

# Organizing from the Positive Core: An Appreciative Inquiry Approach to Strategic Planning

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# Purpose

To gain an understanding of how Appreciative Inquiry can be used to involve a whole system in creating a life affirming organizational strategy.

# Process

- We will present a series of questions posed to us by a client and together we will explore possible responses.
- You will work through related experiential activities in small groups.
- We will share a case of AI based Strategic Planning along with sample materials - our answers to the questions posed.

# Activity

Appreciative Interviews: Dialogue into the positive core of Appreciative Inquiry and the positive core of Strategic Planning.

# Hunter Douglas WFD

- Window Fashions Division of HD
- Located in Broomfield, CO
- Whole System Appreciative Inquiry for Culture Transformation
  - see [The Power of Appreciative Inquiry](#)
- AI Based Strategic Planning

# Question 1

Now that we have used Appreciative Inquiry successfully for culture transformation and are becoming an Appreciative Organization...how do we more fully integrate AI into our business?

# Answer 1

Engage the Whole System in an Appreciative Inquiry Based Strategic Planning Process

- the entire value chain
- all stakeholders

# 8 Principles of AI - SP

- Whole system - all stakeholders in the conversation
- Information heavy & narrative rich - inquiry focus
- Strength based - organizing from the positive core
- Reframe of organizational boundaries and possibilities vs expansion of current boundaries
- Consideration of social legacy - BAWB
- Conversational, meaning making process
- Decisions based on heart and mind
  - what people care about and want to create
  - what will benefit the organization
- Self organized action toward strategy realization

## Question 2

What would an Appreciative Inquiry Approach to Strategic Planning look like?

# Activity: AI - SP

The Positive Core of  
Appreciative Inquiry

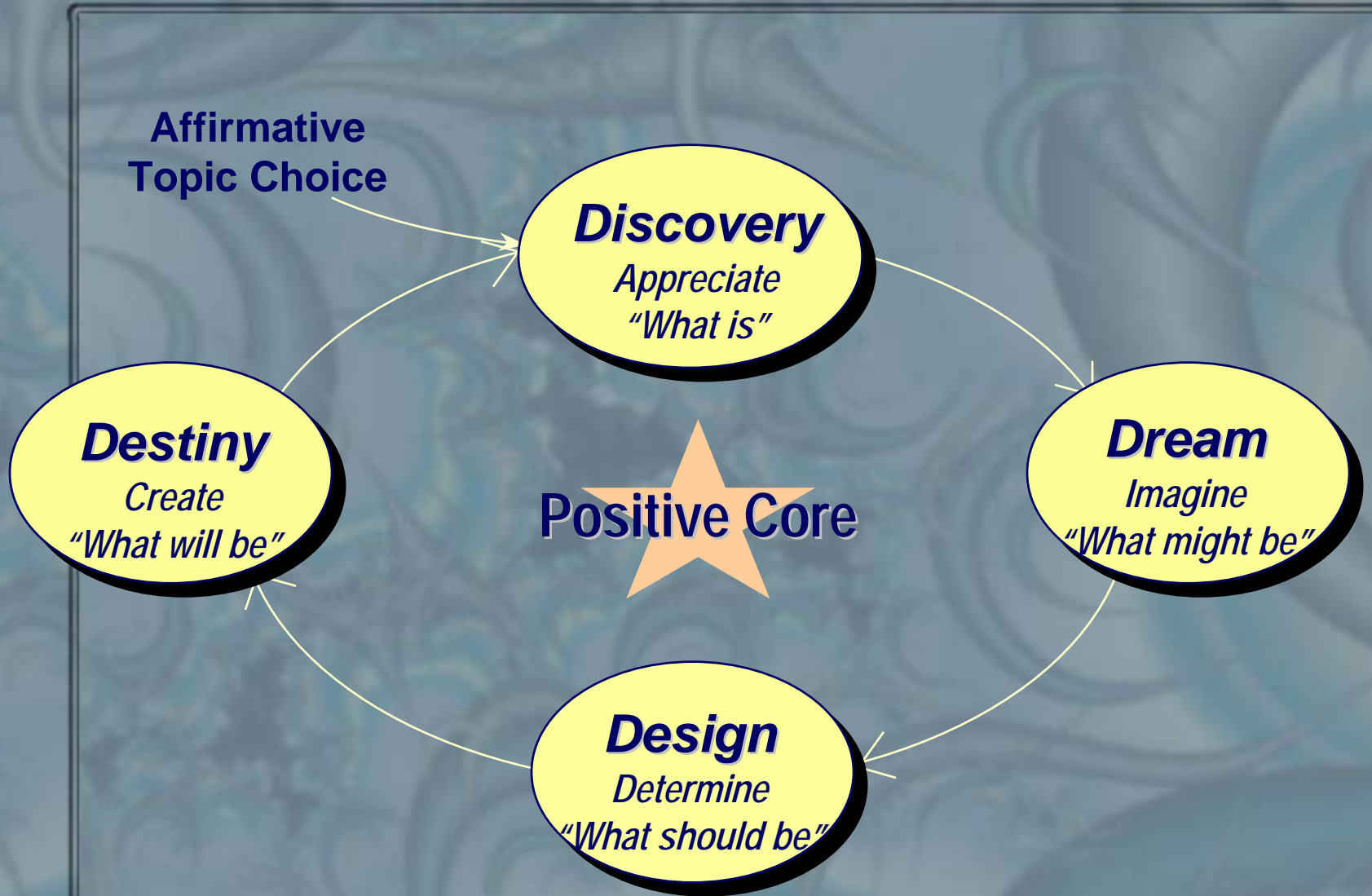
AI - SP

The Positive Core of  
Strategic Planning

# Answer 2

Integration of Strategic Planning  
Process into the AI 4-D Cycle.

# Appreciative Inquiry 4-D Cycle

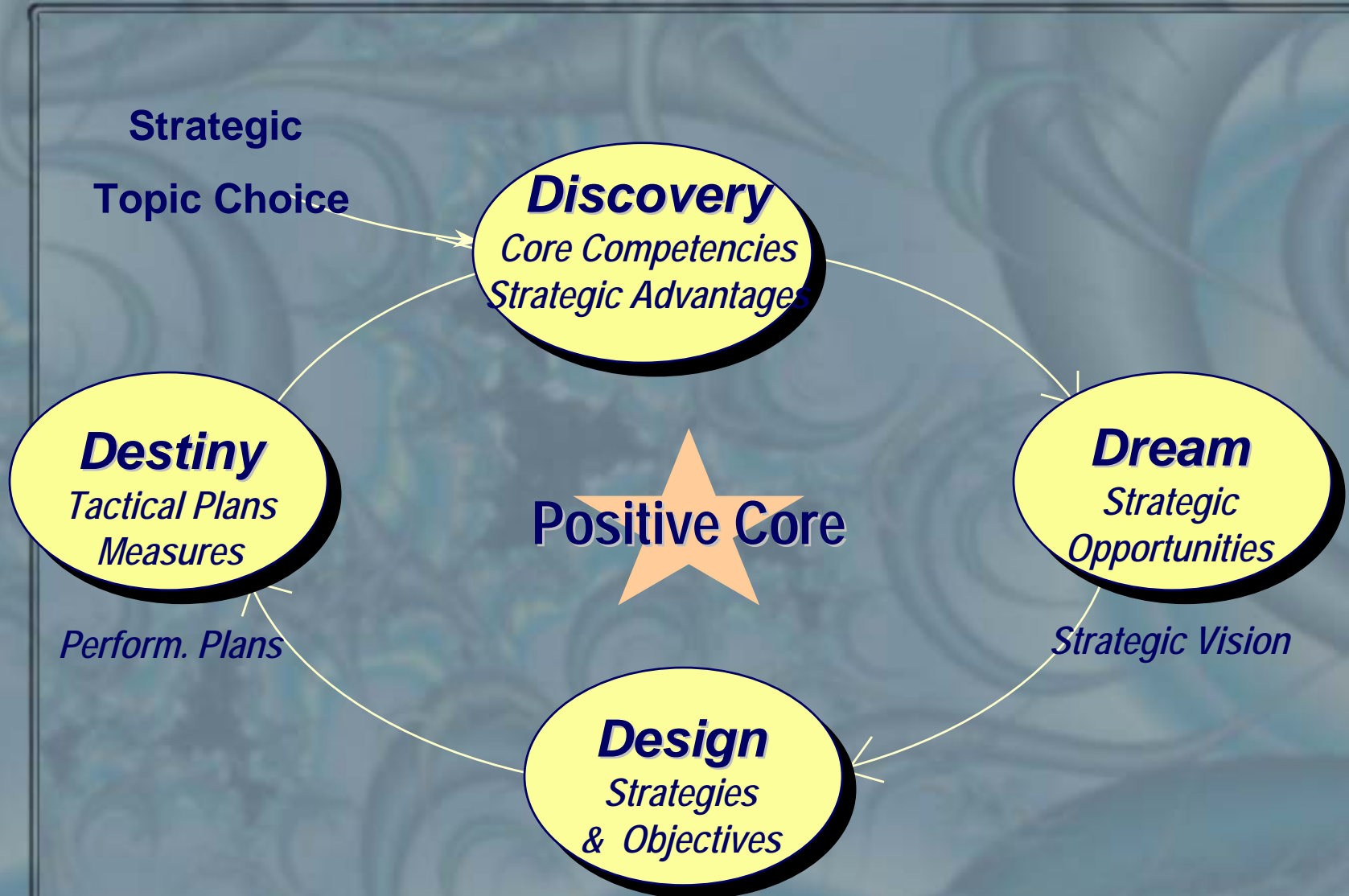


# What is Strategic Planning?

“Strategic Planning is the process by which the guiding members of an organization envision the organization’s future and develop the necessary procedures and operations to achieve that future. Our definition of strategic planning focuses on the process of planning, not the plan that is produced. Successful strategic planning is characterized by organizational self-examination, confronting difficult choices and setting priorities.”

Pfeiffer, Goodstein, Nolan  
Shaping Strategic Planning

# Strategic Planning 4-D Cycle



# Hierarchy of Strategic Activity

“Corporate Strategy is concerned primarily with the selection of economic activities (businesses) that best satisfy the needs of the corporation’s stakeholders.”

“Business Strategy, on the other hand, is concerned with how to create and deliver products and services to external customers in the face of competition.”

Allio

[The Practical Strategist](#)

# Question 3

What information do people need for strategic planning?

- What do they think/feel they need to know?
- What information is necessary and relevant to the organization at this time?
- What information is needed to be shared in order to create knowledge equality among participants?
- What information will stimulate creativity and strategic sense making?

# Hunting and Gathering Information

“Flexibility of perspective is critical. You simultaneously focus on questions that matter to you, and keep your awareness open for the unexpected. Like a hunter, alerted to the presence of prey by the snap of a broken twig, you learn to pick out a key piece of vital information in the dizzying flood of words, images, sounds and numbers that most of us swim in. Most of us have built up a set of strict filters to keep from drowning. We pay attention only to what we think we need to know. Being a scenario-planner, therefore, means becoming aware of one’s filter and continually readjusting it to let in more data about the world, but not becoming overwhelmed.”

Schwartz

[The Art of The Long View](#)

# Activity

## Creating a Knowledge Rich Process

What information would you ensure people have access to as part of an Appreciative Inquiry based Strategic Planning Process?

# Answer 3

## HDWFD

- First time SP in company
- Diverse group with all levels of work & education
- Management promoted within - little exposure to other organizations
- Silos between business units in the company
- Industry leader with established ways of doing things

## Information Shared

- About Strategic Planning
- About other companies and their strategies
- About each business unit - in depth
- About customer joys, needs and wishes
- About existing and potential markets
- About the future...

# How we created a Generative Knowledge Rich Process

- Readings about Strategic Planning and what other companies have done, along with Appreciative Study Questions
- Appreciative Interviews within the organization
- Business Unit Reports
- Customer Survey and Presentation
- Futurist Presentation

# Strategic Affirmative Topic Choice

- Who Selects Topics?
- What Topics will foster an Appreciative Dislodgement of Certainty?
- What Topics will generate conversations about core competencies:
  - people and organizational culture
  - finances and pricing
  - customers and markets
  - products and services
  - community and environment
- What Topics will open up new images of the future?

# HDWFD Topics

- We selected them in consultation with HR VP
- We built upon the AI Culture Transformation
- Topics:
  - Culture as Competitive Advantage
  - Best in Class
  - Business Growth
  - Creative Business Opportunities

# Activity

What other Affirmative Topics would have strategic importance for organizations and communities ?

# The Art of Strategy

“Winning strategists are certain of triumph  
Before seeking a challenge  
Losing strategists are certain to challenge  
Before seeking a triumph.”

Sun Tzu  
in The Art of Strategy  
R.L. Wing, translator

# Question 4

How will the inquiry be conducted?

“Oh no not another interview!”

# Inquiry Methods

- One on One Appreciative Interviews
  - one way with designated interviewers
  - two way
- Appreciative Focus Groups
- Department and Team Meetings
  - one question per week
- Cross Business Unit Studies
- Customer Inquiry Panel

# Activity

## Applications and Questions:

- Share your potential application of AISP and questions you have, with your group
- As a group generate a list of outstanding questions
- As a group select your three top priority questions

# Question 5

What is the best process for Dream, Design and Destiny in AISP?

# To Get to the Future

“To get to the future, a company must be willing to jettison, at least in part, its past. Someone once remarked that, ‘God created the world in six days, but He didn’t have an installed base.’ But what creates most companies from creating the future is not an installed base of obsolete capital equipment ...or end products that must be maintained...What prevents companies from creating the future is an installed base of thinking - the unquestioned conventions, the myopic view of opportunities and threats, and the unchallenged precedents that comprise the existing managerial frame.”

Hamel and Prahalad

Competing for the Future

# Answer 5

## AI Strategic Planning Summit

- Whole System in the Room
- 3 - 5 Days
- Narrative Rich
- Future Focus
- Flow through a 4 -D Cycle
- Self Managing Groups in Dialogue
- Seeking “Higher Ground”

# AI SP Summit Resources

- HDWFD Agenda
- ORC Workbook
- [The Appreciative Inquiry Summit](#)

# Useful Activities & Tools for facilitating an AISP 4-D Cycle

## **Discovery:**

Appreciative Interviews  
Mapping the Positive Core  
Futurist Presentations  
Others?

## **Design:**

Provocative Propositions  
Voting on Priorities  
“Who Talks for the Animals?”  
Others?

## **Dream:**

Guided Imagery  
Future Skits  
Scenarios  
Others?

## **Destiny:**

Self Organized Action Teams  
In Tact Work Group Planning  
Cross Functional Projects  
Others?

# Activity

## Q & A

Each group asks one question until all questions are asked or we run out of time!

# Application Dialogues

Meet with your appreciative interview partner and answer the following:

- What is your one AISP application idea?
- What appreciative capacities do you have that will help you succeed?
- What support and resources will you need and how will you get them?
- How can your partner help you now and in the future?

# For Further Information

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