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### The Organization

The organization is an outbound call center selling cellular products to a community that is not able to apply for contracts with existing providers, due to credit check failure. It employs 250 call center agents, 22 middle management and 5 EXCO members. The company is situated in Woodstock, Cape Town, and is about 8 years old. Call centers are notorious for unhealthy relationships across levels of hierarchy. Agents are treated merely as “resources”, EXCO is “way above” everyone else and middle management is drifting in between. After interviewing a cross section of the organization, I realized there is a strong agreement that “we are not on the same page”. At least they agree on one thing, which is a good place to start. In addition to not being on the same page, there is a perceived problem of lack of communication, misunderstanding and a feeling of disrespect and being undervalued.

### **My first AI intervention (August 2013)**

My first intervention was a reframing exercise with a team of 4 sales agents. I liked the Mac O’Dell’s Problem to Opportunity tree exercise, which motivated me to try it out. I have been working with different groups of sales agents for a period of 6 months. My greatest challenge in the teams is to help them overcome their fear of speaking and having opinions. I would like to engage them in quality thinking and encourage them to share their thoughts. I had no idea how they would respond to this exercise and I have to admit, I didn’t plan my questions beforehand and rather chose to take the “let’s see what happens” approach.

We started by identifying the problem. “Not enough money” was the topic. I helped the group break the problem down to be more specific. First they came up with “we don’t earn enough money with respect to what we do” and then further to “we don’t earn enough relative to inflation”. They then mapped the causes of the problem as the roots of the tree. There was a healthy discussion how this affects their lives and their families and it was an effective platform for sharing something they all have in common. Once they had shared their concerns, they were more creative about what may cause this problem. There was a greater openness to resolving their concerns. They even took on the shareholder and manager perspective and were able to see a much bigger picture.

Roots of the tree:

- they forgot about us
- they look after themselves 1<sup>st</sup>: the rich get richer
- maybe there is not enough money
- increasing all our salaries is a high risk
- fear

Then we discussed the consequences of the problem. Amongst them were:

- Decrease in company performance
- Decrease in company profit

The group realized that they were stuck in a vicious cycle of unproductivity. I was privileged to witness a group “aha” moment.

### Reframing the problem

This was so difficult. Negativity is rampant in some of the teams. Simultaneously, I was not my most confident because this process is new to me. When I hit a “no can do” moment, my only survival strategy is to become transparent. I shared with them that I was a little stuck and didn’t quite know what to do next. I then opened the manual and we worked through the instructions and questions together. It became real teamwork and everyone got quite inspired to work out how we can reframe the problem. This was great and really worked. The emotional field in the room changed to become far more positive.

The desired outcomes they came up as a result of the reframing process included:

- To be part of a learning community
- To achieve certification and growth
- Recognition at core level
- Awareness of other's efforts
- Achievable targets

I used the sticker star technique to agree on a topic. The energy of the group was on “achieving certification and growth – an increase in learning”. I explained that we were reframing the initial problem into a positive core which would give the group purpose and drive. They all identified strongly with this.

We discussed the fruits that this trunk would bear. The energy and enthusiasm in the room was completely different from the problem tree activity. They engaged, got excited and came up with brilliant thinking. It felt like the group was empowered to solve their own issue and became so excited about all the different solutions they envisaged.

The roots of the tree, the things that fuel our tree, ended up being a discussion of “what we can do to strengthen our tree”. Things started taking shape. They identified strongly with the metaphor of the tree and they spoke about the fertilizers for their tree. They also came up with the idea that they needed tools to look after their tree (spades, rakes etc.) – They became gardeners. One team member discovered that the fruit will fall down to the ground and provide fertilizer for the tree, hence creating a cycle of self-renewal. This was a metaphor for how good teamwork can be fertilizer for increasing opportunities to grow. WOW - I have truly never experienced this group as innovative and energized as this!

The next day, when I came into the call center, this team had taken the initiative to redraw the tree in color, laminate it and each team member had a copy at their work station.

## 2<sup>nd</sup> AI Intervention (19 September)

The GM of the call center (Summer mobile) asked me to help him improve relationships across management platforms. The outcome of our conversation was to try and get everyone onto the same page and create a basis from which to start building strong relationships. He also felt he wanted a greater sense of ownership and engagement from management.

### Strategy

If I had to do an intervention on the entire team, it would consist of 150 Agents, 2 Sales Managers, 12 Team Leaders and 1 General Manager.

That adds up to 167 people excluding some additional staff members.

Even though my enthusiasm led me to believe that I can do this, I did eventually decide to bite of a smaller chunk (a nice learning for myself). I decided I would start with the Sales Managers, Team leaders, HR staff, finance and back office staff and the GM (total of 22). This seemed seriously less daunting.

1. I spoke to the manager and he agreed that working with the management team is a good start. I was also transparent about being new to this work and we would have to practice the “Pygmalion effect” on each other 😊
2. I had a short intro session with the Team Leaders and sales managers to introduce myself and what I planned to do.
3. A week later I gave a presentation (Slideshow as attachment) to everyone involved: What is AI: the philosophy and the process? This was very inspiring and was received well. I had a lot of positive feedback and buy in.
4. Identify Core Group: I explained the theory of the “slice of the cake” and I asked participants to indicate if they would like to be part of the core group.
5. And so the process began. The core group consisted of 2 sales managers, 1 HR staff, 1 back office staff and 2 team leaders.

Definition: Identify topic with core group

I had a lot of questions and I think I kept Ezelle busy for a while.

*“How do you go about choosing the people for the core group? I understand the diversity and the slice of the cake concept, but then what? How did the US Navy select their core group once they knew what percentage of each group they want?”*

In the presentation I explained the purpose and function of the core group. I asked people to come forward voluntarily and join the core group, explaining that it needs to remain a high energy experience and not a “must”. It was interesting to notice that the general manager put pressure on the team to be enthusiastic and to join in. I found this most challenging, because it makes observing the natural energy and flow of the group more difficult.

## 27 September – the beginning of our core group meetings

We discussed the purpose of the core group and what potential influence they could have on the group.

They called themselves the “ambassadors of the AI movement” .

I asked the group whether they would like to approach the process with the problem/reframing or the interview route to define the topic of inquiry. They chose the reframing route.

We started by discussing what problems existed in the team. There was a unanimous feeling about the problem. They then brainstormed the best outcome to get a positive topic.

The topic is **“We instead of me”**.

What I struggled with was how many alternatives, new thoughts and words kept coming out. I often thought “Oh my, this is never going to end!” and I noticed my inherent urgency to get to a solution and I had to keep reminding myself to stay with and trust the process. I was amazed at, how in the end, it all came together and they picked exactly the words that had the most meaning to them. I was tickled by the power of words, and how one word can strike up a life giving moment, while another word can leave you “life-less”.

More clarifying questions to Ezelle:

*“I have the modified interview which we are currently testing with the group*

- 1. Once this is done, I get the whole group together, and who interviews who? This is where I am stuck. Do the members interview each other or the core group interviews them?*
- 2. In the interview, each person jots down the life giving moments on the Summary sheet*
- 3. The whole group identifies the most life giving moments they heard in the interviews, using the summary sheets, which get noted on a flipchart. Or should 22 people split into smaller groups where they create their own flipchart?*
- 4. Then we create a gallery. But if I facilitate the whole group with 22 people, then there’s only one list. I guess that’s also ok?*

*I’m confused with step 4 and 5. I’m worried to send the groups off alone. Not sure they’ll know what to do. Any thoughts?”*

Eventually, the Interview was tested and the core group was happy with it. The next obstacle was that not all 22 people could disappear from the call center at once. Oops, I had not thought of that. I had to get creative, even though I would have liked to strictly stick to the process in order to feel safe.

I split the entire group into an AM group and a PM group, again taking diversity into consideration. We booked a beautiful venue where we could have lunch together. The interviews started with the AM group in the morning, followed by the PM group. We all had lunch together at the cross over point. The AM group went back to work after lunch and the PM group started with their interviews. This worked very well because I had 2 groups of 11 people.

I split each group (AM and PM) into 2 groups and had face to face paired interviews. By the end of the day we had 4 galleries.

The following day, we had a 2 hour session with the entire team of 22. We hung up the gallery and they discussed the common themes. I used the star method to identify the topic that was most relevant and high energy for the group. Oh dear, there were 3 themes and now what? I hadn't asked Ezelle what to do if that happens. At this point I noticed my anxiety about not sticking to the manual. Because I noticed it, I let go of it as much as I could, and just followed what was happening in the group. Instead of pushing an outcome or agenda, I was curious about how the group would like to proceed.

What happened next was quite magical. The group decided that they would create a new theme. One that would combine the high energy words of all 3 themes. They selected a scribe, a time keeper and a facilitator to make sure everyone participates and all voices are heard (their initiative). What blew me away is the team work that already started happening. I stood back and observed.

The final high energy theme, which was immediately beautified and distributed, was:

"...by connecting teamwork, values  
and excellence, I ignite our...  
summerworld"



At first I thought this is already the provocative proposition. But I realize, after reflecting on the exercise and the team, that this is the positive core. This is what gives life to this team. After the Dream stage, there will be some provocative thought emerging.

This process so far has created a wonderful end to 2013 and I could feel that the team was inspired to continue in the following year.

28 January: brief to the General Manager

Hi Martin

I thought I would jot down for you what the rest of the AI process looks like....

The next stage of the AI process is the “Dream” process.

This is where we create a shared image of a preferred outcome. It is a visual image of our positive core which we defined as “by connecting teamwork, values and excellence I ignite my Summer world”. This process is fun, explorative and playful, so it doesn’t only take us further into commitment but also acts as a really great team builder.

I am going to split the group into 4 groups of 5 and allocate 2 hours to each group.

Then we are going to have a 1 hour presentation with everyone involved.

At the end of this stage, we will have a provocative proposition – a bold statement that defines what we would like for the future. This is something which the group as a whole desires.

After this stage comes the implementation, the delivery stage. Here we start making commitments which are tangible and observable.

Could you get some clarity on the glass room next to your office? Is it available for us to use? Do we have the right to use the space? And how can we secure a booking. I don’t want to be shunted into the boardroom again because we need open space for this part of the process. Maybe we need to get hold of the other trainer and confirm our booking....I’ll come chat to you about it tomorrow.

That’s it.

Have a good day,

Katja

## 24 February: Dreaming

I split the group into two sessions with 2 groups of 5 each. What worked very well was the group size. What I didn't anticipate was how much creative material they used to create a shared image of a preferred future. I thought I would struggle tapping into the creative side, but was pleasantly surprised. There was such an awesome energy in the room and everyone participated and had fun. It was difficult for them to let go of the words of the positive core and there was a high degree of literal translation of the words into an image.

### Our agenda

1. Warm up exercise
2. Review on the process
3. Designing a Group Alliance: how do we want to be together in this workshop
4. Creating a shared image
5. Sharing of images
6. Creating a provocative proposition

Examples of some of the images:





Provocative propositions:

*"We are growing, invincible achievers."*

*"We inspire winning synergy through creative evolution."*

*"My positive attitude is fueled by my selfless choices."*

*"I am proud of how I change people's lives for the positive."*

March 10<sup>th</sup> – Delivery/Destiny

We completed the final stage of the AI process, Destiny/Delivery, 2 weeks later. All 4 groups came together for 3 hours and shared their images and provocative proposals. The groups then split up again and started writing down the smallest possible steps that would make their provocative proposition inevitable. It was wonderful that we had 4 different propositions, because out of them came quite a variety of suggested actions. One group struggled very much getting out of the theoretical, philosophical frame of mind and didn't understand what I meant by coming up with specific and observable action points. But the other 3 groups made up for it and produced some wonderful suggestions that raised the energy levels of the entire group. I used the traffic light intervention to get a feel for what the group thought of the suggestions. I thought this method worked really well especially when dealing with the yellow and red cards. It was an incredibly efficient way to identify how the suggestions would have to be executed or changed in order to get the buy in from the majority of the group. There was a high degree of commitment when it came to taking ownership of the tasks. We walked away with a comprehensive list of "do-able" actions with very definite ownership attached to each.

Strategic Intentions

Strategy Points		Ownership
Develop Summer Chat		Shahin, Michael, Lawrence
	connecting all departments and staff	
	motivational quotes	
	joke of the day	
	company changes, updates, top performers, recognition	
	selling tips	
Branding Campaign		Zita, Melissa, Mishque, Shameeg, Lawrence
	Simple Smile posters	
	introduce new jargon (body & verbal)	
	Buzz words	
Accountability		Shaheen, Lawrence, Nicole, Zita
	Signing a declaration	
Positive Recognition		Shahin, Michael, Zita
	CCS - Card System	
	"praise" committee	
Flexi Time		Martin
Internet Stations		Martin
In-house doctor - managed process		Martin, Michael
Child Care Facility		Sadieka, Vuyo, Mishque, Melissa & Wendy
Provident Fund		Bianca, Janna
Getting Aircon to work properly		Shahin

1 April 2014

The entire group met to discuss how we will keep the ball rolling so that we deliver on the intentions set by the team. The enthusiasm and commitment continued to be high. Everyone enjoyed designing a team alliance and they regularly made reference to it when asked about when things get tough. It is an agreement that was discussed very thoroughly and it contributes strongly towards the commitment everyone has shown, both in behavior and actions.

I have been thanked several times by the GM that the team is enthusiastic and that the cohesion amongst them has become stronger. He feels that the communication has reached a new level and there is a greater honesty and sense of responsibility in the team.

My only commitment is to facilitate the group meetings every 2<sup>nd</sup> week. What I really liked was the pace of the process. Even though I thought it should all happen in 2 days, it really suited this environment to stretch it over months. What I found hard is to keep holding the space for the process. I noticed that I had to consciously keep the momentum going. I did this by making reference to the process in other meetings and by using the AI language when communicating with the team. What was great was that the GM really enjoyed the process so he was fabulous at keeping the process alive. The team mentioned several times how much they enjoyed it. I noticed an increase in creativity in the team. It feels like the team has allowed itself to think out of the box since the start of the process. There is new sense of infinite possibilities and they have implemented some incredibly creative processes with the sales agents. They have come up with a new performance review process which is far more inclusive of the agents than before and offers individual learning and growth.

My wish for the inquiry was that the participants connected with their incredible strengths and allowed themselves to celebrate it. I was skeptical because the GM is hardwired in the old paradigm of focusing on failures and how to avoid them. I have seen a new manager emerge in him, and he loves to call me into his office to celebrate all the successes he has had since the last time he saw me. That is a real gift for me.

## Team Alliance

*“How are we going to be together?”*

- Respecting each other’s views
- Understanding of differences
- Adaptable
- Clarity on common goal/vision
- Commitment
- Accountability
- Enthusiasm
- Honesty
- Creativity
- Encouragement

## Keeping the ball rolling

Keep asking: *“What can I do to make it happen?”*

When are you going to meet? How often? How long?

*Every 2<sup>nd</sup> week of month at 12.30pm, for 1.5hr*

*We’ll share ideas, plans and timelines for individual commitments.*

*Discuss how we can support each other.*

*Discuss actions going forward, where to from here*

Is anyone going to own the agreements?

*Jacque will print out and laminate alliance. Let’s remind ourselves of the alliance at every meeting and see if still applicable and complete.*

*We’d like to speak about it when agreements are not held and bring in the metaskill of understanding and encouragement.*

*Being honest with yourself and being adaptable to change.*

Who is going to minute the outcomes of meetings?

*Individual Projects will manage their own documentation and timeline*

How will you measure success?

*Each team decides on success points with time frames: sizable chunks with measurable goals*

How will you celebrate successes?

*To be decided on group meeting when success has been achieved.*