

Appreciative Inquiry

START
with
Core Values

IMMERSE

yourself by knowing the environment.

Discover

- We learn by asking open-ended questions.
- We become trusted partners by creating a space for others to be successful.

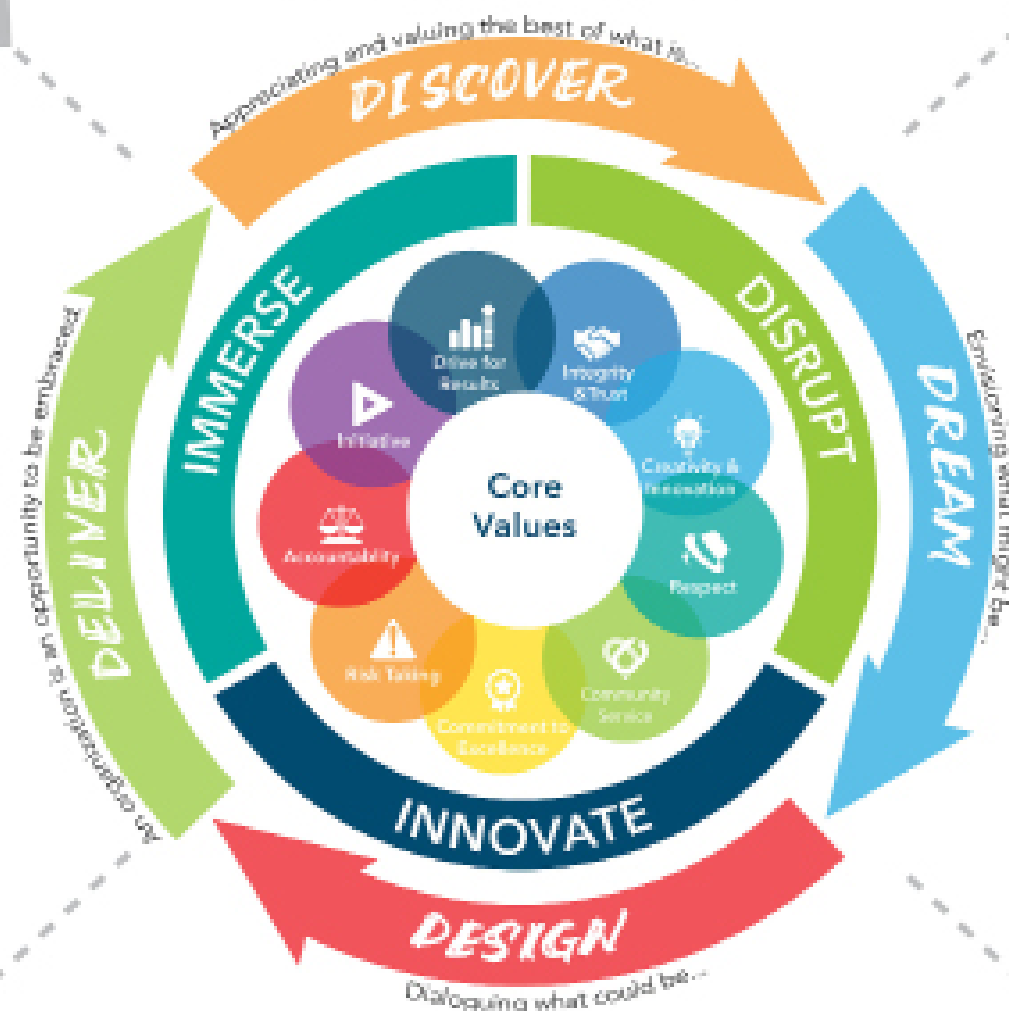
"We live in the world
our questions create."
David Cooperrider

IMMERSE

again and continue
to iterate.

Deliver

- We measure success by how we live in the desired state.
- We take it to the next level by leveraging the strong foundation we have built together.



DISRUPT

by challenging
the status quo.

Dream

- We get to breakthrough understanding by having authentic conversations.
- We ask unconditionally positive questions to help our customer identify the future desired state.

INNOVATE

by bringing new ways of working to the client.

Design

- We foster a co-creative solution space by providing new ideas that are consistent with the vision and organizational goals.

Appreciative
Inquiry Applied:

US Navy
Leadership Summit
<http://bit.ly/USNavyAI>

The Integration of Visuals and Appreciative Inquiry for Organizational Change

The following examples represent graphic facilitated Appreciative Inquiry activities within large-scale organizational change management efforts.

Purpose

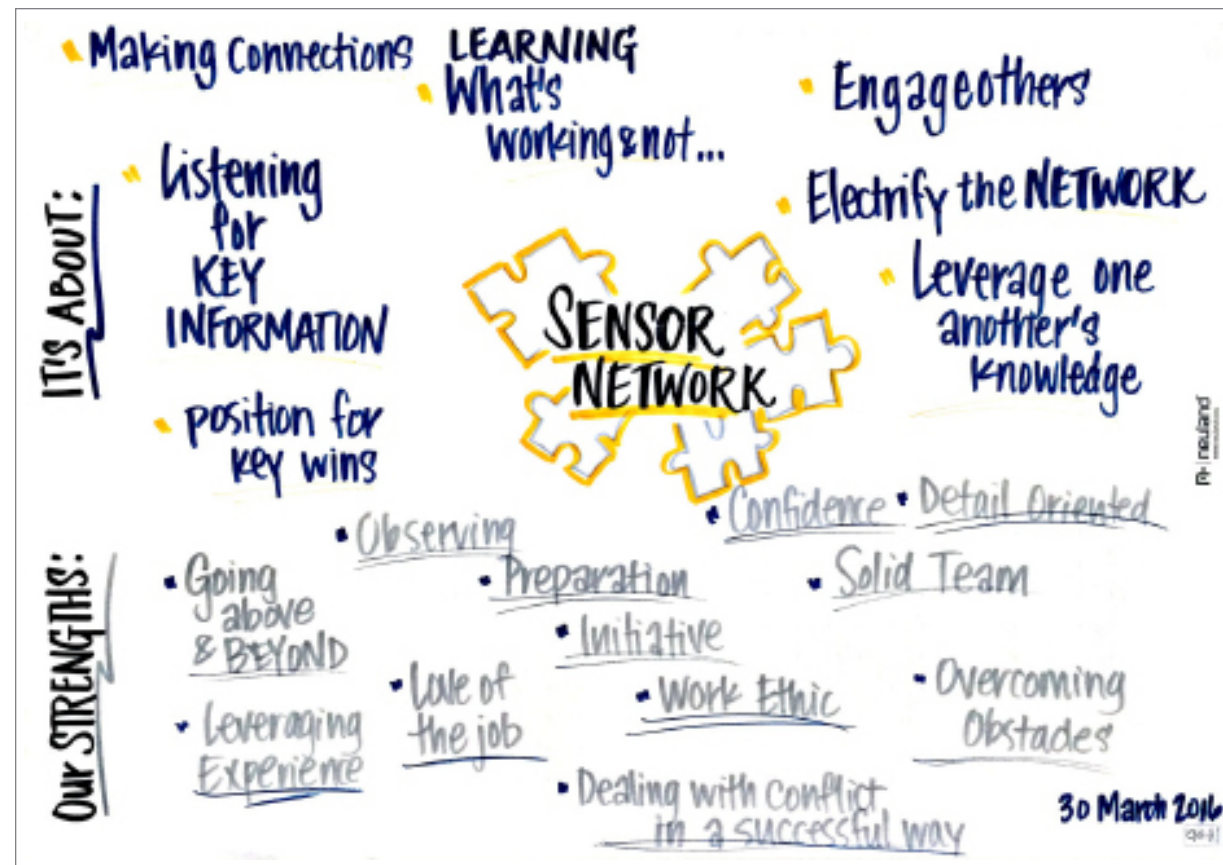
The purpose of using visuals is to illustrate the value of Appreciative Inquiry (AI) and document group thinking.

Process

Graphic recording helps the group see what they are saying. Graphic facilitation leverages templates to harvest information and guide the conversations to the desired state. Facilitation methods are used to support the group as they make their way through the 4D process.

Payoff

The resulting visuals become a bookmark and record in time for the team to use as a foundation from which to strategize and grow.



Setting the Tone of the Meeting

System engineers tend to jump in quickly to solve problems. It's their nature and they are fantastic at it. At times, it can become a cultural habit. However, it's not hard to break when a team is asked unconditionally positive questions. See the results recorded in the above graphic.

It's About:

How do you see this group serving the client's best interest?

Our Strengths:

Without being humble, what valuable skill do you bring to this effort?

As a result of this capture, participants referred to the graphic throughout the meeting and following when asked what the Sensor Network was about. Because I am only 1 of 6 Visioneers (in-house graphic facilitators), I don't attend all of the corporate meetings. When I do, I leverage AI as part of the approach design and delivery. As a result, I receive feedback that warrants increased participation and invites onto certain projects leadership recognizes as important to have me in the room. Examples of feedback include:

- "What did you do differently in this meeting that other facilitators don't do?"
- "I have noticed a difference in my relationships with my clients when I started asking the questions you provided us on those little wallet cards."
- "I always feel goooooood [*shaking body movement*] when I come to your meetings."

Open-Ended Questions

Clarifying questions:

Can you say more about that?
Could you tell me more about that?
What does _____ mean to you?
Why do you think that is?
How so?

Process questions:

What's coming up for you now?
What's your reaction to that?
How would you describe what's going on?
How might you reframe that?
How does this affect you?

Solution questions:

What could you do about that?
How else might you...?
What might your next step be?
To what extent have you...?
What would happen if...?

How open-ended questions can be reframed to be unconditionally positive questions

In an environment where most consultants tell and sell based on problem solving rather than co-create, we found it helpful to equip our workforce with questions that would empower them to listen for the client's desired state.

Clarifying questions:

What are our/your strengths?
What made that successful?
What would be the best outcome for ____?
What are the benefits?

Process questions:

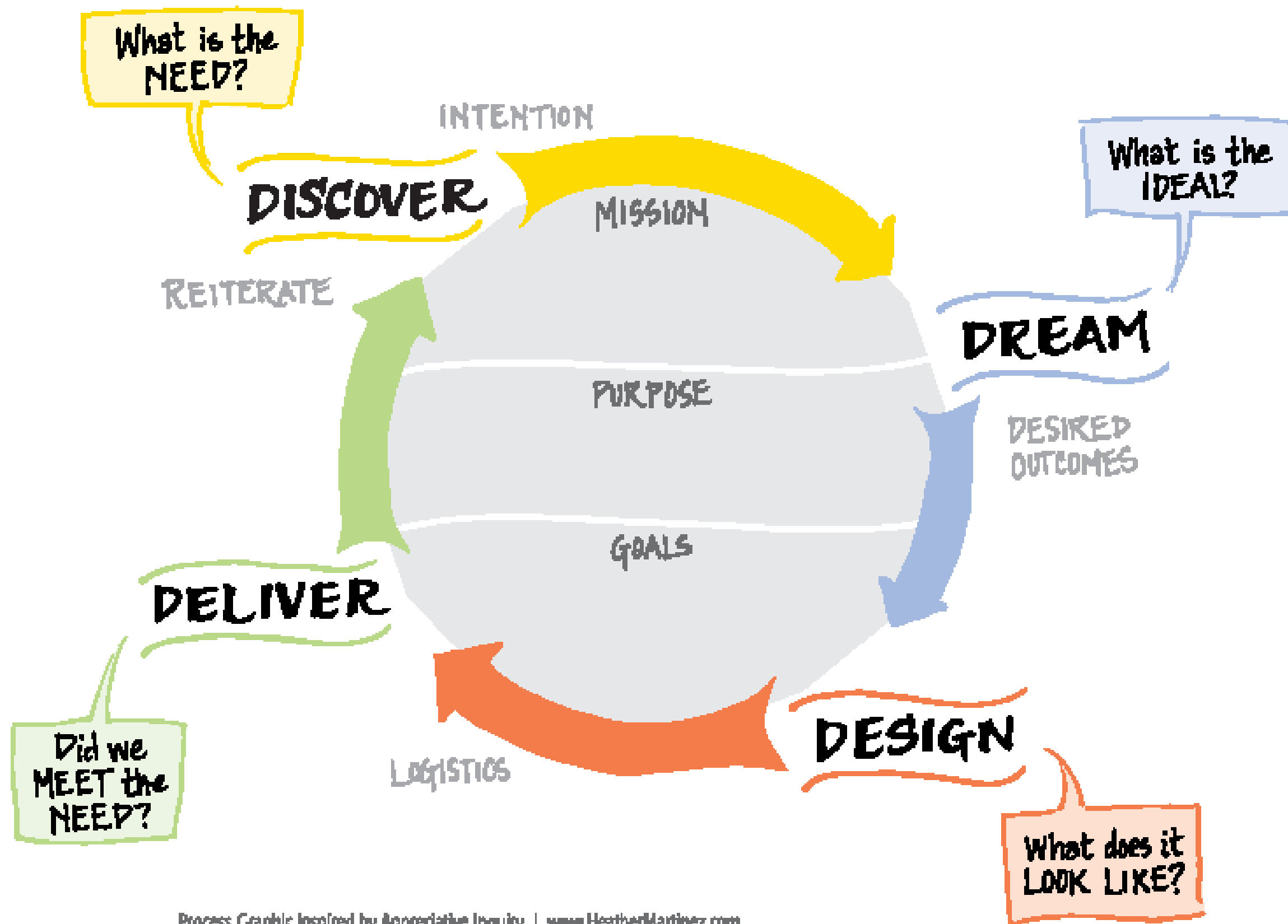
How does this inspire?
What created the passion?
How could that be more inclusive?
How could that have more impact?

Solution questions:

What has worked before?
What opportunities do you see to enhance ____?
How do we consciously mine the value of ____?
What can you do to make that happen?

Job Aid

This wallet-size job aid was created to help remind employees how to ask open-ended questions when working with customers and teammates to build trust by listening and helping the other person feel heard, gather important information and focus on the other person before jumping to solution.



Process Graphic Inspired by Appreciative Inquiry | www.HeatherMartinez.com

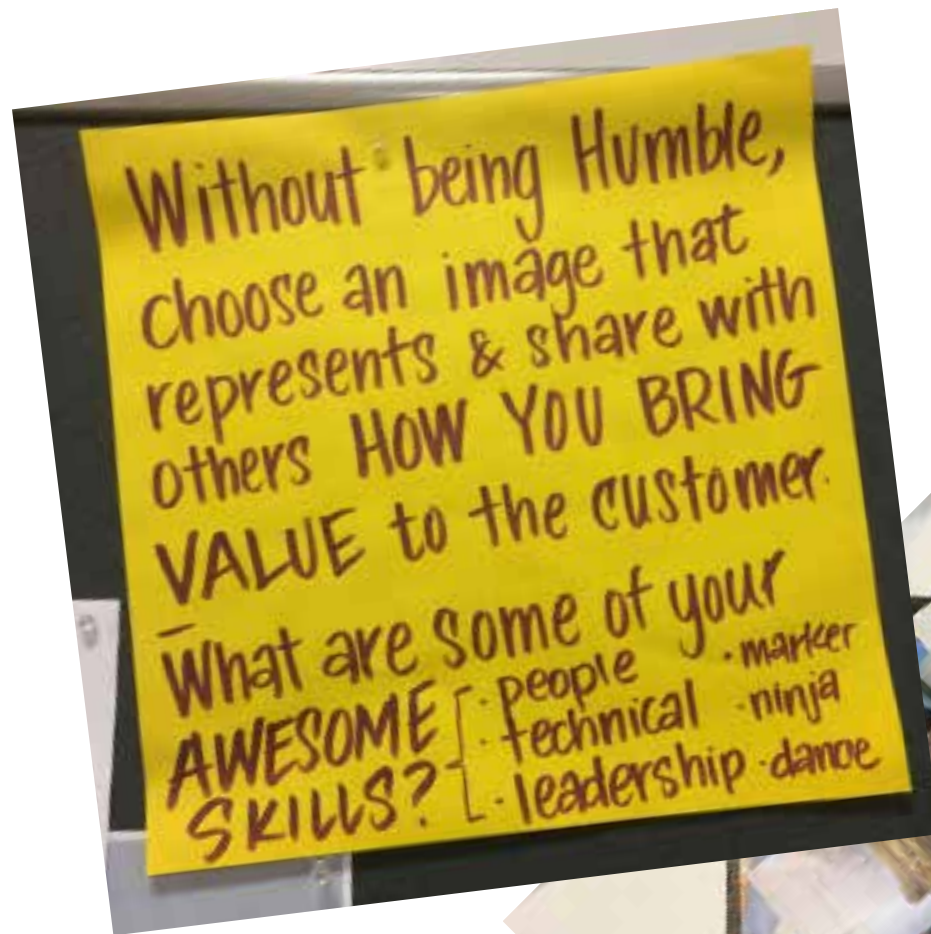
Discovery Meeting Template

Originally developed as a guide when meeting with clients seeking logo and branding support to write a creative brief, this template acts as an intake form and allows the AI facilitator to gather additional information about the needs of the group for the upcoming meeting or retreat/offsite. I have discovered over the past three years working on the Organizational Effectiveness Change Management (OECM) team that by allowing the client to “unpack their backpack” we can get past any obstacles, assumptions, endowment bias’ and break existing undermining habits that don’t serve the group. Doing so allows us to get to the core needs of the group before the event.

This template is available to print 11”x17” and as a PowerPoint slide to capture insights in realtime. Use this link to download:

<https://gumroad.com/l/Alprocessgraphic>

After 6 months of using this template in every discovery meeting on the OECM team, I was asked to map their intake questions to this template. I then gave a presentation to the team on how to use the template and offered group coaching on reframing their “problem-set” questioning style to one that reflects AI methodology. After a few weeks of implementation, seasoned facilitators were reaching out to me to help with more reframing and inquiring about my approach design. Because so many of the meetings where I was allowed to design the meeting using an AI approach and activities were successful, my demand rose to the point where I had to add 3 more Visioneers to the contract—who also shared the same approach design methodology.



Appreciative Imagery

Using imagery to share personal stories.

When arriving to the meeting, participants are greeted with a table covered in photographs or magazine clippings. Each participant is asked to choose an image based on a universally positive question. Some examples may include:

- Without being humble, how you bring value to our clients?
- What image(s) represent your moral integrity or a value you live by?
- What unique strengths or skills do you bring as a contribution to the success of your team?

Appreciative Recognition

Participants are asked to reinforce one another's strengths, life-giving contributions to the team, and positive behaviors by capturing attributes on sticky notes and posting them on a flip chart. By continuing this process throughout the meeting, participants stay engaged by listening and reflecting on behaviors.

After debriefing these two exercises, participants responded by saying:

- "Images are so powerful! When thinking about how to tell my story, I couldn't choose just one."
- "It was nice to hear that my contributions are valued by others on my team."
- "This was an interesting activity. I plan to use it in my next team meeting!"





Meeting Principles

Written on flip charts and hung around the room at the start of a meeting, introducing meeting principles can help set the tone for the meeting. They can also help shift group thinking so that transitions from one activity to another are easier..

Red Dot Conversations (aka *Perimeter Prime* by Chris McGoff) provides participants with the understanding that in order to have extraordinary conversations, they must first create an environment of trust. They need to ask questions they have never asked, share openly and authentically in order to have the type of conversations they have never had. Participants are encouraged to ask questions that focus on the desired outcomes of the meeting. As a facilitator, the questions presented are then reframed as *unconditionally positive questions* to help condition those asking the questions both in the room and as a practice going forward.

Feedback from presenting the Red Dot principle have included:

- "I feel as if I had permission and a way to express myself that encourages change without reprimand."

3 LEVELS of LISTENING:



- "I felt heard and that my ideas are valued by others."
- "I could feel the difference [in response] between asking a transactional question—one that I frequently ask—and how asking an open-ended, positive question opened the conversation up in ways I had never experienced before."

Three Levels of Listening & Sustainability Garden

Changing behaviors on a team can be challenging when individuals are blocked learners, habits are formed, or people lose motivation. By introducing and encouraging the 3 levels of listening, participants are given the opportunity to become acutely aware of how they are responding to others and have the choice on how they want to show up. In practice, the facilitator encourages and validates good behavior by reframing and reminding participants as they respond out of context. *Example:* It's obvious when a person is waiting for others to stop talking to say what they want because their comments lack a natural flow of ideas. Participants are encourage to use the words "Yes, and..." to build off of one another's ideas. If the idea can't be built upon, and the person begins talking, the group now has the permission to decide if the topic is "Red Dot" and important to discuss or if it belongs in the sustainability garden to be address at a later time.

SUSTAINABILITY garden

- BEED Program / Job Shadowing
- Draft ODE Job Checklist + Duty List



Getting to level 2 could easily be the new norm. It can be exhausting for some to stay in the global listening level. When facilitators follow up a "Red Dot" conversation by asking participants how they felt or what they noticed, it engages global listening. By posing an unconditional positive question, it reframes the conversation and the meeting is then set back on track to reach the desired state.

Feedback from the use of Three Levels of Listening and Sustainability Garden:

- "I had no idea that I was just waiting for others to stop talking in order for me to share my idea. I now understand how a conversation goes in a positive directions when we all practice "Yes, and..." "
- "I don't like it when my ideas get put on the parking lot chart. Parking lots are where good ideas go to die. When my idea gets put on the sustainability garden chart, I feel like it has been recognized as something we need to continue talking about."
- "The sustainability garden is where "idea seeds" have been planted that need to be nurtured. We plan to hang it in the breakroom and take it to team meetings to make sure we continue the conversation on topics that need to be discussed."

During a discovery meeting with the client, questions are asked that follow the AI process. After determining the desired outcomes of a meeting and planning the agenda, a good way to set the tone, introduce participants to one another and build an element of trust is to conduct 1:1 interviews.

Participants pair off and conduct interviews based on prewritten unconditionally positive questions. Some examples include:

- Without being humble, what projects, activities or initiatives did you personally (or as a team) contribute to your success this past year?
- Share a story when you were faced with a challenge that you successfully overcame. What contributed to your success?

By pairing off one to one, participants have an opportunity to express their successes and connect with others. After the initial question is presented, the meeting principles: Red Dot Conversations and 3 Levels of listening are presented and participants are asked to practice focused and global listening while listening for the positive attributes exhibited by the person sharing.

By recording the positive attributes of the participants based on their stories, the facilitator has an opportunity to return to the chart to remind the team when they are faced with a challenge, they have all the resources they need to create their preferred future state.



As a part of the introductions: without being humble, participants were asked to share what they have personally contributed to the team or felt were team accomplishments.

The team lead shares their vision of the team and where they see themselves (Shaping) in the 4-step change management process: assessment, listening, shaping and action.

In addition to the accomplishments and vision shared, attributes of what contributes to success reconfirms the team's strengths and attributes.

- “What a great way to start the day! I was happy to hear everyone’s accomplishments rather than complaining about all the things that are wrong.”
- “So many times we are expected to know what the team lead wants. This allowed us to share first and then hear how what we have done relates to the vision.”
- “In my 30 years of working with the government, I ain’t ever seen anything like this!” (followed by a big hug!)





Setting the tone by benchmarking success

When planning for a full-day offsite, the director expressed a love for Disney.

When designing the approach and prepping the charts for the meeting, I knew that it was important to give the director an opportunity to set the tone (pictured top), for the team to share their accomplishments (pictured bottom left) and reflect on the preferred future state. By identifying the attributes associated with exceptional customer experiences, participants had an opportunity to share personal stories of their experiences and commit to doing the same for their customer.

From graphical captures to appreciative inquiries, the theme of the day reflected the historical values set by Disney. In 1955, "We Create Happiness" was a service vision put in place to suggest that no matter what your role was in the park, your job was to make the guests happy.



CAREER DEVELOPMENT ADVISEMENT / CAREER COUNSEL

1. I can reach my career goals at
2. I understand the steps I need to take to advance in my career.
3. I understand the career development resources that are available to me at



PROMOTIONS

7. I believe rank in person reviews are conducted fairly here.

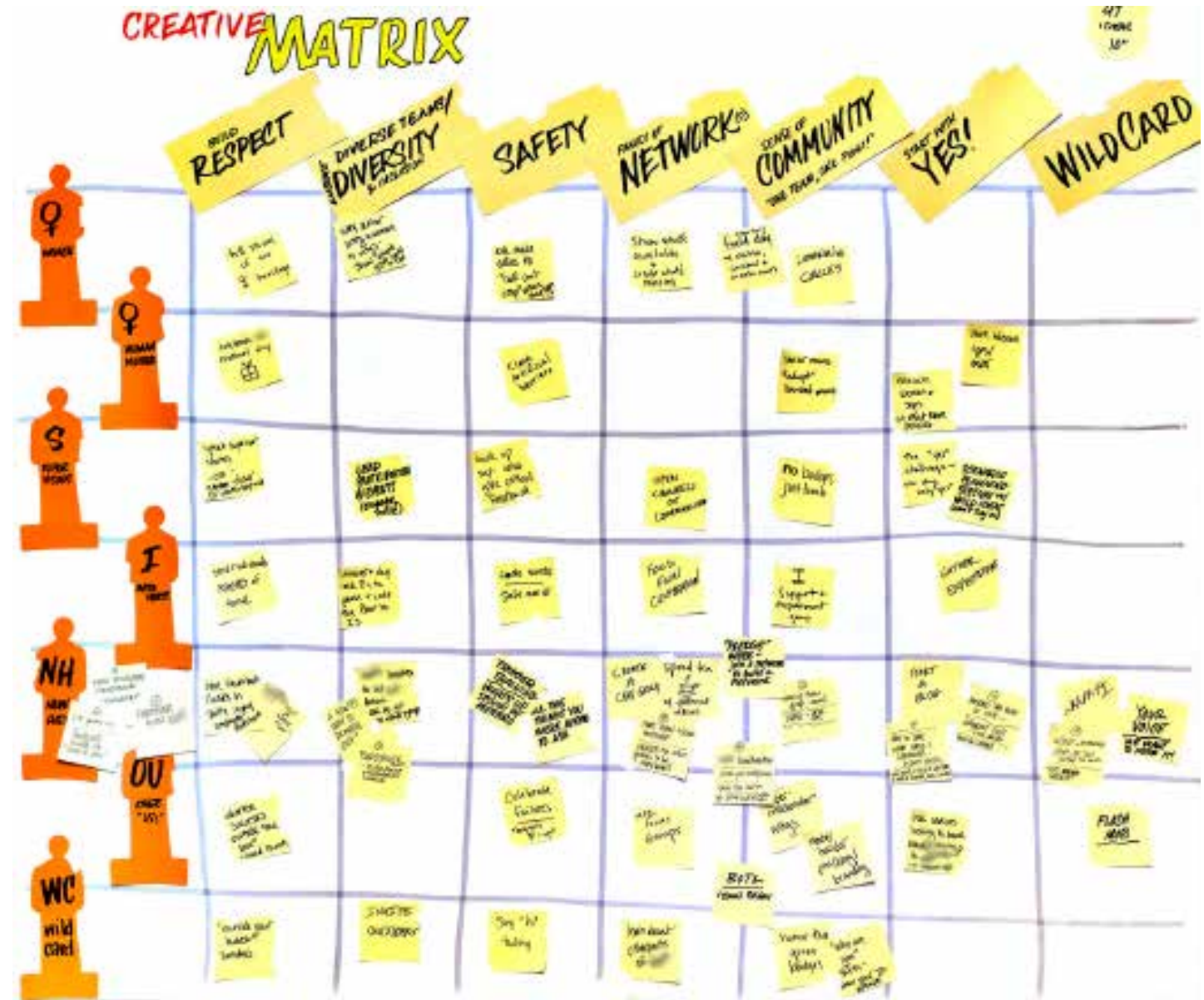
9. Promotions in my are based on merit.



Leveraging AI after a quantitative survey to gather qualitative information

An ad hoc committee gathered after an agency-wide employee engagement survey. When analyzing the data, the team identified the top 3 strengths of the office and the 3 areas that could use improvement. Using the AI Opportunity Tree, participants chose 2 of the three challenges and used the specific survey questions to focus on the root causes, fruits of success and first action items they can take to turn the challenge into a success.

Following the offsite, the ad hoc committee took the information harvested from the exercise and shared the results at a Town Hall meeting and outlined the action items the office was going to make for the workforce. As a result, the workforce started having conversations about the actions and how individuals can contribute.



Combining Appreciative Inquiry with Human Centered Design

Finding ways to combine AI with other methodologies is an opportunity to amplify the effort in order to meet the client's desired state.

The graphics above represent how AI and HCD can be combined to identify attributes of a positive culture and how those attributes can be used to brainstorm actions and activities that support the creation of that culture.

Attributes of a Positive Culture

After pairing up and sharing stories of how participants have experienced being part of a winning team or company, the attributes of how those experiences contributed to being a positive culture were captured on a flipchart.

Human-Centered Design Creative Matrix

- Objective: Harvest as many ideas as possible
- Discuss the creative matrix objective/process

Validate the Creative Matrix ~ 10 min.

- X-Axis: Types of stakeholders
 - Validate and add to the stakeholders column with unmet needs.
- Y-Axis: Attributes of Success
 - Validate and add to the attributes listed from the previous activity
 - Wildcard row for out of box thinking: How would Amazon do it? How would Oprah do it?

Form 2 small teams, give each a template, each person receives a yellow sticky pad and marker.

- Explain instructions and sticky note etiquette.
 - One idea per sticky. Bonus points for drawing pictures and writing legibly.
 - Ideate each intersection of the grid.
 - Each team gets 10 minutes.

- Start individually and fill up as many cells as you can, share ideas and fill up the rest of the cells.
- Tally the number of ideas per team.

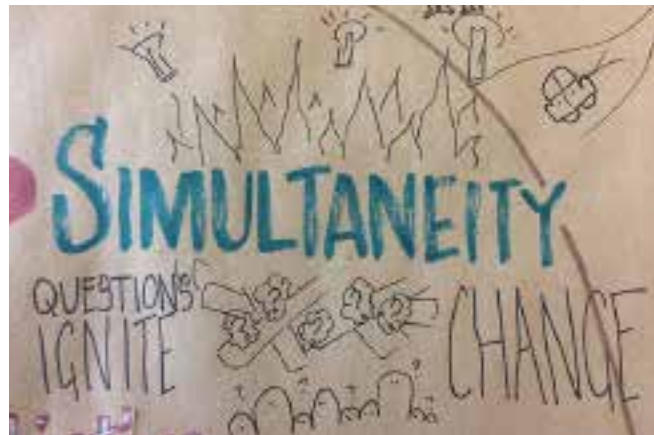
Questions to ask/themes to consider for each cell:

- What types of activities can we do to help advance the culture at the Agency?
 - Serve the needs of the stakeholders.
 - Execute fun activities that follow the tenets of our committee/effort.
 - Influence behavior and policy that will have a lasting affect.

Move to another matrix and practice "Yes, And..." or take the idea to the next level (what would make the idea out of this world/crazy?)

- Write a "+" to the additional stickies (or use a new color sticky)
- Tally new ideas
- Final group circles the three most popular ideas that had the most energy around them.

Celebrate the first completed "quest" by handing out prizes.



Sharing a Vision of Appreciative Inquiry

After increasing the number of Visioneers on the OEMC contract, we held an AI skillshare where together we practiced activities and debriefed to best understand what participants would experience. Activities included:

- 1:1 Interviewing
- Appreciative Imagery
- Defining AI principles through graphic capture of (pictured left)
- Sharing of case studies: Each team member brought a case study of how they have used AI in previous facilitations.
- Review of how AI is currently leveraged within the company and how we can increase the use including for a future team retreat.
- Appreciative sharing of how each team member is appreciated for their contribution.



Narrative Study

Presented by Heather Martinez, Visioneer
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Attended AIFT course 9-12 February 2016

As a graphic facilitator building a startup team in a startup organization, we served on a contract to support large-scale organizational change. It was my job to not only capture and support teams visually, but to bring new ways of working to ensure long-term success.

As part of the Organizational Effectiveness Change Management team, I had the pleasure of working with organizational development specialists and consultants acting as facilitators. Many of the professionals were talented but not necessarily facilitators first. They often fell into traditional change management thinking: find the problem, fix the problem. When paired with a facilitator, I attended discovery/intake meetings, designed the agenda, wrote facilitator guides, co-facilitated and graphic recorded during the sessions.

The teams we served were across the organization. A majority of the workforce population were analysts varying from veteran and seasoned professionals to those new to the field. There was a spectrum of experiences and age. During my time with the organization, I witnessed a lot of change. A year after being on contract there was a leadership change. It was not widely accepted and the workforce became apathetic. When I first began working with teams I would hear things like, “you aren’t going to make us hold hands and sing Kumbaya are you?” and “we don’t like the soft stuff.” Yet after a meeting, they would ask what techniques I used and I would tell them Appreciative Inquiry. Many admitted that they like the approach. Some went as far as to consult with me about inquiries and ways to talk to their teams to bring out the best in them.

As a Visioneer working for a systems engineering startup, our team quickly found that while on the surface, we could facilitate quite well back at headquarters. But when it came to solving the hard problems, they often left us out of the conversation because they wanted to talk about problems. When I was brought in to kick off the Sensing Network effort, the client was very hesitant to use AI and asked me to not use those words. He also changed the 11”x17” handout many times to take out words that sounded like “consultant speak” and reminded me that these were engineers and wanted to focus on the problems that the customer had. I spent a good deal of time at the beginning using AI to harvest what he wanted and he finally approved of the

handout including AI language. After the meeting, the energy from participants was so high and people asked if “this is the new way of doing things” and stated “that they hoped so.” Oftentimes I have been asked to facilitate teams back at corporate because they understood what I would bring and that it was different than what they had been doing. I became the “last resort” using AI techniques that would end up shifting efforts and transforming paradigms. The latest effort has been in helping stand up a practice that incorporates all of the skills in the organization. Using AI throughout, the group has accomplished much in the past 2 months compared to what they had in the last two years.

While I have not had the opportunity to facilitate a formal AI summit, I live AI everyday and breathe it into every activity and opportunity that I can. What surprised me the most is how frequently [on the onset] I was not allowed to call what we were doing AI as people would be so resistant to the process. Yet when people asked why the approach was so different or why it worked, I gave full credit to AI. Nearly every time I would be asked to facilitate the next meeting or invited to coffee/lunch to discuss AI and consult on possible inquiries.

My wish is to have more opportunities to apply AI. I am currently seeking non-profit and community-based opportunities to apply my skills to.

The Visioneering team is made up of 6 graphic facilitators each possessing a unique set of skills and strengths:

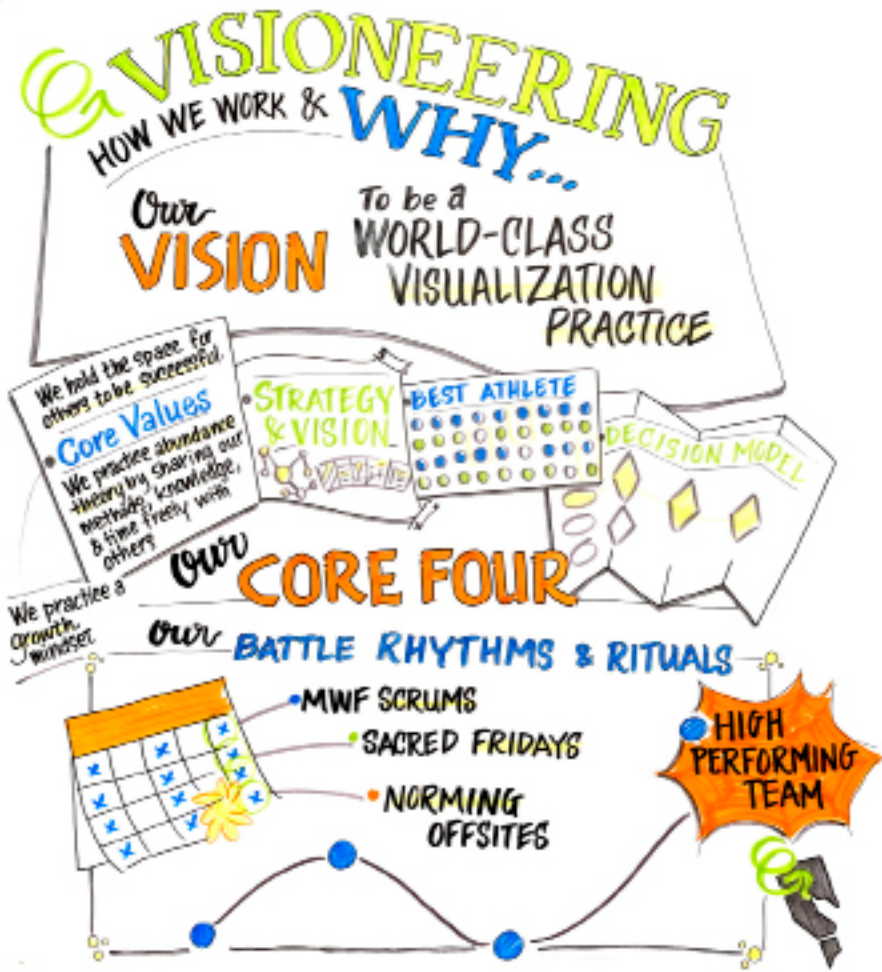
- Organizational Development
- Leadership Development
- Facilitation
- Certifications: MBTI, Agile Scrum, etc.
- Business Development
- Aesthetic Direction
- Technical Skills

We leverage one another’s strengths by using both commercial and homegrown tools:

- MBTI: Individual Assessment
- Team Dimensions Profile: Team Assessment
- Best Athlete chart: homegrown harvey ball template showcasing strengths and development areas paired with our decision model

As a fully-developed practice, we have rituals and rhythms that we keep to sustain high-performance:

- Tri-weekly scrums to share requests, current projects, support requests and insights
- Three-day norming retreats to review our Core Four and action plans
- Core Four: Core Values, Strategy/Vision, Best Athlete, Decision Model
- Feedback including SBI+I: Situation, Behavior, Impact + Intention
- Sacred Fridays: gathering every week for a deep-dive scrum, general business and a skillshare presented by one of the team members



These materials have been scrubbed of client information and can be shared to benefit others studying AI. I am also happy to provide visual charts and facilitation instructions along with AI inquiry suggestions for any of these activities.