

Understanding the ROI of the AI Summit: A Definition, Short History and Conditions for Success

Bernard J Mohr and James D. Ludema

This article is based on *The Appreciative Inquiry Summit: A Practitioner's Guide to Leading Large Group Change*. San Francisco: Berrett-Koehler (2003)

Understanding the ROI of the AI Summit: A Definition, Short History and Conditions for Success

Bernard J Mohr and James D. Ludema

This article is based on *The Appreciative Inquiry Summit: A Practitioner's Guide to Leading Large Group Change*. San Francisco: Berrett-Koehler (2003)

The ROI of Having the Whole System in the Room

When we tell people that an AI Summit requires 3 to 5 days of intense, energizing offsite work to be successful, they generally gasp, look at each other in astonishment, and say “there’s no way we can afford to pull our people away from their work for that period of time!” This response, of course, is understandable in many ways. Most organizations keep their operations running 365 days a year, in some cases 24/7. To shut down the whole organization for five days is never easy and sometimes impossible. Similarly, no one wants to spend more time in meetings than is absolutely necessary, especially when they pull us away from the “real work” of the organization.

There are four important things to point out in this regard. First, AI Summits are always focused on the “real work” of the organization. This is different than other types of meetings such as training sessions, retreats, pep rallies, and conferences that pull people away from the core task of the organization. AI Summits are designed to help the organization make a strategic and tactical leap forward on its “real work.” For example, a series of summits David Cooperrider and Ron Fry did recently with Roadway Express focused on the topic of “optimal margin.” Groups came together for four days at a time in

multiple sites to discuss, plan, coordinate, innovate, and design their organizations to produce optimal margins in the highly competitive long-haul trucking industry. There is nothing more real for Roadway Express than their margins vis-à-vis the competition.

Second, our experience with more than 100 Summits to date suggests that three or more days makes a dramatic difference in the quality of the relationships that get established, the depth of the conversations that take place, and the impact of the change that occurs. It takes time for people to get to know each other, build trust, hear each other’s point of view, see new connections, imagine new possibilities, develop new strategies, create new designs, and launch new initiatives to radically transform the organization. Inevitably, when organizations try to cut corners and “get it done” in a day or two, they are disappointed with the results. The change is superficial, and after a couple of months, people begin to feel like the whole event was just another “flavor of the month.”

Third, much of the important work in a Summit is done during breaks, lunches, and overnights as people connect with each other informally and hatch new ideas. We strongly support Marv Weisbord and Sandra Janoff’s notion of at least 2 overnights. This allows much

Bernard J. Mohr is a Principal with Innovation Partners International. His areas of expertise include corporate transformation, high performance/high engagement work systems and leadership for complex organizational change.

needed time for personal reflection, informal dialogue and whole group synthesis.

Finally, AI Summits cost less and take less time than traditional change processes precisely because they get the whole system in the same place at the same time. They circumvent the usually slow and time consuming process of passing attempts at change up and down the chain of command. John Deere earning millions of dollars in new market share, Nutritional increasing profits by over 200%, and many other examples show that the return on an AI Summit is directly related to how much time and energy you invest in it. Consider the following story.

Tony Burman, the Canadian Broadcasting Corporation's (CBC) Chief Journalist and Executive Director of CBC Television News – an 1100 person global unit responsible for news and current affairs programming – wanted to create a vibrant culture of change. Several years earlier, he had begun a process of renewing his department through working committees. But he wanted a change approach that was more inclusive, more pervasive and ongoing. Following a two hour exploratory session with members of his senior management team and Bernard Mohr, Tony decided to hold an AI Summit. He believed that bringing together reporters, cameramen, journalists, producers, managers and hosts to invent new ways of collecting, editing, producing and evaluating news was the way to engage and ignite employees.

Some were skeptical about bringing together staff without first having a clear vision of the end game by senior management. Some journalists were wary of a process that adopted an affirmative approach. But Tony, his team, and the CBC Learning and

Development department gambled on the Summit. Following the three days of intense dialogue, debate, creative dreaming, invention and planning they could not have been more pleased. The group presented their initiatives to the Executive Vice President of Television, Harold Redekopp. Harold responded, *"In all my years at CBC I've been trying to explain what deep organization transformation is really about. This is the first time I have really seen it in practice – we have done it and we should all be very proud of ourselves."*

Defining an AI Summit

The Appreciative Inquiry Summit is a method for accelerating change by involving a broad range of internal and external stakeholders in the change process. It is typically a single event or series of events of 3-5 days in length, that bring people together to: (1) discover the organization or community's core competencies and strengths, (2) envision opportunities for positive change, (3) design the desired changes into the organization or community's systems, structures, strategies, and culture, and (4) implement and sustain the change and make it work.

As the CBC case illustrates, the AI Summit process creates conditions to enable deep transformation in people, organizations and communities. It does this by bringing members of the "whole system" together to learn from their strengths, envision new possibilities, and co-create the future. It is based on the simple yet profound assumption that human communities enable extraordinary performance when they combine and develop the capacities of every member in service of the whole.

The AI summit methodology represents a radical shift away from traditional change management approaches that put the responsibility for change in the

hands of just a few individuals and are based on the assumption that the best way to move forward is to solve problems. The appreciative inquiry summit begins with the premise that organizations change fastest and best when their members are excited about where they are going, have a clear plan for moving forward, and feel confident about their ability to reach their destination. In other words, quick and effective organization change is a product of having the “whole system” aligned around its strengths and around ideas that generate energy for action.

A Short History of the Appreciative Inquiry Summit

The seeds of the AI Summit methodology were planted in the mid 1980s when John Carter, David Cooperrider, and Mary Ann Rainey, all doctoral students at Case Western Reserve University, were asked by Touche-Ross Canada to lead an important strategic planning process. Two key executives were close to retirement, and they wanted to empower a culture of co-leadership throughout the organization before stepping down.

Based on their growing interest in the appreciative approach, John, David, and Mary Ann created a set of positive questions designed to discover and highlight everything that gave “life” to Touche-Ross when it was most successful and most capable in terms of co-leadership. But, instead of using the traditional OD approach of doing the interviews themselves, they engaged some 350 partners from 40 offices around the country to interview each other. Junior partners interviewed senior partners, and vice versa, to promote dynamic cross-generational learning. Their logic was that if indeed the 350 partners were the future leadership of the organization, who better to understand at a deep level the forces and

factors that support organizational excellence at Touche-Ross.

Once the interviews were completed, David, John, and Mary Ann brought together many of the partners to develop a set of “provocative propositions” that represented their image of the ideal organization. They called this event the “Partners Roundtable” because it was a fully participatory, open, dialogical process. Every partner was an equal participant in the co-creation of the future. The Partners Roundtable was the first experiment in large group, “whole system” appreciative inquiry, and many valuable lessons were learned.

- The first lesson was simply the remarkable power of a process that invited full participation and full voice on the part of organizational members. Both junior and senior partners said they accelerated their learning and experienced immediate growth in their effectiveness by being able to interview each other across the “generational divide.” Similarly, at the Roundtable, in a matter of two short days, the partners developed a comprehensive strategic plan that engaged their energies and redirected the focus of the organization.
- Second, David, John, and Mary Ann were amazed by the power of storytelling at the Partner’s Roundtable. When people shared stories of peak performance and extraordinary contribution, not only did it delight the listeners, but it promoted learning by revealing and describing the root causes of success. It also made the seemingly impossible, suddenly possible. If they did it very well once, they could do it even better the next time.

- Third, they discovered the power of a positive guiding image of the future. When the partners wrote their provocative propositions they were in essence writing a set of comprehensive design principles that would shape the future of their organization. Taken together, these design principles comprised a robust, practical image of the future. It described their commitments around systems, structures, strategies, organizational culture, approaches to leadership, and so on. It set the stage for concrete action in the organization.

The Rapid Growth of the AI Summit Methodology

Since those early days we have learned much about success with this methodology – in places like the *Organizational Excellence Program*, - created to allow senior executive teams to come together to discover their strengths, build a compelling vision for the future, share best practices, and launch action initiatives to enhance the effectiveness of their organizations); *The Christian Reformed World Relief Committee (CRWRC)* - where we took a single organization and focused it on a single change agenda, ie developing an appreciative approach to building and measuring organizational capacity; to the *United Religions Initiative* - a five-year project of 5 global summits and approximately 10 regional summits of 100 to 250 people each to draft a preamble, purpose statement, set of organizing principles, charter, and plan for evolution of a global organization dedicated to promoting interfaith cooperation, peace, and healing.

These are just three of hundreds of organizations worldwide in the corporate, non-profit, government, and community sectors who have used the AI Summit methodology since the early 1990's. Other examples include

McDonald's, John Deere, GTE (Verizon), British Airways, British Telecom, Hunter-Douglas, Roadway Express, Vermont Coffee Roasters, Nutrimental, Avon Mexico, US Navy, Canadian Broadcasting Corporation, Canadian Department of National Defense, World Vision, American Red Cross, United Way, United Religions Initiative, and dozens of non-governmental organizations (NGOs) and communities around the world.

These organizations have employed the AI Summit methodology to address a variety of agendas including leadership development, strategic planning, organization design, culture transformation, business process redesign, brand building, vision and values clarification, customer service, knowledge management, labor-management relations, quality, safety, the formation of partnerships and alliances, and the integration of mergers and acquisitions. Some organizations, such as Hunter-Douglas, Nutrimental, and Syntegra, a division of British Telecom in the Netherlands, have begun to use the AI Summit as an on-going way of managing. They hold regular AI Summits to address specific topics, pursue new business opportunities, or re-align the organization around a common strategic direction.

Ten Essential Conditions for AI Summit Success

We have learned much from these organizations and the courageous experiments they have done with the AI Summit methodology but it is still a radical idea for many organizations. People are often surprised when we tell them that we prefer working with large groups of 200 – 300 people for most of the organizational change work we do. They wonder how we do it, how we keep order among so many people, how we arrive at consensus, and how we ensure commitment to consistent follow

up. These are good questions but not the questions we ask ourselves when planning, facilitating or assessing the success of an AI Summit. Instead, we ask, how can we create a safe and inviting context for open, authentic conversation? How can we help the large group honor diverse ideas and opinions, bond emotionally and move together toward higher ground? How can we build excitement and trust in a co-created future? In other words, how can we help build an organization's capacity for ongoing positive change?

With these questions as our guide we find that there are ten essential conditions for the success of an AI Summit. Certainly, there is much more to a summit than these ten conditions, but we consider them to be an essential starting point – and there is much more to these conditions than we have room to describe here. For detailed descriptions of each condition please refer to *The Appreciative Inquiry Summit: A Practitioner's Guide to Leading Large Group Change*. San Francisco: Berrett-Koehler (2003)

We offer this consolidated form as a way of summarizing what we have learned and hopefully as a stimulant for your own practice and growth – and also perhaps as a basis for client-consultant dialogues about what will help to ensure success.

Ten Essential Conditions for AI Summit Success

1. A Relevant, Clear and Compelling Task
2. An Unconditional Focus on the Positive
3. Robust Planning
4. The Whole System in the Room, The Whole Time
5. Commitment to Support Success of Decisions and Outcomes
6. A Healthy Physical and Relational Space
7. Minimal and Mindful Facilitation
8. Begin with Appreciative Interviews
9. Flow Through the AI 4-D Cycle
10. Create a Narrative Rich Environment

An Invitation to Experiment with the AI Summit

The AI Summit methodology is still in its infancy. There is much to learn and many experiments to be done. We hope that you will join with us and with other practitioners around the world in taking the AI Summit to new heights and co-constructing it in ways that give it ever more potential to transform organizations and human communities.

Reprints of this article are permitted provided that the author's name and contact information are clearly listed on each page.