



AFTER THE DANCE WITH WHOLE-SCALE CHANGE (WSC)

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We have given much thought to how large group events demonstrate principles of human systems dynamics (HSD) and how HSD explains why large group events work. Our work in *The Handbook of Large Group Methods*, Chapter “After the Dance” Alban and Bunker, Wiley, 2006, began to explore how to sustain the work after the event but our space was limited for that publication. This article delves more deeply into HSD principles and Whole-Scale Change protocols, principles, and experience. You can find more information on Appreciative Inquiry, Open Space, and Future Search on http://hdsinstitute.org/dept_press_publications.asp

BACKGROUND

The Whole-Scale Change (WSC) methodology was developed by Kathleen Dannemiller and is used in a variety of applications including strategic planning, work design, re-engineering, training and culture change. The designers have developed processes that allow their client systems to:

- Clarify their current reality (including the drivers for change)
- Shape a vision for the organization they are striving to become
- Develop action plans that move them toward that future
- Address information, process, structure and relationship issues vital to the change process

The operating model behind Whole Scale Change was developed by Beckhard and Harris and is that organizations change only when a combination of dissatisfaction with the current state, a co-created vision of where the system could be, and articulated first steps toward change together outweigh resistance to that change.

The equation that reflects the belief that change will only occur when:

DVF>R or *Dissatisfaction x Vision x First Steps > Resistance*

One of the principles that Kathy Dannemiller held to so strongly was the use of a Design Team (DT). Every large group event would be preceded with time spent with a Design Team that was a representative group of the whole that would be attending the event. Her process would be to listen carefully to how the DT was describing the system, and then she would prepare a draft agenda of the 3-day event, which would be discussed by the DT at length. This was her unique way of seeing the system through the experiences of others, watching for patterns that would match the design that she knew would work with a larger group.

Other consultants have modified this approach using a smaller DT of about 8-10, also of a mixture of the whole, and working for 2-3 days to develop the agenda from scratch, using the DVFR as a reference. These consultants knew that the patterns of behaviors that were demonstrated during this time with the Design Team would be the patterns that would emerge during the event and would therefore need to be addressed in the design.

No matter what the approach, the consultant is able to either follow the Dannemiller/ Whole Scale Change approach literally, or to go more organic and include other parts of large scale change models in the design. The key learning is that the use of a “max mix” (the maximum mixture of the whole) Design Team, provides a lens into the system that allows the consultant the ability to observe interactions, understand hidden issues, and be prepared to encounter the larger system by having engaged with the smaller system (Design Team)

Our purpose in this article is not to outline the specifics of WSC but to look at the “pattern setting” process. If you would like information about the method, consult *Whole-Scale Change™: Unleashing the Magic in Organizations* by Dannemiller Tyson Associates.

SETTING THE PATTERN

Taking a look at a WSC intervention, we use the CDE model (*Facilitating Organization Change*, Olson & Eoyang, 2000) as a primary lens. The CDE Model represents the three variables that influence a self-organizing process thus shaping emerging patterns, the speed with which they form, and the sequence of their development through time.

The three essential factors are the container (C), significant differences (D), and transforming exchanges (E). These three variables are intricately connected. If one of them changes, the others shift to adapt, and the emergent

pattern changes, as well. The complex interactions of these factors are easy to see when you consider how the size of a room (C), diversity of participants (D), and mode of interaction (E) affect the patterns that emerge over the course of an engagement. Changing any one of them may have a profound (and unpredictable) effect on the others and on participants' experiences. All three of these variables affect patterns that emerge during large scale events and how those patterns might be sustained after the event concludes.

The **container (C)** holds the separate individuals together long enough for a pattern to emerge. Many different elements might function as containers for a single group. The container can be psychological (e.g., a visionary leader or fear of the unknown), physical (e.g., a meeting room or national boundary), or social (e.g., identity groupings or shared experiences). If there is not a sufficient container, a group wanders around, and energy and information are dissipated before they can coalesce into a new and more productive pattern. Containers are critical in effective large group interventions—the place, convening question(s), and the timeframe are among the constraints that can hold the system together until something interesting happens.

One of the first containers to consider with a WSC process is the facility for the meeting. Many events are limited by the size of the room available. There needs to be enough room for round tables, space around the premature to post easel charts and maintain a flow of people during the review process, and enough space to move the easel charts in and out.

The *content* container is the focus on strategy, problem solving, or relationship building? The answer to this container question is determined by the Leadership Team, who also sets the objectives. The rest develops from there.

Within the container, if everyone is the same, nothing novel will be generated, so significant **differences (D)** are the second critical condition for self-organizing in human systems. Differences provide the impetus for change and establish the shapes of emerging patterns. In the Whole Scale Change process, there is always a reference to “max-mix” which is to ensure that there is a representation of formal or informal power within the organization, work location, job role, longevity, or experience levels. Some of these differences may be irrelevant to a task at hand, so they can be ignored. Others, such as power or level of expertise, may be critical to patterns of the future, so they receive focus in the design and execution of an event. Participants' experiences, perceptions, and values are all differences that prove to be significant in almost every large scale event.

The differences are managed by the use of round tables, max-mix table assignments, rotation of facilitation etc. The differences are also accentuated through instructions such as “everyone's truth is their own and the recorder

needs to record what is being said as it is being said”, which promotes individual voice.

Unless connections are built across significant differences within the container, no change will occur. Transforming **exchange (E)**, the third condition for self-organizing, provides the connections that allow for change at the individual, team, and whole system levels.

Exchanges are promoted at three levels: as the individual puts their voice into their table work, the table collects the individual inputs for posting for the whole, and a reporting out or posting for review by all.

CASE STUDY

In 1997, the Amalgamated Bank of South Africa (ABSA Group) had 38,000 employees. The bank consists of 4 commercial retail banks: Trust Bank, United, Volkskies, and Allied. There are 34 divisions in ABSA of which the commercial banks are one. United Bank is located in 9 Provinces (which are like states) in South Africa. ABSA chose to conduct a large group with the United Bank Gueteng (one of the provinces). There are 2,000 employees in United Gueteng who are contributing 38% revenue to the total of United Bank. The consultants were Minnesota-based Kristine Quade and Roland Sullivan. A detailed description of this intervention can be found on www.QuantumChange.us

Container:

The pressing issue for United Gueteng was they were the lowest performing bank in the lowest performing province. Time was of the essence and the schedule created a very tight container. Beginning the first week of October with the building of the Executive Team was followed directly into an event a week with 1/3 of the bank in each event while the remaining 2/3 of the bank kept the operation going. The process was completed 4 weeks later.

The Design Team created a design that would treat each event as “rolling”. Each event was to start work and finish work. In addition, some work would be done as a draft to be finished by the next event. Time became one of the containers.

The other containers included:

- The three rolling events were held at the World Trade Center, the site of the apartheid hearings a few years prior. The room was large enough to hold 700-800 people at 88-100 round tables with room to move in easel charts and post the work of the tables on the walls.

- The assignment of participants to their tables—each to represent a max-mix of the whole, thus ensuring that teaching and learning was occurring with each interaction. With each interaction, the tables were instructed to rotate the role of facilitator and recorder/reporter which ensured equal participation and avoided domination by strong members.
- Tables reported out their learning which ensured that information flowed from the individual-to-the-table-to-the-whole-room where participants could observe that the work of their table was replicated across the system because of the max-mix table assignments
- The role of the Design Team, a max mix of 12 people from throughout the organization were the keepers of the agenda and the ones who decided if any changes needed to be made.
- The role of the Leadership Team which was to maintain permeable boundaries. Each was assigned to a different table and instructed that their role was that of participant and under no circumstances were they to influence the work of the table because of their position.
- A strong Support Team which consisted of Human Resources professionals from across ABSA who had two roles: 1) to support the work of the participants by delivering written instructions after verbal ones were delivered, moving in easel charts, post and type the work of the tables, and ensure that the work of the event flowed smoothly. 2) to learn as much as possible about how to design, facilitate, and utilize the work of a large group for further interventions within ABSA. This group was the “future consultants in training” group.

Each of the above containers followed a “stretch and fold” process. The container was both physical and emotional. The container was both simultaneously the large room and the small table. Within each container the pattern would replicate itself at multiple levels. For example, we were told that we would never get South Africans as well as bankers on their feet with excitement. The Support Team adopted an energy that “anything is possible” as they executed their role and their excitement spilled over to the participants who were often found standing, clapping, singing, and dancing throughout the event.

An example of an emotional connection occurred during the first event and the first day. One of the Design Team members was in charge of music during the interludes. As participants went to lunch, he played “We Will Win” by Helmut Lotti. During the afternoon break, several participants requested the song again, so it was played as the participants left for the day.

The next morning, people wanted to hear it again. At lunch on the second day, a Support Team member typed up the words and copies were left at each table. This song was played and singing occurred throughout each event. During the second event, the participants asked: where is “our song”, and the process repeated itself. At the end of the third event, the Managing Director gave a copy of the Lotti CD to each branch. This became the emotional anchor to the event and banks would play the song during their staff meetings and clients waiting outside for the bank would request to hear it—creating a larger community...a giant pattern!

While the size of the room was quite overwhelming at first, participants found a connection with the whole organization which to this day still exists. People could see they had an important role that was larger than a job. And they were being asked for their input which had never occurred before.

Differences

Differences were a strong element during this intervention. Participants were assigned to tables where they were not with their co-workers but with others from different levels, functions, banks, and jobs.

In addition, each of the events had an agenda item which was to identify what was working and not working. The purpose of this work was to give voice to the “dissatisfaction” within the system and give the participants a choice about what was the most important dissatisfactions. The top “dot-getters” from this exercise became the items that were addressed at the end of the three days during the action planning phase. In addition, participants could see that there was a 2:1 ration of working to not working and there was a significant feeling within the room—it was caustic. The participants made a conscious choice to shift their energy during the first and second day to more of a “can do” attitude.

The Design Team chose to put in a module called “mind set” because of the strong influence of excuses within the system. During the afternoon of day 1, a short video was shown about a man who crawled into a railroad car and was sealed inside over night. The man believed that the car was a refrigerator car and in the morning he was found dead. The participants processed this video by identifying the language they used for “can’t” within their work environment. During the morning of day two, a different video was shown about a man who was in an airplane crash and was told he would never walk or talk. The video showed his journey, ending with walking out of the hospital and saying goodbye to his care givers.

The participants were asked to identify what it would look like of “can” was in operation and to create a visual of what that would look like for United. Proud moments followed as tables presented their “can do it” picture for United. The

pattern had been reset. At the end of the events, a participant approached Kristine, the consultant, at a shopping center restaurant and said that his family had noticed a difference in him and that he was much happier in his work. The pattern had changed for 2000 participants AND their families—now a multiple of “can do”.

Other differences that had an impact included:

- The Leadership Team had their own development and alignment process prior to the large group events and could thus speak with one voice—each for the other.
- Customers addressed the whole group to talk about their experience while waiting in the line for hours to deposit their check or ask a banking question which resulted in many new processes focused on customer satisfaction.
- The process of “dotting” provided individual choice about what was important and at the same time provided space for the “will of the larger group” to emerge. In seeing the direction of the larger system, individual issues were put aside for the good of the whole.
- Different functional representatives were invited to Event 2 where the work of the group was to focus on internal improvements. Part of the work was to generate what was needed to and from the functions for the bank to be more effective. Once these needs were in the open, groups developed what they were willing to “give” in order to improve the process. The perspectives of these outside individuals helped in a cross understanding of the difficulties when handing off work (in both directions) and resulted in many process improvements that touched other parts of ABSA—another pattern broken!

Exchanges:

The greatest strength of the WSC approach is its dependence on building transforming exchanges. Like most traditional organization development interventions, WSC depends primarily on exchange to move toward new systemic patterns. Containers and differences are established by the Design Team prior to the event, and will only be changed if some unforeseen issue arises in the course of the activities. During the event, the activities focus on building new opportunities for learning and insight—exchanges—across pre-existing differences within organizational boundaries.

The design of the WSC shapes all the conditions for self-organizing human systems. Getting the whole system in the room shapes the container for the emergent patterns. Working with max-mix tables introduces all of the relevant differences. The structure agenda outlines multiple ways that participants exchange ideas and information to move into new and more productive patterns.

Compared to other large scale event designs, however, the WSC focuses primarily on shifting exchanges between and among individuals and groups to move the system into new patterns of insight and action. The exchanges with the United intervention begin with the Leadership Team and their interactions while defining the scope of the project. The Managing Director had only three direct reports. The other 4 were in a matrix relationship and had no special allegiance to the success of United. When this team met for three days in an offsite location, the relationship between all of the team members was forged so tightly that the team began to operate as one unit. Their discussions were around strategy and the necessary requirements for success within the organization. Each of the matrix leaders committed their full attention to ensuring that United was getting what was needed from their organization. It all boiled down to understanding what the problems were and how they all inter-related.

The second level of exchange occurs with the Design Team. The United Design Team was truly a “max mix” team with a cross section of representation. Each person held more than one point of data. The teller had been with the organization for 20 years and had many experiences ranging from being a victim of many bank robberies to really understanding what it was like to relate to customer complaints and not being able to solve simple problems because of bank policy. There were even several skeptics about change in general and the possibilities of United being able to change. This team became the collective voice of the whole and it was the consultant’s job to observe the group interaction which would mirror the larger group interaction, as well as pay attention to what the Design Team said would work or not work in the events.

This team met before the event, sometimes during each day, at the end of each day to review feedback and make adjustments for the next day, and even in-between events to make adjustments. At the end, the team was incredibly tight and wanted to continue the process by being imbedded in the various transition teams. They developed the DNA for change and wanted to ensure that it continued.

The third level of exchange occurs during the event. The part, whole, greater whole is strongly apparent. Participants are assigned to tables that are also a max mix of the whole. There was careful planning during the United event to ensure that each table had a mixture as much as possible. No one was with their direct manager. There were voices from all parts of the system. Therefore each person learned to hear about what is going on in the rest of the system by listening to the stories of people they did not know and generally did not interact with. At the early stages of sharing, the design was constructed to assist in the trust building at each table. Starting with the introductions, the interactions were cautious and careful. By the time the table got to the sharing of what is working

or not working the first afternoon, the individual participant learns they can share their functioning view of the whole with out judgment.

The development of the working and not working became another imbedded story in the system. A senior vice president had been asked to come in the morning and share the larger ABSA picture. The Design Team member had done all in her power to let the executive know this was business casual and what the format would be. He still chose to come in a suit and tie. As he went to the microphone, a singular voice became a collective voice as the group shouted “take it off”. In frustration, he took off his coat and tie and then began to deliver a direct and almost pounding speech.

During the question and answer period, one table question was responded to with “I cannot believe you have asked such a stupid question but I will answer it anyway”. The room began to take on a chill. The executive answered several other table questions when a question again drew his anger. Again his response was “dumb question”. At this point the consultant wisely called an end to the questions and sent the group to an early lunch (causing havoc in the kitchen!). The design team quickly huddled and decided they should proceed with the afternoon work which was to identify what was working and not working.

Almost every table identified the senior executive as “not working” and there were many individual comments in the day’s feedback section about him being a “low for the day”. The Design Team met for the evening and decided something needed to be done. They called the Managing Director to ask for his advice and he said he would take care of it. The next morning, he reported to the Design Team that during the evening he had had the most difficult discussion with his boss ever and that he would be back to address the group in as they opened. Without saying more the Design Team chose to trust the process!

As the group opened in the morning a Design Team member shared the highs for the day, the suggestions and the changes in the agenda. He then said there were some lows that had identified the senior executive as a low and because of that the executive wanted to address the group. You could have heard a pin drop in the room!

The senior executive came to the stage, again in a suit and tie. He silently took off his tie and placed it on a chair. He silently took off his coat and placed it on the chair. He loosened his collar and went to the microphone. He said: “Yesterday I was rude. I did not understand what this meeting was about but that was my mistake. My behavior was wrong and I have affected your process. I am deeply sorry for what I have said and done. I apologize sincerely for the hurt that I have caused. If my apology is not enough I am going to lay down on the stage and you can walk on me”. At which time he flopped face down on the stage. After about two seconds of stunned silence, the group rose to its feet with cheers.

Needless to say that in that day's feedback forms the highs for the day identified the appearance of the senior executive.

And at the second event, several first day feedback forms asked when the senior executive would come to talk to them! The story had traveled back to the branches and was talked about for quite sometime. An executive had demonstrated humility and the system had cracked wide open for all management to demonstrate being open to feedback.

There were numerous examples of exceptional exchange during the three weeks of the rolling events. Leadership asked for and listened to input on the strategy. Leadership accepted changes to the mission statement. Each branch developed their own action plan and reported them out to the whole. There was relationship work done between levels of management and the workers—each identifying what they needed from other groups and each group making commitments for change. This same process was repeated between the matrix organizations that were invited to the second event. The most powerful were the individual commitments that were made. Many people said they had been ready to leave the organization and go to work for the competitor bank. But as a result of this work, they felt optimistic about the future and wanted to make sure they were a part of the great success.

HOLDING THE PATTERN AFTER THE DANCE

The three-day event is just a beginning of transformation for an organization. The system has experienced being open, vocal, making decisions, and seeing something new emerge. A Transition Team was formed that represented each branch and matrix organization. The internal consultants chose to have this be a body for sharing success stories which were then transmitted back to the home group (exchanges).

United went on to have a 69% increase in profits over the next four months as a direct result in open communications, problem identification, quick solutions being put in place and a general atmosphere of excitement that customers experienced.

Bank robberies decreased and the root was identified as a general link between someone on the inside. The branch teams had become family and no one was now willing to turn on family.

This was a tremendous success story for United which then positioned ABSA for its greater work of uniting four banks into one healthy and award winning organization.

Using the chart in the After the Dance chapter in *The Handbook of Large Group Methods*, Chapter "After the Dance" Alban and Bunker, Wiley, 2006, use the

chart below to identify some specific strategies that you might use after a Whole Scale Change event:

SUSTAINING THE CHANGE

PATTERN		STRATEGIES
Relationships	C	
	D	
	E	
Communication	C	
	D	
	E	
Action	C	
	D	
	E	
Focus	C	
	D	
	E	

PATTERN		STRATEGIES
Beliefs	C	
	D	
	E	
Leadership	C	
	D	
	E	
Learning	C	
	D	
	E	
Involvement	C	
	D	
	E	
Decisions	C	
	D	
	E	

CONCLUSIONS:

When people get together, they interact with each other in a variety of ways, and new patterns come into focus. This generative process happens whether or not there is a sophisticated design or a gifted consultant. Self-organizing is one of the fundamental capacities of individuals and groups. At every moment, before during and after an event and whether or not we are looking, human systems will be forming and reforming patterns of individual and group behavior.

So, why consider human systems dynamics and the CDE Model for conditions of self-organizing in human systems?

The CDE provides a way to think more analytically about and act more responsibly in the process of self-organizing. What are the conditions that will make the self-organizing process faster? What will slow it down? How can we disrupt a current pattern and help a richer, more diverse one grow in its place? How can patterns that form for individuals and small groups be replicated in larger groups or across the entire organization?

This particular case of Whole Scale Change demonstrates how the CDE informs the fundamental design principles of well-known approaches as well as the in-the-moment choices and the follow-up activities of the wise consultant. When a practitioner is conscious of the conditions for self-organizing, he or she has significant advantage to:

- Trouble-shoot issues or problems when they emerge
- Make reasonable adaptations in traditional event designs
- Incorporate the odd surprise into the intentional design of the event
- Learn lessons in early stages of design that inform action later in the process
- Develop shared language and concepts with colleagues who can share the challenges and insights of a Whole Scale Change event
- Leverage patterns that appear for individuals or small groups into transformative insights for families and organizations