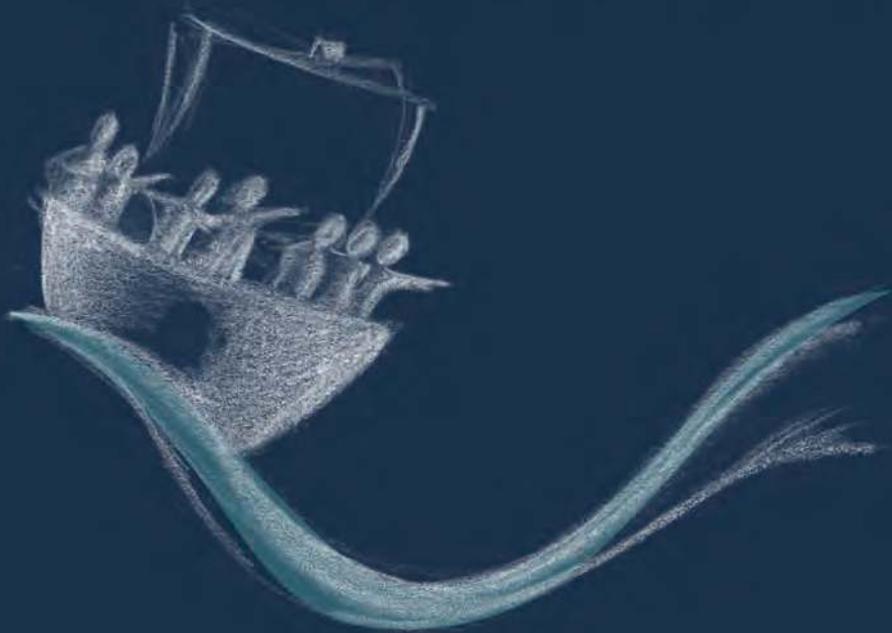


The Wave

Using co-creation to tackle key challenges
in organisations and in society at large



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bridgingpositions

THE PURPOSE OF THE WAVE

Co-creation as we see it is a journey undertaken by people, usually from different fields and backgrounds, who come together to find meaningful and sustainable answers to complex challenges and to work out together how to effectively implement them.



This manual and the set of cards that goes with it are for people who want to engage mindfully in the process of *co-creation*.

It is designed so that it can be adapted to many different situations. However, here we focus on three key applications.

- For one or more workshop events where people come together around an important challenge or a key idea that requires exploration and a sustainable solution.
- As a change process for a whole organisation or team that would like to embed *co-creation* into its culture and practices.
- To train *catalysts* (or update their training).

HOW DID THIS MANUAL AND THESE CARDS COME ABOUT?

We started out by asking ourselves the question: *How do we bring meaningful and mindful co-creations to life?*

A simple answer emerged: *Let's create a manual to describe the core elements and ways of co-creating mindfully and meaningfully. We'll include a set of cards describing different practical activities that can facilitate co-creation events.*

This manual and set of cards are for people who would like to mindfully engage in the process of *co-creation*. Anyone who wants to develop ideas or solutions to tackle a challenge, explore important issues, solve problems, or foster innovative thinking in a meaningful and sustainable way. It can also be used as a framework to facilitate longer culture change processes within an organisation or team.

By *co-creation*, we mean a collective journey taken by people from diverse cultural, social and working backgrounds who engage with each other to make advances on a certain topic.

Today we can see several *co-creation* initiatives, such as Open Innovation, Creative Space and 'Co-Productions' up and running. However, we believe that much of the time, these innovative processes are carried out in a way that does not unleash their full potential.

In our experience, these *co-creation* initiatives often place a great emphasis on tools, mechanics, processes, procedures and techniques, while equally important aspects such as mindfulness, appropriate attitudes, emotional and social awareness, physical energy and personal and collective motivation are overlooked.

This kit is born of a wish to support people in bringing out the full potential of cooperative innovation meetings. It aims to help them jointly face important challenges that are too complex to be tackled from only one perspective, and to work on collaborative progress in organisations and society.

The Wave is designed to help explore the following question:

How can we, with a calm and responsive state of mind, lead innovations that bring out worth, value and growth through a flow of coordinated actions that involve diverse people from around the world?

Our experience

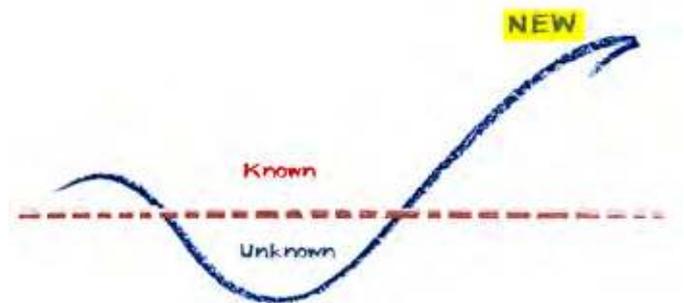
As specialists in *co-creation*, we see a desire for *meaningful and sustainable change* in many of the different systems we work in. At the same time, we perceive a knowledge gap. People are asking themselves: *how*

can this be done? To bridge the gap from *wanting to* to *being able to* is what we aim to achieve through the Wave.

Years of practice have taught us about a set of important factors that need to be considered in order to bring about meaningful and sustainable change. This kit is about sharing our learning and experience.

THE WAVE MODEL

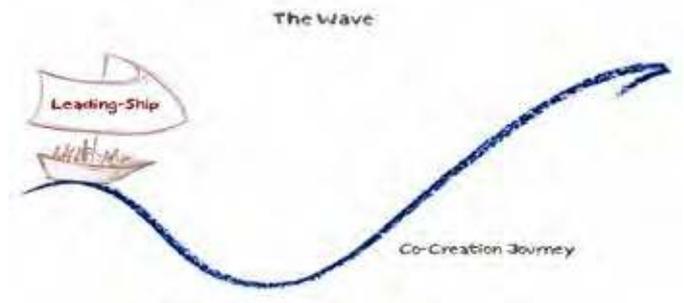
The Wave was inspired by the work of Otto Scharmer (2009), Nick Udall (2008) and of course by our 25 years of knowledge and experience in leading *co-creation* projects in the educational field and in social and corporate groups. Otto Scharmer's Theory U (2009), Nick Udall's creative rollercoaster (2008) and the Wave model are all based on the experience and knowledge that: 'to come up with something NEW, by definition this NEW thing has to be UNKNOWN before', in M. Clarke and C. Jacob's words. Therefore the Wave is a collective journey designed to travel from the currently known through the unknown and then onto the new. This flow is what creates the Wave dynamic.



In order to achieve a breakthrough, you have to venture into and beyond the unknown. The Wave will help you navigate through it all and plot a route to new action.

The Wave explains in a comprehensive way how to design and facilitate *co-creations* that lead you through the unknown. It explains how we use *co-creations* which employ diversity to create a breakthrough (the new), leading to workable results that people are willing to buy into.

We use the metaphor of the Leading-Ship to describe how a group of participants can be led through a Wave journey. This helps us to understand the importance of creating a safe vessel (the ship), so that participants can launch themselves into the unknown part of the Wave journey.



CORE IDEAS ON WHICH THE WAVE IS BUILT



The Wave is based on valuing personal subjective experiences, ideas and insights, and highlights the fact that it is important to offer these to everyone. The Wave operates in parallel on three different levels or in three layers of reality: the Macro, the Meso and the Micro.

The Macro, the widest perspective: Scharmer and Kaufer in *Leading from the Emerging Future* (2013: page 250-251) and many others experts state that a paradigm shift is needed in societies at large. On a global level, we need to shift our current mindset from giving priority to the economics of growth to one where caring for the environment and for the wellbeing of humanity are paramount.

The Meso, the intermediate perspective: we agree with the many researchers and executives (Scharmer et al; 2013: page 112-116; Scharmer; 2007: page 18, 342; Jaworsky, 1996; Senge, et al, 2008) who are convinced that a new form of leadership is required in organisations and institutions. This involves a paradigm shift from hierarchical leadership to self-organizing bodies that mindfully and meaningfully co-create in the service of humanity and in safeguarding our planet.

The Micro, the smallest-scale perspective: as human beings, we are a beautiful complex masterpiece;

we are probably the most complex system in the world. We are worthy of dignity and it is worth taking care of ourselves and of others. Building on what different healthcare and psychological research says (Cayoun, 2014; Kahneman et al, 1999; Rath et al, 2010), we consider seven universal, interconnected elements that shape our lives and that need to be balanced and taken care of for our wellbeing. We call them the seven areas of wellbeing:

- **Cognitive:** our need for reasoning, learning and understanding, sharing ideas and broadening our perspectives.
- **Physical:** our health, our wellbeing in terms of our body and mind, environment, mobility and nutrition.
- **Emotional.** Having enough time, space and opportunities to manifest our emotions through our expressiveness and creativity.
- **Social.** Quality relationships that fulfil physical and psychological needs - e.g. affection, recognition, acceptance, autonomy, esteem, security - which involve roles, habits, loyalties, norms, etc.
- **Purpose.** Having meaningful intentions, ideas to bring to life, dreams that motivate us.
- **Spiritual.** Having a path that is complementary to our daily life and that nurtures us by giving us an overall confidence and trust in the meaning of life as it is.
- **Global/Environmental.** A healthy connection with the environment that nurtures us and interconnects us.

THE BENEFITS AND COSTS OF USING THE WAVE

Co-creation in general and the Wave in particular are designed as a human dialogue process. This comes with benefits and costs. We want to clarify some of **the benefits and costs** that you need to consider when using the Wave so that your decision to proceed is built on a clear understanding:

We see some of the **benefits** as follows:

- **Holistic approach.** The process will foster all seven areas of wellbeing (see *Core ideas on which The Wave is built* on page 16 above on core ideas) both individually and collectively. This means that there is a learning and growth curve both for individuals and as a group. This ensures that it will be more effective, engaging and sustainable.

- **Diversity.** A diverse group of participants brings different perspectives to the challenge. By making use of their different points of view, a complete picture can take shape. *Co-creation* is the process of bringing different, heterogeneous brains together to form one powerful collective brain and use it to answer the *core question*.
- **Ownership and Sustainability.** The interests of diverse stakeholders are interwoven into the process and manifest themselves in a jointly engaged result. Because of the different resources and engagement everybody brings to it, there is a strong commitment to the outcome of the *co-creation* and a strong feeling of ownership. This eases its implementation and makes it more sustainable.
- **Sense of Community and Inclusion.** Engaging in any exploration by using *co-creation* creates a sense of community. Everyone brings his or her opinion to the table, everybody is heard and acknowledged. If this is then embedded within both a self-mastery journey (the cards with Self focus) and a social awareness journey (We cards) as designed in the Wave, a true community is created that is engaged in a common purpose.
- **Iteration Meeting Feedback.** Building on what many *Agile*¹ and *Lean thinking*² experts and coaches suggest (Denning, 2010; Mann, 2014; Adkins, 2010), the Wave journey is often designed not as a single event, but as a choreography of iterative meetings which build upon each other (in Agile Software Development these are called Sprints). A review of what has worked, of what has already been done (or not done), what is hindering actions and or what support is needed, is held in each sprint.

Costs to consider.

- Truly working comprehensively on the seven areas of wellbeing individually and collectively requires engagement, time and resources. This is especially true for the *core team*, which leads the process and needs to inspire trust in the wider group of people involved, the participants. It is important to nurture and align healthy energy, healthy attitudes and healthy behaviours. Plan plenty of time, energy and resources for this!
- Bridging experience and research, we agree with Weisbord et al. (2007: 16-19) on the necessity of

- 1 "Agile (or Agile Project Management) originally derived in part from the manufacturing sector, and has evolved into a set of principles and practices that have flourished within, and found applications beyond, the IT sector. Its adaptive, value-driven, collaborative and empowering essence drives innovation in an iterative and incremental manner that is founded upon organizational and experiential learning" (Moran, 2015).
- 2 "Lean thinking is a business methodology that aims to provide a new way to think about how to organize human activities to deliver more benefits to society and value to individuals while eliminating waste." (Wikipedia). Womack et al (2010) used the term lean thinking to capture the essence of the philosophy underlying the Toyota production system while describing a broader utilization of it.

possessing enough authority to act during the Wave process and subsequently in the implementation phase. Therefore it is important to have decision makers on board and to be able to rely on their commitment and, ideally, their presence through the entire journey. Paramount to any *co-creation* is that decision makers must honour and support the outcomes even though they may be outcomes that they were not able to foresee in the first place. The rejection of the outcomes of a *co-creation* by decision makers is the worst possible end to any *co-creation* process. Make sure that this is understood by decision makers before you start!

- Working on and agreeing in advance on who benefits from and owns the results of the *co-creation* process is important: typically *co-creation* is an open source process and the results are not exclusive to one group.
- Managing the difficulties and complexities of the system(s) involved in the Wave journey.
- Managing the flow of information and activity across the boundaries – from one group to another - where an adequate degree of trust is yet to be established.
- Continuously enabling the commitment and responsibility of all participants of the Wave journey. Naturally there will be moments of great frustration in the *co-creation* group, considering the diversity of the participants. Dealing with diversity and complexity continuously stretches one's own and everybody else's beliefs and comfort zones.
- Allowing oneself and the group to experience the very uncomfortable feeling which arises from going into the unknown (by definition something 'new' is unknown beforehand). The *core team* needs to master the challenge of letting others speak, remaining grounded and trustful even when *participants* are going through the most unsettling state. The frustration of the *participants* will naturally flow towards the *core team* who are seen as responsible for the process.



SAMPLE WORKSHOP PROGRAMMES

Five examples of very different *co-creation* processes and meeting designs explain the cards and show how they can be used. Beyond these examples, you will need to find your own way to use the cards for your particular context and *core intent*. If you need support, you can contact us.

Case study one: a two and a half day *co-creation* meeting

In this case, the *core team* was composed of a *catalyst* and the three owners of a start-up, who had the idea of developing a new service for a specific target group. We developed a Core (see CORE Card) for the meeting and identified the most important people to invite using the DEARS Card. Looking at the Core it was easier for us to see what kind of design was appropriate (see below).

As preparation, we coached the different people who were going to contribute an Info Market post (Info Market Card). To warm up and get to know each other, we decided on the Power Networking activity (see card) and formulated the right questions for that purpose.

We had 15 *participants*: experts from different fields, academics, students and possible end users of the service. We generated the *core question* (Core Question card): “How do we create a service that provides healthier conditions for community Z?”

Meeting Flow: ½ day connect + 2 days *co-creation* meeting

Day 1	Day 2	Day 3
Connect Four Rooms of Change Power Networking Info Market	Co-creation meeting Above and Below the Line Visual Mapping Trio Coach and Walk Reflecting on Experience Inspirational Walks Art Collage	Co-creation meeting Focus area 1 Choreography

As a *catalyst*, it is very important to be aware of the role you are taking on at any one moment. I still need to pay a lot of attention to distinguishing when I am in the role of *catalyst* and when I have my own interests that I would like to see represented.

Whenever I was unsure of the next steps to take, it was helpful to reread chapters of the manual or play with the cards for inspiration. By doing so I gained new insights into the process that allowed me to design the next steps to be taken.

Case study five: the Organisational Backbone¹ Process (An organisational change process)

After an acquisition, our client (the CEO of an organisation) needed to integrate two different organisations into a single new one. He needed to form a new joint management team and had to build a new organisational identity out of the two former separate companies.

Initial Conditions

In our first meetings, we identified three major challenges:

- there was no deeper understanding of what the organisation and its parts were aiming for: a new organisation-wide identity was missing,
- momentum in the cooperation between colleagues, teams, departments and businesses was not coordinated. People were not pulling in the same direction,
- difficult business circumstances make alignment, orientation, focus and concentration critical for success.

Benefits and Outcomes

We agreed to start a process (the Organisational Backbone) which would bring forth:

- a true propelling vision for the company, the business unit and the teams,
- a real and successful strategy,
- a coherent, implemented Organisational Backbone, which gives all actions a common goal, all employees a clear orientation and far more importantly, identity and propulsion,
- the building of a new joint Executive Management Team.

¹ Process adapted from Nowhere Group.

Why the name **Organisational Backbone**?

The backbone is the central element of a skeleton. It is the central axis from which every major movement of the body originates. Without an intact backbone, any movement of the body is either painful or does not work at all. Taking this metaphor of the backbone to an organization, the so-called Organisational Backbone is its fundament; it allows a company to focus its energy properly, with the process aligning and orientating the organisation throughout, starting from the Management Team and leading to each employee.

Elements of the **Organisational Backbone Process**

We started explaining the process steps by using the “3 Steps 2 Change Model” (see card 65).



Getting The Management Team on board

Half-day workshop

This is to get the right people on board and focus their willpower and commitment on the intended change.

“The Art I” of the Organisational Backbone

2-day workshop

Art: the actual planning and design of how to reach your change intention takes place here.

- Developing a joint understanding of the 2 legacies.
- Learning how each organisation creates its successes.

“The Art II” of the Organisational Backbone

2-day workshop

- Search for the future of the newly structured company.
- Organisational Backbone implementation preparation.

“The Craft” of the Organisational Backbone

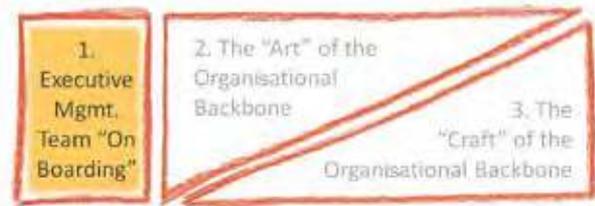
Our support, to be decided after the Art sessions

A plan, no matter how well designed and worked out, has no impact unless it is well implemented. When we talk about Craft, this is the everyday discipline of carrying out what was planned and designed during the Art phase.

- Generating buy-in for the Organisational Backbone within the new organisation.
- Implementing the Organisational Backbone Elements within the organisation.

1. Getting people on board: the why and the how

In previous projects as change management *catalysts*, we have experienced that the alignment and focus of the management team is the single greatest positive influencing factor when it comes to driving organisational change. Setting up this alignment, focus and maintaining it is the biggest lever for achieving sustainable change or for re-orientating an organisation.



Without the profound commitment and willingness of the management team to engage and drive the corresponding leadership tasks, the backbone approach is set to fail. For this reason, the first key step of the Organisational Backbone Process is the session to get the executive team on board.

For the onboarding, we used a half day session where the management team was guided through a dialogue (see the *Onboarding Questions Card*) with the goal of making a clear decision on whether or not to go ahead with the Organisational Backbone process.



Onboarding:

2-3 hour dialogue session		
Welcome	Explanation of the why, what and how of the onboarding session.	→ 3 Steps 2 Change Card
Check In	How is everyone? Hearing each participant's expectations of the onboarding session.	→ Checking in Card
Onboarding Dialogue cards	A generative dialogue is led through the following topics: <ul style="list-style-type: none"> • Why should we make this effort? • What is a strong attractive future outlook for our organisation? • What is the Organisational Backbone Process and can it serve our needs? • What are the external conditions that we need to consider? • Do we - as the management team - have the necessary will, commitment and resilience to carry out this process? 	<ul style="list-style-type: none"> → Generative Dialogue Card → Onboarding Questions Card
Check out	What has been your greatest insight here? Are you up for this?	→ Checking Card

By the end of the Onboarding session the management team jointly took on the responsibility for both the 'Art' and 'Craft' of the Organisational Backbone Process. We had each member's full commitment: they felt the ownership and engagement to go forward. We believe that this is vital for the Organisational Backbone Process to unfold its great potential and effect.

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9. CHECKING



Different methods to connect participants and to obtain feedback at the beginning of a process (Check-in), at the intermediate stage (Mid-check) or at the end (Check-out).

Benefits

Check-in is a way to connect participants to each other at the beginning of an event. Mid-check allows participants to express their feelings, concerns and wishes at different stages of the process, so that the *catalyst* can gather a better understanding of the different realities of all the participants and ensure that everybody is able to work together. Check-out is the feedback from the process and an appreciation of the work achieved together.

Area of Application

Check-in and Check-out offer everyone a personal start and culmination to the process. Mid-check can be used when the energy during the process stalls or when everyone needs a break. Then it is useful to hear what is on everyone's mind. This activity can be implemented as a routine for meetings to strengthen a team's connections and to help them to get to know each other better.

Group Size

6-8 people; any size; in large groups, divide people into sub-groups of 8 people.

Time Needed

Less than 30 minutes

Space and material

Fuzzy balls

Leading-Ship Focus

Self, Topic, We

Wave Step

Connect, Flow

Process

Different Check-in options

1) Top of my mind

Ask participants to take turns answering these three questions and listening intently...

- Introduce yourself: name, role, location
- How am I?
- What is at the top of my mind ... (in relation to our meeting)

2) A flower, some baggage

Ask participants to introduce themselves with a "flower" (something beautiful that has happened to you recently) and some "baggage" (something heavy that's going on in your life that pulls you down a little). Everyone reflects individually and whoever is ready first starts, followed by the person on their left, and so on. Maximum 1 minute each.

Different Mid-check and Check-out options

1) 3 Stems

Stems are the beginning of sentences that need to be completed.

Formulate three "stems" based on the following rules:

- The first disclosing something about yourself, e.g. what I have noticed about myself in this team is...
- The second revealing a perception/appreciation you have about the other person/people, e.g. what I have appreciated about working with you all is...
- The third relating to something that is happening in the present moment or a wish to do something in the future together, e.g. going forward, my hope is...

2) Popcorn

With a ball thrown randomly, you hear feedback from the people that catch the ball.

3) One breath

Each of the participants gives feedback that can be said in one breath.

Sources

Card exercise created by Vittoria Piattelli.

3 stems by Nowhere Group.

Flower and Baggage by Oxford Leadership Academy.

10. CHOREOGRAPHY (A DESIGNED SEQUENCE OF STEPS)

Creating a clear shared view with all stakeholders of the interlinking roadmaps of different projects. Prepared milestones are arranged in 3-5 timelines (from 2 months to 2 years) to create a choreography (a designed sequence of steps) that can be synchronized, when all stakeholders are in a room.

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Z	□□□ □	□□ □	□□	□	□		□□	□	□
BU	□□ □	□□	□	□□ □	□□	□□	□□	□□	□□

Benefits

The timing and logic of the order of actions becomes clear. Possible pitfalls in resources and time are spotted and corrected. Coordination among all stakeholders is created. As a path towards a successful project or future is shaped, moving into action is easier. Participants can take responsibility for steps in the near future. The new projects connect to the normal workflow by relating to scheduled events and meetings.

Area of Application

When Focus Areas (See Focus Areas Cards) are clear, this activity is the essential step for making sure that they will be worked on correctly. Whenever synchronicity and timing are important, the Choreography visualises connections and relationships between different projects, goals, levels of hierarchy and more.

Group Size

Any size

Leading-Ship Focus

Context, Topic, We

Time Needed

30 - 60 minutes

Wave Step

Action, Flow (L)

Space and material

Markers, Post-its, 3 rolls of masking tape.

Preparation

Decide with the *core team* on the length of time to be devoted to the different projects or Focus Areas (see Focus Areas Cards) that the roadmaps should focus on. With the masking tape, create a grid on the wall on which:

1. the horizontal axis represents the time ahead, divided into columns of weeks/months ahead.
2. the vertical axis represent the 3-5 projects/Focus Areas divided into rows. When creating the Choreography on the wall, insert a row for current day-to-day business.

The milestones and next actions should already have been prepared by the participants on Post-its (See Focus Areas Card). They can now present them and put them on the Choreography grid.

Process

1. Acknowledging the Present: when the Choreography grid is prepared, participants reflect on which important events and meetings are already scheduled. Write them down on Post-its and position them in the row of daily business in the appropriate time frame.
2. Naming the projects: ask the participants to label each project or Focus Area with a Post-it on the left hand side of the Choreography grid.
3. Filling in the roadmaps: now the milestones and next actions can be arranged in the Choreography grid. Pay attention to the relationships between the actions. What needs to be done before another action is possible? What connections to other important events in the context save resources (time, travel costs, etc.)? Dependencies can be visualised by arranging the Post-its close to each other to make a shape similar to a GANTT diagram.
4. Move into action: looking at the first 2-3 milestones of a project or Focus Area, who in the room as a person or organisation is willing to take this further? Note down responsibilities.

Catalyst Instructions

This activity can also be adapted for working on coordinating different levels of hierarchy in an organisation, instead of the projects or Focus Areas. The horizontal lines then represent the different levels (unit, production site, management team, etc.). Arranging milestones and actions in these Choreography grids makes responsibilities and temporal dependence visible. Make sure you have one person that is responsible for each milestone or action that needs to be brought forward.

Sources

Card exercise created by Julian Geuder and Vittoria Piattelli.

Inspired by Project management Theories, Systemic Thinking, Change Management theories, Agile tools.

25. FOCUS AREAS 1

Focus Areas are the levers that, if identified and addressed, will shape the appropriate strategy used to advance the intention for change embedded in a complex situation. Led by a questionnaire, participants use a Generative Dialogue (see Generative Dialogue Card) to gain a systemic view on each Focus Area (its purpose, the motivation to work on it, the resources and interconnections needed, any possible obstacles and its milestones).



Benefits

To implement a change intent successfully and sustainably, we need to look for and discuss the why, the what, the how, the when and who is responsible for each milestone. When a challenge is complex, it is good practice to find three to five areas to focus on; if these are implemented at the same time, they will push our intent forward. This activity is about exploring these questions for each area of focus.

Area of Application

Whenever there is a need to design a roadmap with milestones with an in-depth overview of the why, what, how, who and by when.

Group Size

6-8 people for each Focus Area - groups of any size

Leading-Ship Focus

Context, Topic, We

Time Needed

30 - 60 minutes.

Wave Step

Flow, Actions

Space and material

Markers, Focus Areas template, Post-its or A4 paper, pinboards with pins, or tables.

Preparation

Prepare Templates of Focus Areas for all groups.

Process

1. Collect initial ideas for Focus Areas (See cards for Visual Mapping, Generative Dialogue, In-Forces and Metaphor Exercise). Note every Focus Area down on a separate template, or on Post-its or A4 paper.
2. Cluster the Focus Areas and let the whole group develop headlines for each cluster.
3. Form subgroups for each headline, which is now the Focus Areas we want to concentrate on. Explore one Focus Area in these subgroups, guided by different questions. Here are two examples for a set of questions provided on prepared worksheets:
 - Focus Area Wanted Poster (see Wanted Poster Card)
 - I am this Focus Area: ...
 - You need to focus on me because ...
 - When I have been worked on you will...
 - Actions needed to implement me are...
 - Obstacles in my way could be...
 - Key stakeholders who can move me forward are... How can you involve them?
 - Concrete steps you need to take... (what and by when?)
4. Bring the subgroups together and have one person presenting the Wanted Poster of each one to the whole group.

Catalyst Instructions

You can process the Focus Areas and create a roadmap (see Choreography Card). In this case ask the participants to write each action and milestone on separate Post-its.

Sources

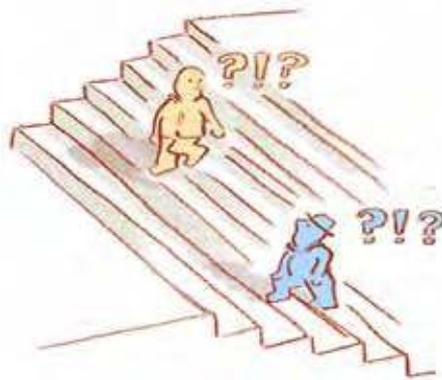
Card exercise created by Julian Geuder and Vittoria Piattelli.

Original source J. Geuder.

Inspired by diverse elements of Complex Theory and Systemic thinking theory.

29. FRAME AND REFRAME

Frames are inputs, reminders and guidelines on how the process will be and what to pay attention to.



Benefits

Frames give the group a common perspective and orientation that underlies the belief and value system about how the overall process will be (from different criteria) or how to communicate and behave. Frames form the conscious and unconscious boundaries that create the contexts in which people move.

Area of Application

Frames should usually be given to the group at the beginning of the meeting, so that *participants* and *catalysts* can refer to them during the meeting. Depending on the Topic, they have a wide range of applications since they talk about qualities of human interaction. Examples of application areas are team development, conflict resolution and negotiation, coaching and any meeting where orientation is needed.

Group Size

Any size

Time Needed

Less than 30 minutes

Space and material

Flipchart or templates.

Leading-Ship Focus

Context, We, Self, Topic

Wave Step

Connect

Preparation

Choose the appropriate frame (see Rollercoaster, Above and Below the Line, Four Rooms of Change, 3 Steps 2 Change or Guidelines for Great Group learning Cards).

Process

Explain the frame to the participants. Depending on the time available, give everyone a moment to process the input and/or ask participants to connect the input to previous experiences of their own.

Catalyst Instructions

Find a good storyline to explain the frame to the participants. Making it playful and vivid (and of course appropriate to the context) helps participants connect the frame to their own experience.

Sources

A Card exercise created by Vittoria Piattelli.

Inspired by Dave Snowden, Cognitive Edge.



32. GENERATIVE DIALOGUE

Grounded conversation which is connected to a topic and that uses deep listening in order to overcome fixed mindsets and create new meaning together.



Benefits

Dialogue is a key tool for exploring the unknown. Dialogues are collaborative conversations that can take a team to a state of Flow – where insights and new solutions are co-created by the ‘Beautiful Mind’ of all participants. Once realities and knowledge have been shared within the group, the group can then venture into the unknown. When the group is aware that discomfort and tension must be expected as part of a creative process, the participants can work together so that new meanings and new insights emerge. These new meanings and insights can lead to new solutions to problems that had previously been impossible to solve.

Area of Application

Dialogue is one of the most powerful tools available to us and is useful whenever the group needs to delve deeper into a topic. When strong beliefs and opinions are presented, dialogue can help to negotiate and overcome fixed mindsets.

Group Size

Any size: if there are more than 8 people, we suggest creating subgroups of 6 to 10.

Time Needed

30 - 60 minutes

Leading-Ship Focus

Context, Self, Topic, We

Wave Step

Throughout the process

Preparation

Formulate a *core question* (see Core Question Card). As soon as the *core question* is decided upon, the appropriate participants are on board and relevant information and knowledge regarding the topic is shared, a dialogue can begin. Set up the room in a way that participants can really listen to each other (see Make Room Card). An open circle of chairs is usually good practice. If the group is more than 8 to 10, it is good practice to prepare many open circles (small “horseshoes”) facing the area where the information is given (the stage).

Process

A Generative Dialogue starts by providing some frames (see Frame and Reframe, Rollercoaster, Above and Below the Line, Four Rooms of Change and Dialogue Frames Cards) that allow the group to come together on how to communicate and behave and to get an idea of how the overall process will work.

A brief orientation of the timing of the project (an agenda) is often helpful to make people feel secure by showing them that there is a solid framework in place. Usually a Check-in, whether the group is new or not, is good practice for loosening things up a bit and hearing everybody’s voice (including the shy or distracted ones in the conversation), and for connecting to the topic (see Checking Card).

Delegate self-managing roles if needed (see *Core Team* Chapter in the *Manual*).

Enter into a creative dialogue conversation connected to a topic. Even better would be to discuss a *core question* (see *Responsibilities of the catalysts* chapter). If you decide to have participants in a circle of chairs, have the *core question* visible on a piece of paper on the floor, in the middle of the circle. This way, if you go off topic, you can just read the question aloud again and bring the focus back to the topic. Once pertinent realities have been shared, with each participant having shared his/her point of view and the information absorbed by the whole group, and time has been given to reflect on and digest the different perspectives, some irritation may arise as the precursor of a breakthrough. If irritation arises in the form of frustration, distraction, anger, people shying off or total chaos, keep the focus on the *core question* and on the dialogue frames (this is not a monologue, AND not BUT, build on each others’ ideas, etc.) The *catalyst* should keep the focus on the progression of the topics, the flow and any kind of disturbances that might emerge. You might use rituals - for example the cymbal sound (see The role of the *core team* chapter) - to pause and reflect briefly on where we are and who is talking and listening. Sometimes a longer break is needed (see Inspirational Walk or Trio Walk Cards). Sometimes total focus is needed. Here is when the *catalyst* and the *core team* venture into the unknown and rely on listening not only to content, but also to body language, group energy, to how the exchanges are taking place, and learn to trust and work with what is emerging.

Navigate through all the processes that allow you to venture into the unknown together, experiencing the emotional and mental challenges of grappling with potential solutions until one obvious solution emerges.

Participants of the co-creative experience need to venture into the unknown, to leave known land and discover what is not yet known.

Sources

Card exercise created by Vittoria Piattelli. Inspired by Bohm (1996), Isaacs (1999), Conversation Model of O. Scharmer (2007) and Senge’s work (1990), which encourage all workers to engage in a dialogue, “the free and creative exploration of complex and subtle issues, a deep ‘listening’ to one another and suspending of one’s own views.”

52. ONBOARDING QUESTIONS

Dialogue which follows five questions clusters to develop the commitment of key stakeholders at the beginning of a creative process or a plan for change (designed earlier by the *core team*).



Benefits

This activity brings together the relevant key stakeholders in a plan for change and allows them to generate a common understanding, alignment, sense of urgency and commitment .

Area of Application

The onboarding questions are used at the beginning of every change initiative to build the momentum needed to begin and carry out the initiative. Without the willingness of the relevant stakeholders to engage and drive the corresponding tasks forward, the plan for change is bound to fail.

Group Size

6-8 people

Leading-Ship Focus

Context, Topic, We

Time Needed

60 - 90 minutes

Wave Step

Connect

Space and material

Flipcharts, moderation kit, printed cards.

Preparation

Get the relevant key stakeholders in the room.

Process

- Gather together the most relevant stakeholders (without whose support the initiative will not succeed) and the *core team* (people who will need to drive the initiative forward) (see DEARS Card).
 - In a circle seating arrangement (see Make Room Card), introduce the questions belonging to the five clusters one after another, by reading them out and laying them on the floor. Everyone shares his or her view with the group. The facilitator writes the answers on a Flipchart.
- 1. Why should we make this effort?**
 - What are the challenges we are facing?
 - What sense of urgency do we have?
 - What happens if nothing happens?
 - How could this process help us overcome those challenges?
 - Is this process our chosen one or do we see a different way that we should proceed?
 - 2. Creating a strong attractive future outlook**
 - What will be different if we are successful?
 - What new things will be in place?
 - What will someone from inside the organisation perceive as different?
 - What will someone from outside the organisation perceive as different?
 - What will you see, hear and feel when we are successful?
 - If you had 3 wishes - what would be your wishes for the organisation, to help ensure this future success?
 - 3. Dialogue about the suggested process:**

Explain your suggested intervention process.

 - What questions do we have? (Is everything clear?)
 - What are the benefits of this approach?
 - 4. What are the external conditions that we need to consider?**
 - What concerns do we have about this approach? (Where do we see difficulties?)
 - Am I up for this? (Is everyone willing and committed to driving this forward?)
 - 5. What do we need to talk about?**
 - How does our frame constrain us?
 - How does our frame set us free?
 - What are the relevant questions we need to ask ourselves and find solutions for?
 - What are the topics we need to tackle?
 - What are the two or three burning issues that would really make a big difference for us, if we had a way to deal with them successfully ?
 - What is really great about your group/team etc.?
 - What are the three questions you need the management / board / shareholders to answer in order to fully reach your highest potential?
 - What is standing between us and reaching our organisation's full potential?

Catalyst Instructions

Adapt the questions to the type of intervention (event, workshop, conference, retreat, large group intervention etc.). Question 3 is the ideal space to introduce and explain the details of the planned intervention process. For that we suggest that you use the CORE (See CORE Card). Consider the time available and select the appropriate questions.

Sources

Card exercise created by Julian Geuder. Inspired by Systemic Questions, Change Management theories, Theory U by Otto Scharmer, Nowhere-Group, bridgingpositions 3 Steps 2 Change Model.

65.3 STEPS 2 CHANGE MODEL™

Introduction of a frame which creates a common understanding of three important phases in a change process.



Benefits

Introducing the frame raises awareness of the different parts of the transition. Participants understand why it is important to spend resources on getting the team on board and that implementation needs to start as soon as possible.

Area of Application

The frame can be used in designing an intervention and explaining the planned steps to the organisation or team.

Group Size

Any size

Leading-Ship Focus

Self, We, Context, Topic

Time Needed

Less than 30 minutes

Wave Step

Throughout the process

Space and material

Flipcharts, marker pens, crayons.

Preparation

Prepare a 3 Steps 2 Change drawing on a flipchart or poster.

Process

Explain the importance of the separate parts to the participants:

The transition is split up into three parts, starting with Onboarding and followed by two complementary parts: Art + Craft.

Onboarding

Every transition needs the people who are responsible to be strongly committed and fully accountable. Therefore, include a separate starter in the planning of the transition to ensure everybody is on board for the project/change intent for both parts, Art and Craft. To mark out a clear intention, you can use guiding questions (See Onboarding Questions Card).

The Art

The Art represents all meetings and interventions organized in order to develop a joint understanding and to find answers to the *core question* (See Core Question Card). At the same time, while the inquiry and compiling are taking place, the team is being built up to form a solid structure.

The Craft

The Craft is about implementation and brings the content and actions from Art into the workplace. The transition can only be effective if the Craft part is as well planned and carefully carried out as the Art part. Art and Craft do not have a clear sequential order: they start at almost the same time, but with inverse intensity. Over time, the focus is shifted towards Craft. This is the essential part when insights and concepts from the Art part are processed and implemented.

Catalyst Instructions

Provide practical examples: e.g. a willingness to get fit.

Sources

Card exercise created by Vittoria Piattelli.

Source: Julian Geuder and Vittoria Piattelli.