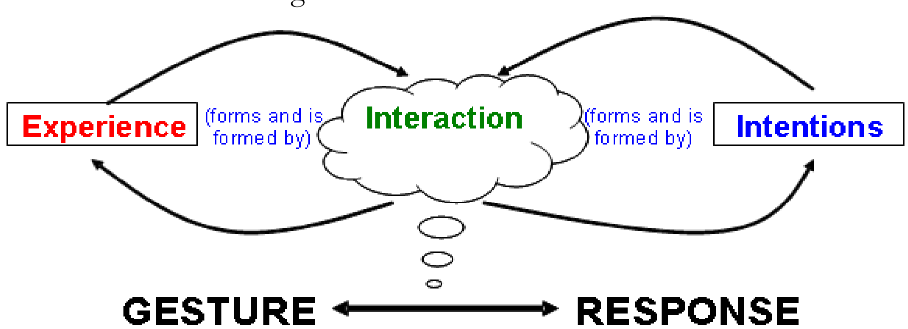
We began with the low hanging fruit of performance management then jumped to the lofty hanging fruit of strategy. I'm not sure where the fruit of learning and development hangs but here we are so let's see where this might take us. There is enough OUCH! in learning and development to keep us busy for a few posts anyway!

Our focus is learning and development that deals with conceptual topics and complex behaviors; things like leadership, communication, relationships and the like. We are not focusing on learning and development dealing with more technical skills such as learning to operate equipment etc.

Learning and development is a multi-billion dollar investment by organizations and anyone reading this has been part of some kind of initiative that focused on learning and development. There is no doubt that continual learning is important and needed. I think there is a fair bit of doubt however regarding how this learning is thought about and how it happens.

The purpose of any learning and development initiative is to change behavior.

Actually from a social construction perspective the purpose is to change interaction but we'll get to that distinction in a post down the road. So a good start point in thinking about learning and development is how behavior is changed.



The left loop of the interaction model is very important here. In an earlier post the left loop was explained as follows:

This is the part of the model that is comprised of **experience** and **interaction** and the connections between the two. **Experience** exists in the past and **interaction** exists in the present. The upper arrow, from **experience** to **interaction** represents the dynamic of bringing all of our past **experiences** to bear on a present **interaction**. The lower arrow, from **interaction** to **experience** represents the dynamic of the influence of present **interaction** on our understanding and meaning of past **experience**.

Taken as a whole, the left loop represents patterns, typically patterns of interaction and behavior that provide us with a personal history constructed over the span of our lives. Over time these patterns can become quite stable.

The last sentence is very important. Behavior becomes stable and repetitive over time because of countless interactions that have become habit. We don't have to think much about most of our behavior which is very efficient and effective. Most complex learning and development initiatives in organizations are focused on changing these stable and well learned patterns.

Let's have a look at some data regarding trends in learning and development and see what is actually happening out there. This data is from a report called *Trends in Executive Development 2016 – A Benchmark Report*. This is an extensive report gathering and analyzing data from 466 medium to large organizations. The majority of the data is from the United States although it does have worldwide input. I am extracting data from this report to focus on certain aspects of learning and development but not using all the data.

In terms of priorities for executive development the top five in the report are listed as:

1. Address key business issues/challenges.
2. Build awareness of new technology.
3. Develop capabilities needed to achieve vision and execute strategy.
4. Increase productivity.
5. Create a compelling vision and engage others around it.

One of the things that jumps out is that these priorities have a heavy focus on context. Context meaning key business issues specific to the business, technology that would be specific to the business and increasing productivity specific to a business.

The same can be said regarding the 'hot topics' in executive development:

1. Business ethics/integrity
2. Customer focus
3. Cognitive readiness
4. Competitive positioning

Hot topics 1, 2 and 4 have a heavy focus on context while 3 may be seen as having a heavier focus on content.

The reason this focus on context is important is that so much of learning and development in organizations focuses on content. The difference between context and content is that context requires specificity and adaptability of learning design whereas content requires generalization and consistency. The focus is quite different, almost opposite in fact.

What the above is saying is that at a senior level in organizations what is happening and being asked for is learning and development that is specific to organizational (and even individual) needs and that the design is adaptable to these specific needs.

In terms of how a lot of that development is happening, at senior levels the top four processes were:

1. Executive coaching
2. Assessments followed by developmental feedback
3. Mentoring
4. Blended learning

And for high potential development:

1. Mentoring
2. Developmental job assignments
3. Assessments followed by developmental feedback
4. Executive coaching

What jumps out here is that for the most part the process of development takes place over an extended time frame.

So for the senior people (or soon to be) in organizations what is happening with learning and development is primarily:

A focus on business context in an extended time frame design.

When we look at the interaction model this makes all kinds of sense in terms of how behavior and interaction are most effectively changed. Lots of opportunity for interaction across variable contexts and situations. Basically, developing different and stable patterns. A new history.

However, when you look at the typical design of learning and development initiatives with **a focus on business context in an extended time frame design** one very important and consistent fact presents itself:

They are expensive!

Perhaps because of this expense it is only a small percentage of people in organizations that have access to this type of learning and development. When you consider moving this type of learning and development to a greater percentage of people in an organization the cost quickly becomes a very big problem.

This is where something interesting happens, very interesting. In order to deal with the cost issue of context focused extended time frame learning design, the design, almost mysteriously changes to the following:

Content focused events

When you look at the most common form of learning and development for the majority of us in organizations, it follows the design of a content focused event. This is pretty much the opposite of what is seen as valuable and effective at more senior levels.

When we look at the interaction model, content focused events tend to be very ineffective at changing behavior. The content focus is not adaptable enough to the real context it needs to be applied to and in. Even more problematic is that the opportunities for interaction are severely limited.

Because of this, if you are involved in any way in these things sooner or later, you will fail to deliver what is expected, that being behavior change. Designer, content producer, facilitator or participant sooner or later you will fail.

OUCH!

Yet when we look at the proliferation of content focused events that are supposed to create effective learning and development we don't seem to be very effective about learning how to reduce this OUCH!

We'll look at this in the next post.

Discussion and comment points for this post:

1. How does formal learning and development happen in your organization?
2. How effective is the learning and development in your organization?
3. Is there OUCH! in the learning and development you are involved in?

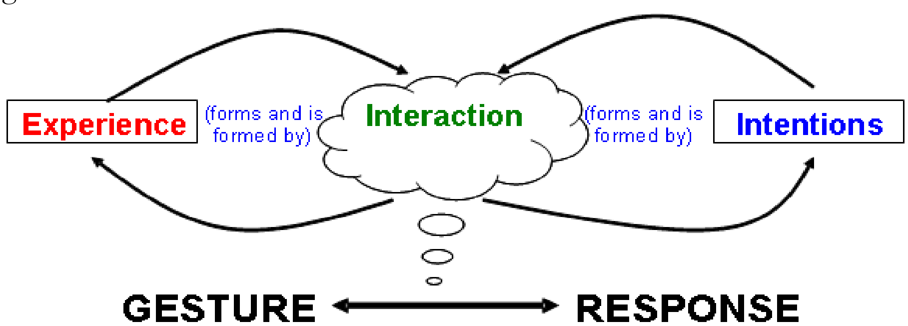
Learning and Development – The Mystery of Content Focused Events

In the last post we looked at what so often happens in organizations when learning and development initiatives designed with a ***context focus over an extended time frame*** get applied to larger numbers of people in the organization.

The design changes to *content focused events*

Before we look at roles and what can be done to reduce the OUCH! in *content focused events* it makes some sense to consider why the design changes in this way. This will inform our consideration of different roles and help us change interactions about learning and development.

In essence we are doing some learning and development about learning and development and thus trying to change behavior and interaction!



The left loop; patterns of interaction regarding learning and development, seem to be very stable in defaulting to *content focused events* as the go to design for larger numbers of people. The hope is that these posts enable lots of interaction that may alter this stable pattern.

The one immediate benefit of a *content focused event* design is that it helps to contain the cost of *context focused extended time frame* designs if those designs were to be accessed by more people. This is very important. So what is it in these *context focused extended time frame* designs that makes them cost prohibitive for larger numbers? The variable with the most impact on cost is:

The presence of a one-to-one relationship between the 'teacher' and the 'learner'.

Executive coaching, assessments followed by developmental feedback and mentoring; three of the top four processes for senior level development noted in the last post exhibit this very well. If you use this design for larger numbers of people the cost skyrockets.

So it seems the pattern of behavior at play to address this cost problem is to design using a **one to many relationship.**

The mysterious thing is that seldom is the question asked; 'Why design this way?'

If this question does get asked, there tends to be a lot of blank stares; 'it's just the way things are done', or 'it's easiest', or 'it's cost effective'. Rarely will someone say it is the most effective way to change behavior.

In order to understand why this design is so insidious we are drawn back to one of the key assumptions that underlies the typical way we understand organizations; power creates certainty. In the case of learning and development the power part of this assumption gets assigned to two primary areas:

1. Experts
2. Learning content

The certainty part of this assumption gets placed on the requirement for an almost magical 'event'.

What this means in terms of the interaction model above is that the **intention** of learning and development initiatives are 'owned' or assigned to the expert or to learning content. We are now into a very familiar pattern that we have described in both performance management and strategy. If the **intentions** of the initiative are delivered effectively by the expert or the content is 'good' enough then it is assumed the learner should learn and behavior change is certain.

If behavior change does not happen, the dynamic of blame, shame and guilt emerge. Either the expert wasn't good enough, the content (or perhaps the facilitator delivering it) wasn't good enough, or the learner was incapable of learning!

OUCH!

The assumption that power creates certainty in the realm of learning and development is very problematic and almost invisible. It creates not only blame, shame and guilt, but endless cycles of accessing the next expert's ideas, the next best content, the next best facilitator, the next best ROI measurement and the next best event.

Perhaps most damaging is that this assumption hides the fact that **interaction** creates the potential for behavior change! The primary 'problem' is not in the expert, the content or the learner. The primary problem, the OUCH! is an assumption that places the potential for behavior change in the wrong place!

Question this assumption and it becomes much easier to question the design of content focused events.

Questioning this assumption however is not easy. Changing a stable pattern of behavior and interaction never is. But we do have a pretty good start point. That start point is what was pointed out in the last post; what is actually happening with learning and development at senior levels in organizations.

If we want to counter the assumption that power creates certainty in learning and development we don't have to tackle it head on. We can use what is being done right now at senior levels and shift the discussion from one focused on cost, to one focused on learning design that also deals with cost. The start point however is design.

Roles for those of us having accountability in learning and development initiatives will be the topic of our next two posts and following that an example of learning design that reduces OUCH!

Discussion and comment points for this post:

1. Have you ever questioned the viability of content focused events for learning and development? What happened?
2. Have you ever felt the pressure to design or facilitate the 'perfect' event for learning? What was that like?

Learning and Development – Roles

In the last post we talked about the need to challenge the assumption of power creating certainty in the area of learning and development. By doing this we could interact differently about the default design of *content focused events* that create so much OUCH!

We also discussed using what is currently happening regarding learning at senior levels in organizations as a good source of information to challenge this assumption.

The next two posts will focus on the first of four roles that can be played by those of us who are accountable in some fashion for learning and development within an organization. These roles however need to be redefined from what we might expect them to be given the current way we tend to understand them. Regardless if you are the senior L&D person, an instructional designer, a learning co-coordinator, a facilitator or have some other accountability these roles are important.

The roles below are listed in what I think are the order of importance for having the greatest influence on interactions that can reduce the OUCH! in learning and development. In addition each role is accompanied by a mantra, or more accurately, a day-to-day intention, given the posts on strategy.

Interestingly, what tends to happen given the hidden nature of the assumption that power creates certainty in learning and development is that these roles get reversed. We are pushed toward, or find ourselves primarily in the role of, or supporting the role of facilitator. When this happens all the other roles are significantly constrained and their impact dramatically diminished. The facilitator role is important in learning and development. If that role is expected to deliver what the other roles need to do however, it will fail in this regard.

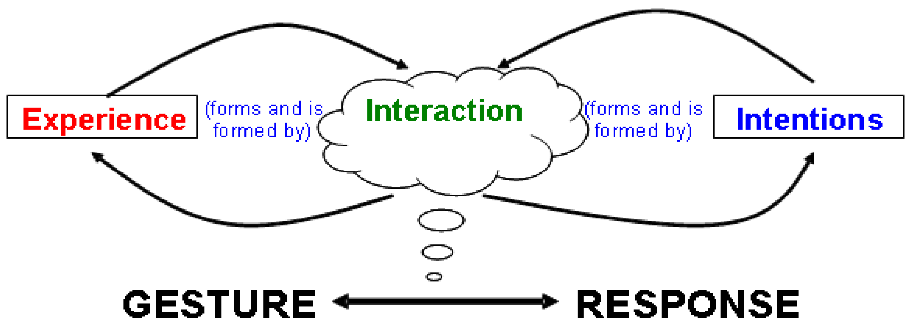
One key sign that you are in, or supporting the role of facilitator in your organization is that there is a **proliferation of content** in learning initiatives. By this I mean you are constantly looking for new content to deliver or make available, you are consistently talking about how to find time for more content delivery in your learning designs or that you are regularly looking for new and better experts and facilitators to create and/or deliver content.

If there is an abundance of learning content in your organization it is highly likely the facilitator role is primary. This will also mean there is likely a lot of OUCH! in your learning and development work. This can be altered by interacting differently; by considering the roles listed below.

Role	Mantra
Designer	More Interaction
Educator	Be Early
Consultant	Build Internal Capacity
Facilitator	Be A Model

Designer

The Designer role is exactly what it says; designing learning and development initiatives. The mantra, or day-to-day intention is 'more interaction'. Because the left loop in the interaction model is so stable regarding learning design, it is hard to over emphasize the importance of this mantra. Often what happens when the roles above are reversed is that the design role becomes very narrow, focusing only on how to design a learning initiative where facilitation of content is the primary variable. The design concern becomes one of 'how can we fit in another role play' rather than 'how can we best change patterns of behavior and interaction'.



The design role we are focusing on is one that acknowledges (that knows!) behavior and interaction change occur over time, through multiple interactions and with a focus on context. That a new left loop is being created and the learning design needs to have as many opportunities for interaction as possible.

This is exactly what is designed at senior levels with executive coaching, mentoring and assessments followed by developmental feedback. The design difference is that for larger numbers this design has to be accomplished without the traditional one-to-one relationship. In addition, as we saw in the last post, the focus of senior level learning was on **context** not content. What this then means is that the two design cornerstones of *content focused events* are not nearly as important; experts and learning content. And to top it off, the event itself is no longer as important either.

This is the design role that takes the OUCH! out of learning and development.

Let's take a little closer look at what is happening in executive coaching, mentoring and assessments followed by developmental feedback. This will help us build a better understanding of how the **idea** of these types of designs can work with larger numbers.

In the three learning processes above there are three key variables that affect the potential for behavior change:

1. The participants' active engagement in the process.
2. An extended time frame where multiple interactions occur.
3. The presence of a resource that plays the role of content and process 'expert'.

We will look at variable 1 in another post since although this variable may be the most important it is really not affected much by learning design!

Something interesting happens with the remaining 2 variables; a subtle and hidden impact of the assumption that power creates certainty. What happens is that the 3rd variable, the presence of an 'expert' (expertise is power), is seen as the key (really the only) design variable that is affecting behavior change. We know this to be the case by the sheer number of content or expert focused learning events that occur and the volume of content produced by experts and used by organizations. It also produces the cost problem associated with using these designs with larger groups. If the 2nd variable was seen as key we would be experiencing very, very different learning designs for larger numbers of people.

The design role noted above sees this 2nd variable as primary in affecting behavior change and thus the mantra, more interaction. The expert, or content is still important but seen as secondary.

This is a very significant shift in how we think about learning design and not an easy shift. Yet much like what so many of these posts have been shining a light on; this shift is really just a shift to what is already happening, not something new! The OUCH! in learning and development comes from the formal processes that have been designed by typical theory and way we understand organizations!

We know we learn through our interactions, we know it takes time to change, to build a new left loop. We know that exposure to learning content means nothing until it is applied in a context that is specific to us. We know that expertise is only important when we choose to make it important.

The next post will look at learning design that more closely fits what we know. Where there is less OUCH!

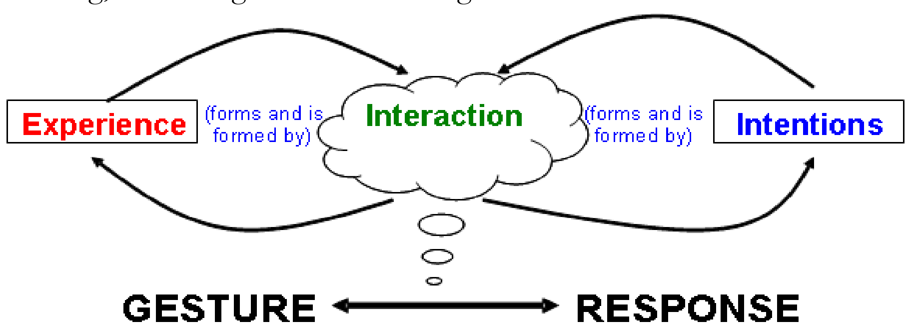
Discussion and comment points for this post:

1. Do you have a 'proliferation of content' in your organization?
2. How does learning occur in your organization for larger numbers of people?
3. Do you have OUCH! in learning and development?

Learning and Development – Design

In the last post we talked about a learning design role that recognized the primary variable affecting the potential for behavior change was an extended time frame. Where the expert or the learning content is seen as secondary in importance. This post will be looking a little deeper at design for larger numbers of people that enables higher numbers of interaction and focuses on context.

If the expert or content is secondary it is important to understand what 'they' are actually doing in an extended time frame design. A good place to look to investigate this is with the designs currently being used such as coaching, mentoring or action learning.



When you look at what happens in these designs through the interaction model you see continual movement around the model with shifting intentions based on interactions, incremental shifts in redefining experience and numerous 'successes' and 'failures' as new gestures are attempted and responses received as a new left loop is potentially built.

The expert or the content is actually quite a small part of the overall process. The number of interactions they have that affect the learner is quite small compared to the number of interactions the learner is having over time. However there are three very important aspects they bring to an extended time frame process.

1. Performance pressure
2. Concepts to experiment with to change interactions
3. A process for learner reflection

Performance pressure

The expert (coach/mentor for example) brings a level of performance pressure simply because there are regularly scheduled interactions between the expert and learner over this extended time frame. The learner feels a need to have 'performed' in the interval between interactions.

Concepts to experiment with to change interactions

Typical learning content tends to be quite specific (i.e. active listening, questioning skills etc.). As this content is applied through interactions over time there is less specificity since the application of the content/skill ALWAYS changes the skill. This is due to the different **responses** we receive as we gesture toward others using these specific skills. Learning content broadens out to become a concept over extended applications. Active listening and questioning skills (learning content) become effective communication (concept). This is an important distinction and one not often seen as affected by an extended time frame learning design.

When power is attributed to learning content and the assumption is that power creates certainty, the assumption extends to the gesture response part of the interaction model. This means if you effectively apply the content/skill as a gesture, the response should be predictable (certain). The left facing arrowhead of the gesture response is eliminated.

Over numerous applications (actual experience in a real context!) in an extended time frame design the learner recognizes that the left facing arrowhead certainly does exist! Over time they adjust their application of the skill as the context requires and the skill is no longer specific but a focused pattern of changing applications; a concept.

In an extended time frame design **content transitions to concepts** and the expert works with, introduces, adapts and provides perspectives on these concepts.

A process for learner reflection

Over the years I have done quite a bit of coaching and invariably the people I work with tell me the best part of the process is having someone to talk to about their experiences as they try to change behavior. Sharing their challenges, successes, ideas, frustrations and joys. The sharing itself, the storytelling, the reflection on the left loop, the ideas for the right loop is an important part of learning design.

With an extended time frame design there are numerous opportunities for these interactions.

Over the years I have also learned that it is this process of learner reflection that is much more important than me being a specific part of it!

I have been told I'm a good coach and I think that is true. However I also think that 80% of that 'being good' is simply about showing up! From the perspective of the design role we are describing here, it is important to really think this is true!

We have identified the three key roles that the expert or learning content play in existing extended time frame learning designs. Let's add in the extended time frame for numerous interactions as another design variable and we have the four key things that make these designs effective:

1. Extended time frame for numerous interactions
2. Performance pressure
3. Concepts to experiment with to change interactions
4. A process for learner reflection

What is really interesting is that when you look very closely at those four points above from a design perspective you discover that the importance (and cost!) of the two variables typically seen as critical are not nearly as important as we currently think:

1. The expert

2. Learning content

So the design question, the questions to be answered by the role of Designer is:

What do these designs look like and how do they work?

In many ways these designs look an awful lot like normal day-to-day work with some important differences and we will get to the specifics and challenges of the question above soon.

Before we do that however we want to remind ourselves of the four roles in learning design and their mantras:

Role	Mantra
Designer	More Interaction
Educator	Be Early
Consultant	Build Internal Capacity
Facilitator	Be A Model

The last couple of posts have been focusing on the role of Designer. As described this role tends to be quite different from what we typically think of when we think of learning designer in organizations now. The typical learning designer tends to focus on learning content and experts as key design variables. This typical role and its outputs are heavily influenced by the typical way in which we understand organizations and the assumption that power can create certainty. This is the left loop of current learning design and it is very stable.

If we take on this different design role we now will have learning designs that are quite different from what we now have. This then brings us to the next roles we need to play to reduce the OUCH! in learning and development: Educator, Consultant and Facilitator.

These will be the focus of the next two posts.

Learning and Development – Educator

The last two posts have looked at the designer role in learning and development. As we have noted, this role is quite different from the typical designer role and would produce considerably different learning designs than what we see so much of now; content focused events.

This post will look at the Educator role played in learning and development and the 'mantra' associated with it. The following post will focus on the remaining roles of Consultant and Facilitator.

Role	Mantra
Designer	More Interaction
Educator	Be Early
Consultant	Build Internal Capacity
Facilitator	Be A Model

Once you have 'considerably different' learning designs worked out the role is that of Educator. This is not the educator role of educating people IN a learning and development initiative. It is the role of educating people (most often people with power) that the 'considerably different' designs you have are viable, workable and more effective than content focused events.

This role is about building a new left loop in the way we understand learning and development for larger groups of people in organizations. Personally, of the four roles listed above I find this role the most challenging. The reason for this is the stability of the left loop regarding how we currently understand learning and development and the fact that more often than not I am playing this Educator role with people who have power. Power over the decisions about how learning and development will occur in their organizations.

The problem is not that these people are resistant or simply want to do things their way. The problem more often than not is that no other way is even seen as an option in the first place! The left loop has become such a powerful habit it is often not even recognized as a habit, it is simply the way things are!

This is why the mantra for the Educator role is **Be Early**. It is critically important to be as early into the conversations about learning and development as possible. If you are early into these discussions you have a much greater possibility of affecting change from a design perspective. If you are not early there is a really good chance the learning design is already well down the road and you will be in the Facilitator role and all the risks associated with that role when design has not been part of the roles you play.

Just think how often you have been part of a learning initiative where the scenario plays out something like this:

> *You get a call from someone saying they are getting their group together and want you to help them with something (communication, change, decision making, relationships etc.). The date has been set,*

> *people have been invited and often they have even allocated a period of time in the agenda for you to work with.*

From a design perspective you are now being pushed very significantly into the Facilitator role and that role is asking you to do your best to facilitate a content focused event. The person who has contacted you has very little interest in talking about 'considerably different' designs and little interest in being educated by you why they should consider such designs.

Anyone who has a role in learning and development has experienced this. It is a very, very common pattern of interaction in organizations.

So, how do you *Be Early*?

1. First you need some idea of design alternatives so you have something to *Be Early* with! Remember the mantra More Interaction!
2. Second, you need to recognize once you have ideas for design alternatives you are playing the role of Educator so you need to be able to justify (make the business case) for these alternatives.
3. Third, even if you aren't early; try something that illustrates, even incrementally, an extended time frame design.

To the first point above, we will be looking at a design idea in future posts but there really is no go to design. If you focus on more interactions you can invent what might work best for your organization.

One of the things OUCH! is attempting to do is provide logical, rational arguments to seriously question typical ways things are done in organizations. It is hoped that you can use some of these logical points to act on point 2 above.

As an example of that last point let's look again at the scenario above. Quite often in scenarios like this what you are being asked to help with is an agenda item in a longer meeting. Perhaps three hours of a two-day meeting has been allocated to focus on 'communication'. Rather than simply saying 'Yes, I can do that for you' you could for example propose that you spend one hour on content dealing with communication and then do 10 minute debriefs or reflective learning about how that content was actually applied after other meeting topics were dealt with on the agenda.

It's an incremental step perhaps but is illustrative of the four key aspects of extended learning design:

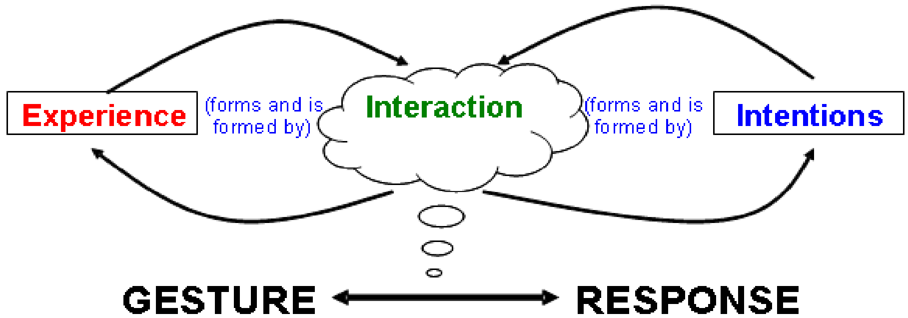
- Extended time frame for numerous interactions
- Performance pressure
- Concepts to experiment with to change interactions
- A process for learner reflection

It also gets you into a design discussion, at least a little, and you can use that to play the Educator role, at least a little and you will be seen in a different light, one that can Be Earlier the next time.

Playing the Educator role, while it can be very challenging is actually one of the best opportunities we have to <u>personally</u> experience an extended time frame learning design, for us, learning and developing our own role of Educator!

It is highly unlikely you are going to change the stable left loop of content focused event learning design in your organization with one magical interaction. One perfectly crafted argument delivered to those in power that changes the way learning and development is done!

So how would you design your own extended time frame learning initiative? One that helps you learn and develop the four roles noted above? A design that helps you build a new left loop regarding learning and development in your organization? How might you use the interaction model to think this through and make sense of your experiences as you move forward?



The next post will look at the remaining two roles; Consultant and Facilitator.

Discussion and comment points for this post:

1. Have or do you play the Educator role as defined above? Tell us your story...
2. What advice might you have for someone playing this role?

Learning and Development – Consultant and Facilitator Roles

We have outlined four roles that need to be played in the area of learning and development in organizations. All of these roles are defined and positioned to try and reduce some of the OUCH! in learning and development. This post will focus on the last two of these roles and the 'mantras' connected to them.

The **Designer** and **Educator** roles are more or less behind the scenes when it comes to learning and development. The **Consultant** and **Facilitator** roles play out directly with the people we are working with; the participants and learners that are the main focus of the learning and development initiative.

Role	Mantra
Designer	More Interaction
Educator	Be Early
Consultant	Build Internal Capacity
Facilitator	Be A Model

Keep in mind that all of these roles have a focus on learning and development initiatives with the intent of changing behavior. Initiatives that take place over an extended time frame and with a focus on context. In addition the expert and learning content are seen as secondary in helping behavior change.

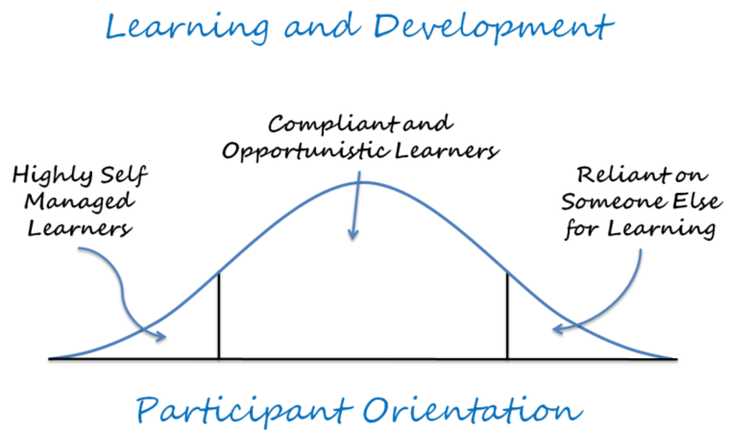
In some ways the role of Consultant is similar to the Educator role however the focus of the Consultant role is more specific to the group you are working with. We are however educating the group (and group leadership) regarding extended time frame designs with a focus on context. This is necessary due to the very stable left loop in the interaction model shaping how learning is typically thought about for larger numbers in organizations.

The 'mantra' for the Consultant role is 'build internal capacity'. This means building internal capacity to own the PROCESS of learning and development, not just building internal capacity for the specific behavior change desired. The reason for this is that building internal capacity for the PROCESS helps to sustain the interactions needed to change behavior. Internal capacity enables the primary focus of the learning initiative to be on the extended time frame and context. Without a focus on building internal capacity the primary focus too easily shifts to the expert or learning content and these two areas, while important, are not the primary variables affecting behavior change.

Like the Educator role the Consultant role can be challenging; primarily because you are trying to change that very stable left loop regarding learning in organizations. Personally however I find the Consultant role less challenging and this has to do with two key things:

1. It is easier to make sense of 'different' learning designs when you can be more specific.
2. The people you are working with want to build internal capacity.

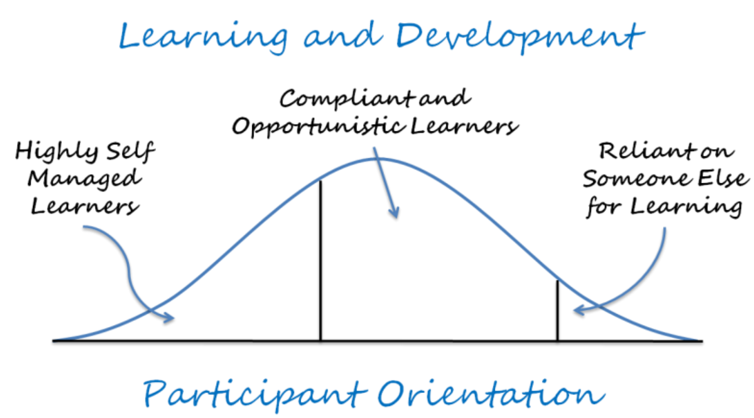
In my experience, when I have been able to interact with people about the rationale for extended time frame, context focused learning designs agreement, support and engagement has been very common. This is why the Designer and Educator roles come first and why they are so important. When it comes time to play the Consultant role, you need to have the rationale, the 'business case' for Building Internal Capacity. One thing I have found quite valuable in these discussions are the interaction model and positioning behavior change as changes in the left loop which need numerous different interactions over time. As well I have found the following two graphics of value.



This graphic represents a simple distribution of how we often perceive participant orientation towards their learning in learning and development initiatives.

At the left are the highly self-managed learners, those that take ownership for their own learning, go beyond the content and are both wonderful and challenging as participants. They are learning 'high performers'. In the middle are the compliant and opportunistic learners that do what is asked of them in learning initiatives, are engaged and participate effectively. On the left are those that are typically reliant on someone else for their learning. They shift the accountability for their learning to the facilitator, the learning content, the process etc. Almost no learning design is effective enough for this group.

So the question becomes, 'Who do you want to design for and what happens when you work to build internal capacity?'



What I have found is that when you design for the highly self-managed learners with the intent of developing internal capacity, there is actually a lot more of this group than often thought to be! Interestingly we often design learning initiatives with so much concern for that group on the right that the design never really gives the group on the left a chance to engage and influence like they will if given the opportunity.

In the Consultant role when I use the interaction model and these two graphics the people I am working with seem to quite easily and enthusiastically engage. Pre and post 'event' processes are not a problem but part of a process that makes sense and is seen as a sensible alternative to the OUCH! of content focused events as the only way to do things.

This brings us to the last role of the four; Facilitator and the mantra *Be A Model*. If you have played the other roles as effectively as you can the Facilitator role tends to be quite comfortable to play. There is quite a shift though in the way the Facilitator role is often thought of from the perspective of content focused events, where the facilitator is typically positioned as the expert. This can be a tough shift sometimes; again the left loop regarding what a facilitator typically is defined as is quite stable.

To *Be A Model* in the Facilitator role means you truly realize you are facilitating a learning process, where the roles preceding the Facilitator role actually have more impact in changing behavior than the Facilitator role does.

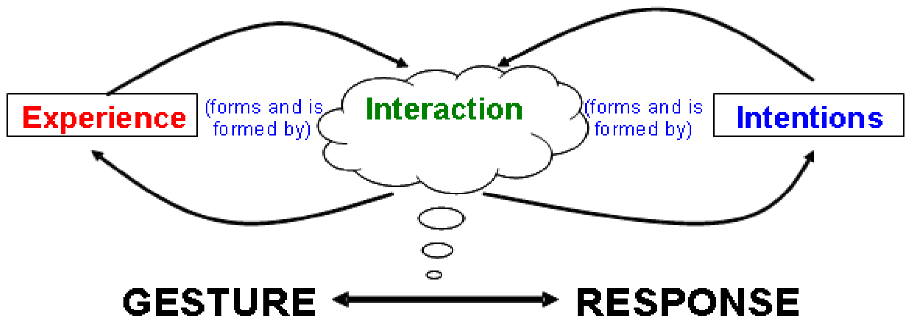
What is fascinating is that all those skills we have developed that make us 'amazing' in the current role of Facilitator still get to be applied, but those skills are more in the service of the three preceding roles. We will be looking at this a little more in the next post, with a focus on what role learning events play in extended time frame and context focused learning designs.

For now, have a good look back at the four roles we have been focusing on. How can you develop and play, support, ask for, demand, influence those roles. I really think we all have a part to play. It may not be easy but it does take an awful lot of OUCH! out of learning and development.

The Role of Learning 'Events'

Perhaps after reading the last number of posts you may think I have a real hate on for learning 'events'. Not true however! Well maybe a bit of a hate, but that's reserved for content focused learning events; I think learning events themselves can have real value.

Learning 'events' give participants an opportunity to interact in a context that is different than day-to-day interactions and as well events often have participants that are not part of the daily interactions participants have.



This means there are valuable opportunities for participants to experience different left and right loops and also to be part of different patterns of interaction. These are all important in the learning process.

As you will recognize the key aspect that contributes to behavior change in a learning event are the interactions people have. I have been part of numerous learning events over the years and without fail, when participants are asked what was the best part of the experience they will say, 'the chance to talk to my colleagues/fellow participants'. This is the primary reason I do have a bit of a hate on for content focused learning events. Too much content quite simply decreases the opportunities for interaction. Not only is interaction what participants find of most value, it is also the key variable in affecting behavior change.

My estimation is that for many, many learning events you could cut at least 50% of the actual learning content and get better results. However because the left loop is so entrenched it seems very difficult to actually do this. If it is believed that power can deliver certainty and in the case of learning the power is in the content then it makes all kinds of sense to jam as much content into a learning event as possible.

We've all sat in rooms from early in the morning until late at night trying to digest what seems like endless learning content. And just outside that room is the wonderful location the event is being held at and we so want to get out of that room and enjoy (and interact in) that wonderful location.

OUCH!

As noted in earlier posts the above is an example of 'content proliferation' and if you are in this pattern you can be pretty sure you are in the Facilitator role without the roles of Designer, Educator and Consultant having been played effectively. It will also likely mean that the learning event is seen as the primary (often only) means by which behavior change will be affected. And even though learning events can be very valuable, if that is all you have it is never enough to alter a stable left loop; never enough to change behavior.

If the learning event is designed as part of an extended time frame; if it is not all you have it can be very valuable and enjoyable as well! One the main reasons it can be valuable and enjoyable is that the event is not burdened with expectations that it simply cannot deliver on. The hallmarks of really well designed learning events are:

1. Significant space and time for participants to interact with each other and on their own (a process of reflection).
2. Learning content that is more conceptual than specific.
3. A very limited need to declare 'takeaway's' or 'action plans' or 'what have you learned?'.
4. No immediate post event evaluations.
5. The above elements of the event are talked about up front with participant. This is a version of the Consultant role which is needed since the left loop is just as stable with participants regarding learning events so the rationale for such a design is usually important.

If the above sounds like it could be an awesome learning event, it is! When you lift the burden of expectations of needing excessive learning content, listing of takeaways after each content delivery, the pressure to declare what has been learned, and evaluating the effectiveness of the event itself, the event can truly focus on the most important variable in behavior change, interaction.

Many years ago in that same organization where I began my career by making ice cream, I moved into the role of director of organizational development. Just like the work I did their in the area of performance management I had a significant role in the learning and development area. And much like performance management me, and the organization kind of made up our learning and development strategy as we went along.

I was very fortunate to come across The Center for Accelerated Learning and although I didn't know much about the theoretical 'why' of their approach to learning it just made so much sense to me. As I look back the hallmarks noted above were built into their approach to learning, even technical learning! I subsequently ran learning events focusing on Leadership, Creativity and Innovation, Change, Trust and Compassion and even did events in the wilderness. The hallmarks above were in all of those events (usually 3-5 days) and they were awesome (we had waiting lists!). And although it was not formalized into the design, I now realize they were in fact extended time frame designs as I and a group of 'learning associates' supported the learning back in the workplace.

Now you may be wondering if those learning events added any value to the business. Yes they did. We're going to look at evaluation and measurement of learning and development initiatives in a future post but for now I can say this. Burdening those learning events with more content, more requirements for takeaways, more evaluations certainly would not have added any more value to the organization. It would have simply made the event much less valuable and enjoyable!

I can also say having been part of learning events that are burdened with those types of expectations, they add no value to actually changing behavior, and in fact they detract from it.

As I've traveled this journey to understanding the value of learning events in extended time frame and context focused learning designs there was a time when I thought it would be best to move away from the idea of a learning event altogether. And yet I loved those events and had seen value in them; seen people dramatically affected by them. I now think learning events are very important, the interactions can be very powerful. And when those events are part of a longer process and not burdened by impossible expectations they fit wonderfully into the learning design; they can be fun, have impact and not have much OUCH! at all.

A Design Framework for Learning

There is no real magic to an extended time frame and context focused learning design. As we have noted they are quite common with things like coaching, mentoring and action learning. They are not so common with larger groups however.

Currently in learning and development there is also quite a bit of interest in the 70 20 10 learning framework. 70 represents the percent of learning occurring through direct experience (usually on the job), 20 as the percent of learning occurring through exposure to networks, working with others and perhaps coaching/mentoring and 10 representing the percent of learning occurring through formal learning initiatives. In essence 70 20 10 is what is being referred to in these posts as extended time frame context focused designs.

Interestingly the 70 20 10 concept has been around since the 1980's resulting from work done by the Center for Creative Leadership. Interesting as well is that this concept/model although generally accepted as accurate still typically only gets applied at senior levels! In addition, many applications of this concept have reinterpreted the 70 to simply mean the experience of accessing learning content while on the job... OUCH!

Like many concepts (no matter how different) when they are filtered through current theory and understanding of how organizations work (the left loop) the concept ends up as simply another tool or technique supporting that current theory or understanding.

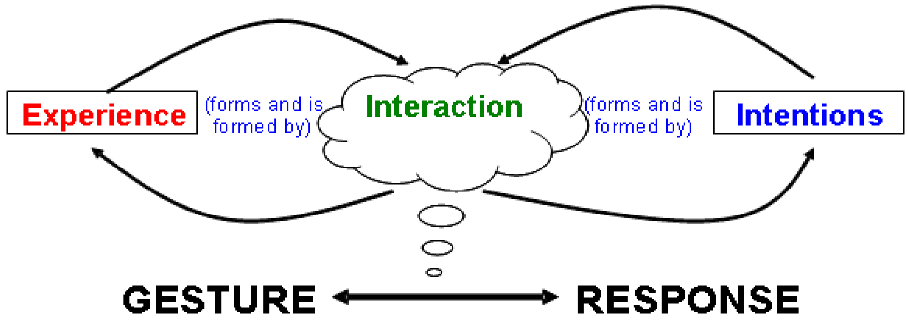
In an effort to avoid this let's review the key design elements of extended time frame context focused designs:

1. Extended time frame for numerous interactions
2. Performance pressure
3. Concepts to experiment with to change interactions
4. A process for learner reflection

In addition, it is understood that the primary variable affecting behavior change is the **extended time frame** and both the expert and learning content are secondary in importance.

The statement in bold above is very important and is an important design consideration as well. When we look at the interaction model, with complex learning we are trying to change patterns of interaction and behavior that have become stable over time.

What this means is that in order to affect behavior change not only are you establishing a new left loop but **within the process of learning itself you need to disrupt current patterns of interaction**. Otherwise the current patterns of interaction are very likely to overwhelm new content or concepts, overwhelm attempts at new interactions and you do not get behavior change.



This is why simply introducing learning content into day-to-day work is so often ineffective. It just gets swallowed up into the existing patterns of interaction. Keep in mind that a new behavior is a **gesture** yet the **responses** to that gesture may not recognize a new gesture since the current pattern of gesture and response is so established. Thus it is important to alter patterns of interaction **during the process of learning itself** and as it happens this fits very well into extended time frame context focused designs for larger groups.

Below is a framework for an extended time frame context focused design that I find works very well. The framework described illustrates a fairly extensive initiative when an external consultant is used but you will see the connections if internal resources were used. Each design element has a short explanation referring to points made in previous posts that are important to this design. In the next post we will look at some variations of this design but for now have a read and think how this might work for some of your learning initiatives.

Prior to the points below, agreement has been reached with the organization and the external consultant to move forward. The primary roles played by the external consultant to this point are Designer and Educator.

1. A small internal learning 'steering committee' is formed to oversee the initiative. This group is composed of volunteers that are directly involved with the learning initiative. *The purpose of this is to drive internal capacity plus to continually promote the value of this design to offset the power of existing ways in which learning and development are understood.*
2. The steering committee meets with the external consultant to overview the process and determine the role of the steering committee. *Educator and Consultant roles are being played by the external consultant to explain the rationale of the design and to continue developing internal capacity.*
3. The steering committee determines the composition of the learning groups that will sustain the learning (most often these are intact teams). *Again, driving internal capacity and ownership.*
4. The steering committee communicates to all participants as needed to overview the process and details.
5. The first 'learning event' is held which provides an initial learning concept to all participants and modeling of next steps (typically no longer than ½ day or less if virtual learning is utilized). *This is the Facilitator role with a bit of Educator and Consultant mixed in. Note that 'concepts' are provided as much as possible rather than content.*
6. Learning groups meet once a week (minimum) to apply the learning concept to a real business issue for a period of 4-6 weeks. *The learning is therefore focused on business context. Normally these meetings are regularly scheduled intact team meetings so no significant disruption to the business is required.* ***See below for a critical component to this design element.***
7. The steering committee monitors the process and interacts with the external consultant if

changes to the process need to be made. *Monitoring may take many forms including measurement of impact. We will look at this in a future post.*

8. Steps 5-7 are usually repeated two more times with different concepts being provided for each learning event. *This increases the potential for behavior change plus establishes a new pattern of interaction for applying learning which is building internal capacity.*

Note to design element 6: It is here where it is very important to disrupt the normal pattern of interaction that a group may have established **during the process of learning itself**. This is especially true of intact teams applying new learning concepts in regular team meetings. Below is one way we do this and we insist the group follow this process through the entire first meeting cycle:

- Two people are assigned to bring an actual business issue to the next team meeting.
- At the meeting one of these people describes their business issue to the rest of the group. They have three minutes to do this and the rest of the group can only listen.
- The group then has three minutes to ask any 'clarifying' questions of the 'presenter'.
- At this point the presenter turns their back to the group and the group discusses the business issue and applies the learning concept introduced in the learning event to better understand and make recommendations for action on the business issue presented. The presenter can only listen for these five minutes.
- The presenter turns back to the group and for an additional five minutes the group discusses what has been learned and what steps can be taken moving forward. No more discussion on the issue happens at this point.
- The process is repeated for the second person assigned to bring a business issue.

You may recognize the above as a process or exercise often called *Fly on the Wall*. It is very effective at disrupting stabilized patterns of interaction. This is vital for groups to really interact differently with a new learning concept.

The design framework above works and makes a tangible difference to the business. It has all the elements important to extended time frame context focused designs:

1. Extended time frame for numerous interactions
2. Performance pressure
3. Concepts to experiment with to change interactions
4. A process for learner reflection

Costs are reasonable because the two variables that drive costs up with traditional designs; experts and content are not designed as the primary variables affecting behavior change. **It is this change, placing the expert and learning content as secondary variables in behavior change that is most significant; and often the hardest to deal with in the Educator role.** As you can tell, there is no magic to the above design; but it does incorporate the change in bold above.

The next post will look at some variations of this design framework as well as a little deeper look at why it can work.

A Design Framework for Learning *Contd.*

This post will take a look at some variations in the extended time frame context focused learning framework design illustrated in the last post. It is important to recognize this design as a framework rather than an 'answer' and that underlying the framework are the four primary design elements affecting behavior change:

1. Extended time frame for numerous interactions
2. Performance pressure
3. Concepts to experiment with to change interactions
4. A process for learner reflection

These design elements can be incorporated in countless ways so let's investigate some of these as variations in the design looked at in the last post. When looking at variations the text in italics is really most important in terms of what you are trying to accomplish. Underneath the italic text are listed some other options.

1. A small internal learning 'steering committee' is formed to oversee the initiative. This group is composed of volunteers that are directly involved with the learning initiative. *The purpose of this is to drive internal capacity plus to continually promote the value of this design to offset the power of existing ways in which learning and development are understood.*
    a. The 'steering committee' may just be one person; especially if you are working with a single team. Often the team leader will play this role but I find it even more effective if a team member volunteers. This helps to drive internal capacity.
    b. Often this role will rotate to other members of the group over time.
    c. If you are working with non-intact teams (i.e. a group of managers/leaders) the steering committee may be some internal function (L&D for example) within the organization. **When this is the case they have a very important Educator role to play with participants!**
2. The steering committee meets with the external consultant to overview the process and determine the role of the steering committee. *Educator and Consultant roles are being played by the external consultant to explain the rationale of the design and to continue developing internal capacity.*
    a. Whoever the steering committee is the role of Educator and Consultant are primary in terms of interacting with participants. In some organizations this will mean the steering committee needs to have enough power to effectively play these roles.
3. The steering committee determines the composition of the learning groups that will sustain the learning (most often these are intact teams). *Again, driving internal capacity and ownership.*
    a. The challenge here is often with non-intact teams. This challenge is most effectively dealt with by ensuring the **context** about which the learning group will meet is important to the learning. The context must have business relevance.
    b. In these situations learning pairs are often more effective than groups and it is easier to find a relevant context with a pair rather than a group.
    c. The Educator role is important here as the design (including learning groups/pairs) and its relevance need to be communicated to participants early and often.
4. The steering committee communicates to all participants as needed to overview the process and details.

5. The first 'learning event' is held which provides an initial learning concept to all participants and modeling of next steps (typically no longer than ½ day or less if virtual learning is utilized). *This is the Facilitator role with a bit of Educator and Consultant mixed in. Note that 'concepts' are provided as much as possible rather than content.*
    a. If you have learning content that has been introduced in the past but has not been effectively applied you can re-introduce it in this design.
    b. You may not need a learning event at all if you already have learning concepts out there (this can include things like values, diversity initiatives, innovation, even culture change). You are then just introducing the idea of the learning group and in essence, step 6 below.
    c. If this is the case do not eliminate the need for a steering committee and treat the initiative as a new initiative.
    d. Virtual learning events fit well here.
6. Learning groups meet once a week (minimum) to apply the learning concept to a real business issue for a period of 4 – 6 weeks. *The learning is therefore focused on business context. Normally these meetings are regularly scheduled intact team meetings so no significant disruption to the business is required.* ***See below for a critical component to this design element.***
    a. This process can work very well with virtual teams in their normal virtual interactions. *The Fly on the Wall* process works well.
    b. With non-intact groups the meeting schedule and context relevance is best managed by the group or pair. Making this visible is part of the Educator role of the designer and steering committee.
7. The steering committee monitors the process and interacts with the external consultant if changes to the process need to be made. *Monitoring may take many forms including measurement of impact. We will look at this in a future post.*
    a. The most important thing to monitor is if the learning groups are actually meeting. If the context is important to participants, learning meetings happen.
    b. The second most important thing to monitor is the impact of the learning concept on business issues addressed. Real stories of impact work best.
    c. Sharing of these stories with the larger group is typically important.
8. Steps 5–7 are usually repeated two more times with different concepts being provided for each learning event. *This increases the potential for behavior change plus establishes a new pattern of interaction for applying learning which is building internal capacity.*
    a. Don't be surprised if your planned learning concepts need to change.
    b. You may find learning groups want to change the *Fly on the Wall* process as time progresses. This is typically a good sign but remind groups to make sure they don't lose the focus on learning concepts or the need to disrupt stable patterns of interaction at some points in their work.

As you likely have noticed what is being created is a new left loop in terms of understanding and acting on how learning and development occurs in organizations. In essence what this design framework is doing is legitimizing how learning normally occurs in organizations; one interaction after another with new concepts being introduced into those interactions.

The OUCH! of content focused events is reduced and the challenge and sometimes pain of actually changing behavior is front and center.

The points above are just some variations and considerations that can surface with this design framework. You may have other ideas to offer or questions to ask. If so add your comments and let's see what emerges!

L&D – A Real Story

Right in the middle of writing these posts on extended time frame and context focused learning designs I received a phone call from a potential client. It almost seemed like a test. A test to see if what I was writing about was just that, writing about something but perhaps not about actually doing what I was writing about.

The request was this:

> *"We have a group of around 50 people and we want to use one of your assessments (the Team Management Profile). The leader of the group is getting these people together for a day long meeting and has allocated 90 minutes for your segment. Can you do this for us?"*

As you can no doubt tell I was being asked if I could run a content focused event and make that event magical so it would add value for this group. Pretty much what I have been writing about as being a waste of time in terms of behavior change.

The person I was talking to was a senior HR person and was skeptical (a good sign!) and asked right up front if I thought this was a waste of time (and money). The interesting thing about requests like this is that they are a really, really good opportunity to play all the roles that have been discussed in this series of posts.

The reason it is a good opportunity is that the 'event' is already so short time wise that everyone knows its value is questionable if that is all you are doing! If the event is longer, even half a day, people seem to think magic is more likely to happen.

So right off the bat you have a chance to play the Designer and Educator role. Below is a summary of our interaction.

I agreed with the senior HR person that if all they were going to do was the hour and a half, it would be better not to do it as the value would be minimal. I said however that the hour and a half could have real value if we designed in some before and after interactions.

We discussed and then I sent her a summary of what that might look like:

- Everyone would receive the results of their assessment prior to the event and would be required to review it and as well watch two short videos that provided some background to the assessment.
- After the event (which would focus on a very specific part of the assessment) I would follow-up with the group one week later with an email explaining how to use a specific part of the supplemental material that comes with the assessment and ask that they use it and review their experience of using it at their next regular team meeting.
- A month after that another email would go to the group explaining a second part of the supplemental material and how that could be used by the team.
- The overall leader and leaders of the sub groups of this larger group would be responsible for ensuring this follow-up use of supplemental material happened and I would communicate with

them via email regarding what this support could look like.

I had put time estimates to each of these areas and my contact went to the leader of the group and subsequently the decision to move forward was made. This was quite an expensive initiative and I think the decision to move forward made much more sense when the extended design was discussed. It became quite obvious that the potential for value was far greater with this design.

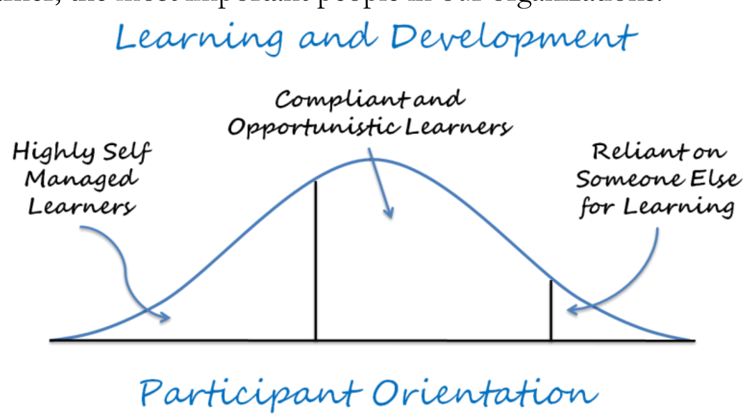
As it happened, the organization decided to accredit two internal people to use this particular assessment internally and it will now be those two people who drive the sustainable use rather than me. They already have different ideas regarding how this will happen that are more specific to their understanding of the organization and I am quite sure they will be more effective than I could be with their capacity to be much more flexible and available than I would be.

When you think of the roles that have been discussed in these posts you can see each of them playing out here.

Role	Mantra
Designer	More Interaction
Educator	Be Early
Consultant	Build Internal Capacity
Facilitator	Be A Model

You can also see them playing out in a very typical situation in the L&D arena in ways that recognize the stability of the left loop regarding learning in organizations and how it is imperative to try to change things incrementally if needed and dramatically when the opportunity presents itself.

Perhaps the most important design impact this type of interaction has is that the design is focused on the self-managed learner; the most important people in our organizations.



The event and my role as expert are not the key variables in behavior change. The design provides self-managed opportunities for people to sustain the use and value of the assessment. It is evident to all that the participants in this initiative have the accountability (and opportunity) to sustain its value. I am certain there are a lot of self-managed learners in this group that will do just that.

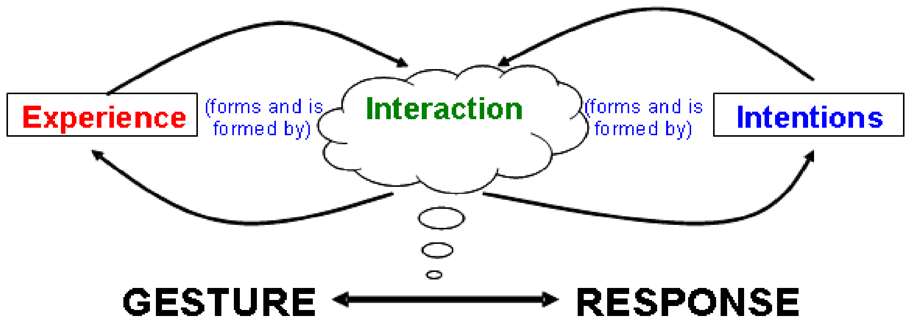
This also freed up the event to be just what it could be; an opportunity for people to interact a lot about a specific part of the assessment data. We didn't have to worry about takeaways, what was learned or next steps. I would imagine in a few weeks' time people will not even remember who the facilitator was, but they will still be using the content and the concepts available to them.

It seemed so right to get this call right in the middle of these posts (remember that synchronicity thing from the strategy post!) Shifting our thinking about L&D and creating different designs that have much less OUCH! can fit into our current scenarios and situations. It does not have to be incredibly hard, different or new. It's really about creating our own new left loop, one interaction at a time....

What are we Learning and Developing?

The posts in this Learning and Development series so far have mostly focused on the process of learning. This post will look at the actual content of what is happening in that process; what is being learned.

You get a stable left loop in the interaction model through the process of numerous interactions.



Interactions that over time establish a pattern that is similar in both content and process. In the post *OUCH! What's the Purpose of This?* one of the points why I am doing this was noted as:

- To illustrate that most organization theory and thus formal practice supports a **drive for certainty** as well as seeing the **individual as a discrete and separate entity distinct from the contexts they experience**; and that this theory does not match our experience.

In order for these things to exist as stable left loops it has to mean an awful lot of what we are learning and developing is this **drive for certainty** and that the **individual is a discrete and separate entity distinct from the contexts they experience**.

This type of learning content feeds the OUCH! in our organizations constantly. And it seems that over time, as this left loop has become more and more stable, we have an almost insatiable appetite for this learning content, perhaps better described as an addiction!

So when it comes right down to it the area of Learning and Development is really mired in a lot of OUCH! producing patterns! Not only does the process of how we typically understand L&D produce OUCH! so does the content we feed into that process! And of course that content then informs and further stabilizes our left loops in things like performance management and strategy.

As a brief example:

About 5 years ago I was on Twitter reading some tweets and came across one by a very well recognized organization guru. The tweet basically read that if you 'pulled these 4 levers' you would get the culture you wanted in your organization.

Normally after reading such a thing I would just go bang my head against the wall a few times and leave it alone but this time I actually tweeted back – *So if we pull these levers we should get the culture we want? And if we don't get it are we incompetent?* I did not expect any kind of response but I actually got something back! The tweet said they were not sure about incompetent but you should get the culture you want if you pull those 4 levers.

So if not incompetent, what is it, if you don't get the culture you want?!? Whatever you call it, there is a lot of OUCH! just waiting to happen.

This example illustrates one of the most common things to be avoided in learning content:

- **A step by step process that ensures you will get some result.**

This type of learning content represents a drive for certainty and more specifically the assumption that power can create certainty. That power may be positional power but more often with this type of learning content the power is subtly defined as the 'correct' execution of whatever steps are listed that will get you some result.

Any learning content that in some way or other ensures that by using that content effectively will produce some kind of a result is problematic.

It is important to be very diligent in looking for this connection in learning content to a drive for certainty. Not only is it often subtle but our own stable left loop in assuming certainty can be produced by power can really constrain us in seeing the subtle links.

Given this, and although this may seem a little drastic, I think we are best to be highly skeptical of ANY learning content since so much current learning content is in some way connected to this drive for certainty.

Learning content that has a connection to a drive for certainty will typically have two common elements:

1. There is a 'correct' way to apply this content.
2. That correct application will produce a (desired) result.

When the desired result is not achieved these two things then create:

Blame, guilt or shame either directed at the learner (shame or guilt), the situation/people the content is applied to (blame) or the content itself (blame).

We can help ourselves be diligent and skeptical of learning content by asking ourselves if it has the two elements or the outcome listed above.

Learning content that positions and develops the individual as **a discrete and separate entity distinct from the contexts they experience** is in many ways a special version of the drive for certainty. I will be looking at this in a more focused way in the post series on Organization Development so will put it aside until then.

For now I would encourage us to take a very critical look at the learning content we have in our organizations through the lens of what is written above. It would be interesting to see some discussion on actual learning content and some debate on whether or not it is connected to the drive for certainty.

Comments, thoughts, examples, debate?

The next post will focus on learning content that stays away from this drive for certainty.

Learning Content Without Certainty

When I was thinking for a title for this post and came up with the four words above I had a kind of twinge as I typed them. As I thought about that twinge I realized that it was coming from my own drive for certainty; my own left loop in that regard. After all, don't we all want to be certain that if we are going to invest in an initiative to learn something that the result will be positive and of value?

It may be this twinge, however it may manifest itself, that draws us to the type of learning content discussed in the last post. **Learning content that in some way or other ensures that by using that content effectively will produce some kind of a result.**

Unfortunately, given the complexity of human interaction, founded on transformative causality, no such guarantee is possible. There simply are not, 4 levers, pulled effectively that will give you the culture you want for example.

So what are we to do? Short of scrapping most existing learning content I think there are three areas that can be good starting points:

1. From existing learning content remove:
    - The 'proper' way to apply that content.
    - The connection to the production of some desired result (certainty).
2. Focus on content that helps us think differently about our own interaction models.
3. Legitimize that any learning content requires an extended time frame and context focus.

Point 1 above is interesting when applied. The first thing that happens when you remove the proper way to apply the content and the connection to certainty is that you are left with concepts. The second thing that happens is that a lot of the actual learning content disappears.

For example currently there is a ton of learning content on the need for effective conversations. **Effective conversation is a concept** and there is no doubt we need to be having effective conversations in our organizations.

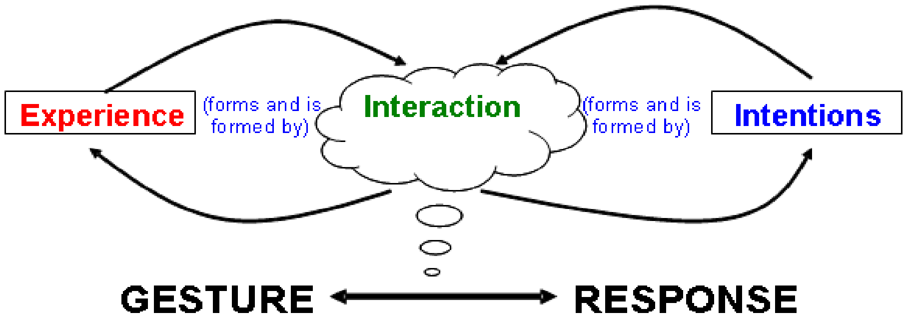
The bulk of actual learning content however is focused on the 'proper' way of applying that concept and given this proper application the assumption is that you will get what you want.

In order for this content to exist it must be generalized and as unfortunate as it may be, none of us exist in a generalized world. We exist in worlds where having an effective conversation means dealing with a very specific person in a very specific context. There is simply no 'proper' way to approach this scenario and there is certainly no guarantee of success.

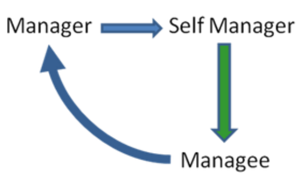
Before we had this onslaught of learning content about effective conversations we probably would have done one of the following if there was a need for an effective conversation:

- Nothing.
- Tried something and see how it went and moved forward from there.
- Asked someone about how to best approach the situation and moved forward from there.

And this brings us to point 2 above – **focus on content that helps us think differently about our own interaction models**. Trying something or asking someone are quite simple examples of this and in essence is the foundation of the learning design discussed in earlier posts.



Since our patterns of interaction and behavior tend to stabilize over time we may need help in recognizing our patterns and altering them and this is where learning content may be valuable. This content will help us think differently. It will not prescribe how to 'do' differently. That part is always up to us and is specific to the environments we find ourselves in.



What Dr. Freedberg described as the Self-Management Model is an example of a thinking tool (learning content) that I positioned in the series of posts on strategy. The concept being focused on is self-management and this content provides a way for us to think about our current interactions with our manager, our patterns of interaction and experience and as well our intentions for future interactions with that manager.

You probably have other learning content such as this that helps you think differently about your own interaction model. One very common aspect of this type of learning content is that you can use it again and again depending on the situation.

This brings us to point 3 above – **legitimize that any learning content requires an extended time frame and context focus**. It is the legitimization that tends to be the challenge here; especially when learning initiatives are focused on larger numbers of people. The posts on learning design focused on legitimizing this point.

What the above three points bring to learning content is much more of a match between the content itself and our actual experiences of being in an organization. This reduces OUCH! and this case reduces OUCH! in learning and development. What this match between learning content and experience exposes is the very real and difficult challenges we have with learning in organizations; learning in general. It is hard to alter our left loops; it is hard to bring new intentions to interactions that may have been stable for years.

It is learning content that exposes this difficulty that is most effective in our organizations. It helps us think about our interactions seriously and perhaps change them. And it is the change in our interactions that changes us and our organizations.

What learning content (concepts) have you found most valuable?

Learning and Development – Measurement

It's pretty much unavoidable to look at the topic of learning and development in organizations without looking at measurement. Unfortunately the topic of measurement in learning and development often creates levels of frustration that no other area of learning and development does.

I think a lot of this frustration, a lot of the OUCH!, is created by the typical way in which we understand organizations which of course informs how we understand learning and development. As noted in earlier posts the primary way learning and development occurs in organizations is through **content focused events**. Even though these are seen as cost effective they are still expensive. The real problem though is that they are typically seen as the only thing, the only activity that is supposed to change behavior and thus positively affect performance in the organization.

If you have a single event that has a large price tag and that single event is supposed to be the primary variable in affecting performance it makes all kinds of sense to ask, 'what is the return on this investment?'

I think that in many ways the frustrations felt in trying to respond to this question are not so much frustrations with the question itself, but that the question surfaces the real problem of content focused learning events.

They don't change behavior!

We all know this but we continue to engage in these singular events and then end up doing a whole lot more non valuable work trying to measure their impact and it cannot be effectively done!

OUCH!

Given that the point of L&D initiatives is to change behavior you have a real problem when the above question is asked if your primary design for learning is a content focused event.

A lot of the OUCH! in measuring the effectiveness of learning and development disappears when the design shifts to extended time frame context focused initiatives. When we look at things like executive coaching, mentoring and even action learning initiatives two things tend to happen in terms of measurement:

1. It is not a priority.
2. It takes a subjective or qualitative format.

It could be argued that this happens because this type of learning design tends to be reserved for more senior people and they have the power to legitimize these two points. You could also argue that the effectiveness of the design itself is what is causing the above to occur. My guess is that it is both. But if you are in an organization or situation when measurement of L&D is a priority the second point is very important.

The most effective way to measure the impact of learning and development is to use

subjective or qualitative methods.

If you want to go deeper into the details of qualitative measurement I have found value in the book *Qualitative Research & Evaluation Methods: Integrating Theory and Practice* by Michael Quinn Patton. There are other resources focusing on this area as well if you check into it a little further.

In a nutshell however, especially with L&D initiatives qualitative measurement is most effective when it takes the following format:

- Collection of individual 'stories' of application and impact of the learning initiative to business scenarios.
- Analysis of enough stories to extract 'themes' of the impact.
- Sharing of these themes and making the actual stories available for review by others.

In many ways the informal process of sharing stories is what sustains the use of things like coaching and mentoring. You will often hear people (often senior people) who passionately tell their stories of how valuable a coaching process has been or how much impact a mentor had on them early in their career.

As you move to extended time frame, context focused designs you are really just formalizing and doing a bit more analysis of this story sharing process.

This type of measurement or evaluation is a shift from the typical attempts at quantitative evaluation so it is important to incorporate this shift right into the design of any initiative. Trying to add this on to the end of an initiative typically is quite difficult. People need to know how evaluation is going to happen so they are prepared and can consider their stories right from the start.

The other thing this type of evaluation does is put the primary accountability for evaluation on the learner and how they are applying their learning in a business context. Most quantitative evaluation methods of learning initiatives do a very poor job at this.

If you are in an organization that is adamant about measuring the return on investment of learning, the faster you can get to qualitative evaluation the better. The causal factors affecting the value and impact of learning are very complex. Quantitative evaluation of learning almost always will force you into looking for simple causal (often one-to-one or A to B) factors. Since these do not exist for complex learning topics your quantitative measures are always at risk of scrutiny by someone who wants to question them and you will be mostly defenseless when this happens.

Moving to a qualitative evaluation process inhibits this significantly. It is very hard to refute a large number of practical stories from participants that say the learning is having a business impact. On the other hand it is also very hard to refute a large number of stories that say the learning is having little impact!

However isn't this what we want from our evaluation of learning?

What are your learning evaluation stories?

OUCH! Organization Development

My plan was a summer break from writing the OUCH! posts. And now here it is December and I'm finally writing a new post! I'm not too sure why summer stretched into fall and almost winter but I have a sense some of the delay had to do with knowing that I was going to be writing posts on organization development. The topic is close to home, and while it is an area I have been focusing on for the better part of 30 years, I also think organization development is deeply flawed. I wasn't clear how to address a topic that I am intimately involved with and at times simply makes me want to scream in frustration!

I'm still not clear but it seemed clarity was not forthcoming so I finally decided to just start writing and see what emerged. Based on the posts dealing with strategy I probably should have realized this was the best approach a long time ago! Our left loops are pretty strong and ubiquitous it seems when it comes to wanting certainty (clarity in this case)!

One of the things that kind of got me over the hurdle of writing these posts was a radio interview with Garrison Keillor the creator of the radio show *A Prairie Home Companion* which ran from 1974-2016 when he decided not to do it anymore. I don't know a lot about Garrison Keillor or the show but in the interviewer's introduction of Keillor he used a term to describe Keillor's approach to writing that stuck with me. The term was 'ferociously gentle'. I like the combination of those seemingly opposing terms.

Quite often when I would write, or talk about organization development the screams of frustration would be forefront; perhaps representing the term ferocious. And yet when I work in the field, with colleagues or associates the screams of frustration are not at the forefront. Most people I have interacted with in the area of organization development are genuinely trying to make their organizations 'better', for everyone involved and grapple with a definition of better that is often not aligned with the rest of what the organization needs or wants to do. It is this experience that brings the term gentle to the forefront.

I do believe those of us in organization development need to seriously question what we are doing. I believe that what we are doing simply has to change if we want to deliver on the definitions of 'better' that I hear so often. If not, I believe we will continue to contribute the shame, blame and guilt pattern of interactions that we <u>say</u> need to be changed. Our good intentions are not sufficient. We need to apply the strengths and skills we have very differently. We need to be better. I believe that those I have worked with in this field can do this. And that we will all need to be ferociously gentle as we do.

So off we go!

In order to consider and write about organization development it is necessary to define what organization development is.

Unfortunately there does not seem to be a working definition to be found, in OD circles anyway! Post a question in a LinkedIn group dealing with OD asking what the definition of OD is and a couple of hundred responses later you will be no closer to a definition. Here is a link to a video titled *What Is Organization Development?* by the Organization Development Network. You would likely think they would have a definition given their focus and membership is involved with the topic all the time. My guess is that if you watch this 13 minute video you will be no closer to a definition of what organization development is. And the framework that is hinted at won't help you either.

The Wikipedia definition of OD is:

> ***"Organization development (OD) is the study of successful organizational change and performance.***"

The problem with this definition (besides the singular focus on study vs. application of that study!) is that everyone in an organization would be an OD person! Everyone is involved in change and performance in some way!

The telling part about OD history is that it originated as a discipline in the 1930's when psychologists noted a connection between organizational structure and design and behavior. From these beginnings the field and practice has exploded, never losing these fundamental roots; **those being a psychological approach and a focus on organization structure and design affecting behavior.**

So while the definition above would include everyone in an organization, the psychological and structural approach to that definition enabled OD to become a separate entity. Not everyone was an OD person, not because of what OD was, but by the way you went about doing that definition. Kind of sneaky really and quite effective at keeping the discipline alive and well today.

I believe it is this approach to OD that is needs to change; where we need to be ferocious in our critique of what we do as OD practitioners and to make fundamental shifts.

To this end, the definition I am using for organization development in these posts is quite similar to the one above:

Organization development is the study of and interactions associated with movement toward successful change and performance.

Everyone is focused on OD in an organization. OD 'people' or departments study (or should be) the interactions leading to successful change and performance more than others.

The definition above works for these posts. It also leads to the need for so much more defining and grappling with meaning. That's where we can all be both ferocious and gentle as we work to apply the definition above to the topic of OD itself.

OD – Psychology, Structure and the Need for Balance

In the last post I said it was the approach to OD that needed to change. **That approach is psychological in nature and focuses on structure and design of organizations.** To be more precise, the change is more a balancing of these two approaches. As approaches to OD they have real value. When these approaches are the <u>only</u> way we approach OD then I think we do have a problem. I would say that this approach is mostly unquestioned in OD circles. And if you dare to question it you will be quickly criticized.

If you use the word balance then there must be things opposite from what is prominent; something considerably different. Something on the other side of the scale.

The balancing perspective of psychology is <u>social construction</u>. The balancing perspective of structure is <u>interaction</u>.

As I was preparing to get back to writing these posts I looked back at a lot of blog posts I had written on the topic and thought that some of these simply needed to be used again, perhaps with a bit of editing, mainly for context. To illustrate the above perspective, below is a post from 2009; very relevant to this topic in 2016. I have been writing posts for almost 10 years now; this post is the 3rd most read post during that time. Edits and additions are in italics.

> **REFLECTIONS ON THE OD NETWORK CONFERENCE – SEATTLE 2009**
>
> Two weeks ago my colleague and I attended and presented at the OD Network conference. It was an interesting time with lots of conversation, chances to meet new and interesting people and then to reflect on the experience and see what emerged.
>
> Perhaps the first thing that stands out for me was that the people who I met there and conversed with were really good people. Everyone seemed to be very sincere in their efforts to make a positive difference in the work they did and were at the conference to learn new things and meet new people that would help them in their work. It is nice to be with a group of people where you sense that sincerity alongside high levels of competence.
>
> The second thing that emerged for me was that the primary and often unquestioned method by which OD practitioners look to help their clients was to assist them go 'inside and deeper' *(a psychological approach)*. By this I mean to look inside oneself or one's organization and try and go deeper inside until some core truth or meaning is found and then by bringing forth that deeper truth into the world, improvement could be made. This might be referred to as true vision, who you really are, deeper meaning, core self, or some other manifestation that resides within us to be found if we go deep enough.
>
> This models the psychotherapeutic *(a version of psychological)* method and while this method can add value it struck me as the conference moved on how dominant this

viewpoint and approach was and how little it was questioned let alone the investigation of alternative methods. In fact I would surmise that a large percentage of the attendees at the conference have never considered or been exposed to other methods of making sense of the work world. They have certainly seen a variety of ways of approaching the 'inner and deeper' approach (many illustrated at the conference) but not often exposed to a fundamentally different perspective.

As an example I was with a group of about 15 where the word psychotherapeutic was used and everyone nodded in agreement of some understanding what was meant by that. The word social construction was then used a little later and only one person knew what was meant by that, and they were an academic studying the subject. Intrigued, I then experimented in the same way with two other groups with almost identical results.

Our presentation was on complex responsive processes; the work of Ralph Stacey and colleagues which has a solid grounding in social constructionist thinking, or basically the 'outward and broader' view of the world and people in it. In contrast to psychotherapeutic thinking, social constructionism posits that we exist and develop in a world that is social and this social process is primary. It is not exclusive of inner and deeper approaches but would say that even if discoveries were made by going inner and deeper those findings came into being by a social process and do not gain meaning until played out in a social context. *If you click on these links the idea of interaction as balancing systems thinking (structure and design of organizations) is what our presentation was focused on. Probably one of the most challenging and rewarding 'presentations' I have ever done. This was also the first big 'public' presentation of our interaction model after a couple of years working with it on our own. Since then it has become the foundation of how we understand and work with organizations. Really how we understand this crazy world of ours.*

I believe it is time for the OD world to be much more inclusive of social approaches to development and change. At a very practical level it matches what is actually happening in the world of our clients. They interact in a social process continually and if we engage that process we can work within it, not outside of it which is what the psychotherapeutic process requires. Too often the OD world asks, even demands that the work world slow down and go inner and deeper. Perhaps it is time to match the pace of the world and go outward and broader.

I have no doubt that the people I met at the conference have the capacity to do this. They were smart, awesome people. The theme for the conference was 'Now is Our Time'. I would agree. Now is our time to move outward from the constraints of the psychotherapeutic model and seriously look to additional ways of adding value.

2016 – I'm not so sure we have made a lot of progress since 2009 in the field of OD. Perhaps this just goes to show that a content focused event (see the Learning and Development posts) doesn't change the world very effectively.

But let's keep trying. We now have blog posts to do this, more of an extended process of interaction. We can still change the world!

We need to start from something very basic however. The fundamental difference of purpose between organizations and people. Not often looked at but that will be the next post. It kind of changes everything!

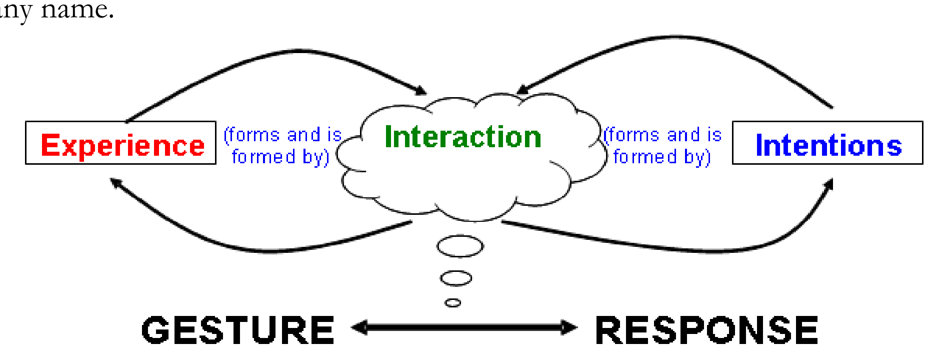
The Purpose of Organizations vs. People

The world, not just the world of OD has a consistent and continuous habit of anthropomorphizing; defining and understanding a thing as if it were human, or having human characteristics. The OD world does this all the time with things like the organization itself, culture, purpose, change, strategy and more. The organization or aspects of it is treated like a giant individual person, with selected characteristics of a human being.

A practical benefit to this habit is that it makes it easier to actually talk about something like an organization. Our words simply go together better when we do this. I will be doing this later in this post and ongoing.

In terms of understanding organizations however, this habit is primarily helpful as a metaphor and unfortunately we seem to have all too often lost the metaphor. We actually talk and think of organizations as living entities in their own right. However, I do not know of any organization that will exist if the people leave. If the people leave you just have buildings, equipment, computers and other 'things' just hanging around waiting to decompose. There is no culture, no change, no purpose. This means all these 'things' are a result of people, and more specifically, people interacting.

Organizations are only 'alive' because of the people who make them up. For example culture is not a thing to be found, it is the repetitive patterns of interaction between people that has become stable over time. Culture in an organization is the left loop of people who hang out doing things under the same company name.



Yet our habit, our pattern of interaction, our left loop in this regard has come to see organizations as if they were people, as if culture can be found somewhere, as if strategy is a thing to be aligned with, as if change was something like changing the oil in our cars.

If you want to change culture, change strategy, even just change anything, you change interactions, nothing else. If you want to understand an organization to some extent you try and understand the left loop, the stable patterns of interactions that constantly go on day after day.

One of the areas that our habit of anthropomorphizing organizations causes real problems is the idea of purpose. This is one of those things that brings the ferocious out in me no matter how hard I try to balance it with the gentle!

By anthropomorphizing organizations we have come to think that the purpose of organizations is the same purpose that people have. By purpose I mean a fundamental driver of meaning and behavior. **I believe this perspective causes more shame, blame and guilt than almost any other typical and current perspective in how we understand organizational life.**

And the OD world overwhelmingly supports this perspective.

I think there is a basic difference between the purpose of an organization and the purpose of a person.

1. The purpose of an organization is to be a viable economic entity.
2. The purpose of a person is to express identity.

I am going to go into more depth on what I mean by these in the next couple of posts but for now, the primary point I want to surface is that I think there is a huge gap between these two purposes. When we do not recognize this gap, when we treat and understand organizations as people, we create a reaction, in people, that is characterized by feelings and behavior related to shame, blame and guilt and all the defensive, aggressive and problematic responses that come with these feelings and behaviors.

Before we go into more depth in the next posts I would ask that you just reflect on those two purposes noted above. For now I would ask that you suspend judgement on their 'correctness' and just think about them in terms of the interactions you have and see in your organization and outside your organization. Is there a difference? If so, what is that difference? What is your purpose? Is it closer to being a viable economic entity or expressing identity?

Let's just see what emerges.

The Purpose of Organizations

In the last post I noted what I think is a really big and ugly problem that has come from anthropomorphizing organizations. **That big and ugly problem being that we consider the purpose of organizations and people to be the same**. If you push people to explain what that same purpose is they will most often say 'survival' is the core or fundamental purpose of both people and organizations. Ask where this idea comes from and you often will get some comment on Darwin and/or the idea of survival of the fittest. Ask what is meant by survival, especially in terms of organizations and things can go almost anywhere. And when things go almost anywhere you really are almost nowhere. What this means then is that there are actually very few meaningful conversations in organizations about the fundamental purpose of an organization, let alone people. The term 'survival' is mentioned and it is assumed everyone is in agreement and understanding is shared.

In that post I also noted that I think the fundamental purpose of organizations and people is very different; there is a big gap in meaning and behavior and this gap needs to be recognized. **I defined purpose as *a fundamental driver of meaning and behavior.*** It was stated that:

1. The purpose of an organization is to be a viable economic entity.
2. The purpose of a person is to express identity.

Let's start with organizations. By viable economic entity I am being very, very basic. I mean the ability of the organization to meet payroll. I think it is accurate to say that no matter what kind of organization it is, if it can't pay people those people go somewhere else. No matter how amazing that organization is or what it actually does. And as mentioned in the last post, without people nothing else matters, nothing else even exists in an organization.

If an organization can meet payroll then there is the possibility of profit, the possibility of delivering on its mission, the possibility of social responsibility, the possibility of shareholder value and all the 'other things' organizations can do. It is these 'other things' that are the <u>anywhere</u> that discussion about the fundamental purpose of organizations goes to. And it is right here that we get lost and where OD in particular is disturbingly lost.

Ask the OD world what the purpose of an organization is and there is a really good chance you will get a psychologically oriented response, probably even a depth psychology perspective. Something to do with meaning, individual purpose, alignment with a higher purpose. While this response may have a well-intentioned, even noble origin, it is simply not what the left loop, the fundamental left loop, the driver of meaning and behavior IS in organizations.

If you took up the challenge from the last post and reflected on the interactions you experience regularly within your organization, my guess is that the pattern of interactions has far more to do with the organization being economically viable, than anything else. Of course if you did take up that challenge it is highly probable that you are in an organization that has met the basic definition of economically viable noted above (meeting payroll) so some additional purpose(s) of your organization will be at play as well. These may be things like vision, mission, strategy, maximizing profit and so on.

Nevertheless, whatever those purposes are they are sitting on a foundation of economic viability. That foundation is the purpose of organizations. Your organization likely has a complicated and convoluted definition of economic viability since it has exceeded the basic threshold. As soon as that viability is challenged or threatened in any way, the response will be an economic one, and any and all those psychologically based definitions of purpose espoused by the OD world are first constrained, then compromised and finally abandoned.

This is not a moral criticism of organizations. It is the left loop of every organization in existence. For companies with shareholders this left loop even has legal precedent in the Dodge vs. Ford ruling in 1919. It is simply what the purpose of organizations is.

The problems emerge when we think and act like this purpose is the same for people; for you and for me. The next post will look at the purpose of people.

The Purpose of People

It is a bit challenging to not get all philosophical when you talk about the purpose of people. At some level this is truly a subjective topic so the best you can do is try to put some of your thinking out there regarding why you have come to your subjective conclusion and go from there.

As noted in earlier posts I think the purpose of a person is to express identity.

This perspective is different from the idea that survival is the purpose of a person; survival being the dominant popular perspective since Darwin did his thing quite some time ago. I put survival secondary to the expression of identity.

Why? Well there are two primary reasons, one slanted toward social construction and the second slanted toward simplicity.

First, if we live in a socially constructed world, that world and our existence in it is relative to other things, most significantly other people. Simple survival adds very little meaning or substance to that relative existence. How we express our identity, including how we express our identity to simply survive, adds significant meaning and substance.

In a socially constructed world, expression of identity precedes survival.

Also, just ask yourself what you have done in your life where you were totally focused on just surviving. My guess is your list is very tiny and for most of us, non-existent. If you do have a list my guess is that it was an expression of your identity in terms of how you went about that focus on survival. Someone else probably would have done things differently; their own expression of identity.

Second, if survival was the primary purpose of people, it is very hard to explain why we have such diversity and the creation of so many things that just don't directly relate to survival. What is the need for art, literature, poetry, blog posts on organization development! What is the need for differing races, species, beliefs, religions etc. etc. etc.

If survival was the primary purpose of things, it would have been far more effective to stop at the single celled organisms floating around in the oceans. They do it better than anything!

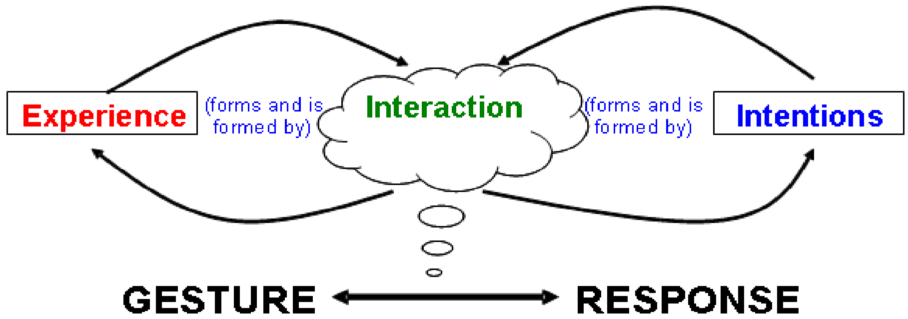
To account for most of what is around us in this world, expression of identity precedes survival.

At least for me, and subsequently these posts!

From this point then, the purpose, the fundamental driver of meaning and behavior for a person rests on a foundation of expressing identity.

As noted in earlier posts, for an organization, the fundamental driver of meaning and behavior rests on an economic foundation.

Consider just how different these purposes are, how different the entire interaction model is if it rests on a foundation of expressing identity or rests on an economic foundation.



What are interactions like; what are intentions like; what is the left loop like and what are the gestures and responses like for each foundation? With even a cursory consideration of these questions we find extensive differences, in many cases differences that would be opposites.

And yet, in the OD world we tend to either ignore these differences or worse treat organizations and people as having the same purpose. The act of anthropomorphizing is no longer metaphorical, it becomes reality and this is where things come off the rails and get ugly.

The next post will look at some of the examples where this dynamic plays out and the damage it can do. As well we will look at what can happen when we acknowledge the big gap between the purpose of an organization and a person.

Struggling with the Gap of Purpose

It has taken me a little while to figure out what this post should focus on. Previous posts established two distinct and quite different purposes for organizations and people.

The purpose of an organization is to be a viable economic entity.

The purpose of a person is to express identity.

These two purposes are not typical of the mainstream definitions of purpose of organizations and people and they illustrate real and important differences. Differences that tend to be ignored in the OD world. The OD world has anthropomorphized organizations beyond the metaphorical and treats organizations like people. And this treatment takes a decidedly psychological perspective.

My challenge in trying to figure out what this post should focus on was a result of my seeing a real gap in the purpose of organizations and people and struggling to illustrate this gap. What I eventually realized was that the present focus of OD simply does not see a gap; the problem mainstream OD creates is seeing both organizations and people as the same psychological entity! Two problems masquerading as one!

What brought me to this revelation was a walk with my dog and a visit to my favorite coffee shop. On the chalkboard of the coffee shop was a quote. 'Our coffee is an experience that chalk is unable to convey.' And I realized that....

'Our identity is an experience that organizations are unable to convey!'

Yet when it is considered that organizations and people are the same, as mainstream OD does, then an organization SHOULD be able to convey our identity; at a very real and personal level.

OUCH!

I need to take a small step back at this point. Above I have been doing my own anthropomorphizing of organizations; treating 'them' as some kind of entity with qualities they simply do not have. It seems to be the only way to write about them in any coherent way. In earlier posts I said organizations are nothing more than the pattern of interactions between people; a fairly stable left loop of people hanging out doing stuff under the same company name.

So if there is a difference between the purpose of an organization and the purpose of people then the interactions we have within the economic context of an organization should be different from those we have within the context of expressing identity.

And if you say organizations and people are the same then interactions should be the same in both contexts. Well they aren't and we all know and have experienced this. Mainstream OD with its focus on systems and psychology feeds this OUCH! constantly and this OUCH! is loaded with blame, shame and guilt.

The next few posts will look at a few of these:

- Finding meaning in your work
- Doing what you love
- Character
- Higher purpose
- Individual power

And maybe more.... even typing these things just makes me want to scream!

Before the next post though, I would ask you to think about the last training or OD type initiative you were involved in. Think about what the interactions were like within that initiative and consider what the intentions of that initiative were. You might want to even jot a few notes down so as we go through these next posts you can be ferociously gentle in your analysis of what was happening.

Are You Doing What You Love?

There is little that irritates me more than hearing OD people, or anyone for that matter talk about 'doing what you love'. I close down videos and web casts, walk out of rooms, throw out articles and come close to banging my head against walls when I hear someone pontificate on doing what we love. We are encouraged to seek out, in a job, what we love, our deepest calling, our destiny, and other endless piles of rhetoric that just make us feel inadequate when we cannot find it.

Keep in mind that the foundation for interaction in organizations is economic (its purpose). Rarely do you **find** those things listed above in economics. I will be questioning their actual existence in a future post.

It's a good time to re-use an older post that deals with this topic with a little addition to the end. This post was originally written in 2012.

PASSION – CHOICE OR DESTINATION?

There's a lot of talk in the OD world about passion and doing what you have a passion for. So just imagine what it might be like if everyone in the world took this sage advice and went looking to find the work they had this wonderful passion for. You're probably now wondering where your next meal is going to come from, you have no place to live in and you're walking the streets naked. Well, there likely wouldn't be too many streets to walk either.

Too much of this OD rhetoric treats passion as something to be found, a wonderful destination 'out there somewhere', and our work is to search until we find this nirvana. Besides being an arrogant slap in the face of the 99% of the world that has to work at something to get by to the next day, week or month it is a devastating message about passion itself. The message is that passion lies outside of us somewhere. That passion is not a choice to be made but a destination to be discovered.

To me it represents another example of the problems with the creative tension model However; this example grates on me like nails down a chalkboard. Certainly, I hate what I see as the arrogance of it but perhaps more importantly I think it compromises our capacity of choice. And when it comes right down to it, is there anything more central to our identities than the power to choose.

I think it is far more powerful (and realistic) to see passion as a choice.

When passion is seen as a choice we cannot escape ourselves and off load the idea that somewhere out there is a place, thing or job that will 'unleash' our passion. Yes, 'unleash' which is another very popular word in OD circles these days. Unleash our passion like it has been chained up somewhere; probably by some boss, teacher, circumstance, whatever we might choose that is outside of ourselves and getting in the way of us being passionate.

Those who see passion as a destination tend to be always looking for something better. Their 'current state' is never good enough and typically the reason for this lies somewhere outside of them. They're always waiting for something better and looking for someone or something to blame when the wait gets too long. They tend to be generally unhappy in a subtle way and a drain on the energy of those around them.

Those who see passion as a choice do good work, even if it may seem mostly meaningless. Primarily because it is them doing it and they have the power to choose to do good work or not. And even if the work is mostly meaningless they choose to bring meaning to it by building relationships with those they work with. The choice may have little to do with the actual tasks at hand and more with the context in which those tasks are done. And those that see passion as a choice see the most important context in the work they do is quite simply, them.

A few weeks ago I heard a CEO talking to a small group of new employees I had the privilege of working with. One of the things he said to them was to be passionate about what they do. The 'do' of that statement could be anything; the passionate part was their choice.

What choice are you making?

2017 – This tendency that OD has to place passion, loving what we do and other emotional components as something to be found 'somewhere' in organizations (like the holy grail) contributes greatly to the dynamic of shame, blame and guilt. It is an example of anthropomorphizing organizations beyond the metaphorical and into perceived reality.

If we are brutally honest, most of the actual work we do is personally meaningless! How we do that work and how we do it with others has meaning, it is an expression of our identity that could occur in any organization, anywhere at any time.

So the next time you hear someone babbling about doing what you love; just leave.

Character

This subject is a troubling one and one that is getting all kinds of mainstream attention. Below is a post that was originally written in 2014. It was published in the *TMS Learning Exchange* E-Journal as well as the online publication *Dialogue*. I am reposting it here as I think it is very relevant within the OUCH! context and representative of how mainstream OD focuses on this topic. This post is quite a bit longer than most here so find some time, sit back and read and then offer your comments.

A CAUTION IN THE SEARCH FOR CHARACTER

In the aftermath of the 2008 semi collapse of investment capitalism and the ensuing and continuing global recession there is a growing trend calling on the need for 'more character' from those who we see as leaders in our organizations. Business schools around the globe have picked up on the need for character by emphasizing and expanding curriculum in ethics, sustainable growth, stakeholder value, community responsibility and such. And as would be expected when something is seen as necessary to lead successful organizations, research and metrics are being developed to measure character. Indeed there is already a growing body of work that ties measurements of character to measures of financial return.

Think for a moment what this may mean as this spreads out into a more general understanding of how we see organizations, success and leadership. It used to be if your organization did not produce the results expected of it, leadership was simply incompetent. Now leadership will be both incompetent and of questionable character. How would you like to carry that judgment around with you?

Think for a moment further about what this may mean generally, not just to leadership. There is a virtual maelstrom of blame being thrown around now to avoid the judgment of incompetence in organizations. Add in the variable of questionable character and it will get worse. Few of us will escape the onslaught of avoidance techniques (including our own) and we can also expect greater levels of the consequences; higher turnover, lower engagement, greater stress and pressure, and perhaps worst of all, a turning away from accountability in its most basic form.

I am not at all against a focus on character in our organizations. What I am against is how this focus on character is beginning to play out in our organizational lives. There are three critical areas that I see as highly problematic:

1. Character in the service of certainty.
2. Character being defined as owned by the individual
3. The dumbing down of the concept of character by metrics

1. Character in the service of certainty

How have we got to this point, this growing trend? The primary, fundamental and mostly unquestioned assumption regarding how we understand organizations is that those who lead can plan the future they want for their organizations. Leadership can create a future that is highly predictable/certain to happen; if they are competent enough. So how can the economic events leading up to 2008 and ongoing be explained within the framework of this assumption? If you landed on a lack of competence as the reason for this widespread compromise of the assumption noted above you would be saying there were an awful lot of incompetent people running large and important organizations. Many of these leaders were educated and trained in Western business schools. Many had the latest management guru's books on their office shelves. Many were coached or counseled by leading consulting companies. And prior to the 2008 economic crash, many were doing exactly what we wanted of our leaders, making a lot of money for their organizations and their shareholders.

If you land on incompetence as the reason for the economic mess that most of us have been effected by, then there is a lot of incompetence in the entire realm of organizational life, likely including you and me.

So we tucked away the incompetence reason and landed on 'character' as the reason.

Interestingly this is a very typical shifting of accountability in trying to explain why things don't go as planned when the assumption of the ability to create certainty is unquestioned. This shift is one from perceived objective metrics to subjective ones. If, for example as a leader of an organization you make an investment decision that doesn't succeed as planned someone can accuse you of not analyzing well enough and look at objective reasons why this was so. If objectivity doesn't produce a sufficient reason for failure then the move is to something subjective, like character. No objectivity is needed here, no hard proof. If someone, especially someone with power, accuses you of a character flaw it is very, very hard to refute this since the definition of character is subjective. You DO have a character flaw from the perspective of their definition, and their definition is right if they have enough power. Character in the service of certainty is painfully uncreative, simply another 'thing' we can hang our hopes of a certain future on. Unfortunately, as noted above, the consequences when character does not produce certainty are even more painfully personal and destructive.

If we want to have productive discussions about the need for a different kind of character in organizations we need, at the very least to decouple it from our assumption that certainty can be created. More effective would be to do away with this assumption in the first place. Then we could talk about character as the highly subjective and context dependent thing it really is. We could talk about character and power, character and the requirement of profit, character and personal compromise.

Are these not the discussions we should be asking our leaders to have? That we should be having ourselves?

2. Character being defined as owned by the individual

Character as something owned by the individual is simply another example of the cult of individualism so prevalent today. This assumes that character is created by an individual, solely owned by them and open to change by individual, personal choice. Context is irrelevant. Relationships are irrelevant. Power is simply something to be consciously dealt with.

The idea that character emerges through interaction with others and is only relevant within the context we find ourselves in is an inconvenience best ignored. Otherwise the assignment of blame becomes too challenging; we might find ourselves in the mix, since we are part of the context.

Keep in mind that many of those now blamed for being so crucial to the economic collapse in 2008 were deemed exemplary contributors to their organizations only months earlier. As the tide of public opinion turned on them, including that of their very own shareholders, their character, as if by magic turned as well, from beacons of light to demons of greed.

If we want to understand how character can impact our organizations we must acknowledge that character, to a very large part emerges in a socially constructed way. That any valuation of character cannot be separated from the context in which it exists. While this may edge us toward the chasm of relativism, where character means nothing and context means everything, we will be better served by nearing this edge than ignoring it altogether. Only by considering context can we really seek to understand the impact our character may have or the impact that context is having on our character. We are faced with much greater clarity of the choices we are making.

Is this not what we want from our leaders? Is this not what we should expect of ourselves?

3. The dumbing down of the concept of character by metrics

As soon as you link a measurement of character to a measurement of financial return you are falling into the trap of assuming someone or some group in power can produce a certain future. Character simply becomes another metric propping up the false belief in the capacity of leaders to create certainty. It is no different than return on investment, cost benefit analysis, sales projections and all the other much more 'objective' things we measure and assume if done right will get us what we want.

When we apply metrics to highly subjective concepts, eventually the concept, and challenges associated with it get 'dumbed down'. By this I mean something that is very complex, and which should remain very complex, gets thought about in very simple ways because what looks like a simple measurement now defines the concept.

We are quite close now to having numbers measure character. If you hit 8 out of 10 you will be of good character; a 5 and you get thrown on the trash heap. No discussion needed on character at all, just the numbers please; I've got recruiting to do here!

Another example; I have asked a number of financial services people what they think caused the 2008 crash. Every one of them said the same thing with different examples used. It was a relatively few greedy, powerful people that caused it all. And when asked what might prevent such a thing from happening again? More or less find a way to get rid of the greed or the greedy people.

Simple reason, simple solution, and no personal accountability at all.

And all the while their own jobs are to do exactly what those greedy people were doing so effectively just prior to the crash; make lots of money on investments.

It becomes so simple when you attach a metric to character. Simple to determine good character from bad, simple to assign blame when things go wrong, simple to say 'I had nothing to do with it'. And you never really have to talk about character at all, you just need the number.

What is interesting here is that some very good work is being done leading to finding metrics related to character. Serious and important conversations and considerations. True caring about what is needed in organizations to make them better across a broad spectrum. There is real hope that the work will make a difference. The dumbing down occurs when all this good work becomes a measurement.

We would be far better served to forget the metric and push for conversations and considerations in organizations that uphold the complexity of character. That asks people to grapple with that complexity and keep the conversations going. To realize there will never be a definitive answer, just more conversation, just more moving forward as best we can.

So what can we do, what can you do? The Don'ts are: Don't let the concept of character be connected to certainty. Don't let character be defined as an individual attribute. Don't let the concept of character become simple.

And the Do's? Ask yourself what character means to you; what is it for you. Engage in conversations with others about the same questions. Keep the conversations going and see what emerges. Talk about power and context and how it impacts character, yours and others.

And perhaps most importantly let yourself be human with regards to character. The ideals of what we think our character should be will always be compromised in some way by being in an organization. Always. Let that be ok even if it is uncomfortable. Letting it be ok keeps the conversations about character going. The discomfort keeps those conversations valuable.

Influencing Resources

- *Payback: Debt and the Shadow Side of Wealth* – Margaret Atwood, House Of Anansi Press Inc., October 1, 2008. I found this a good resource on differing perspectives on debt and how these perspectives shape our thinking of personal value, including character.

- *Complexity and Organizational Reality: Uncertainty and the Need to Rethink Management after the Collapse of Investment Capitalism* – Ralph Stacey, Routledge, February 1, 2010. I like the ideology put forth by Stacey of Complex Responsive Processes and this book applies that ideology to the real world occurrence of the 2008 economic crash.

Afterward

I realize this article is primarily about character and organizations. It is hard if not impossible to put a boundary around organizations and not find their influences outside those imagined boundaries. Organizations leak; everywhere. I think the issues discussed in this article will leak outside of our organizations as well. Imagine a scenario not in a formal 'work' organization. Perhaps your daughter in school struggling with grades, your brother facing foreclosure on his house, your mother without enough retirement savings….

Imagine hearing people discuss these situations starting with this statement:

"It was a flaw of character."

In the light of something not going as planned imagine hearing this statement. Would you be hurt? Angry? Shamed? How will you defend someone against such a statement? How might the person this statement is aimed at be looked at in the future? How will you look at them?

That statement and the questions that will be posed in its wake are on the brink of mainstream conversation. It is frightening.

Engagement

Engagement has more definitions than can be counted in a reasonable lifetime. But most of them tend to have a similar thread. Some kind of alignment with a purpose of some sort.

There is an awful lot of hand wringing or chest thumping about this thing called engagement in organizations these days. A lot of it done by OD people. It seems endless amounts of data are generated on the topic and most of it says organizations suck at engagement and heaven forbid if they don't get better.

I think most of this focus is at best misplaced and at worst just bullshit. The cause of both has to do with seeing people and organizations as having the same purpose. In the OD world that purpose will have a strong focus on finding meaning in your work, finding your unique contribution and other things associated with a person being 'self-actualized' at, in and through work. In other words, some idealized version of an expression of identity. So if you are to be engaged at work, you must be aligned with that purpose.

Given this, and that the data being collected about engagement is focused this way, it doesn't take a lot of figuring out to recognize why engagement scores are low. Asking an organization to produce high engagement scores (alignment with the purpose of expression of identity) when its fundamental purpose is to be a viable economic entity is like asking me to dunk a basketball. Sorry it just isn't going to happen. Except with engagement you will be made to feel guilt, shame or blame if it isn't happening in your organization. This is the misplaced focus of engagement.

Now if you read the dunking comparison above and said well actually I could dunk a basketball if I had a trampoline or someone to lift me up or some other creative 'solution' and the organization, and especially leadership of the organization needs to be the trampoline or the ones to lift me up; well that's just the bullshit part of engagement.

So let's ask a question about engagement that is aligned with the purpose of an organization being a viable economic entity.

Given that the purpose of your organization is to be viable economically and your job here is to contribute to that economic viability, do you feel your work is aligned with that purpose?

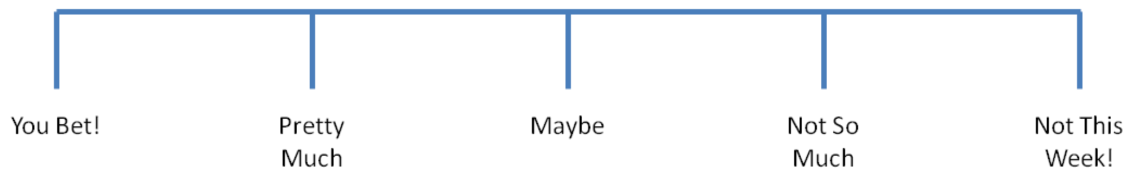
My guess is that if you ask this question, engagement scores go up, simply because the focus of engagement is not misplaced. It matches the purpose of the organization. You might feel a little depressed about the question and its comment on organization purpose but that's just the remnants of belief in a fantasy about what organizations are all about.

Another thing happens when you focus engagement this way. You realize that most of what actually contributes to this idea of engagement is 90% or more common sense and good manners! Common sense within the economic reality of the organization compared with other organizations of similar economic realities. And the good manners your parents hopefully taught you!

The real crappy part about this whole engagement thing is that not only are organizations (specifically leadership or management) expected to deliver on this misplaced focus, but the rest of us (employees) have come to believe that they SHOULD be able to deliver on this misplaced focus as well!

It's a breeding ground for guilt, shame and blame; and the OD world heaps on the fertilizer by continuing to treat organizations and people as having the same purpose.

So another challenge for the next week. Just let that question in bold above stay present in your mind as you go about your work. At the end of the week answer that question using the following scale:



Since many results currently measuring engagement are showing engagement levels considerably less than 50%, if you answered You Bet!, Pretty Much or Maybe you probably scored higher in engagement than many studies are showing. And my guess is most of us scored one of those three because our jobs do contribute to the economic viability of the organization!

So now that you know you are 'engaged' you can ditch the blame, shame and guilt! How easy was that!

Motivation

Ok, just one more topic to sort of rant about and then we'll move on to the so what of all this.

M O T I V A T I O N !!!!!!!!!!!!!!

Most managers' job descriptions I have seen will have some kind of a statement or a specific objective focused on motivating those that report to them.

Well no surprise here but I pretty much hate that. I am quite convinced if they were all just deleted motivation would go up as well as performance levels.

Why? Two primary reasons; one we can look at by defining motivation in a different way than what the mainstream definition is. The other through the lens of the interaction model.

First, what is motivation? I owe a large amount of gratitude to Dr. Ed Freedberg in shaping my thinking in this area.

If you ask people this question you will typically get a response that has some sort of passion attached to it. Things like 'Motivation is doing something I really like' or 'I am motivated by accomplishing something important to me.' What this illustrates is that the mainstream definition of motivation has a definite 'feeling like it' component. We are motivated when we 'feel like' doing something.

If you are a manager and are supposed to motivate those that work for you then you have to make those people 'feel like' doing the things associated with their job.

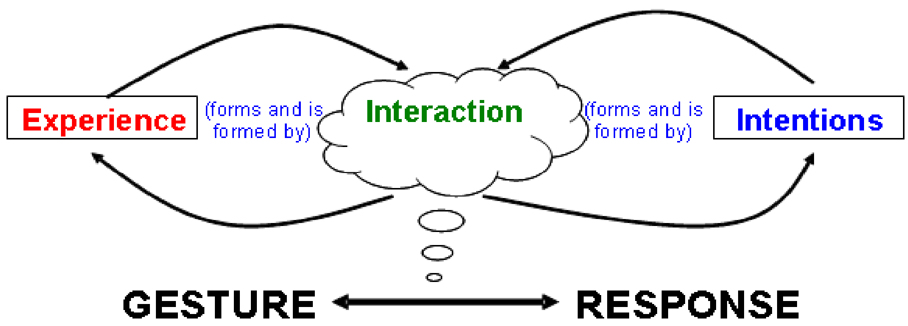
So how many of us 'feel like' attending that budget meeting, having that performance management meeting, responding to that jerk of a customer, firing someone, staying late, dealing with that co-worker you really just don't like?

There are simply just a lot of things in our day-to-day work that we don't 'feel like' doing! Yet we do them anyway. Dr. Freedberg first added a word to the beginning of motivation; success motivation. He then described this as *"…doing what needs to be done, whether we feel like it or not."* Note that this does not exclude the feeling like it component, but that component is not all there is, in fact it's not even a big part of motivation. Feeling like it is kind of like a gift, a neat part of motivation we don't <u>need</u> but it's nice when it's there.

Perhaps even more significant, when we look at motivation in this way, there is a shift to personal choice rather than the expectation that someone else can create our motivation.

This brings us to the interaction model.

In the interaction model motivation is initiated as an intention that leads to interaction; the top arrow of the right loop. Motivation begins as an intention for the future and feeds back into choices we make about our present interactions that we hope will realize this intention.



So think for a minute what it means to have someone else be responsible for, heck even owning your intentions! This is what happens when we place the responsibility for motivation in the job descriptions and objectives of our managers, our leaders. At best, when this happens we are puppets and at worst we are victims. And the managers and leaders in this mess at best will fail in their efforts and at worst will be villainized.

Neither is very conducive to building a LEFT loop, a pattern of behavior that contributes to much of value in an organization, let alone motivation and good performance.

Yet, mainstream OD and countless books, articles, videos and presentations are created, and consumed about motivating people and why it is so important for managers and leaders to do this.

Why?

That's our next step along the OUCH! journey.

Moving Forward

It's time to move forward. To consider what OUCH!less organizational development might actually be. OUCH!less OD is not necessarily a smiley, happy place. It certainly is not a place of certainty. It is however a place with much less shame, blame and guilt; at least shame, blame and guilt caused by the way mainstream OD understands and acts within organizations now.

In the first post of this series I stated that the mainstream approach of OD at present focuses on psychology and structure and that this approach needs balance.

The balancing perspective of psychology is social construction. The balancing perspective of structure is interaction.

Let's start with social construction. I am going to use an older post to get us going. It was written in 2012 and was originally published in the *TMS Learning Exchange* E-Journal. Of all the blog posts I have written over 10 plus years this is one of my favorites. A little longer than usual but a good start I think...

BALANCING THE PSYCHOLOGICAL AND THE SOCIAL

We seem to live in quite a 'psychological' world. A world where everyone understands the words 'ego', 'personality', 'psyche', 'identity', 'self' and so many other words and phrases that, in some way or other, have a sense of individual creation and then ownership attached to them.

The starting point for a world understood psychologically is internal and individual. The first sentence of the prologue of Carl Jung's autobiography, *Memories, Dreams, Reflections*, captures this well:

> *"My life is a story of self-realization of the unconscious. Everything in the unconscious seeks outward manifestation, and the personality too desires to evolve out of its unconscious conditions and to experience itself as a whole."*

One of my sincere hopes for 2013 and ongoing is that we find ways to take the best of this psychological perspective and balance it with a social perspective. A perspective where the words 'construction', 'emergence', 'transformation' and 'interaction' are better understood as part of what makes us who we are at any one point in time. And that who we are is seen not so much as an identity we own, but one that is more fluid, contextual, and shared in its construction by the countless day-to-day interactions we have with others.

I think the pendulum has swung too far to the psychological side and has created a place, for the individual that psychology has created, that too often is lonely and full of guilt, shame and blame. Perhaps with a little more balance toward the social we can find more 'human' places to 'be'.

As the psychological perspective has taken precedence the idea of the individual has become paramount. We, as individuals, are seen as both born with and having created the identity we now own. We are alone in its goodness or badness, its rightness or wrongness, its worth or lack thereof. And it is the I, the individual, who is seen as having sole and unfettered domain over this identity.

As the concept of the psychological individual has become dominant, what that individual should 'be' has been idealized in almost every walk of life. We are inundated explicitly and implicitly with what we should be like as a leader, a manager, a mother, father, daughter, son, consumer, citizen and on it goes. These idealized identities are virtually impossible to attain, yet we are somehow supposed to measure up, and as sole proprietors of our identities it is up to us alone to attain these mythical standards of personhood. And when we cannot reach these heights on our own, we find ourselves in this place of guilt, shame and blame.

The gifts of the psychological perspective; deep reflection, a search for greater awareness, comfort with the transpersonal experiences we all share as well as the vast differences we do not, get lost as the pendulum swings too far. No perspective, exclusive of others, is healthy, and I hope we can let the pendulum swing back a little, and our health as perfectly normal humans can be reclaimed.

What does a social perspective bring, and how might it help us to find balance?

A social perspective brings context into focus. A perspective that reminds us that who we are is significantly affected by the place, time, and people we find ourselves in and with. A focus on context allows us to be a little more the product of the space we find ourselves in and a little less of the person that should be able to transcend that space.

A social perspective brings relationship into focus. Relationship and interaction as immediate causal factors in the emergence of our very selves. As we have discovered through complexity science, the relationship between things may be more important than the things themselves and this can be another way of seeing ourselves. A focus on relationship allows us to believe that the potential for true personal and social change resides in every interaction and allows us to see ourselves less as the expression of innate, unchanging characteristics.

A social perspective brings a focus to the present. A realization that the future resides in the here-and-now and that history can be reimagined by how we think about it today. An acceptance that nothing is more important or real than what, or who stands before us at this moment. An understanding that, while we are dramatically influenced by the weight of our histories and the lightness of our futures, we are not shackled to them since we have the capacity to choose in the present. We have the capacity to choose to act into an uncertain future.

A social perspective brings acceptance to irresolvable paradox. Where context is important, rightness and wrongness become more relative, truth is no longer absolute. The heroes and heroines of yesterday can be the pariahs of today. What is accepted in one place and time is not in another and this can be understood. We can find space for difference while not losing our sense of belief. Paradox need not be resolved.

The social perspective allows for the natural existence of uncertainty. George Herbert Mead talked of a 'conversation of gestures', where meaning is not found in the initial gesture alone. Meaning emerges from the interplay of gesture AND response. The incredible complexity of our past and as well as our hopes for the future come to bear on each interaction we have and the outcomes of those interactions are founded on this complexity. Uncertainty exists in every interaction we have. It is normal and natural. Acceptance of uncertainty allows us to fail or succeed and move on, rather than being racked by the impression we should have been able to somehow manage the uncertainty away.

Finding a little more balance toward a social perspective is a challenge. A broad challenge. The psychological perspective has influence from our first realizations that we are a separate being: from the first time we are scolded and told to 'think about what you have done!'; from the first time we walk into a school and experience a teacher; from the first time we are told who the heroes and heroines of our society are; from the first time we are measured as an individual. We are taught from childhood that we are individuals, and that we are separate and distinct, and these teachings spread into the makings of our institutions, organizations and societies. It no longer seems to be a choice of which perspective we shall take. It is more like the water in our fishbowl, simply an unrecognized need of our existence.

My hope for more balance is not unfounded. As we struggle with the individual consequences of a pendulum swung too far, there are hints that perhaps a choice of perspective does indeed exist. The challenges of unprecedented levels of depression, stress, bullying, and a resurgence of fundamentalism are not being adequately addressed by a psychological approach. There are hints of change needed, some even from within:

> James Hillman and Michael Ventura in their book *We've had a Hundred Years of Psychotherapy and the World's Getting Worse* say *"…Because psychotherapy is only working on that 'inside' soul. By removing the soul from the world and not recognizing that the soul is also in the world, psychotherapy can't do its job anymore."*
>
> Robert Aziz in his book *The Syndetic Paradigm: The Untrodden Path Beyond Freud and Jung* states, *"In great contrast then, to the highest symbol of the Jungian Paradigm, the archetype of the self – which is linear as opposed to nonlinear, concretized and fixed as opposed to dynamic – the highest symbol of the Syndetic Paradigm is that of the Empty Mandala."*

But perhaps more importantly for me are the hints of change I see with the people I work with. Having shifted focus away from many of the dominant perspectives that inform organizational development work, most being psychologically based in the service of certainty, I now focus with people on the day-to-day interactions they have. And how those interactions create patterns that may be sustaining and how we might consider changing those interactions. We talk openly about the uncertainty of our organizational lives, and that even in the midst of this uncertainty we will move on together, because that's what we do.

The stories and experiences people have in organizations resonate with this perspective. We see ourselves much more fully. In many cases we can position the trappings of organizational process and procedure as simply more formal platforms for the continuing conversations that make up what we call organizations.

It is a more balanced perspective I think, and one that seems to fit, just a little better, with what we experience, what we live in our lives and our organizations.

I hope for a balance since a swing too far to a social perspective may create a focus where context is paramount and individual choice is meaningless, where irresolvable paradox swallows belief, and where uncertainty paralyzes decision. No perspective exclusive of others is healthy.

In 1914, on the brink of the first Great War Natsume Soseki in his book Kokoro wrote *"Loneliness is the price we have to pay for being born in this modern world, so full of freedom, independence and our own egotistical selves."* We have been paying this price for quite some time and my hope is that we now can begin to choose not to pay it quite so much.

I hope that we choose to balance a psychological perspective with a social one and perhaps find ourselves with a different way of understanding where such wars, both internal and external are no longer a price to pay.

Why Balancing is Important

Imagine you are standing in a field that stretches out of sight ahead and behind you. On your left a little ways away is a deep chasm. The same on your right, quite a bit further away. You are walking along quite close to that left edge, not even thinking about falling into that deep chasm and disappearing forever. The deep chasm on your right is hardly ever considered, it's too far away.

The deep chasm on the left is a psychological end point; the one on the right is a social construction end point. The world of OD and I think the way we understand life in general walks very close to this left edge, this psychological end point. However, each chasm is eerily similar even though the journey to fall in is very, very different. You really don't want to fall into either one, since once you do, meaning, our own personal meaning is swallowed up.

As you near the left edge, toward the psychological end point it is you, the individual that is primary, paramount and alone. What does this look like in organizations?

- A reliance on individuals that are deemed somehow 'superior' to typical individuals – gurus, experts, people with power.
- A reliance and focus on leaders and leadership.
- A belief that we own our individuality.
- A belief that 'context' is mostly irrelevant and the individual can overcome, transcend and conquer any context.

As we move nearer the edge, the individual, distinct and separate from all else becomes primary, and as you fall off the edge, the individual is 'determined', something outside of the individual has determined what they are, what they are to do and what their purpose is. In this chasm nothing matters because the individual is swallowed by the belief they are determined, controlled, manipulated, and owned by something superior to themselves.

This, I think is the end point of a psychological perspective on what organizations are and what people are, in those organizations. I think we are walking far closer to this edge, to this chasm than we are the other. What are the consequences of walking close to this edge? Look around you at work or look in the mirror.

- An almost endless onslaught of messaging that if we do 'this' thing, whatever some expert tells us, we will, in essence, be better individuals.
- A deep sense of guilt or shame that we are not good enough to do those 'things' that will make us better.
- A belief that good leadership is the answer to our challenges and problems.
- A turning away from accountability and choice at a personal level since that leader is the one that really is accountable.
- A feeling of powerlessness.
- A need to protect ourselves, our individual selves from anything that may be seen as detrimental to our individuality.
- An insistent longing for something 'better', if only we could find it.

OUCH!

A little OUCH! this time; there is a need for gentleness I think. For the above are not inevitable consequences, but consequences of a perspective, a perspective that can be challenged, one that needs balancing. When we look closely at almost all mainstream OD work, almost all messages from organizational gurus, almost all writing on leadership you will find some version of the bullet points above. It is this that needs balancing.

As I have noted in earlier posts it is this psychological perspective that is dominant in the OD world at present. The other dominant perspective is structural or systemic. I think this perspective fits very well with the psychological perspective and may be two sides to the same coin.

More on that perspective in a future post. The next post will focus on the right side of that field and what it is like to walk near that edge and what that chasm is like....

Why Balancing is Important *Contd.*

In the last post a visual was introduced; a field extending in front and behind you with two chasms on the left and right sides. We looked at what it was like to walk much closer to the left chasm, the psychological end point. This is the perspective of mainstream OD, perhaps even a mainstream, western worldview.

What about the right side? I don't think we walk on that side much at all, we don't really know that landscape very well. Perhaps we don't even know it exists! Actually, I think we work very, very hard to ignore its existence, even if this work has mostly become invisible, a background of day-to-day struggle manifesting in the consequences noted in the last post.

The chasm on the right represents a social construction end point. As we near this right edge it is context that is primary. The individual, you, are simply a part of that context. What would this look like in organizations?:

- Generalized expertise, experience or knowledge is devalued since specific context renders it inapplicable.
- A reliance on reacting to the present with very little focus on the past or future.
- A belief that we can personally adapt and change to any context/situation we find ourselves in.
- A belief that the individual is no more important than other variables in a given context, and that personal choice is mostly irrelevant.

And as you fall off the edge into the chasm of social construction end point the individual is 'relativized', simply another random variable, one of countless others that may or may not have any impact on the context at hand. In this chasm nothing matters because the individual is swallowed by their relativity to everything else.

This, I think is the end point of a social construction perspective on organizations and what people are within them. I don't think we often walk too close to this edge or even acknowledge its existence but what might be the consequences of this perspective in organizations:

- An almost endless need to react and respond to each situation as if it was new and different.
- A deep sense of frustration that our knowledge and experience was undervalued.
- A belief that no one, not even us can resolve our problems and challenges.
- A turning away from accountability and choice because our choices have no more chance of making a difference than any other random variables.
- A feeling of powerlessness.
- An insistent longing for something to believe in, something more significant than the here and now.

OUCH!

Another little OUCH! since just like the psychological end point, the social construction end point is simply a perspective; and that can be challenged, would need to be challenged.

So we fall into one chasm of determinism and the other of relativism; neither sounds very enjoyable do they! However, these two posts are about balancing and right now, in the mainstream OD world we are getting very close to the left hand edge, that chasm of determinism. I don't think we are even close finding our way to the right side of this field we walk on, which would at least give us a chance to consider balancing.

What I see are more and more attempts, more and more complexity in trying to overcome the CONSEQUENCES of this psychological perspective and very little challenging of the perspective itself!

What might balancing look like? That's the next post and perhaps more....

Balancing and Paradox

You may have noticed that in the last two posts I have used the word balancing. I have not used the word balance and have not mentioned finding a balance. This is because balancing is a verb whereas balance is a noun and finding balance gives the impression that some end point can be discovered if we look well enough. If we were to think we could 'find' a balance, some kind of end point we would be falling into the same OUCH! producing dynamic as we have right now, as we tread along the left edge of our field, quite immersed in the psychological perspective of organizations and working within those organizations.

So what might balancing be like?

As we walk along this field that has been mentioned in the last two posts, with the chasm of determinism (psychological) on the left and relativism (social construction) on the right we are always moving along; new situations and contexts, new people, new things to consider, new things to entrench. At times we will move further to the left side of the field and at other times to the right. We will constantly be balancing the psychological perspective with the social construction perspective and since those two perspectives are so different we will find ourselves living in a never ending and irresolvable paradox.

At an individual level this paradox rests between two polarities:

1. We, as an individual are the most important thing in our world and as an individual we can create certainty in our lives by making the right choices.
2. We, as an individual are one of countless variables affecting our world and as an individual we live in constant uncertainty and our choices don't really matter since any other variable is just as important.

Kind of feels a bit like an OUCH! doesn't it!

However, I don't think we have really given ourselves much of a chance to consider what this paradox might feel like at all, especially in mainstream OD, since in essence, point 2 does not exist! At least it does not exist in the mainstream content we are exposed to in terms of how we understand organizations and people within them.

Go and try to find a book, article, keynote speaker, podcast, video or anything else focused on organizations that seriously considers point 2.

And yet, each one of us experiences point 2 time and time again in our organizations and in our organizational lives. In our very real and day-to-day experiences point 2 absolutely exists. It is very likely that our day-to-day experience in organizations is much more like point 2 than point 1!

Balancing therefore begins with an acceptance of point 2, which in effect is nothing more than accepting, seriously accepting the reality of our day-to-day experiences in organizations.

This may not be comfortable, but it is real. And it acknowledges the reality of our experiences rather than making us feel guilty or inadequate because of them.

What this also means, is that due to the current and mainstream psychological perspective about organizations, balancing requires us to be hyper critical of mainstream OD content and processes. To demand an explanation of why and how this content and these processes will actually create what they espouse.

After taking these steps it may certainly feel like you are alone in the dark with no clue which way to turn to find a sense of security and purpose. So balancing also means acknowledging that in each and every moment we do have choices available to us, and we can certainly make those choices, to the very best of our wonderful abilities; and see what happens.

Balancing is recognizing that the feeling of being alone in the dark is quite normal as well as the fact that we can choose which direction to go, fully realizing that once we make that choice of direction, we may still find ourselves alone in the dark, or we may find a place much more hospitable.

When I work with people on strategy I emphasize a perspective that I think captures this idea of balancing within the context of strategy. I ask each person to hold on as tightly and rigorously as they can to what they think is right, and also to be prepared to let go of what they think is right as soon as other perspectives emerge. In order to take this perspective you have to be very focused and accepting of the reality and legitimacy of what is happening in the present.

The last few posts have looked at the balancing of the psychological perspective with that of social construction. The next posts will look at the other mainstream perspective of OD; structures and systems, and the balancing perspective of interaction.

Systems Thinking – Being Somewhat Critical

In the last post it was stated that one of the ways of balancing mainstream OD perspectives required being hyper critical of current content and processes in the OD world.

Let's look at systems thinking from a 'somewhat critical' perspective and we'll work our way up to hyper critical in the next post

Systems thinking tends to be seen as one of the foundational disciplines espoused in the OD world. I was introduced to systems thinking in the early 1990's (as many people were) through the book *The Fifth Discipline* by Peter Senge. I was trained in systems thinking by Innovation Associates and used the ideas extensively.

I think one of the biggest contributions systems thinking has made to our understanding of organizations is that the relationships between things are as important or perhaps even more important than the things themselves. Systems thinking asked us to think bigger than the pieces and to try and see some kind of whole, that whole being a system.

I still think this contribution is extremely important. I also think that systems thinking has morphed into a discipline of predictability and certainty, or at least an attempt to do that in organizations. A good way to understand this is to take a simple look at kinds of causality.

Formative causality. This means that something is 'caused' by design. An example is that of an oak tree. Within the acorn is the 'design' of an oak tree. If you plant the acorn and given the appropriate conditions for growth, the acorn 'forms' an oak tree. The process of formative causality is tremendously complex but the basic premise is that an acorn gives you an oak tree, nothing else. You can predict that you will get an oak tree by planting the acorn. Formative causality has a strong component of predictability.

Rational causality. This means something is caused by rational thought and thus rational causality is primarily focused on humans. A person can think something, make a choice about that thinking and then cause something to happen by acting on that choice. You cannot predict what someone's choice may be, given a specific scenario, and the more complex the scenario the higher number of choices that are likely to be available. Predictability fades considerably with rational causality.

Transformative causality. This means something is caused through interaction between people. Two or more people interact within a given scenario and choices emerge through that interaction that cause things to happen by acting on those choices. For example you may go and interact with a colleague being quite sure of what you want to do, and during the course of that interaction new ideas emerge and a different choice is made. Predictability fades further with transformative causality but the outcomes are not necessarily unrecognizable.

What has happened to mainstream systems thinking is that it is based on formative causality. In other words, what mainstream systems thinking leads you to believe is that if you design your organizational systems well enough, if you think systems well enough you should be able to predict the outcome of those systems.

OUCH!

Most formal organizational processes, some of the ones we have been focusing on in OUCH! are based in systems thinking, explicitly or otherwise. The premise is, if you design the process or system correctly you will get the result you want. A good strategy gives you growth, a well-designed performance management system gives you good performance, a good change management plan gives you smooth change and on and on it goes.

The variable that gets lost in all this is that where people are involved, formative causality is hardly at play at all. Even rational causality is not nearly as important as transformative causality in organizations!

Organizations operate from transformative causality and it is firmly founded on unpredictability and uncertainty. For the most part, mainstream systems thinking is at odds with how organizations actually function!

That last statement is not at all popular in OD circles. But lets' look at what happens when you try really hard to make systems thinking, as it now tends to be used, 'work' in organizations.

That is the next post and I'll call it hyper critical....

Systems Thinking – Being Hyper Critical

Before investigating what happens when systems thinking (applied where people are involved) is used to try and create certainty it is important for me to restate that I think the original contribution of systems thinking; that the relationship <u>between</u> things is as, or more important than the things themselves, is extremely valuable. I actually think that this premise is still at the heart of systems thinking and it is the way we have come to understand and use this premise that is problematic.

Nevertheless, since many OD practitioners DO use systems thinking in the service of certainty, the OD world has to take accountability for this and the non OD world has to be hyper critical of this kind of use.

To provide an example of this mainstream use I went to one of the LinkedIn groups I follow did a quick search of systems thinking and the first discussion that came up took me to a website espousing systems thinking. Below is some of the text on the homepage of that website:

> *"When Stafford Beer originally created the Viable System Model (VSM) he was seeking to develop a "science of organisation", a set of invariant laws that could be applied to any sort of organisation of any size. So far, we have not found any organisational context in which it does not apply. It is an approach which helps us to make sense of organisations, or groups of organisations of any degree of complexity and tells us something about how they operate, why they function the way they do and what we might be able to do to change them."*

When you use the term 'invariant laws' and state that you have not found 'any organisational context in which it does not apply' you are talking certainty, or at the very least, giving the impression that if you 'do' this type of systems thinking you will get what you want. The last sentence is much truer to the premise of systems thinking I think but all too often some version of the preceding sentences disguise that premise.

Two concepts are critical to the idea of systems thinking; boundaries and feedback. Boundaries are a real problem for systems thinking and that problem messes up the concept of feedback.

In order to have a system that you can act on that system needs to have boundaries, some kind of limit so you can study and model it. The problem is that it is extremely hard to define a boundary to a system; and it gets worse when people are involved!

The simple example often used to explain cybernetics (a form of systems thinking) illustrates this well. The example is that of temperature control using a thermostat in a room. The boundary would be defined as the room itself, plus the heating source, let's say a furnace. The temperature is set and if it is colder than what is set the thermostat reads this feedback and causes the furnace to come on. Once the temperature reaches the set point the thermostat reads this feedback and turns off the furnace. Simple cybernetics.

However, let's say you want to change this system. How do you do that? Obvious, right! You change the setting on the thermostat. Duh! Except your boundary defined as the room and furnace does not contain the person changing the setting. Well, easy enough, we will expand our boundary to include the person. But how is that person deciding on what new temperature to set the thermostat? Are they being told to? If they are then we have to expand our boundaries to include the person doing the telling. If they are deciding on their own, what are their criteria? What might be the impact on others that happen to wander into that room? Might they influence the person to make another change? If so, the boundary has to be expanded again. And on and on it goes....

So what does mainstream system thinking do? Well they do not abandon the problematic concept of boundary. No, they create second order cybernetics!

This boundary problem is inherent in systems thinking and what happens is that the boundaries just get larger and larger, the feedback loops more and more convoluted and the systems methods created to deal with this more and more complex. Eventually what often happens is a jump into the mystical. Synchronicity, Gaia, Presence, metaphysical intervention; some jump into the realm of the highly subjective. And this jump into the subjective is supposed to create certainty, if we only get it right! Forget the gentle in 'ferociously gentle'; this just makes me ferociously angry!

OD practitioners get very angry as well when you put this in front of them. I have been chastised, told I do not understand systems thinking well enough, I probably can't understand the complexity, or simply ignored. I have experienced the exact same thing that happens to systems thinking when a variable is introduced that doesn't fit; jump to the subjective and make sense of things that way. A convenient way of ignoring the problem or masking it with complexity.

OUCH!

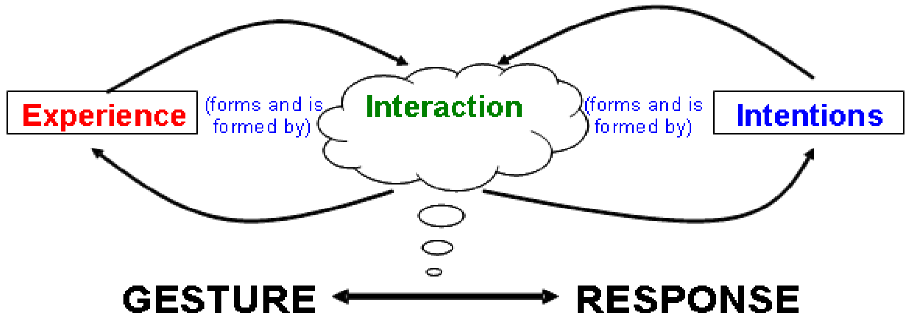
I remember years ago being in a session where we were investigating and learning systems thinking, We spent a couple of hours creating a systems diagram focusing on world hunger. It was huge and we finally stopped since the variables and feedback loops seemed endless. We then asked ourselves so what is this telling us about world hunger and what we can do about it? We looked at the diagram and came to the conclusion that we had no real idea about the dynamics of world hunger or what we could do about it. At least in terms of being certain what we did would solve the problem. That should have been a big red light right then and there! But it wasn't. After all, organizations are not like world hunger.

Later in the session we had to work on our own organizational challenge using systems thinking. Of course this was way less complex than world hunger. But the conclusion I came to was that the real challenge was not in any system I could draw or model, it was the way people involved in the challenge, perceived things, how they made choices on that perception, the power that might affect those choices and the specific contexts in which those choices might be made. In other words, I had no idea about the dynamics of this challenge from a systems perspective. If I wanted to work on it, change it, I needed to go and interact with people and move on from there.

And that was where the red light came on, even if it was very dim and still took a number of years for it to get blindingly red enough for me to put aside mainstream systems thinking in my OD work.

The interaction model is based on transformative causality. It does not predict anything.

It illustrates the process by which transformative causality happens among people. It illustrates our day-to-day experience and while thinking about our day-to-day experiences it may provide some insight and perhaps some ideas for further interaction. It illustrates the tremendous complexity of transformative causality, a complexity that we all know exists. And when used it legitimizes these day-to-day experiences in a far more real way than does systems thinking.



The two primary perspectives of mainstream OD; psychological and structural or systemic lead us directly into the storm of shame, blame and guilt. The psychological perspective leads us there by telling us that we as individuals should be able to overcome anything in our way toward success and the systemic perspective by telling us we can overcome anything by designing and building systems that cause success.

I am reminded of a song lyric by the Canadian songwriter Bruce Cockburn – *If I had a rocket launcher, if I had a rocket launcher If I had a rocket launcher, some son of a bitch would die*

I hesitate to use that lyric and song as what I am describing does not match the horror of the song but at the same time I do think we need to be very angry about what mainstream OD puts in front of us and as OD practitioners we need to be very careful about how we use the power we have.

The next post will look at a few other concepts where this dynamic is or has happened.

On the Road to Fadom

Systems thinking, although one of the espoused foundations of mainstream OD is just one of many potentially valuable concepts that get severely compromised when applied with a perspective of being able to create certainty.

Two more recent examples getting a lot of OD focus right now are VUCA environments and Neuro coaching. My guess is that they will have a 'popular' lifespan of a handful of years and then they will fall into the background as the process of disillusionment with the inability of these things to create certainty repeats itself. Other new and promising concepts will come along.

VUCA stands for volatile, uncertain, complex and ambiguous. Put the word environment behind the acronym and you have a catchy phrase to describe the organizational environments most of us experience daily. However since the OD world has jumped on the complexity science bandwagon, VUCA now has a 'science' to hang its hat on. And mainstream OD is desperate to attach itself to some kind of science to justify and legitimize itself.

Complexity science actually does have a lot to tell us about volatile, uncertain, complex and ambiguous environments. Perhaps the most important lesson is that these environments are unpredictable! It is also unpredictable in these environments to determine which variables in the environment may actually cause the outcomes we eventually see. In other words, these environments truly are VUCA and you can't plan or design yourself out of them to some kind of certain future.

Yet, mainstream OD does exactly that. If you read up on VUCA, attend a talk or training session you will in all likelihood be given the impression you should be able to 'figure it out' and you will also likely get exposed to some 'complexity tools' to help you do just that! Again, the pathway leads to big doses of blame, shame and guilt when it doesn't work out as it should.

Neuro coaching is another example. The scientific advances in understanding how our brain works and how our brain and body work together over the past number of years is extraordinary. So, much like complexity science in the VUCA example above, mainstream OD has jumped on this bandwagon as well. Now that we have some idea of what various parts of the brain do, it's a short leap to say we should be able to control, or perhaps manipulate other brains to get what we want. I actually heard a presenter not so long ago use the term 'amygdala hijack' as if this part of the brain could take over the rest of your brain and body and force it to do its bidding. No amygdala anywhere has ever hijacked anything! Certainly the feeling of anger may have a lot to do with the neural networks in the amygdala but knowing this does nothing in terms of what we choose to do with that anger. Nor does it allow you to control your amygdala. Your grandmother probably told you to count to 10 before you did anything based on your anger and that's still good advice no matter how much we know about the neurobiology of the amygdala!

But put a little science and some cool words together, wrap it all up in the promise of certainty and you have a mainstream OD initiative waiting to happen.

OUCH! OUCH! and more OUCH!

Interestingly, this very dynamic happened with a model created by one of the people that has significantly influenced my thinking about organizations. The person is Ralph Stacey and the model is the Stacey Matrix. Stacey created this model to help illustrate the types of environments we find ourselves in and some of the characteristics of those environments using a two axis matrix, certainty and agreement. Stacey was trying to illustrate and describe organizational environments, not what to do about them. It wasn't long however that people began to create lists of things that should be done within the various parts of the matrix to create higher levels of certainty. Stacey subsequently distanced himself from this Matrix stating the problems with its use; using it to give the impression that you could solve this problem of uncertainty.

The problem is not with the ideas of VUCA, Neuro coaching or the Stacey Matrix; it is the overlay of this belief that we can create certainty by using these ideas. It seems we have a very strong drive or need for certainty and mainstream OD willingly and mostly without question feeds this need. Besides the need for mainstream OD to take accountability for this it is valuable to ask why we may have this need for certainty.

Where might this need come from? This is what our next posts will look at.

Craving Certainty

In the last post I noted that it would be good to better understand where this drive for certainty may be coming from since it is so prevalent in mainstream understanding of organizations and within the OD world that works with these organizations.

Certainty however, was not 'invented' by OD or any other person or group. Certainty is a very important aspect of any living being. Without certainty of various forms and types we would cease to exist at all; let alone exist to question why certainty is a big OUCH! in our organizational lives.

We are going to look at the idea of certainty from three different perspectives:

1. Biological
2. Social evolution
3. Social process

From the biological perspective we will use some of the work of Antonio Damasio and specifically some of the ideas from his book *Self Comes to Mind*. From a social evolution standpoint we will use some of the ideas of Yuval Noah Harari and his book *Sapiens*. For social process we will use some of the ideas from Norbert Elias and his book *The Society of Individuals*.

There are of course countless other perspectives on this idea of certainty. I have picked these three because they have been very important to me in shaping my thinking regarding how organizations function and in particular how mainstream thinking of organizations is problematic.

In addition, while we will not go into very much depth of the people and ideas mentioned above, I think there are critical ideas that can be extracted from these works that are very relevant to what has happened to this idea of certainty.

As noted above, certainty is fundamental to our existence, it is not something we can 'choose' to do without. The three perspectives we will use to look at certainty will establish this point. From there we can look at what has then happened to this idea of certainty that makes it problematic in organizations and what we might be able to do reduce these problems. What might we be able to do to reduce the OUCH!

I am keeping this post short to introduce where we are going. Plus you may want to investigate some of the links above.

We are on the home stretch of OUCH! It is time to begin to put it all together in some coherent fashion. That coherence begins with understanding where our craving for certainty comes from.

However; a question for you to consider. What do you 'want' to be certain about?

Craving Certainty – Biology

Antonio Damasio is a neuroscientist and spends a lot of his time trying to figure out just what is happening inside our heads from a biological point of view. I tend to get rid of a lot of books once I've read them but the four I have of his won't be leaving my bookshelves.

But why a neuroscientist and certainty you might legitimately ask?

One of the things Damasio (and others) have discovered is that the brain spends a lot of time and energy mapping the body's physical state, monitoring what is going on in the body and working very hard to keep the body in a state of biological homeostasis. I am equating biological homeostasis to a version of certainty. Our bodies operate with some very narrow parameters to sustain not just health, but life itself. While you might be able to tolerate your coffee 10 degrees cooler than you would like, your body is in deep trouble with a 10 degree difference. And while you may be able to consume a fairly significant range of pH foods and drinks, that same range could be deadly to the function of internal organs.

Biologically we need certainty to survive and the brain and body work very hard to create and maintain that certainty. And we rarely have to consciously think about this as our brain and body sustain this biological certainty.

One of the drivers of certainty is completely out of our conscious thought and control. It is hard wired and genetic.

This of course is not all that new. A further step that Damasio takes however, is.

When you look at nature, including our own bodies and brains we find the phenomenon of fractals. Basically fractals represent a self similar pattern and/or design at various levels of size and scale. A common example is that of broccoli. You can look at one broccoli floret and it more or less looks like the whole thing, just smaller. Fractals are incredibly common in nature, including our natural selves and occur at many, many more levels of scale than the broccoli example.

Damasio applies the concept of fractals to the human body, from the cell to the organs, to body systems, to the brain and to the body/brain connections. And then that further step; that step outside the body/brain, to the plural, to people and societies.

Damasio is saying that the dynamics seen within the human body, that create homeostasis, life regulation, and biological certainty, extend as fractals do, to societies, which of course include organizations. From the book *Self Comes to Mind* (page 63):

> *"By the time minds and consciousness were added to the mix, the possibilities of regulation expanded even more and made way for the kind of management that occurs not just within one organism but across many organisms, in societies. Consciousness enabled humans to repeat the leitmotif of life regulation by means of a collection of cultural instruments – economic exchange, religious beliefs, social conventions and ethical rules, laws, arts, science, technology."*

Most of us tend to think that it was our brilliant, individual selves that imagined, planned and created those cultural instruments noted above. We do not consider that there may be a very natural, non-conscious and biological impetus for such creation and that this impetus is firmly founded in a drive for certainty.

We may indeed have a very real, biological need for certainty that ramps up from our single cells to the cells of our organizations.

Hmmmm, if the drive for certainty is genetic is OUCH! then biological, genetic and unavoidable? Well, let's look at social evolution and social process first before we revisit where OUCH! is coming from.

Craving Certainty – Social Process

Norbert Elias was a sociologist and lived (1897-1990) through what can be considered one of the most significant and 'compressed' times of social change in history. For me in many ways Elias' work made social construction 'clear' and was a great influence on our interaction model.

So why Elias and certainty?

Elias studied the process of the development of societies and had particular interest in the civilizing process; the process by which individuals in society exist together. How formal processes such as laws, institutions etc. and informal processes such as behavioral constraints developed over time. I am equating the idea of laws and informal constraints on behavior as a form of certainty; things that are required for large groups of people to exist together.

One of the points Elias makes is that as people became more specialized in the things they did, they became more interdependent. This interdependence required changes in the way people interacted, the way they behaved and the very way in which they understood 'how to be' given this interdependence.

Way back in history, hunter gatherer tribes were relatively small and everyone knew each other. While there was some specialization of tasks this was not the main influence on how people behaved together. The main influence was the knowledge each person had of the others. As the agricultural revolution emerged the nomadic life of hunter gatherer people ended and much larger groups of people began living together and there was a much greater specialization of work. If you were a toolmaker you had to rely on a farmer to provide food and the farmer needed to rely on the toolmaker to help the farm function. This interdependence created a need for differing ways of behaving with each other so both the farmer and tool maker could effectively get by.

To get a feel for where this idea of interdependence is now, just take a moment to look around you and consider how many other people you have relied on to have what exists in your immediate environment. I would guess it's quite a lot of people. And you probably don't know, or have ever met any of those people!

Yet, our societies exist with an astounding level of certainty that this interdependence will work!

We are pretty darn certain that we can go to the grocery store and buy food, send our kids to school, go to the movies if we want and all the other things we consider very, very normal. Yet the only thing that makes these things seem normal are countless formal and informal constraints and enablers of behavior that create this certainty! As we have become more and more specialized in what we do we rely more and more on 'social certainty' to enable us to get by in our normal worlds.

Society requires a very high level of behavioral certainty!

Not only did Elias illustrate this 'civilizing process' he noted something very important ABOUT this process. From *The Society of Individuals* (pages 63-64; underlining is mine):

> *"... in the course of history, a change in human behaviour in the direction of civilization gradually emerged from the ebb and flow of events. Every small step on this path was determined by the wishes and plans of individual people and groups; but what has grown up on this path up to now, our standard of behaviour and our psychological make-up, was certainly not intended by individual people. And it is in this way that human society moves forward as a whole; in this way the whole history of mankind has run its course."*

Elias is pointing out that this drive for certainty that is such a necessity for societies (which include our organizations) to exist, *"…emerged from the ebb and flow of events."* Much like the biological certainty noted in the last post, we really didn't have to think much about this certainty, it was simply a requirement for societies, and organizations to exist.

Hmmm... does this mean that certainty is a requirement for the existence of organizations? Meaning (again!) that OUCH! is natural, normal and inevitable. This may be getting depressing!

But let's look at social evolution before we get too depressed.

Craving Certainty – Social Evolution

Yuval Noah Harari is a historian and his book *Sapiens* provides an excellent brief history of humankind and poses some very challenging questions about both the past and the future. It is also, I think, a very good illustration of the socially constructed nature of our world without ever mentioning the term!

Why a historian and certainty?

Harari outlines some similar things as Elias in terms of the social process of large groups living together. Again, he points out the need for social certainty in order for these groups to function together and as well that there was very little conscious or individual thought required for this social certainty to emerge.

Harari adds a component that I think is important. After looking at the ancient history and evolution of humankind he outlines what has happened relatively recently in human history. This being a belief in the certainty of the **future**. In order to have this belief we must **imagine** this certain future. It is therefore an act of imagination to believe in a certain future and yet this act of imagination is typically not seen as imagination. From the book *Sapiens* (page 103):

> *"When the Agricultural Revolution opened opportunities for the creation of crowded cities and mighty empires, people invented stories about great gods, motherlands, and joint stock companies to provide the needed social links. While human evolution was crawling at its usual snail's pace, the human imagination was building astounding networks of mass cooperation, unlike any other ever seen on earth."*

We rarely think of thinks like a stock market, a religion, laws and institutions as acts of imagination but these things have all emerged, without any conscious big picture or strategic thinking through social interaction.

This phenomenon of an imagined and certain future is quite recent in human history but is now so much a part of our experience (our left loop) that it seems very natural and normal. Below is a simple, economic story/example that Harari noted that I think illustrates in a very real way how much this drive for certainty has become needed and entrenched in today's societies.

Example of belief in an imagined, certain future from *Sapiens* (pages 305-307):

> *"Samuel Greedy, a shrewd financier, founds a bank in El Dorado, California.*
>
> *A. A. Stone and up-and-coming contractor in El Dorado, finishes his first big job, receiving payment in cash to the tune of $1 million. He deposits this sum in Mr. Greedy's bank. The bank now has $1 million in capital.*
>
> *In the meantime, Jane McDoughnut, an experienced but impecunious El Dorado chef, thinks she sees a business opportunity – there's no really good bakery in her part of town. But she doesn't have enough money of her own to buy a proper facility complete with industrial ovens, sinks knives and pots. She*

goes to the bank, presents her business plan to Greedy, and persuades him that it's a worthwhile investment. He issues her a $1 million loan, by crediting her account in the bank with that sum.

McDoughnut now hires Stone, the contractor, to build and finish her bakery. His price is $1,000,000.

When she pays him, with a cheque drawn on her account, Stone deposits it in his account in the Greedy bank.

So how much money does Stone have in his bank account? Right, $2 million.

How much money, cash, is actually located in the bank's safe? Yes, $1 million.

It doesn't stop there. As contractors are wont to do, two months into the job Stone informs McDoughnut that, due to unforeseen problems and expenses, the bill for constructing the bakery will actually be $2 million. Mrs. McDoughnut is not pleased, but she can hardly stop the job in the middle. So she pays another visit to the bank, convinces Mr. Greedy to give her the additional loan, and he puts another $1 million in her account. She transfers the money to the contractor's account.

How much money does Stone have in his account now? He's got $3 million.

But how much money is actually sitting in the bank? Still just $1 million. In fact, the same $1 million that's been in the bank all along.

Current US banking law permits the bank to repeat this exercise seven more times. The contractor would eventually have $10 million in his account, even though the bank still has but $1 million in its vaults. Banks are allowed to loan $10 for every dollar they actually possess, which means that 90% of all the money in our bank accounts is not covered by actual coins and notes. If all the account holders at Barclays Bank suddenly demanded their money, Barclays will promptly collapse (unless the government steps in to save it). The same is true of Lloyds, Deutsche Bank, Citibank, and all other banks in the world."

The above sounds pretty normal in the financial world but the only way this can be normal is for us to believe in the certainty of an imagined future. In this case, that the bakery will be a success. And since it now imperative to believe in this imagined future certainty for our societies to function we believe in other imagined things that we have come to assume will help create that certainty. Things like business plans, projections, strategic plans, people's appetite for baked goods etc. As Harari notes:

"It sounds like a giant Ponzi scheme, doesn't it? But if it's a fraud, then the entire modern economy is a fraud. The fact is, it's not a deception, but rather a tribute to the amazing abilities of the human imagination. What enables banks – and the entire economy – to survive and flourish is our trust in the future."

We need certainty in our imagined futures for current society to exist.

So with a very cursory look at three perspectives; that of biology, that of social process and that of social evolution it seems the drive for certainty is a normal and natural occurrence for us humans. I have said that it is a drive for certainty that is the primary cause of OUCH! in organizations.

So is OUCH! normal and natural as well? I don't think so; at least the type of OUCH! I am focusing on.

I think the OUCH! I am focusing on is not normal and natural. Let's look at why and then what we might try to reduce it.

OD's Fatal Flaw

The last three posts have investigated our drive for certainty and established that this drive seems quite natural, normal and needed. It is also a drive for certainty that creates so much of the OUCH! in organizations.

So what is going on here?

When we look at the last three posts there are two very important points about the drive for certainty:

1. This drive is very broad and far reaching; it is not specific.
2. This broad drive requires very little conscious thought and planning.

I think the quote from Norbert Elias fits well here. From the book *The Society of Individuals* (page 63):

> *"Every small step on this path was determined by the wishes and plans of individual people and groups; but what has grown up on this path up to now, our standard of behaviour and our psychological make-up, was certainly not intended by individual people."*

What our current and mainstream understanding of organizations has done; and what mainstream organization development supports is a perspective on the drive for certainty that is:

1. Very narrow and very specific.
2. Requires copious amounts of thought and planning to achieve this specificity.

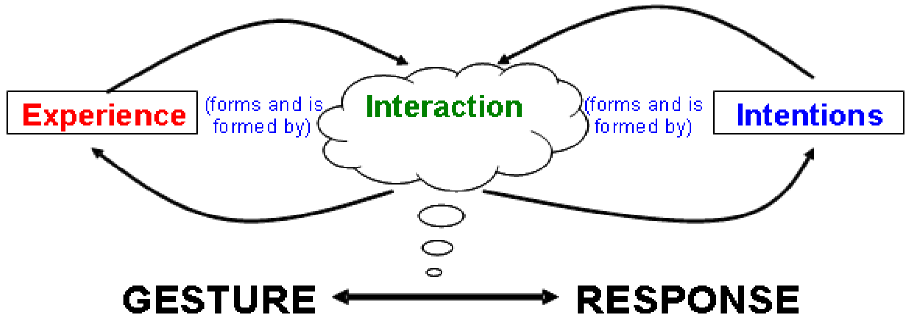
Basically the opposite of what has occurred normally and naturally throughout history. And it is this specificity accompanied by the assumed thought and planning needed to achieve it, is what causes the current environments in organizations that are filled with blame, shame and guilt.

OUCH!

What is going on here is that we have taken the 'small steps' mentioned in the quote above and come to believe that these can indeed define what will grow up on our pathways, no matter how far those pathways may extend out to the future. And because of the specific nature of this viewpoint, this belief gets concentrated at the individual level and we come to believe that some individual should be able to create certainty.

This is the perfect breeding ground for OUCH! since certainty, quite simply, cannot be planned. And in our current world even the small steps are getting smaller.

The reason for this can be illustrated in the interaction model. Interaction between people exhibits transformative causality. From transformative causality emerges outcomes that cannot be predicted or planned for. Those outcomes will not be unrecognizable, but they cannot be predicted to any degree of accuracy, especially as time frames increase.



We hear a lot of noise these days about the increasing pace of change. There is one reason for this. We are interacting more. With each interaction comes the possibility of novelty and change emerging. So as interactions increase the possibility of novelty and change increases as well.

It takes time to understand and adapt to novelty and change, it always has. Humankind has always and necessarily lagged behind in their understanding of the emerging novelty and change in their environments. This is not a failure, it is simply the nature of interaction, transformative causality and the capacity to understand and adapt.

We are not experiencing anything different from what people experienced when they first gathered together in larger groups; more interaction. Now however, our ability to interact has grown exponentially; our capacity to understand the emergent outcomes of this exponential growth has not.

Physical evolution has always lagged behind social evolution.

Yet mainstream understanding of organizations, supported by mainstream OD tells us not only should we be able to understand these increasing levels of novelty and change, we should be able to plan and account for them in ways that will produce some kind of certainty.

This for me simply feels so, so wrong....

I don't actually think most people in OD have thought much about this. Humankind seems to have a very legitimate drive and need for some kind of certainty so why not try to invent things that we think will help this happen in our organizations? This makes sense to me.

But it also makes sense to ask if any of these things are actually working? The resounding answer is no! There is no evidence indicating that a strategic plan creates future success, no evidence that a performance management system creates better performance, no evidence that a vision leads to itself or that a 'wonderful' leader creates any kind of certainty at all!

It is this lack of reflection on what is actually happening in our organizational settings that angers me most about the OD discipline. The people we work with deserve better from us!

As I have been writing these posts I have become more and more convinced that if we simply stopped doing 50% (maybe more) of the formal OD type things we now do in organizations, nothing of significance would change at all, except maybe a lot less shame blame and guilt.

It is unlikely the above is going to happen too soon. But we can make our own changes, our own 'small steps' and see what might emerge on our own pathways.

That is where we are headed next.

Small Steps – Ebb and Flow

> *"... in the course of history, a change in human behaviour in the direction of civilization gradually emerged from the ebb and flow of events. Every small step on this path was determined by the wishes and plans of individual people and groups; but what has grown up on this path up to now, our standard of behaviour and our psychological make-up, was certainly not intended by individual people. And it is in this way that human society moves forward as a whole; in this way the whole history of mankind has run its course."* ([The Society of Individuals]() – pages 63-64)

I think this quote used earlier from Norbert Elias is a good place to start as we look at what small steps we can take to reduce the OUCH! we now experience in organizations. It is also a good reminder of the ebb and flow of things. Most of the formal things we do in organizations, so many of those things causing OUCH! came about like many of the things that supported our drive for certainty as we came to live in larger and larger groups. Not much initial thought or planning, not much consideration that these things were even involved in a drive for certainty. Just things that emerged through our countless interactions in organizations that we thought might help organizations succeed.

If we follow this line of reasoning we would expect that many of these formal things will eventually disappear and be replaced by potentially more effective 'things'. Indeed, there already is a lot of noise about replacing or abandoning performance management systems.

So why not just wait it out and all this OUCH! soon will pass?

Well that would be like deciding not to take any small steps at all! And even if those small steps cannot predict what might grow up on our pathways, they do hold the potential of contribution. As well, OUCH! creates a lot of shame, blame and guilt and we can take our own small steps, planned steps to reduce this OUCH! in our own experience and perhaps for some of those that we interact with on a regular basis in our organizations.

Even though as individuals we may be very tiny parts of the very large ebb and flow of organizational life we do not have to tolerate the very large amounts of OUCH!, the very large disconnect between mainstream understanding of organizations and our actual experience. And who knows, perhaps some of our small steps may have a large impact!

We will be looking at these small steps within the context of our direct and actual day-to-day experiences. Things we can try in our day-to-day interactions that have the potential of reducing OUCH! We will also be using the interaction model.

We will be focusing on the following:

- The formal stuff matters, but not much.
- With people, it's always an experiment.
- Reflect on power.
- Be critical and ask for evidence.

As we go through these areas perhaps some others will emerge but for now, this is where we will start;

considering our own small steps.

The Formal Stuff Matters, But Not Much

One of the quickest ways to remove some OUCH! from our work environments is to change our perspective on the formal things we do in our work environments. Everything else can look and be exactly the same; everyone else can have lots of OUCH! in the same scenario but you don't need too.

This is not some magic answer, or some contradiction to most of what I have been writing about for months! It is simply a logical and rational way to think about those formal things we do in organizations. Things like our roles in performance management systems, strategy sessions, learning and team building events, budgeting sessions, sales projection meetings, communication strategy development, change management planning..... and add your own.

Of course these things matter, but not that much. The logical and practical reason for this is that the FORMAL interactions we have in these areas are numerically tiny compared to the number of day-to-day interactions we have about these same topics. The FORMAL interactions are just <u>one</u> or perhaps a few of countless interactions we have in these areas!

So the best way to get some OUCH! out of these formal things is to think about them as simply one more interaction about an area of focus that it is important.

There is simply no need to get all hyped up and stressed out about having a huge impact in a performance management meeting, or a strategic planning session. These meetings are nothing more than a different context for interaction! Mathematically they have a much smaller chance of making any difference than your day-to-day interactions about the same thing.

The best way to help yourself think this way is to recognize all those day-to-day interactions that you **do have** on these topics. What do your performance interactions look like day-to-day; your strategy interactions; those about change? When you recognize these interactions, stepping into the formal context is simply a continuation of existing patterns of interaction. In fact, when you look at these formal things in this way, you can look at these formal interactions as another <u>valuable</u> context, one perhaps more focused and direct than those day-to-day ones. They do not have to be loaded with false expectations however, and it is this that removes so much OUCH!

Now, if you try to recognize day-to-day interactions about a specific area of focus, let's say performance, and can't think of any, you are either in denial or in trouble, and 95% of the time its denial; just look honestly harder and you will find them. If it is the 5% at play, you are in trouble since you are not interacting with people nearly enough about these important areas of focus in your organization.

Strategy, performance, learning, change, communication ARE important! It's just the formal processes we inflict on ourselves to deal with them that are not!

So give it a try:

- Think about an important area of focus.
- Recognize the day-to-day ways that you interact with others regarding that area of focus (you

should be able to recognize lots!).

- Think about your next formal interaction about this area of focus and see it as simply one more interaction.
- Reflect on how this 'feels'.
- Act on that feeling when it comes times for that formal interaction.

You may notice a reduction in OUCH! You may also notice an increase in your discomfort with your day-to-day interactions in these areas of focus. You may also notice that the reasons the formal things are important in your organization have nothing to do with that actual thing! They are just means of social control and a misguided sense of understanding organizations. Reducing OUCH! doesn't necessarily make things wonderful. It just means you probably have more important and realistic things to think about and act on. It means there is a better fit between your experience of being in your organization and how you understand your organization.

If we are going to be concerned, let's be concerned and focus on things that actually matter. The above may help you do that....

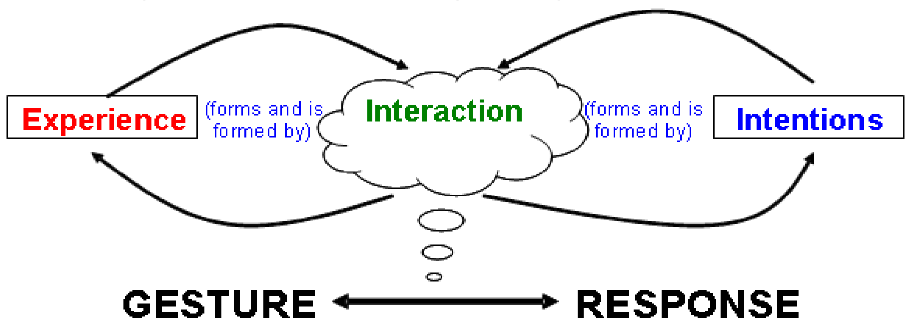
With People, it's Always an Experiment

In the last post we looked at changing our perspective regarding the formal things we do in organizations. Seeing them as just one more interaction among hundreds we have day-to-day on various topics.

This post focuses on changing our perspective of the **expectations** we have of our interactions within our organizations, especially those formal interactions that are intended to create some kind of expected result. Things like strategy, performance, change, vision. Even things as seemingly concrete as job descriptions or performance objectives.

No matter how hard we try and no matter how often we hear that what we do should lead to a specific, measurable and concrete result, if people are involved, every one of these things is much, much more of an experiment than a mapped out journey.

No one has yet been able to figure out how to predict human behavior past the innate, autonomous reactions related to biological certainty. There is a good, logical reason for this.



As I have noted in earlier posts if we look at the top two arrows of the interaction model, each individual brings to bear on every interaction they have, the tremendous complexity of their past experience and their future intentions. Adding to this complexity is that much of this past and future complexity is not even conscious!

So in the midst of our countless interactions it is quite simply not possible to predict what responses we might receive. And the idea of prediction gets even more absurd as greater numbers of people are involved and greater numbers of interactions occur.

There is no doubt in my mind however that YOU and ME are going to be asked, expected or required to produce some kind of certainty in our organizational roles. To reduce OUCH! our small step is not to necessarily fight this expectation (although great if you can/do) but to recognize, for yourself, that this expectation is absurd, for good logical reasons.

As described in the last post everything may look just the same in your organization, but you can think about this differently. It may be quite frustrating to have this perspective but I think frustration is far better than guilt, shame or blame.

A short example and an excerpt from a blog post I wrote in 2011 about a Twitter exchange I had:

> The exchange was with a very well-known management guru (unless they use a ghost tweeter) who was posting about 4 steps needed to get the culture you want in your organization. Without expecting a response and pretty much sick and tired of '4 steps to get anything you want' programs I simply posted something like…*"So if we follow these steps and don't get the culture we want does that mean we're incompetent?"* Well I actually got a response back – *"Not sure about 'incompetent,' but yes, if you pull those 4 levers effectively you will create the culture you want."*

If I was in an organization dedicated to implementing these guru's 4 steps, it could be pretty risky to stand up and say this guy was full of shit. Worse yet, if I believe this guy I am well on my way to being seen as incompetent or some other crappy description of my value and worth. Worse still, if I don't recognize any of this I quite easily begin to see myself defined by those crappy descriptions. This is the pervasive nature of OUCH!

So in a nutshell, this post is asking you to say this guy (and so many other expectations of certainty) are full of shit! Just say it in your quiet voice!

Keep in mind as you adopt this perspective that an awful lot of expectations in organizations and an awful lot of 'experts' are full of shit! You may find this silent mantra becomes highly repetitive for you. OUCH! may very well be replaced by high levels of frustration and a creeping feeling that all this formal organization stuff is quite possibly not just absurd, but mostly meaningless as well.

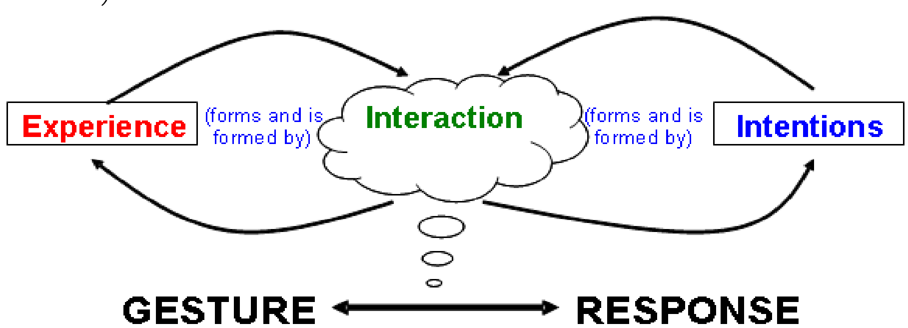
When you get to that point you will most likely smile....

Be Critical and Ask for Evidence

The last two posts have looked at changing our perspectives about the formal things we do in organizations and the expectations we have about our interactions. Changing our perspective tends to be an internal and reflective process. This post is about taking those perspectives and making them more visible. More visible when confronted with OUCH! producing activities. It is about saying things are full of shit (as noted in the last post) but through gestures that may produce responses that keep things moving forward!

There an awful lot of OUCH! producing activities built into our organizations and thrust upon us by so called 'experts'. Due to this I think it is best to adopt a critical perspective about most mainstream and formal things that happen in organizations. This way you are constantly looking for the subtleties that so easily can slip by us and end up creating OUCH!. This doesn't mean you have to be always negative or resistant, just be very sensitive to those things that are asked of us, or we are exposed to that create OUCH!.

What might some of these things be? In terms of the interaction model it will be anything that eliminates or ignores the left facing arrow in the gesture response dynamic, anything that eliminates or ignores the bottom right arrow in the right loop (the arrow depicting a change of intentions based on present interaction).



When these two parts of the interaction model are eliminated or ignored it is the clearest sign that what you are being asked to do or being exposed to is somehow supposed to create certainty and this means OUCH! at a very real and personal level.

Some common examples of things that do this:

- Almost anything that has a certain number of 'steps' that when taken are supposed to end up with some concrete result.
- Almost anything that has a defined end point that is supposed to be reached by someone who has organizational power.
- Almost any single learning event that is supposed to change behavior or produce a concrete result.
- Almost any acronym that when applied is supposed to create a result of some kind (this is a variation on the first point).
- Almost any set of behaviors that are supposed to create success of some sort.

Given the above you can see why it is good to start off being critical!

From this critical perspective you will readily see the OUCH! causing things we are all exposed to. From here it is good to then ask for evidence that any of these activities will actually do what they are espoused to do.

In my experience when you do ask for evidence there are often two common outcomes:

1. You will be given evidence based on 'stories' of when these activities were done in other organizations and the result was positive. This is very common 'evidence' when experts are involved.
2. Your question gets answered without evidence ever being mentioned but that it is necessary to do <u>something</u> and this something is good. This is very common within the power dynamics of organizational hierarchy.

You now have a choice to make since neither of the above is evidence that these activities will produce what they are supposed to do. Your choice is whether or not you want to push harder and risk entering into conflict or just leave things alone, say this is full of shit in your quiet voice and apply what was discussed in the last two posts.

In my opinion, in our given organizational environments, either choice is viable, sensible and just fine. If you do choose to push harder, you may find you end up with some very positive and powerful interactions. Personally I am finding this is occurring somewhat more often and this is certainly positive but I cannot say why this might be the case. Only you know the details of your situation and which choice would be best.

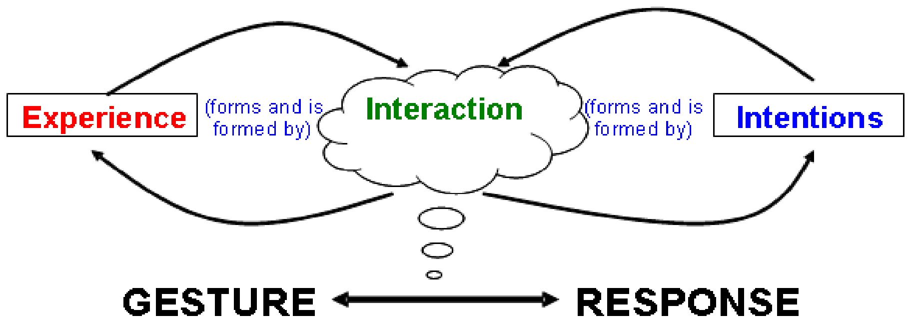
Now, if you are in a position of organizational power I do think you need to choose to push harder. I do think you need to enter into these interactions about evidence and see where they go; perhaps reducing OUCH!. Keep in mind that when you really dig into this idea of evidence, when it comes to people, you will likely not find much; remember with people it's always an experiment! Nevertheless, there are choices to be made, things to try, things you think are better to try than others. There is your own left loop of experience and the left loops of others, along with the right loops of intentions that will inform your choices.

Being critical and asking for evidence, exposes OUCH!, after that you move forward doing the best you can, even with very little evidence that your choices will work or not. And that movement forward will be a little less burdened by the expectations of certainty.

Reflect on Power

The last three posts have looked at ways of taking our own small steps in reducing OUCH! in our organizational lives. This post continues by looking at something that is best ignored if you are trying to convince someone, or believe that you can design certainty. That something is power.

Power is present in every second of our lives and yet overall it is rarely dealt with in mainstream understanding of organizations. The reason power is best ignored in mainstream understanding of organizations is that it is the primary thing that throws a wrench into this idea of creating certainty. Power, in a very fundamental way is the most significant <u>output</u> of our gestures and responses, the actual way the interaction model plays out in our day-to-day lives.



There are almost endless ways of considering and understanding power and the processes in which it affects us. Within the interaction model power can be considered fairly simply. The way we use power is identified in the gestures we use and the way we are affected by power is the way it affects our responses. The <u>dynamic</u> of power is the interplay <u>between</u> gestures and responses in any given interaction.

For example if you are reading this, you are reading my gesture. That gesture has a certain power in that it is affecting your responses such as taking up your time, perhaps influencing your thinking, perhaps helping you to sleep! You may respond back to me with a comment and it would be your specific response that I would respond to that would identify the ongoing dynamic of power emerging between us.

As you can see power is at play all the time, and it is at play primarily and most practically through our ongoing gestures and responses.

There are two important reasons to reflect on power in an effort to reduce OUCH! in our organizational experience:

1. Power is often ignored in mainstream understanding of organizations.
2. Understanding how power plays out for us as individuals gives us the potential for more considered gestures and responses.

In the last post I said once you have asked for evidence (and typically do not get any) regarding something you are being asked to do producing the result espoused, that you have a choice; keep pushing or not. This is a recognition of the real and important power that will be at play in your specific situation.

Most mainstream approaches to situations like this will ignore this power and you will be given the 'tools' or the impression (subtle or not) that you should keep pushing! After all, only by 'keeping pushing' could you create the certain result you want! Well, the power at play in these situations is the most real and important thing happening! Much more important than any tool or impression. And that power can negate any plan for certainty! It should not be ignored to any degree!

When you do not ignore power you have the opportunity to consider the most important dynamic happening between people in organizations; how power is affecting the gestures and responses of people as they move along in their day-to-day organizational lives.

From here you can reflect on your own gestures and responses, and those of others and consider them; ask why they are what they are, ask if perhaps they can be different, how you might alter your gestures and responses to affect change. You can consider yourself and those around you in a much more practical way, one that may be very difficult but also has less OUCH!

I encourage you over the next while to really reflect on the power at play in your work environment. Consider how your power shapes your gestures, how you respond to the power in the gestures of others and how the dynamic of power has both patterns and uniqueness for you.

You may find that you begin to understand you and your work experience quite differently.

You will be Compromised…

I have worked in and with organizations for 40 years now (wow, time does fly)! Over that time there have been numerous times where I felt like I was doing something that just 'didn't feel right'; for me.

For example, going back to the scenario I began these posts with, the ice cream plant, you may recall we ended up doing a budget based on the assumption of hot weather. When that didn't occur we ended up in a position of having to lay people off for a period of time. Some of those laid off were high seniority people who had never been laid off before. I was a new supervisor so now a member of 'management' in this unionized environment. I would not be among those laid off. I had come from that unionized environment so a year earlier I would have been laid off as well.

I can still clearly remember having to go around the plant floor and hand out layoff notices to people I knew well. It did not feel right; for me. I felt like I was doing something that compromised me in some way, even though it was perfectly acceptable and even expected in this organizational scenario.

That was about 37 years ago and since that time I have not met a single person who does not have their own personal story, similar in some fashion to mine.

Does this make us bad people? Not strong enough to live up to our personal standards or values? Does it make organizations demons simply waiting to make us feel lousy?

I choose to look at it this way. As I have noted in previous posts there is a fundamental difference in the purpose of organizations and the purpose of people:

- The purpose of an organization is to be a viable economic entity.
- The purpose of a person is to express identity.

It is this fundamental difference in purpose that makes personal compromise inevitable in our organizational lives. I would say that for me, most of these compromises don't make me a bad person or ethically weak. It is simply part of the economic game that is the purpose of organizations and for most of us we need to play this economic game.

So it is not helpful to participate in organizational life, blaming organizations for having a purpose that is quite different from us as people. It is also not helpful to heap guilt or shame on ourselves for feeling compromised; it is inevitable.

But the reason these things are not helpful is that they become distractions, perhaps even unconscious or convenient distractions from recognizing, reflecting on, and trying to change things that ARE more serious compromises.

In light of having to distribute those layoff notices it was quite easy for me to think that this is just what being in an organization is when you don't meet your budget and we all know that. It was part of my job to hand out these notices. I could easily forget that the cause of this was primarily the ridiculous and OUCH! filled budgeting process! Could I do anything about that? At the time, that question did not even cross my mind.

So while it is important not to blame the game for having the rules it does, and not blame ourselves for playing the game, it is just as important to really question the rules of this game we all play and try to change them when we think the compromises are important.

A lot of what these posts have been about, the OUCH! in our organizations are things that DO compromise people. Compromise people significantly, and for the most part we are willing participants in this compromise. And our left loop to deal with this compromise is to exist in environments that we have filled with blame, shame and guilt.

So again we find the need for balancing. Balancing the need to be gentle with ourselves as we participate in organizations that compromise us, and the need to be ferocious in our efforts to see and change the causes of compromises.

Some Final Thoughts

This is the 63rd post in *OUCH! The Misfit Between Theory and Experience in Organizations*. It's also the last post in what will soon be an e-Book. But certainly not the last post on this particular topic I'm quite sure!

In many ways writing these posts has been about getting my thinking straight and as coherent as possible in terms of my perspective on organizations and our experience within them. To that end things have gone well!

In addition, as I have written these posts I seem to have become more sensitive to the amount of OUCH! in organizations and the multitude of things that cause it.

As an example, some time ago I was sitting in a large room listening to a senior talent management executive talk to about 50 or 60 people about what they were doing on the talent management front, right from recruiting, onboarding, development, retention and succession. Pretty much the entire gamut of an experience in an organization. What they were doing was also pretty much leading edge in this area; managing the employee experience from arrival to retirement.

I knew this person and it was nice to hear them talk about their leading edge work. Yet as I sat there I began to wonder, really wonder, what would happen if they simply stopped doing all of it!

I came to the conclusion that not much of anything would happen.

Of course there would be some transition to this place where none of this happened but pretty quickly those people listening to this presentation would figure out their own ways of managing their experience from arrival to retirement in their organizations. They didn't need to have their experience 'managed'.

However, we seem to have come to a place in organizations where we think and feel it is necessary to 'manage' everything. We no longer even think whether or not this adds any value, yet alone causes OUCH! and real damage.

As I began writing OUCH! I had a perspective that a lot of the reasons for this was our unquestioned assumption that we can 'manage' to a state of certainty. More or less 62 posts have illustrated and reflected on this. I still agree with this perspective.

As I come to this final post however I wonder if we may look back 50 or 100 years from now and recognize that these things we do in organizations that cause so much OUCH! are simply another form of an attempt at social control.

Not much different from the rules of behavior in the Courts of royalty from hundreds of years ago. Not much different than the rules of religion. We look back now and see many of these rules as nothing more than an effort by those in power to manage and control those not in power. At the time these things were not seen as this, they were seen as ways to create and maintain stability; certainty, of a particular way of life. And many of these 'rules' created huge amounts of OUCH!. Yet of course you were not allowed to talk about that; that was one of the rules!

Changing these rules, these patterns, these left loops was not easy then and it is not easy now. Do we need a revolution? Perhaps, perhaps not. Do we need resistance? Definitely!

As I sat down to write this last post I assumed I needed to end this writing with some powerful insight, some moving words that would capture the essence of this work.

But it seems this is not the case. I will simply close with a question.

What will you do to reduce the OUCH! in your organizational experience?

