ART OR ARTIST? AN ANALYSIS OF EIGHT LARGE-GROUP METHODS FOR DRIVING LARGE-SCALE CHANGE

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ABSTRACT

This chapter analyzes the success factors, outcomes, and future viability of large-group methods. We have used an exploratory action research approach focusing on eight variously purposed large-group methods (AmericaSpeaks, Appreciative Inquiry, Conference Model®, Decision Accelerator, Future Search, Participative Design, Strategic Change Accelerator/ACT (IBM), and Whole-Scale™ Change). We interviewed nine leading practitioners and creators for each method, as well as six clients who had played key roles in most of these methods' execution at their organizations, asking them to reflect on the current practices and outcomes and the future of each respective large-group method, as well as the methods as a group of interventions. Based on our findings derived through theme and content analysis of interviews, we purport that both the Art (excellence in method execution) and the Artist (the right facilitator) are necessary for achieving desired outcomes of the large-group methods. We stipulate that critical elements of the Art include these

five common elements (or five "I"s): having the right Individuals *in the room; aiming the method at resolving the right* Issue*; having* Intentional *process (including pre-work, intra-method process, and follow-up); having the right* Information *in the meeting; and using the right* Infrastructure *(such as appropriate physical space, technology, etc.). We suggest that while these elements of Art are important, the simultaneous requisite role of the Artist is to manage the tension between the rigidity of the Art (the 5 "I"s) and the emerging human dynamics occurring between the large-group method process and the associated evolving client objectives. That is, to achieve desired outcomes, the execution of large-group method needs to be both highly premeditated and ingenious. We supplement our findings with client case descriptions and quotes from the practitioners and conclude that these large-group methods are particularly appropriate for resolving a variety of issues facing today's organizations operating under the conditions of high technology saturation, interdependence, globaliza- tion, economic downturn, and others – and that this, with some exceptions, will likely remain the case in the future. However, the future use of these methods will be challenged by the availability of Artists who can execute the methods so they lead to desired outcomes. We close with discussion of open questions and directions for future research.*

INTRODUCTION

Is it the Art or the Artist? The Metaphor

Listening to a good symphony performance can be an incredibly exciting experience. So what brings about an unforgettable orchestral performance? Jennifer Hambrick, a WOSU Classical Music radio station host, provides one answer in her blog, stipulating that great music is born out of "arriving at the essence of the human experience that gave birth to the music." This beautiful quote is both the embodiment of and a disguise for many elements that go into making a great musical performance. In Jennifer's (and our) view, both the *Art* of making music (the musicians' skills, the concert hall, the score itself, etc.) and the *Artist* (the conductor and his interpretation of the piece) are essential in producing the magical effect. With regard to what we call *Art*, Hambrick continues, "I can attest to the many aspects of orchestral musicians' work that directly affect the overall sound of a performance … Every orchestra does have its own *sound*." This *sound* is

indeed influenced by various components. The *sound* begins with picking the right *piece* that works for the type, size, and proficiency level of the orchestra. An orchestra itself must include properly trained and assembled group of *musicians* able to work together. The intentional and intense *process* of individual pre-work and group rehearsals would lead up to the performance. The right *information* must be provided to each musician in the form of musical scores, the description of the piece intention, and the conductor's interpretation. The *physical* components of performance need to be in place – an orchestra pit must be acoustically tested, the instruments used must be free of broken parts, and the orchestra hall should meet the standards of the audience and performers.

Regarding the *Artist*, Hambrick continues: "With most recordings, the difference between good and great lies not entirely in what the players in the compared orchestras are doing differently from each other, but first and foremost in the various conductors' interpretations of the music and how the conductors lead the orchestras to play out (literally) those interpretations … Whatever the conductor does on the podium will directly affect how the musicians in the orchestra play and how the orchestra sounds." It is indeed the *Artist* who brings together all these potentially disparate elements that collectively amount to a unified artistry and harmony. He is able to flexibly manage the tension between the intended rigidity of the art and the emerging dynamics and the mood of the audience and the orchestra.

It is then both the *Artist* and the *Art* that come together to create a magical musical experience. Atik, who spent time studying the dynamics of orchestras, noted, "You have sometimes a hundred people, sometimes more, on the stage who develop … I would say an energetic field, a psychological energy field which is very strong and has an existence of its own. And the conductor has to be forming that field and be part of it" (Atik, 1994).

Large organizational systems undergoing substantial change are at least as complex as orchestras creating musical performances; they represent some the same dynamics that occurs in large orchestras. In this chapter, we consider elements of *Art* in executing large-group methods for organizational change (such as using the method to address the right issue, including the right individuals, following the intentional process, having access to the right information and proper physical infrastructure) and stipulate that it is only in combination with the great *Artist* (the method facilitator) that these elements can amount to their desired outcomes (including people and organizational changes as well as long-term benefits) – just like these same aspects come together in creating a beautiful symphony.

The chapter begins with the background and context for this research and the questions we were pursuing in this chapter. It continues with a brief overview of the large-group methods, and proceeds with the findings from the research questions. We conclude with the conceptual model for large-group method effectiveness (which includes the key success factors and the outcomes of these methods), and insights regarding the projected future relevance for use of the large-group methods and implications for managers and practitioners. Future research directions are also discussed.

Research Context: Contributions and Limitations

Before summarizing the findings and conclusions of our research we would like to briefly discuss the context of this research, which both enhances the contribution that this inquiry makes to the field of organizational change – and limits our findings. This chapter, as do all such papers, articles, and books, has a history of its own and owes its existence to many players. It also occurred at a point in time that may have influenced our findings.

First, in early 2009 William Pasmore approached this research team with the idea that while there had been a lot of activity, publications, and stories about the use of large-group methods for enacting large-scale change in the late 1990s and early 2000s (including the most recent volumes by Bunker & Alban, 2006; Holman, Devane, & Cady, 2007), little summative analysis has been written that would inform practitioners, academics, and researchers on the primary questions that have formed the basis of this chapter: *What is the current state of large-group methods? Do they work? Is the use of these methods growing or declining?* And finally and probably most importantly, *is there a future for these methods or are they simply a fad that will disappear as all fads eventually do?* William's questions are intriguing and to the point. As practitioners we have all seen fads come and go, usually doing more damage than good, hurting rather than helping the credibility of our profession and, of course, our clients. On the other hand, if large-group methods for approaching organizational change lead to powerful and lasting effect, it is important to track the evolution of the method (as a group). It is also important to identify factors that lead to success as well as challenges that, unaddressed, could consign these methods that would potentially create sustainable change to our profession's historical landfill. These are, of course, ambitious questions, and we do not propose that we have answered them perfectly or completely. Rather, this chapter serves as another data point, a snapshot in time intended to provide a "current-state point of

view,'' with no pretense of providing the final word. However, we are much encouraged to be a witness of the *2010 version* of the large-group methods (in which many methods we have reviewed seemed to have gained characteristics already different from those described even in the most recent literature, such as Holman et al., 2007). However, we also realize that these questions will remain, despite our efforts, central questions for future research.

Second, the members of our research team came to this task with our own histories, our own experiences, and our own biases. We are an ''intergenerational,'' diverse group with different levels of experience in the field of organizational change, different ages, different countries of origin, and different cultural and religious backgrounds. Our experience with large-group methods runs the gamut of ''considerably experienced'' to ''no experience'' (including one member of the team who had a personal and professional relationship spanning decades with several of the practitioners interviewed and is a past and present partner with three of them – most of our team, however, had never met the interviewees). As to our biases, which we fully acknowledge, we made every attempt to hedge them with whatever intellectual integrity we possess, basing our dialogue and conclusions on the data itself – while grounding it with our passion for understanding of what works in our field. To the extent that we have misinterpreted or misrepresented data, or misunderstood interviewees, we will make an advance apology – the errors are solely the authors'.

Third, the group of practitioners and clients we interviewed has certainly influenced our findings. While we attempted to choose methods representing various types of interventions, our decisions about which methods to include were also limited by our knowledge of these methods and access to the practitioners who use them. Our practitioners are, without doubt, a stellar group – all are masters of change in their own right and have experimented with, adopted, and adapted these methods over long careers. As a group they have seen what works and what doesn't; all are also master consultants. We are deeply indebted to them for making themselves available for these interviews, revealing the ''secrets'' of their trade, and reviewing the drafts of our analysis making sure that we have correctly interpreted their inputs – ultimately providing an invaluable contribution to this chapter. All are both enthusiastic about participating and passionate about what they do. All have helped their client organizations achieve outstanding, lasting results using not just the methods attributed to them here, but many other change techniques and methodologies. We also owe them a debt of gratitude for reaching out to their clients and enabling

interviews with the ultimate "users" who we would otherwise not have had access to (all of whom we found to be equally enthusiastic and passionate about the projects we focused on, as well as frank in discussing these projects' successes and limitations). The clients have had not only the passion but also the courage to try innovative approaches to enacting lasting change in their organizations. These *pragmatic risk-takers* were totally honest with us about their experiences – ultimately confirming one of our long-held beliefs that at the end of the day, all else being equal, it is great clients that make great projects. It is important to note that while we have been given examples of applications of large-group methods around the world, in the end, given the scope of this chapter, we have decided to focus our findings on North American practice of large-group methods.

Last, it should be mentioned, as it may have influenced perceptions of the current and future state of the use of these methods, that the period in which this research occurred is perhaps the most challenging for all types of organizations in the past 50 years. We conducted these interviews while deep in the throes of the "Great Recession." Businesses and other organizations have been, at least while this research has been taking place, retrenching and cost-cutting, and very few are taking any risks. At the same time, the dominance of technology and the internet as a defining force, which Marvin Weisbord noted in our interview with him and Sandra Janoff as probably "the wildcard" when it comes to the future form these methods take, is advancing at an ever-increasing pace.[1] Technology that was not available in the late 1990s and early in this century is creating questions future research will have to answer. While many of the large-group methods we studied are technology enabled, and America*Speaks* has effectively conducted meetings of 10,000 on three different continents using internet-based audio and video, the rest are basically "face to face," based on the principle of getting the "whole system in the room," or at least as much representation of the whole as possible. When the room is the internet, things may well change and new forms of large-scale methods may well take the place of those we studied.

In summary, while our research was truly exploratory, our backgrounds and initial ideas landed us to starting research with some initial hypotheses and hunches – but, as it often happens in organizational change projects themselves, we ended up in an entirely different place than we started. Initially, we were focused on the group of methods themselves, but through the interview process we began to understand that the methods were really only tools in the hands of what we began to understand as the other two

critical components, the *Artists*, and of course, the *Clients*. While they are all innovative, powerful tools based on solid principles, summarized in our *Five I's* conceptual model (presented in this chapter's Conclusions), they remain tools that, as our music metaphor indicates, are only techniques without which the master musicians cannot produce a symphony. Thus, as biased as our views are, through our literature research, interviews, and internal dialogue we began to understand that the answers to the basic questions William Pasmore proposed were far more complex than a simple yes, no, or maybe.

Research Questions

What are Large-Group Methods?

Bunker & Alban maintain that "large group interventions for organizational and community change are methods for involving the whole system, internal and external, in the change process" (Bunker & Alban, 1997, p. xv). They suggest that common elements of such large-group methods include (a) understanding the need for change, (b) analyzing current reality and deciding what needs to change, (c) generating ideas about how to change existing processes, and (d) implementing and supporting change to make it work (Bunker & Alban, 1997). Over time, many methods for generating large-scale change have emerged (Holman et al., 2007). The range of known large-scale change methods, and their usage, over the course of 50 years serves as testimony to the fact that leading change is an ever-present need in organizations. "These large group methods have been used in change efforts concerning (1) changes in strategic direction, (2) acceptance and implementation of quality programs or redesign projects, (3) changes in relationships with customers and suppliers, and (4) changes in structures, policies or procedures" (Bunker & Alban, 1997, p. xvi).

Much has been written about these methods to describe the key processes and methodology (Bunker & Alban, 1997; Bunker & Alban, 2006; Holman et al., 2007, and many others). Large-group methods are seen as a means for engaging participation among large numbers of stakeholders. By facilitating dialogue and discourse among key constituents, large-scale change methods seek to deliver better decisions and plans for change that all parties can support. Theoretical underpinnings for large-scale change methods range from Lewin's (1947) representation of change and Schein's (1987, 1988) thinking about change as cognitive restructuring to Revans' (1978) conceptualization about action learning and many others.

The Research Questions

In light of the context described in the previous section, the purpose of this research was twofold: (1) to understand *how* large-group methods deliver results they promise, and (2) to understand *whether* the large-group methods would work as intended *today* and, if so, whether they would remain effective in the *future*. To understand the answer to these two broad exploratory questions (the *how* and the *whether*), our goal was not to resolve these questions for *each* of the large-group methods, but rather, use each specific method we studied as the unit of analysis in order to draw conclusions about these methods and their inherent particulars and ultimate effectiveness as a class of methods for driving large-scale change in organizations.

METHOD

Selecting Large-Group Methods

Eight large-group methods were chosen from more than 60 methods in use today (Holman et al., 2007). Specifically, we have considered eight large-scale change methods to represent various types of change methods engaging whole systems (Holman et al., 2007). The change methods include *Adaptable methods* (methods "used for a variety of purposes, including planning, structuring and improving" (Holman et al., 2007, p. 22) – for example, Appreciative Inquiry, Whole-Scale™ Change, Conference Model®, Future Search, and Decision Accelerator); *Planning methods* (methods used "to help people shape their future together" (Holman et al., 2007, p. 24) – for example, America*Speaks*); *Structuring methods* (methods used to "redefine relationships and/or redesign work practices" (Holman et al., 2007, p. 25) – for example, Participative Design); and *Improving Methods* (methods used to "increase effectiveness in processes, relationships, individual behaviors, knowledge and/or distributive leadership" (Holman et al., 2007, p. 26) – for example, Strategic Change Accelerator (IBM's "ACT"). We purposely have not considered *Supportive Methods* ("practices that enhance the efficacy of other change methods" (Holman et al., 2007, p. 27) because we aimed to study the main methods of promoting organizational change. It is important to note that the classification above differs somewhat from the classification offered by Holman et al. (2007). This new classification has been vetted with leading practitioners of the above-mentioned interventions and reflects the most current understanding and application of large-group methods. This revised classification also

underscores the previously referred to dynamic nature of large-group methods as these interventions continue to find new forms and applications demanded by modern organizations, ultimately turning nearly all (or maybe all) large-group methods into *Adaptable Methods* used to address a great range of issues and to solve a great variety of problems (even our *2010 version* has us classify majority of the methods we have considered as *Adaptable*). While we did not get a chance to consider interventions beyond the eight large-group methods listed below, we feel that our exploratory research uniquely unveils this evolving dynamics of the use of large-group methods. Below are brief descriptions of the eight large-group methods we have considered (Phillips, 1995) (Table 1).

Adaptable Methods
The Appreciative Inquiry Summit is defined by Ludema, Whitney, Mohr, and Griffin (2003) as "typically a single event or series of events 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" (Ludema et al., 2003, pp. 12–13). The method is based on the premise that organizations grow in the direction of what they regularly and consistently focus their attention upon. To enable a strong organization, the topic of inquiry, according to Appreciative Inquiry principles, should be at the intersection of honest curiosity and the direction in which the organization wants to move – thereby generating the "information" and energy needed to create higher levels of performance beyond that which could be obtained by stopping with fixing a past problem or weakness. The goal of Appreciative Inquiry is to not only identify the positive core of the organization (i.e., its many assets, resources, strengths, and opportunities) but to leverage that positive core in creating the most desired future. This approach enables a form of "grounded visioning" – imagining a desired future which is based on the best of what already exists today, and stimulates participants into designing innovations in strategy, structure, processes, services, or relationships which ultimately turn the visions into new results. The Appreciative Inquiry Summit method includes a 5D model known as Define (identifying the strategic topic(s) to inquire into), Discover (exploring success story highlights), Dream (envisioning what might be, the results, and the impact), Design (of new strategies, structures, processes, services, or relationships), and Destiny (collaborating in implementation to develop and continually evolve the organization). The Appreciative Inquiry Summit is

Table 1. Summary of Eight Large-Group Methods for Large-Scale Change.

Name	Type	Size	Preparation	Events	Follow-up	Cycle	Practitioner Training	Special Resources
Appreciative Inquiry	Adaptable	20–2,000	1 day–many months	1 day–many months	3 months–1 year	As needed, continuous	Self-study	None
Whole-Scale™ Change	Adaptable	10–10,000	2–4 days per event	Several 2–3 day events	1 month–1 year	As needed	General	One logistics assistant per five tables
Conference Model®	Adaptable	40–7,000	1–3 months	Three 2 day events	6–12 months	As needed	General	None
Future Search	Adaptable	40–100+	3–6 months	2.5 days	As needed to purpose	Periodic	General	None
Decision Accelerator	Adaptable	15–100+	2 weeks–2 months	0.5–3 days	30–90 days	As needed	In-depth	Rolling white boards, sound systems, IT support, "crew" space
America*Speaks*	Planning	100–10,000	6–12 months	1 day	3–12 months	As needed	In-depth	Polling system, wireless groupware, one networked laptop, one facilitator table
Participative Design	Structuring	15–200	2 weeks–many months	1–3 days	Active adaptation via redesign	As needed	In-depth	None
Strategic Change Accelerator/IBM ACT	Improving	15–100+	2–4 weeks	2–5 days	30–90 days	As needed	In-depth	None

Note: This table has been adapted from the excerpt from the table presented in *The Change Handbook* (Holman et al., 2007). Changed and additions have been made based on the interviews conducted for this research.

just one of eight methodologies ("forms of engagement") which fall under the larger umbrella of Appreciative Inquiry. Other Appreciative Inquiry methods ("forms of engagement" – Ludema et al., 2003) include, whole-system inquiry projects over a period of time, and small-group activities that stand alone or support larger initiatives (Cooperrider & Whitney, 2007).

The Whole-Scale method was developed in the 1980s at Ford Motor Company when leaders were seeking to move its management culture from hierarchical to more participative. The method, which consists of a series of small- and/or large-group interactions, enables an organization to undergo a paradigm shift. It has been used successfully in designing organizational structures and changing organizational processes (James & Tolchinsky, 2007). The method is based on the principle that once the organization members experience a paradigm shift, they see the world differently and are ready to act to transform the organization toward the new and shared vision (Dannemiller & Jacobs, 1992). Whole-Scale™ Change applies a combination of action learning and accelerators to drive the change (James & Tolchinsky, 2007). Using participants that represent all organization levels, functions, or geographies, Whole-Scale™ Change creates a microcosm of the organization in order to discuss and deliver change. The method then supports participants in developing structures and relationships that enable that vision, and in aligning leaders and employees so that change can be implemented in a collaborative manner.

The Conference Model® engages people in system-wide change through a series of integrated conferences and walkthroughs (Axelrod & Axelrod, 1998). The Conference Model® is an elegant application of Axelrod's four engagement principles: Widen the Circle of Involvement, Connect People to Each Other, Create Communities for Action, and Promote Fairness which lend its uses to such diverse applications as redesigning organizations and processes, developing new organizational cultures, creating team-based organizations, and creating organizational futures (Axelrod & Axelrod, 2007). The Conference Model® includes up to three conferences (ranging from 30 to hundreds of participants at all organizational levels): Vision Conference (where vision themes are developed by participants), Technical Conference (where current organizational barriers are identified), and Design Conference (where vision themes, disconnects, beliefs, and behaviors are combined to design criteria for the new process or organization). Walkthroughs are mini-conferences that are used to connect people who were unable to attend a conference to the change process and solicit their feedback. Walkthroughs are critical to success because they provide a mechanism for involving the whole system (Axelrod & Axelrod, 1998; Axelrod, 1992).

The Decision Accelerator is generally used as "organic work system for sustained innovation and change work within a single organization".[2] As the title would suggest, this method accelerates decision-making and operational effectiveness by engaging critical stakeholders in a highly focused way, and is a tool to help organizations solve critical business issues faster, while at the same time building commitment through a high-involvement/high-commitment process (The Sapience Decision Accelerator (n.d.)). It brings participants together to examine problems and create solutions in a "purpose built-environment".[2] Decision Accelerator has its origins in the work of Trist and Emery (1965), with adaptations by organizations as diverse as the US Army in the 1980s, companies like Hewlett Packard in the 1990s and early 2000s and consulting firms like E&Y/Cap Gemini.[3] The method has been used successfully in strategic planning, merger strategy and implementation, innovation management (from conception to rapid prototyping and final design) and many others.[2] What seems to separate the Decision Accelerator from other methods we examined is the importance placed on the "intentionally designed laboratory environment"[4] and the attention paid to the infrastructure and design of the meeting room itself. The infrastructure typically includes the use of mobile white boards, music, graphic artists, video, a dedicated "real-time knowledge capture" support team (within the room) and other elements that seem to create high degrees of information flow, which in turn creates high degrees of adaptation, innovation, focus, and action. The unique physical environment created for a Decision Accelerator has been described to the authors as "somewhere between a meeting and a rock concert" in terms of the planning required, its use of music, the "crew" support team, and the energy generated.[2,4] Finally, it is important to note that Decision Accelerator is only considered a large-group method when the Decision Accelerator implemented as a one-time event. However, more often Decision Accelerator is seen as an organizational model and work system which mobilizes the network and serves as an open systems planning process in preparation for further work systems network nodes executing to plan. In that, Decision Accelerator has evolved in some cases into a full strategic change process and "high-speed information processing environment" that in at least one case seems to have taken the leap of creating a whole new way of working – a new work system based on collaboration, innovation, and speed.[4]

Future Search was developed by Weisbord and Janoff (2005) as a means to help a system transform its capability for action and has been used for a wide variety of applications. According to Weisbord and Janoff (2010), such applications include developing strategic plans, redesigning product supply

chain, developing environmental sustainability plans, creating collaborations among former antagonists to commit to the organizational renewal during an economic recession, creating and implementing plans for improvements, and many others. The intention of the Future Search method is to enable consensus, build commitment, and enable planning. The approach posits that by supporting mutual learning, multiple stakeholders can co-create future-oriented solutions to difficult issues they face today. The Future Search is suited to complex systems and issues such as communities, institutions, schools, and other entities to make and implement plans, restructure organizations, and solve social, economic, and technological problems (Weisbord & Janoff, 2007). The process allows participants to explore the current state of the larger environment, understand the driving need for change, and collaborate to create a future through action planning together. As such, the Future Search conference requires a high level of engagement by participants, and is based on the belief that people support what they help create. There are seven underlying principles that must be adhered to in order for the event to be successful (Bunker & Alban, 1997). These principles include working with the "whole system in the room"[5]; the need for participants to think globally and act locally; recognizing common ground; self-managing nature of the group; expertise resides within the total group; focus on developing an ideal future scenario (rather than problem-solving); and the belief that change involves the whole person: mind, body, and spirit. These principles are now also grouped into four ideas – having the whole system in the room; experiencing the whole system before focusing on any part; focusing on the future and seeking common ground; and enabling people to take responsibility for their own learning and action (Holman et al., 2007).

Planning Method
The America*Speaks* method aims to create a forum for citizens to provide input toward decisions that affect their community (Lukensmeyer & Brigham, 2002). The method's premise is based on the underlying concern that, for a variety of reasons, citizens are increasingly excluded from public decision-making processes. The America*Speaks* method seeks to address this concern and simultaneously influence public officials to make informed decisions. Large-scale forums, such as the 21st Century Town Hall Meeting, provide a means to engage hundreds or even thousands of participants. The method focuses on discussion and deliberation among participants, rather than presentations or speeches. Prior to the event, each participant receives a discussion guide with information about the issues under consideration. On arrival, participants are grouped at tables of 10 or 12 and instructed to

begin. As they address the issues, they are supported by a trained facilitator who provides process support and keeps participants focused on the task. Through the use of wireless technology and groupware computers, America*Speaks* collects input and polling data from each discussion group in real time. Within minutes, the organizers can provide reporting in real time to participants in service of further discussion or decision-making (Lukensmeyer & Brigham, 2002). Ultimately, voting results are compiled into a set of collective recommendations that are provided to participants, decision-makers, and the news media.

Structuring Method

Participative Design is example of a Structuring Method where work groups redesign their own work. The method begins at the bottom of the organization and works its way up. Participative Design was developed in response to difficulties encountered in implementing traditional Socio-Technical Systems design process (Emery & Devane, 2007). This alternative approach asks employees to design, control, and coordinate their own work. The underlying assumption is the idea that participants are most familiar with their work and tasks, and best able to develop and implement efficiencies in performing that work. The method has been used successfully to design organization structure, improve operational processes, and increase quality and customer satisfaction levels (Emery & Devane, 2007). The Participative Design process includes the following phases: (1) Education (educational workshops which include employees at all levels, at which senior management comes up with minimum critical specifications against which all designs that are developed must be measured); (2) Analysis (redesign workshops where senior management briefly shares the minimum critical specifications and the work-unit participants analyze how the job is currently done and assess how much this falls short of meeting the specific critical human requirements); (3) Redesign (drawing the existing work flow and organizational structure and then the redesigned organizational elements for better ways of accomplishing the work); and (4) Implementation (interim meetings between work groups to get feedback and learn from their efforts, to develop measurable goals and targets and other impacts of redesigned work) (Emery, 1995).

Improving Method

The Strategic Change Accelerator/IBM's ACT (Accelerate Change Together), is a large-scale change process for addressing issues that impact organizations across geographic and functional boundaries (Phillips, 1995). The method specifically seeks to move participants and issues rapidly from

problem identification to solution to execution. The method was originally developed for IBM as an adaptation of GE's highly successful WorkOut initiative. The premise for the approach was to minimize "silo mentality barriers" and simultaneously address critical business issues and needs. IBM's CEO, Lou Gerstner, wanted to move quickly to a fully integrated, rapid-acting, truly global IBM. ACT was created to drive critical strategic solutions across geographic, functional, business, and traditional "organizational silos" (Phillips, 1995). ACT can be customized to meet the situation and needs of any organization seeking to reposition itself. The method begins with a strategy and planning component, where executive sponsors and key stakeholders define the scope for the session, and the issues to be addressed. Following the planning phase, a business meeting is organized where participants are grouped into teams and develop potential solutions. The participant teams present their recommendations for solutions to a leadership cadre of sponsors and decision-makers. Each recommendation is accompanied with a detailed set of action steps and a "champion" that represent the framework for implementation. The leadership team makes immediate decisions to accept, reject, or gather more data for each recommendation (about 90% of solutions are accepted at that point of the meeting).[6] The remainder of the session is devoted to mapping out implementation plans and strategies for the chosen solution(s). The ACT method seeks (a) to develop creative solutions to critical strategic issues, (b) enable rapid decisions that might not otherwise be possible due to silo-bound chains-of-command, (c) assure full commitment to decisions stemming from the input of all participants, and (d) position the organization to quickly execute recommendations (Phillips, 1995).

Participants

To better understand the current use, antecedents of success, and outcomes of each large-scale method, an interview was conducted with the leading practitioner (and sometimes inventor) of the method, as well as the clients holding high-level positions in their respective organizations that have experienced a particular method (clients were interviewed for six out of the eight methods described in this chapter). The practitioners were selected by the research team through professional networks, based on availability. The clients were then introduced to the research team by the practitioners and were sought to represent prominent successful implementations of a particular large-group method and have been interviewed based on their availability.

Procedure

The researchers conducted an hour-long interview with each practitioner and 30- to 45-minute interviews with clients of the large-scale methods, using a standard interview guide that covered the history of the method, the antecedents of method success, and common method outcomes (please see appendix for interview guides). Each interview has been transcribed and also recorded in order to ensure that practitioner and client comments are represented accurately. The recorded interviews were sent to those interview participants who requested the audio file.

Analysis

After all practitioner and client interviews were completed, the research team compiled all transcribed notes and documents provided by the interviewees (such as web site links, publications, white papers, etc.). The qualitative data was analyzed to determine themes describing success factors and outcomes of the eight large-group methods. Both exploratory theme analysis and content analysis have been used to develop the findings. First, the researchers have looked at all qualitative data we collected and developed a list of emerging themes. The themes were then grouped in categories corresponding our research questions (such as evidence of large-group methods success or failure, success factors and inhibiting forces for large-group methods, future of large-group methods, etc.). Upon conducting this exploratory analysis, the team has gathered for a group analytical session and, informed by background readings, our original research questions, and the emerging themes have developed a Conceptual Model for Successful Large-Group Method (presented later in this chapter). After completion of the session, three team members were tasked with content analysis of interviews. These team members worked systematically through each interview transcript grouping comments into their assigned framework elements (so each model element has only been worked on by one researcher), synthesizing comments into findings, and picking representative quotes from both practitioners and the clients to exemplify the findings. In conducting this analysis, the researchers have moved between interview transcripts and the background literature to ensure that the categories presented mutually exclusive and complete framework of factors relevant to large-group methods (adhering to single-factor categorization of comments). The analysis was then consolidated and reviewed by the senior

members of the research team to ensure that the comments were classified appropriately (and singly) into the model element, that coding was consistent between the researchers, and that the categories were interpreted correctly. The senior team members made revisions to this analysis and finalized the category titles and assignment of comments. We have also kept track of comments that did not fit into any category of the developed framework and included these thoughts in the reflections on the future of the large-group methods and future research directions.

Finally, in our exploratory analysis, we have tried to control various biases common for qualitative research. First, we believe that the diversity of our team (in terms of ages, experiences, countries of origin, etc.) has, to a degree, helped us to control for uniform individual biases in findings. Second, we have asked the practitioners both about success factors and limitations of large-group methods – and have also interviewed both practitioners and the clients. This approach also helped us gather varying perspectives on the questions we pose this avoiding uniformity of respondents' biases. Third, we have also encouraged the interviewees, many of whom are themselves renowned theoreticians and researchers, to genuinely share their insights in the interest of furthering the field of organizational development. Because we found that many of the interviewees have readily shared both advantages and limitations of the large-group methods, we believe that we have been able to diminish positive bias in results sufficiently for this exploratory research.[7]

FINDINGS

Do They Work: The Outcomes of Large-Group Methods

Based on the interviews we conducted, both of practitioners and of clients, we conclude that without a doubt these methods work as advertised. Across the board we were given examples of how these methods delivered on client expectations, both in terms of "hard results" (such as cost savings, process efficiencies, customer satisfaction ratings increase, cycle time improvements, etc.) as well as creation of organizational "social capital."[4] As a whole, this group of methods, with all of their iterations and future combinations, may be the most powerful way to enact sustainable change – because "with all of the complexities and need for stakeholder buy-in to make anything happen, they may be the only way."[2] Let us now review some examples of large-group method outcomes.

Holman et al. (2007) and the contributors to their *Change Handbook* discuss a wide variety of outcomes dealing with *People*, *Organizational systems*, and *Long-term sustainable change* that are driven by the use of large-group methods. These themes are uniformly confirmed by the practitioners and clients interviewed for this chapter. For example, one practitioner cites "three kinds of outcomes that we track on every project: (1) individual; (2) policy change, planning process, and budget changes; and (3) evidence of cultural change, which is our language of large scale sustainable change."[8] Clients seem to support the notion that these methods "fare extremely well against all three of those, if done correctly."[9] Let's consider these three types of outcomes in more detail.

People

Individual Motivations. In discussing the outcomes of large-group methods, the outcomes related to individuals' motivations resulting from directly influencing change building blocks are the first ones that many practitioners and clients address because "once [employees] begin to understand the system in which [they] work and [they] have a voice in changing that system, [this] directly impacts motivation."[10] These findings are consistent with much literature purporting that large-group methods achieve the desired outcomes mainly through affecting people – and do so by impacting group energy, intrinsic motivation, and high emotional engagement (e.g., Bunker & Alban, 1997; Bunker & Alban, 2006; Holman et al., 2007, and many others). More specifically, the people-related outcomes of large-group methods, it seems, have to do with high participation of stakeholders – which leads to high levels of information internalization, high motivation to act upon developed plans, and high commitment to decisions. "People feel more empowered at the end of these sessions ... Six months later they could still quote facts about social security ... People will say *this is democracy in action*."[8] Large-group methods view people as "*social capital*" (initially a Decision Accelerator term) and an asset to be managed through trust. Clients of large-group methods in particular seem to support the notion that large-group methods have a commitment level built into them, whereby employees "are doing change instead of having change done to them ... this is powerful because you have stakeholders co-authoring change."[9] Thus this "co-authored" impending change is not simply followed – it is embraced. Many large-group method clients and practitioners agree that resistance to change often happens when employees feel that the impending change does not embrace old practices and customs that made these employees successful in the past. In contrast to this dynamic, large-group methods "invite people

to identify exactly what has made them successful in the past, and it asks them to build on that, and to carry the best of the past forward. So it gives [employees] confidence, that even though the future is going to be somewhat different than in the past, they are still going to use those things that matter most deeply to them."[11] In sum, the concept of social capital – its creation, relevance, and use – is probably a research topic of its own. Suffice it to say that the power of getting most or all key stakeholders in the same room at the same time and dealing with issues they care about, with the information and authority necessary to act, is without doubt an effective way to create lasting, meaningful change.

Relationships. Many clients and practitioners noted that having people work with each other so closely and intensely for several hours or days creates special bonds and relationships that employees take back to their day-to-day work – which ultimately results in people working better together (making large-group methods into "*mega-teambuilding*" activities of sorts). These methods "build bridges within the organization that are essential for the ongoing implementation of change and new ideas."[11] The trust and relationships that result from the large-group methods are some of the essential outcomes produced as a result: "You stop being that hated other department. It is the building trust and connections with people that help work get done."[10] The client interviews seem to support the exact notion that practitioners put forward and agree that the large-group methods impact individuals "because you have the whole system in the room; it forces the dialogue to get outside the whole silo of conversation"[12] and because "the supporting dynamic is built in … [so participants] don't feel as alone and as disconnected as with other methodologies."[13]

Utilizing the "Whole Person". Most importantly, large-group methods do not appear to compartmentalize individuals into the tasks they are working on directly as part of their daily routines. Instead, they utilize the whole experience of individuals to produce higher level outcomes. Additionally, they lead individuals through a process of personal self-discovery and appeal to the "self-actualization" level of individuals' motivation (the top level of Maslow's hierarchy of needs, Maslow, 1943). Participants leave the experience "feeling valued for what they have created in their life"[14] and "bringing about individual change."[13] Maslow's self-actualization level includes morality, creativity, spontaneity, problem-solving, lack of prejudice, and acceptance of facts – all of the factors called upon by large-group methods from their participants – which enable discovery of

"new information … new ways of relating to one another … learning and action at a new level."[15]

Limitations of Large-Group Methods.   While large-group methods produce potent people-related outcomes, they are not without limitations. It is important to note that large-group methods are essentially systemic and structural interventions and therefore do not address individuals' personality constraints with the change directly – but nonetheless provide unique and often never before experienced opportunities for growth to employees. "We don't work on behavioral characteristics, but offer [people] opportunities to do things that they have never done before when the task and goal is so important to them."[8]

Further, some practitioners and clients warn that continuous use of usually effective large-group methods within the same organization may lead to over-sensitization of individuals to the process of these interventions – ultimately decreasing the usefulness of the methods, especially at the individual level. The practitioner states: "Given the topic, sometimes the same people show up to many different sessions, generating a risk for individual burn out … participants may become desensitized/over-exposed to methodology."[16] The client confirms, "The other problem is … burnout. People think they can anticipate what's coming next … so you have to continually challenge the facilitator team to keep it fresh for the stakeholders and keep them engaged."[9]

Finally, practitioners note the importance of following up on commitments made in the meetings associated with large-group interventions because "lack of follow-through is like breaking a psychological contract" and results in potential negative outcomes of the process.[17]

Organizational Systems
"Hard" Results.   *The Change Handbook* lists a multitude of outcomes that individual large-group method result in, such as process and structural improvements, cost savings, product innovations, and many others (Holman et al., 2007). Our interviewees confirm that when large-group methods are well executed, "they are immensely powerful when changing business structures … whether or not they are mapped cleanly or thoroughly – but this is powerful because you have stakeholders co-authoring change."[13] One group of outcomes that is influenced through the use of large-group methods deals with specific "hard" measurable results (such as cost reduction, revenue generation, etc.). Below are just a few examples of "hard" results obtained through the use of the various large-group methods.

Dick Axelrod describes effects of the Conference Model®: In the Calgary Health System, the wait time has been reduced by between 10 and 40 percent, depending on the sub-specialty. For example, in the diabetes, hypertension, and cholesterol center, the wait time was reduced from 96 days to 4 days (Bichel, Erfle, Wiebe, Axelrod, & Conly, 2009). The client of Conference Model® confirms, "By the end of the process, about 2–2.5 years, we saw very early returns and the employee satisfaction returns went up early. Even though we weren't tracking performance improvement we knew we would see significant increases in productivity. We had reduced our cost by $700 million. Morale had gone up. It was way above what it was before the strike. The change process … was an absolute essential ingredient."[18]

IBM has used the Strategic Change Accelerator method to literally transform the corporation. In a presentation that Lou Gerstner made to his worldwide management council in the fall of 1996, ACT was credited for "[general] cost savings of over $700 m, revenue increases of over $900 m; and inventory carrying cost reductions of over $1.2b" in the first year alone. Lou Gerstner was hold to say to his leaders that if they have not been using ACT, he would question their management skills.[6]

Joel Fadem and Stu Winby used the Decision Accelerator process in a project called Right Track at Alegent Health. As of October 2008 over 180 Decision Accelerators on a variety of issues and challenges, from strategic to operational, were conducted. The process was credited with producing strategies that essentially inverted Alegent's performance though reducing costs, increasing revenues and, notably, patient quality outcomes. At the same time Decision Accelerator has created what can fairly be described as a "collaborative culture," a new way of working within Alegent. Using the Decision Accelerator Alegent created projects that helped it achieve the health care industry's top "Combined HCAHPS and CMS Quality Ranking" during 2006–2007, unseating the Mayo Clinic, for the first time, as number one (HCAHPS Scores Innovation Design Lab Case Study, 2007).

America*Speaks*, which most clearly has the largest scope and scale of any of the methods we looked at, has achieved what can only be described as heretofore "unheard of" results in highly politically charged environments. In its work with the State of California, America*Speaks* was able to totally alter the state's budget priorities and helped to create policy changes that probably would never have occurred otherwise. And, of course, almost anyone who is in this field already knows about their work with the City of New York post-9/11, when they brought over 5,000 citizens together to talk about how the city should proceed in rebuilding the site where the Twin Towers once stood.[8]

Product and Process Innovations. Other types of organizational outcomes of large-group methods deal with process and organizational changes. For example, the Appreciative Inquiry Summit process "allows people to generate and rapidly prototype structure and process innovations."[19] Whole-Scale™ Change is used for process and structural redesign (and at times for both simultaneously while "keeping different pieces aligned and integrated").[20] And yet another possible "process" outcome has to do with building consensus required for moving long range plans forward where large-group methods "allow to build a sense of community."[15] The Future Search client echoes this sentiment: "The Future Search gave us a way to tear down the silos and begin to communicate more effectively and to a larger group of people because we could get them all to dialogue at one time."[12]

Process, structures, money aside – how about averting human disaster? A Future Search was credited by the *New York Times* in an article published in 2005, quoting a Federal Aviation Administration executive who participated in creating a "minor miracle" by helping the FAA avert what was otherwise believed to be an impending catastrophe in air traffic control during the summer of 2005, by bringing together representatives of the FAA, airlines, unions, major US airports, and other key stakeholders to examine and solve the problem (Bunker & Alban, 2006). As is the case with most large-group meetings we examined, this was the first time those who all shared a part of the problem and, consequently, part of the solution had ever been in the same room together at the same time.

Long-Term Sustainable Change

Benefits Realization. Long-term sustainability of large-group methods is on the forefront of the agenda of practitioners (and is certainly a leading concern of large-group methods clients). Based on the interviews conducted by the research team, we have seen strong evidence that the large-group methods have a great potential for producing a long-term sustainable change. "Having done all kinds of different things … I would give [this large group method] high marks to set up conditions for long-term change."[13] Practitioners also note large-group methods' long-term impacts: "The Process Outcomes seem to last."[21] "Cultural change happens …. Any citizen in any neighborhood in the city could see commitments made in the summit by dollars in program areas. The citizen could see the same data as the mayor – that is system change."[8]

Creating Adaptable Systems. One of the key elements of creating long-term sustainability appears to be a focus on creating adaptable systems rather

than simple one-time problem solving. To that effect, many practitioners and clients point to a particular large-group method transition from a one-time event to a "way of getting the work done," in which large-group methods may become "a culture … a way to mobilize and get a lot of work done."[22] The clients confirm that exact notion that "to become culturally embedded in how we get certain work done here"[23] creates sustainability: "We have implemented the design, but needed to make changes to it. You're constantly adapting your organization."[24] Dick Axelrod speaks about "widening the circle" of the Conference Model®, thereby intentionally creating larger groups of change which reach critical mass leading to sustainability.[10]

How do They Work? The Art of Large-Group Methods

Having considered the desired and probable outcomes of large-group methods, we would now discuss the necessary ingredients of success – or, as we would describe them later, the five "I"'s that represent the *Art* of large-group method – and the characteristics of an Artist driving the method implementation.

The Right Issues
Client Situation. The city of Calgary in Canada used Dick Axelrod's Conference Model® to reduce the time between seeing a primary care physician and the referral to a specialist. The primary task was reducing the wait time, which is a very specific operational challenge. However, the task was linked to a higher strategic purpose: to improve the health care system in Calgary, making the Conference Model® large-group method a particularly appropriate way to address this challenge because it required involving a wide group of organizational stakeholders, developing connections between the various groups of stakeholders, creating networks of stakeholders aimed at specific actions linked to issues – and doing all of the above in a fair and equitable way (all characteristics of the Conference Model®).

Key Issues. What do we want to accomplish in this "meeting," "summit," or "event"? What is the purpose of all of us gathering in one room for hours or days Based on the theme analysis of clients' and practitioners' interviews, it appears that to be successful, the large-scale methods need to be aimed at the right issues. The right issues need to be clear, central to the

organizational life, and linked to a greater organizational purpose – or, as Bunker and Alban also suggest, the issues addressed must be systemic and they must affect a large number of people across all layers of an organization (Bunker & Alban, 1997).

Issues as Key Imperatives. "It is necessary to create a connection between people and the purpose. The task itself must be clear; however the greater purpose should also be recognized. The issues that are tackled must be perceived as important, real and tangible in order to gain momentum."[10] While the task may be an important short-term consideration, the purpose of the large-scale method is to allow participants to think more systemically with a long-term approach in mind. For example, Ludema et al. (2003) maintain that the Appreciative Inquiry Summit task should be clear, simply articulated, and of strategic significance. Often, the central task is highlighted in the title of the "event" to ensure participants are aware of its purpose – for example "An Inquiry Into Optimal Margins for Our Company" or "An Inquiry Into a Care Delivery Model For Patients, Providers and Economic Sustainability."[11]

The task of the "meeting" should allow individuals to have knowledge of the whole product or service. At times, "workers only see a small part of the [organization's] final product and meaning is often denied to them"[21] Large-group methods close this gap and allow individuals to see how their contributions fit into the larger picture. For example, the key principle of Future Search is to focus the task on the future, rather than issues or problems of the past. In other words, the task should focus on creating common ground that allows the organization to move forward toward future aspirations. Additionally, aligning individual futures with organizational aspirations further supports the greater purpose of the entire system.

Issues and Sponsor Commitment. The common sentiment among practitioners and clients of large-group methods is that without proper follow-through with the key players, the "event" or method is simply a gathering of key stakeholders. "We don't do this work until it is legitimately linked to decision-making."[8] Practitioners of large-group methods tend to agree with Kotter's (1995) ideal for managing change in that sponsors of the large-scale methods (and large-scale change) in organizations must have the authority to provide resources toward tasks and action items that stem from the "event." For example, in the case of IBM's ACT, in addition to providing resources, sponsors, and decision-makers should be actively involved with the follow-through or implementation of action items that

arise from the event – and without this level of commitment, no change will occur.[6] Similarly, for Future Search, resolved issues will not be incorporated into the organization's future unless sponsors and decision-makers fully endorse the change.[15] Other large-group methods have similar dynamics around stakeholder follow-through.

The Right Individuals
Client Situation. Future Search has been implemented at FAA and is widely believed to avert various issues in air traffic control during the summer of 2005, by bringing together representatives of the FAA, airlines, unions, major US airports, and other key stakeholders to examine and solve the problem. This convening of diverse stakeholders representing the "whole system" was critical in finding the solutions.

Key Issues. What kinds of individuals need to be engaged in the large-group method in order for it to reach the desired objectives? Based on the theme analysis of both client and practitioner interviews, it appears that, to be successful, large-scale methods need to engage the whole system (including a multitude of internal and external stakeholders), secure hands-on participation and sponsorship of the executive leaders, and juxtapose stakeholder groups and sub-groups so that interdependent parties have an opportunity for close interaction during the process.

Individuals as Members of a Whole System. Future Search pioneers Marvin Weisbord and Sandra Janoff suggest that one of the fundamental principles in large-scale change is to get all of the right people in the room.[15] Practitioners concur that event planning must include detailed evaluation of potential participants in the process. The right people include those who have the expertise to contribute to discussions, the authority to provide meaningful direction, and the resources to support decision outcomes. Once these individuals are together in one room, the "wholeness" of the system can be explored (Whitney & Cooperrider, 2000). A system's ability to experience its "wholeness" enables a feeling of togetherness and belonging among members and the opportunity for learning. "Multiple groups in the room have a much greater chance of identifying new possibilities, increasing efficiencies and identifying opportunities to work more effectively across teams or transfer process from one group to another."[21]

"If you're working changing a system and you only have half the stakeholders in the room, you're missing some very key voices, which detracts from the process."[11] When internal and external stakeholders are

brought together, it allows for different voices, perspectives, and experiences to be shared across borders within an organization. When all layers are brought into one room, the silos are broken and one layer cannot point fingers at the other layer, making it less of an ''us'' vs. ''them'' and more of a ''we or us'' change initiative. ''You get a sense that you are connected to a goodness that comes from the power of the whole. You realize you really need one another'' (Whitney & Cooperrider, 2000, p. 15).

Alternatively, another potential failure of large-group methods occurs when autonomous or independent units with no related task sit in a room. Iterative knowledge sharing is more likely to occur with participants who view themselves as interdependent with other areas of the organization. Although there may be individuals who are not advocates of the upcoming change, it is important that all stakeholders, both internal and external, are involved in the cause or issue in some capacity.

Much of what practitioners describe experiencing is represented in Wells' (1990) discussion of the five levels of group process: intrapersonal, interpersonal, group-as-a-whole, intergroup, and interorganizational process. As such, the whole-system process is not without risks. ''When you go large group, you go public in a very big way and that may scare people … There is certainly a higher risk when all stakeholders are in one room, however there is potential for great change, when *each* stakeholder takes responsibility for a portion of the change initiative.''[10] When a public commitment is made, a certain level of accountability exists after the ''event'' is over and everyone returns to business as usual; public commitments engender responsibility (Whitney & Cooperrider, 2000). For example, a Future Search client, in speaking about participation of customers and suppliers in the process, stated that by including ''suppliers and customers, [it] made the whole process much richer … and critical to the success … change was effected on their side as well … I think sometimes you don't want to expose your dirty side. The dangerous thing is that we only like to see ourselves as we like to see ourselves; [in this process], we get a complete view of who we are and what we are doing.''[12]

Individuals as Leaders of Change. ''Proper organizational sponsorship is a critical success factor for large-scale change … With a committed sponsorship leader or committee, the organization is likely to feel that the change effort is of the utmost importance.''[12] Essentially, the ''tone at the top'' dictates how the change will be perceived throughout all layers of the organization. Burke (2002) describes change leaders as individuals with a high tolerance level for ambiguity, as well as the ability to delegate or take

control as situations merit. High-level executives need to model the desired behavior, which impacts employees' perception of the change. For example, in IBM's ACT, high-level executives, titled ''change masters,'' also identify other people who can potentially be change enablers throughout the organization.[6]

Many practitioners agree that a large-scale change effort will always be more successful if the sponsor can assist with the implementation of the change. This sponsor(s) has the resources (e.g., additional human capital or funding) for the follow-through and therefore can ensure that the change is sustainable. For example, for Decision Accelerator, the key to sustaining the change is to have sponsorship that is committed to implement the change because they have the authority to apply the methodology to appropriate issues.[4]

The Intentional Process
Client Situation. A government agency within the national security community utilized Paul Tolchinsky's Whole-Scale™ Change methodology to assist with redesigning the training and education initiatives in the organization. With the assistance of the Whole Scale methodology, the organization was able to move the organization from a bureaucratic structure to a training-centric system. Following the specific process prescribed by the Whole-Scale™ change methodology of small and large groups allowed for a structured process for key stakeholders to discuss the future state of the organization.

Key Issues. Porras and Robertson (1992) describe organization development as ''planned, behavioral science-based interventions in work settings for the purpose of improving organizational functioning and individual development.'' Intentional process is essential in ensuring that all development objectives can be met. The elements of such an intentional process include the careful planning and pre-work, adherence to methodology and underlying principles during the event, and thorough post-event follow-through. An intentional process during the event, in particular, encourages participants to experience both subject immersion and intensity of engagement. Intentional process, in this sense, seeks to raise motivation levels and can lead to greater post-event outcomes.

Intentional Process in Pre-Work
Underlying Principles. While each large-group method has its own unique set of underlying principles, practitioners agree that following the

"principles" of a large-scale method is critical in achieving success. For example, in the case of Future Search, "organizations that observe the principles, will have success."[25] For AmericaSpeaks, events will not be meaningful unless four guiding principles are closely followed: "The challenge in sustaining this work is great; however, the key is to embed this work into the system on an ongoing basis."[8] This shift to a new process in an organization can only begin with an event where the guiding principles are strictly observed.

Following the Prescribed Process. Creating an event plan, process, or agenda as prescribed by methodology is crucial. Schein (1987) discusses that determining settings, methods, time schedules, and goals are essential tasks. Each large-scale method has different components involved in the process agenda; however, the common collective theme is the need to have details discussed and documented prior to the event.

For example, Bernard Mohr, pioneer of Appreciative Inquiry, stresses the importance of having the summit planning group actually engage in Discovery, Dream and Design in their own planning work for the larger summit – thereby giving them an experiential preview of the summit itself. Mohr also suggests that the time to establish "boundaries or givens" is in the planning of the summit and not in the middle of it. "The outcomes of an Appreciative Inquiry Summit are never known in advance, just as the outcomes of any conversation are never known in advance. You can structure, frame and set some boundaries, but even within that structure and frame and boundaries, the Appreciative Inquiry Summit method is fundamentally a method of social innovation. By definition innovation is something we haven't had before and we can't predict it … and of course, the extent to which the people that have access to controlling the resources and influence and authority within the system are comfortable with that, has a direct bearing on the outcome of and use of the method."[11]

Marvin Weisbord and Sandra Janoff point out that cases where Future Search has not been as successful have been due to an organization attempting to reduce costs by reducing time requirements or compromising on number or experience level of facilitators.[15] Joel Fadem, practitioner of Decision Accelerator, speaks of the process agenda as a script of all the fine points that should occur in the event. Sponsors and key decision-makers should review and refine the script many times before the event occurs. Fadem states that the script should include information regarding attendees, human infrastructure (i.e., facilitators and external consultants), time boundaries, structure of small and large-group meetings, and the process

for follow-through of action-items derived in the meeting.[22] IBM/ACT requires a planning team prior to the event to organize key stakeholders, issues to be discussed, and small- and large-team sessions.[6] Participative Design requires the creation of a design team to work on preparation for the event. America*Speaks* has process walk-through sessions prior to the event to make sure all details are thought of as they relate to process and human infrastructure. Consultants and facilitators present at the event are recruited based on their skill set as it relates to conflict resolution and meditation.[8]

Intentional Process in Delivery
Creativity Supported by Structure. Marshak (2006) points to five dimensions – political, inspirational, emotional, mindset-driven, and psychodynamic – that can facilitate or derail change at the individual or group level. Practitioners and clients alike describe managing these dynamics within the event structure to support creativity and change. "The process grew out of the meeting itself; we started with a clean slate and dreamed where we wanted to be," says a client who used the Appreciative Inquiry Summit process. He describes the ability of the Appreciative Inquiry Summit to allow for creativity through the structured use of the phases of the methodology.[26] Bernard Mohr, pioneering practitioner of Appreciative Inquiry, describes why starting an Appreciative Inquiry Summit with Discovery using the "paired interview technique" is important: "the intention at the start of the summit is to create new relationships within the system, relationships across boundaries of hierarchy or departmental silos, so that in the process of answering the inquiry questions, people build new kinds of connections, which become the essential 'fuel' for the implementation process."[11] Similarly, Marvin Weisbord and Sandra Janoff, practitioners of Future Search, discuss the underlying principles as a structure to house the creativity and innovative thinking that the participants bring to the event. The principles are simply the blueprint to allow the participants to focus on a common ground and think of future solutions for the issue(s) at hand.[15] Don de Guerre, Participative Design practitioner, also discusses the concept of working within the framework of six psychological principles, but allowing for space to discuss creative options as they relate to process and design improvements in the organization. "Participative Design is a participative action research process whereby work is not changed unless individuals have the 'elbow room' to discuss alternatives."[21]

Intensity and Immersion. Conducting meetings in special settings for the purpose of generating change has its roots in the T-group intervention

(Highhouse, 2002). The intensity of the large-group process that participants are engaged in allows addressing issues in compressed timeframes without being interrupted by work. Practitioner Dick Axelrod notes regarding the Conference Model®, "We are working on something that is tangible and we are affecting people's jobs. Something they care about a lot. Nitty gritty stuff. It's more than just creating a vision – it's getting into the basics of how we do work and I think it taps into how to improve work … taps into that in a kind of profound way. In a visceral way, they begin to understand where they sit in the system, how they impact others in the system and there is a community that builds and wants to do something about it."[10]

Intentional Process in Post-Work

The third stage in Lewin's (1947) change model points to the need for establishing a system or process that will solidify the new desired state. Many large-group methods include an important implementation component that includes follow-up processes that need to occur after the event is over. Many practitioners believe that the sustainability of the change effort lies in the follow-through processes, which need to be discussed prior to the meeting.[20] For example, the Conference Model® shares the same underlying belief related to follow-through of momentum created in the event. Dick Axelrod, practitioner of Conference Model®, discusses the concept of collaborative loops; where the system learns to design their own large groups after the event. The collaborative loops allow the system to learn of a different way to convene whereby the long-term sustainability concern is thought of as a process issue prior to the event.[10]

The Right Information

Client Situation.   Beginning in 2005, Alegent Health Systems leveraged the Decision Accelerator to facilitate collaboration across the multiple stakeholders in this large and complex health care system. To drive results, Alegent needed to enable dialogue among patients, physicians, community agencies, hospital staff groups, and others. In speaking about the Decision Accelerator's capabilities, the Alegent client highlighted the importance of bringing the right information into the room so that information sharing and immersion can take place. "The more you can bring the topic and experience to life, the more engaged [participants] will be in the process, and the conversations will be richer."[9]

Key Issues.   In all the large-group methods we studied, access to the "right" information is essential to the critical thinking that needs to take place.

To arrive at well-justified solutions, participants need access to comprehensive, relevant, and accurate information in order to carefully and thoughtfully generate ideas and process options. As such, the "right" information needs to be both deep and broad. Information may be supplied to participants; at other times, information is generated by participants themselves. In all methods, information serves as the leveling element that enables participants to contribute, develop a shared perspective, and jointly create a new reality.

Facts and Figures as Information. Some methods emphasize that information is that which is sourced from facts and figures data. In this sense, information can be gathered prior to or developed during the process of a large-group method. Business and marketplace information, organizational financial performance data, and human capital data are key information sources that may support event objectives. Additionally, empirically driven data captured during a method's execution is important information to cycle back into the system for decision-making.

For example, the "Participative Design process is a participative, action research process."[21] Information is collected from system members. Their individual knowledge of and experience within the system is collected during the method's execution. This approach ensures a thorough understanding of the problem domain. Similarly, the Decision Accelerator requires a rapid inspection of information brought into the system by key stakeholders. Information is either brought into the environment through tacit knowledge or created by collective conversation. The Decision Accelerator method in some respects "acts as a big information processing machine."[4] Practitioners hypothesize that information processing in this fashion is more than a method, but fundamental to the way work is accomplished. Information used in the IBM/ACT method includes data collected prior to the event. In some cases, information is a collection of key business issues. In other cases, information is a collection of process maps ready for analysis and consideration. In this method, participants are asked to discuss, evaluate, and make decisions based upon business information.[6] America*Speaks* events carry this idea forward from organization-level intervention to broad scale public events. An essential concern addressed with this method is the importance of providing participants with access to neutral information. America*Speaks* produces a participant guide which contains information that enables participant education prior to the event, to alleviate the concern whether "a community in the US [can] get enough information to behave democratically."[8] During the event, software assists

in collecting information, providing a real-time feedback loop that enables both small-group discussion and large-group decision-making.

Emotional Experience as Information. Other methods assume that information is a blend of, or the intersection between, fact and figures data and the human experience. For these methods, both types of information represent key inputs to and outputs from events.

Historical and current information about the session topic is fundamental for a successful Future Search conference. Sharing and discussing this kind of information creates common ground and is essential to action planning. During a Future Search conference, participants discuss how they are addressing key trends now and what they want to do in the future. As such, the Future Search method supports discovery of new information (Weisbord & Janoff, 2007).

Similarly, the Appreciative Inquiry Summit, one method within the larger practice of Appreciative Inquiry, also assumes that information exists within participants (Cooperrider & Srivastva, 1987; Cooperrider & Srivastva, 1999). The method relies upon inquiry to vocalize that information and bring it forth into the system for evaluation. Bernard Mohr maintains that "historically, we have thought of the process of data collection or inquiry or research as something [that] comes prior to change in human systems ... the rethinking that Appreciative Inquiry has brought to the table (is ... the awareness that change begins at the instant of the first question)."[11]

Paul Tolchinsky describes information as a key component of the Whole-Scale™ Change method, which depends in part on the sharing of information so that participants in the organization can make thoughtful decisions, both individually and collectively as a system.[20] The Conference Model® practitioners recognize the role information access plays in enabling transparency. "In a visceral way, [participants] begin to understand where they sit in the system, how they impact others in the system and there is a community that builds and wants to do something about it."[10]

The Right Infrastructure
Client Situation. The executive of the Vision Council was trying to enable a community of eye health care professionals, manufacturers, and suppliers achieve a goal: to develop a public health message that all could agree to and support. There had been many attempts at crafting a unified eye health message with no success. As a result of using the Appreciative Inquiry Summit method, not only were they able to come to agreement on the essence of a public health message, they also agreed upon structures and

funding needed to carry forward the execution of that message. The latter outcome, a legal entity (the formation of which was concluded within just months of the summit), was unexpected. "You cannot do something like this virtually. You can do follow up things but the meeting was so important. You have to have the face to face."[27] This outcome demonstrates how the Appreciative Inquiry Summit method, its infrastructure, and its approach enable collaboration and accelerated social innovation.

Key Issues.   Both physical spaces and networking technologies permit large numbers of stakeholders to be actively engaged. Both infrastructure elements serve to support the collection and analysis of data, as well as enable decision-making and planning. Technology, in particular, has added value to large-group methods in the same way it has enhanced human productivity and effectiveness in other domains. A variety of technological tools have been used in lieu of physical space or in concert with physical space. Ultimately, adequate infrastructure enables group process, and some methods leverage infrastructure more than others to create an environment where change can take place.

Infrastructure as "Container".   Some large-scale methods use infrastructure to establish a "container" (Green & Molenkamp, 2005) where events can take place. The "container" holds participants together in some fashion for an agreed upon period of time. At a basic level, infrastructure includes facilities to house the attendees, meeting space for large- and small-group interaction, and electronics for communication vehicles. In this respect, infrastructure plays a valuable but supporting role in providing logistical support and facilitating interpersonal relationships and collaboration.

Paul Tolchinsky commented that "you can't use high technologies effectively unless you have ways for people to connect on an emotional level."[20] The Whole-Scale™ Change methodology includes both in-person group sessions and technology-supported communications to encourage participation and engagement. The Conference Model's® approach is similar, using a series of large-group events and walk-through events over time, based on an organization's needs and change plan. "You have to create connections between people and the purpose. You have to promote a sense of equity and fairness in what's going on."[10]

Infrastructure as Enabler.   Some methods further leverage the "container" to create enabling conditions for group-level patterns and ideas to surface. In this respect, infrastructure functions to elicit group dynamics that

dislodge historical norms, support idea generation, and optimally convince participants to change.

For example, the Decision Accelerator leverages physical space, flexible furniture, and tools to enable collaboration across organizational levels and roles. The method creates "a new social physical model … not the historical downstream planning process."[4] Similarly, the Appreciative Inquiry Summit method stipulates that participants move between various groupings during the summit from groups of two, to groups of six to eight and then larger and larger groupings: These various groupings allow for integrating conversations at many levels "you can structure, and you can frame and you can set some boundaries, but even within that structure and frame and boundaries, the Appreciative Inquiry Summit method is fundamentally a method of social innovation, and by definition innovation is something we haven't had before and we can't predict it. Therefore, having the chance for all members of the system to be in dialogue on all aspects of the preferred future is essential to creating actions to which everyone can commit."[11]

In addition to physical space and technology, the America*Speaks* methodology leverages a highly skilled human infrastructure to ensure that all voices are heard. America*Speaks* uses technology infrastructure to bring people into public policy-making, and human infrastructure of trained facilitators – "people who are capable of process consultation, conflict resolution and mediation" – to enable dialogue and ensure the legitimacy of event outcomes.[8]

How do They Work? The Artist as a Conductor of Large-Group Methods

Holman et al. (2007) suggest that mastery of any whole-system change method is a lifetime's work. For the practitioners interviewed for this chapter, that idea is quite literally true. These practitioners are members of an elite group of "*Artists*" and pioneers in large-scale change methodology. Whether driven by a fundamental desire to help people, a deep calling toward social action, or simply dissatisfaction with the status quo, these practitioners innovated and created new ways of implementing change. Burke (1997) maintains that organization development as a field was founded on both humanistic values and ethical concerns for democracy and social justice. In our discussions, the practitioners shared their ideas about what makes large-scale change methods, in particular, so successful. In truth, however, it seems insufficient to discuss the "art" without thinking about the "artist" and his or her contribution to the art.

Consider Schein (1999) and his description of three distinct types of consultation: the expert consultant, the doctor/patient model of consultation, and the process consultant. He writes that the expert consultant is a valued advisor and provider of expertise. He goes on to describe the doctor/patient model of consultation, where the physician asks questions and provides a diagnosis and prescription. He closes with a description of process consultation, where a helping relationship is created as a medium for change. The practitioners we interviewed could be viewed as consultants functioning in all three capacities, and yet, this representation may be simply a baseline description of their capabilities. These practitioners possessed the critical capabilities and experience needed to manage the consulting process, conduct analysis and diagnosis, design appropriate interventions, facilitate and perform process consultation, develop client capability, and evaluate organization change. "There is this intersection between whatever the situation might require, whatever the consultant bias is towards a particular methodology, and whatever the client can tolerate."[10]

Worley and Varney (1998) compiled an extensive record representing the body of knowledge, skills, and competencies needed for practitioners in the organization development and change profession. As this chapter focuses on large-scale change methods and the "artists" who brought them to life, we turn our focus specifically to facilitation, where the artists' unique characteristics and abilities are critical to successful delivery of large-scale change.

Consultant as Seeker

Paul Tolchinsky describes how he "was looking for how can we speed the organization design process and how [he] could be get more participation" in the process.[20] Collaborating in the development of the Whole-Scale™ Change method was the outcome of a need for a new way of doing things. Perhaps this process of continual questioning reflects how the "artists" we interviewed are so innovative in their work. The large-group method consultants we spoke to possess passion, a sense for risk-taking, creativity, and a willingness to experiment. In talking about large-group methods practitioners emphasized that "everyone pushes the boundaries. [Practitioners] are continually validating the parameters. Do these principles make sense to leaders and to the consultants that guide people?"[15]

Consultant as Agent

Consultants often play a special role during the large-group method facilitation that is both different from and similar to other roles that consultants

usually play in the Organizational Development world. Facilitators must "enable learning at a new level"[15] by "paying attention to the individual's journey and the organization's journey" and "how you allow the individual to work on individual dynamics and organization dynamic."[20] Bernard Mohr recognizes how a consultant influences outcomes. As a leading practitioner of the Appreciative Inquiry Summit method, Mohr argues that "objectivity in inquiry is a false premise. There is no such thing as an objective question. All questions are an intervention, which move the system into one direction or another. Every question therefore has within it the seeds of the system's future"[11] Carolyn Lukensmeyer argues that we "need those skills and use those skills for the common good."[8]

In sum, the ability of an *Artist* to be both premeditated (in competently executing every complex detail of the method) and ingenious (in sensing when the changes could be made in real time in order to better meet client objectives) is crucial. This is something that practitioners describe as "delivery agility"[22] as the critical factor for a competent facilitator: "You need to plan an event very well, and then be able to completely change in process if you need to, in order to be productive … The initial premise was to create the conditions for some new thinking to show up in these sessions. Stimulate people's thinking. You can't guarantee that a powerful effective idea or thinking will occur, but you *have to* create the conditions where that kind of outcome could happen … At the end of each day, [there is] a lot of review and rewrite, sometimes even in the middle/during the event. Agility is essential. The facilitator's experience is critical."[22]

CONCLUSIONS

Summary of Findings: The Conceptual Model
for Successful Large-Group Methods

Based on the findings described above, below is our suggested conceptual model for successful large-group method that emerged from our findings. First, we suggest that a successful intervention results in three key outcomes critical for the long-term sustainable organizational success, including *People* who are motivated to change, are committed to the changes, and are empowered with new interdependent relationships formed as a result of large-group methods participation; *Organizational* outcomes, including "hard outcomes" (such as cost savings, revenues, increases in numerically measured customer and employee satisfaction, etc.), as well as changes in
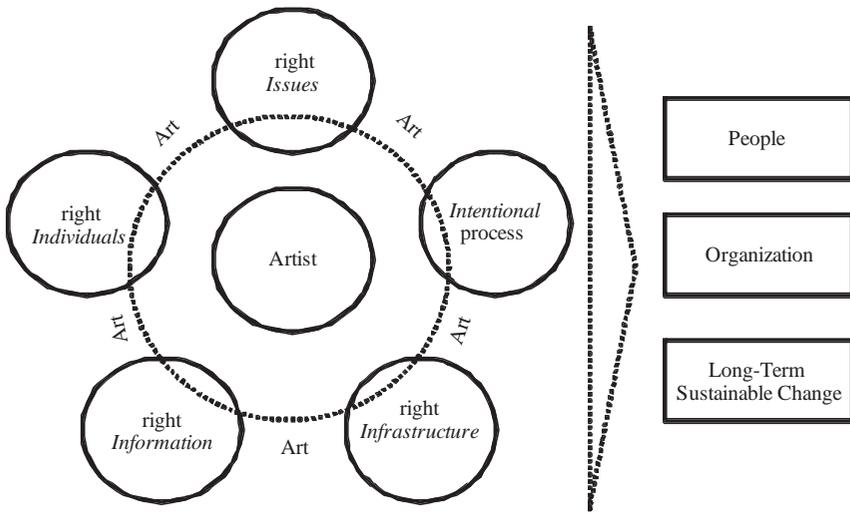
Fig. 1. Conceptual Model for Successful Large-Group Method.

processes, structures, and other organizational aspects aligned to the organizational change objective; and long- and short-term realized benefits that result in the *Long-Term Sustainable Change*.

We also purport that both the *Art* (excellence in method execution) and the *Artist* (the right facilitator) are both necessary for achieving the desired outcomes of the large-group methods. Furthermore, we stipulate that critical elements of Art include the following five elements (or five "I"s): having the right *Individuals* in the room, aiming the large-group method at resolving the right *Issue*; having *Intentional* process (including structured pre-work, intra-method process, and follow-up); having the right *Information* in the meeting; and utilizing the right *Infrastructure* (such as specifically appropriate physical space, technology, etc.). We suggest that while these elements of the Art are important, the simultaneous requisite role of the Artist to flexibly manage the tension between the intended rigidity of the Art (the 5 "I"s) and the emerging human dynamics of the large-group method and associated evolving client objectives is critical (Fig. 1).

Is there a Future for Large-Group Methods?

So, to summarize, we know that they work. There is clear and abundant data throughout many cases included in this chapter – and many that are

not – and throughout the testimonies of our "panel of experts" and clients, much of which, for space and other limitations, we are simply unable to include. And while we purposely avoided deep research into the question of "sustainability," as that has been a topic of several other research papers in this series, we strongly believe that the results produced by these methods are "sustainable," at least under any reasonable definition of that word in today's environment. At the very least they are as sustainable as any other set of methods that we believe is out there. Of course, to some degree, the same could be said and has been documented for many other methods that are available today. Six Sigma Quality and Lean Manufacturing projects have been shown to achieve significant impacts and, in many cases, have been shown to have lasting results. And we would be negligent if we did not mention the many successful socio-technical system projects that have occurred over the years, particularly since many of the large-group methods that we examined were identified by our practitioners as having their roots in the work of Emery and Trist (e.g., Emery & Trist, 1965). We also believe we understand the elements that make these methods successful, as represented by our simple model above. *But is there a future for them?*

To answer this question is of course like reading a crystal ball. We have all seen highly successful methods last for a time and then almost disappear, replaced by what some would call a fad and others would call their salvation. As to our group of practitioners and clients we must admit that we were surprised at the diversity of opinion that we heard from those we interviewed on this question (because due to our own enthusiasm about these methods, we expected everyone to say "yes").

Surprisingly, the answer was not one that we would call anything close to consensus. Some practitioners felt that given the complexity of the issues, and the need for stakeholder buy-in which seems to only be increasing every day, the "flattening" impact of the internet on our society, and the emergence of Web 2.0 tools, there is simply no other option for creating sustainable changes in organizations than "continuously expanding the circle"[28] – and this is exactly what the large-group methods do. Further, as many of the practitioners of large-group methods indicated, the methods themselves seem to continue adapting to these changes (e.g., the previously mentioned example of the seven underlying principles of Future Search (Bunker & Alban, 1997) that have now been consolidated into four that includes the elements of the seven – but also some new nuances (Holman et al., 2007)). Weisbord and Janoff, in commenting on the impending evolution of large-group methods, stated that: "Now everyone is

integrating-a lot of practitioners tailor make interventions for clients."[15] As we have previously mentioned, many of the methods themselves have *adapted* to the changing organizational conditions by becoming *Adaptable Methods* (i.e., methods used for variety of applications), regardless of what type of issue they have been originally designed to help solving (and the number of Adaptable Methods is likely to continue to grow). Yet, at the same time, many of our research participants (both clients and practitioners) felt that the use of these methods, at least over the last 18 months or so, is not increasing but may well be decreasing with frequency of use (due to the "method fatigue" described earlier in the section regarding the limitations of "People" outcomes of large-group methods).

Further, it may well be, as we indicated from the outset, that the difficult economic times that mark the period in which this chapter is being written are having an impact on the perceptions regarding future use of large-group methods. Some of our research participants raise a concern that to some clients these methods seem risky as they are not convinced that the benefits outweigh the costs. And ultimately, as several of our practitioners noted, and as other studies have shown, the client, and their willingness to take the risks, give up control, and turn solutions to problems over to "the group," is critical. These types of leaders, these types of clients, are still a rare commodity in our world – and are that much rarer today when, during the time of crisis, many managers default to traditional ways of solving problems. It may be, as several practitioners have suggested to us, that there will ultimately be no choice, that the democratization of our society, brought about by powerful tools such as the internet, will ultimately determine the outcome.

However, we see even a greater risk to the future of large-group methods. This risk goes back to our original question that ultimately formed the title of this chapter. Is it the *Art* (method) or the *Artist* (practitioner)? The answer, of course, is that it is both, and in addition it is the *Client*. And herein lies the problem and the challenge for the future existence of these methods: *the Art cannot be separated from the Artist*. While this may be a function of the group of methods we looked at, it is clear that the amount of skill required to perform the *Art* has come from many years of practice. Our group of practitioners are consultants who may well be at the very height of their consulting prowess, that share the attention to detail, the capacity to listen and respond to their clients, and the ability "to turn on a dime" when necessary.[2] At the same time only a few methods of those we looked at have so far been extended into a formalized teaching and learning environment. For example, the Future Search is being advanced through

the establishment of the Future Search Network (FSN). Further, since 1991 beyond the boundaries of the FSN, Weisbord and Janoff have trained over 3,600 people in Africa, Australia, Asia, Europe, and the Americas to implement Future Search with hundreds more practitioners having replicated Future Search experience in many of the world's cultures.[15] Additionally, there is a large community of practitioners that has embraced Appreciative Inquiry and the Case University graduate program promotes wide practice and institutionalization of this large-group method. The new Artists (and the new Art) of participative design are also coming from the M.A. in Human Systems Intervention at Concordia University in Montreal. However, while these are very hopeful signs of the Art of the large-group methods being shared beyond the network of experienced practitioners (Artists), to our knowledge, and this may well be an error on our part, as we did not explore this question deeply with our group of practitioners, few other methods include with it the intention of creating a significant number of artists of similar skills (outside the immediate consulting practice surrounding the *Artist*). In other words, there is no *Academy of Art* yet established that an aspiring consultant, who wishes to gain these skills, can turn to – neither is there a place to go, a business school, that teaches aspiring leaders how to sponsor and lead large group based change processes from inside the organizations. So where, we ask, will our future *Artists*, both consultants and clients, come from? And will they, as those before them, have to continuously recreate and reinvent the wheel of large-group methods? Or is there a better way?

These questions, of course, will eventually be answered by the ''next generation'' and we do have some level of hope and trust that at the same time there is what appears to be a great proliferation of different change methods, as identified in *The Change Handbook* (Holman et al., 2007), there will always emerge a group of great *Artists*, both managers and consultants, who can take things to the next level. The real question, of course, is how long can the future wait and what will we have lost in our own lack of knowledge transfer from this generation of managers and practitioners to the next?

Implications for Practice and Future Research

Through our research into the questions posed in this chapter, we conclude that these large-group methods are powerful and are particularly

appropriate for resolving a wide variety of issues facing today's organizations that operate under such prevalent conditions as technology saturation, increasing interdependence and globalization, economic contractions and expansions, and others that may come to mind – and that this will remain the case in the future. Given the speed of issue resolution resulting from the whole class of large-group methods and their obvious associated cost effectiveness, these methods should continue to be ever more attractive than traditional "expert-based" methods for improving overall organizational effectiveness in a sustainable way. We also conclude that the future use of these methods will be challenged by the availability of "Artists," practitioners and mangers alike, who can apply these methods so that they lead to desired outcomes. The limitations posed by perceived risk and the natural inclination that most managers have toward maintaining control within a small group of decision makers will also continue to be a barrier to the use of these methods. The implications for the practice of organizational change and development should be clear, as should the implications for business schools who wish to create leaders capable of leading and sustaining large-scale change.

Practitioners will need to develop beyond the basic skills that are taught to them in even some of the best academic institutions. In addition to basic consulting skills, they will need to develop the skills to plan and lead these types of events and processes, as well as a variety of capabilities to support large-scale change over time. And they will need to have the opportunity to develop these skills under the tutelage of those who already possess them. A solid definition of this "craft" needs to be developed and a system to support its development needs to be created. To the extent that this can become more formalized, the *Art* will have a greater likelihood of successful continuation and expansion, the creation of the *Artists*. As almost all of our practitioners and clients suggested in one way or another, the need is there. It will be up to the practitioners themselves, in addition to institutions of higher education, foundations, or other future or existing institutions, to create the capacity to meet the need. Much the same can be said for aspiring leaders, managers, and business schools.

As to the future research, our team has only scratched the surface of the answers to the ambitious research questions we have posed in the beginning of this chapter. More formalized empirical study into these questions is needed. More specifically, we suggest the following as some potentially interesting and fruitful questions to address. First, how many companies currently use large-group methods and to what extent they are being

successful? To what extent is the use of these methods expanding or contracting? Second, a study of practice is needed to understand what are the skills and capabilities required to plan, lead, manage, and provide effective consultation to leaders and sponsors of change at this level. Third, conversely, we need to look at the characteristics of clients that have greater propensity to use the large-group methods effectively – and, even more importantly, at how do we turn a client that may not have great propensity for succeeding with large-group method into a client that has an outstanding chances of being successful with it. Fourth, to what extent can these types of events be conducted and these methods applied utilizing the internet in new and creative ways and to what extent are benefits, such as the creation of ''social capital,'' either limited or potentially enhanced through the use of these technologies? As several of our practitioners put it, to what extent is what we are learning in face to face, smaller settings scalable to larger and larger systems and is there a way to use technology to accomplish that? Fifth, we feel it would be important to understand what creates the breaking point between transformation at the individual level, which typically seems to occur using these methods, and true long-term organizational transformation. Finally, as we mentioned before, our findings focus on North American practice of large-group methods – expanding this research to include international perspective from clients and practitioners would be a great contribution to the field of studying large-group methods.

In coming back to the metaphor that we began this chapter with, our team has been privileged to be led by the hands of *Artists* to ''look behind'' the curtain of an orchestra creating a beautiful symphony that the large-group methods represent for organizations undergoing organizational change. And in that quick backstage tour, we have seen that no one facet of large-group method in particular is a critical prerequisite for the successful outcomes of these interventions. Instead, it is the interaction of multiple elements within the ''symphony'' of a large-group method that all work together toward the change in human and organizational systems (e.g., right *Individuals* with the right *Information*; right *Issues* within the right *Infrastructure*, etc.). This conclusion takes us back to the systemic view of organizational performance and, we hope, will provide critical input in further use and adaptation of large-group methods, as long as the essence of these methods (the *Art* and the *Artist*) remain at the core of how these methods are implemented because, as Jennifer Hambrick, a WOSU Classical Music radio station host, put it, ''in that essence live the human and the divine'' (Hambrick, 2009).

NOTES

1. Marvin Weisbord and Sandra Janoff interview, November 27, 2009.
2. Joel Fadem interview, November 21, 2009.
3. Some of these companies worked with Decision Accelerator based on a model developed by MG Taylor Corporation, which was founded in 1979 and offered several Decision Accelerator-type "built-environments" in various parts of the United States and offered these spaces to clients to support their collaborative work processes.
4. Stu Winby interview, December 1, 2009.
5. This is a fundamental condition for success Marvin Weisbord first advocated in Chapter 13 of Productive Workplaces (Weisbord, 1987).
6. Chuck Phillips interview, November 3, 2009.
7. This positive bias could have occurred because, in theory, both the practitioners and the clients we have spoken with may have had some vested interest in telling us a positive story about their work.
8. Carolyn Lukensmeyer interview, November 10, 2009.
9. Decision Accelerator client interview, November 9, 2009.
10. Dick Axelrod interview, November 9, 2009.
11. Bernard Mohr interview, November 11, 2009.
12. Future Search Client interview, December 8, 2009.
13. Whole-Scale™ Change client interview, December 8, 2009.
14. Bernard Mohr interview, November 11.
15. Marvin Weisbord and Sandra Janoff interview, October 27, 2009.
16. Joel Fadem, interview, October 21, 2009.
17. Paul Tolchinsky interview, October 12, 2009.
18. Conference Model® client interview, December 3, 2009.
19. Bernard Mohr states interview, November 11, 2009.
20. Paul Tolchinsky interview, November 12, 2009.
21. Don de Guerre interview, October 21, 2009.
22. Joel Fadem interview, October 21, 2009.
23. Decision Accelerator client, December 1, 2009.
24. Participative Design Client interview, December 5, 2009.
25. Sandra Janoff interview, October 27, 2009.
26. Appreciative Inquiry client interview, November 24, 2009.
27. Appreciative Inquiry client interview, November 9, 2009.
28. As Dick Axelrod so elegantly describes it – see Footnote 16.

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APPENDICES

Appendix 1: Large-Group Methods Research
Interview Participants

I. Decision Accelerator

Practitioners: Joel Fadem – Joel Fadem and Associates, Stu Winby – Sapience Organizational Consulting
Client: Senior Executive – Alegent Health

II. Strategic Change Accelerator/IBM's ACT

Practitioner: Chuck Phillips – Sapience Organizational Consulting

III. Appreciative Inquiry

Practitioner: Bernard Mohr – Innovation Partners International
Client: Senior Executive – The Vision Council

IV. America*Speaks*

Practitioner: Carolyn Lukensmeyer – America*Speaks*, Inc.

V. Future Search

Practitioners: Marvin Weisbord, Sandra Janoff – Future Search Network
Client: Chairman Emeritus – Haworth, Inc.

   VI. Whole-Scale™ Change

        Practitioner: Paul Tolchinsky
        Client: Project Manager – United States Intelligence Agency

  VII. Conference Model®/Collaborative Loops

        Practitioner: Dick Axelrod – Axelrod and Associates
        Client: Senior Executive-Boeing, Inc.

 VIII. Participative Design

        Practitioner: Don de Guerre – Associate Professor at Concordia
        University in Montreal.
        Client: CAO – City of Winnipeg, Canada

Appendix 2: Practitioner Interview Guide

   I. History and experience of using the large-group method

     1. Please describe your history and experience with using the [method]?

  II. Success factors using the large-group method

     2. Please describe a project where the [method] was used successfully. Why do you think it worked so well on this project?

     3. Please describe a project where the results were not what you would consider successful and what you would have changed if you could. Why do you think the results were not as successful?

     4. In general, where/under which conditions is the [method] successful (i.e., quality of the method execution itself, participation of stakeholders, focus on designing self-adaptive systems rather than a specific static organizational form, etc.)?

     5. In general, to what extent does long-term success rely on the quality of the large-group method vs. other factors such as strong leadership sponsors, project management, action planning, and execution?

     6. Do you believe these success factors we just discussed are specific to the [method] – or are similar to other large-group methods?

III. Outcomes of using [method]:

  7. In your opinion, do large-group methods of the type you are
      describing "work" in terms of:

    7a. Developing individual's motivations to change? Why or why
         not?
    7b. Changing actual processes, structures, technologies – and
         making those aligned with changes objectives? Why or why not?
    7c. Creating long term, sustainable large-scale change? Why or
         why not?

IV. Future of large-group methods:

  8.   What do you think is the future of these types of interventions is
       in comparison to those in the quality/performance improvement
       field such as LEAN or Six Sigma?
  9.   In your opinion, how well do these methods work in today's
       organizations under such prevalent conditions as high technol-
       ogy saturation, globalization, economic downturn?
  10. Is there a future for these large-group methods?

Appendix 3: Client Interview Guide

  I. History and experience of using the large-group method

    1. Please describe your history and experience with using the [method]?

 II. Success factors using the large-group method

    2. Was the [method] used successfully in your organization? Why do
        you think it worked so well on this project?
    3. [if applicable] Have you experienced a project where the results of
        using the [method] were not what you would consider successful?
        Why do you think the results were not as successful?
    4. In your view, to what extent did you feel the long-term success rely
        on the quality of the large-group method vs. other factors such as
        strong leadership sponsors, project management, action planning,
        and execution?

III. Outcomes of using [method]:

    5. In your opinion, did the [method] "work" in terms of:

        5a. Developing individual's motivations to change? Why or why not?

        5b. Changing actual processes, structures, technologies – and making those aligned with changes objectives? Why or why not?

        5c. Creating long term, sustainable large-scale change? Why or why not?

IV. Future of large-group methods:

    6. In your opinion, how well do these methods work in today's organizations under such prevalent conditions as high technology saturation, globalization, economic downturn?

    7. Is there a future for these large-group methods?