Amanda Trosten-Bloom
Amanda is a widely acclaimed consultant, master trainer, energizing speaker, and pioneer in the use of Appreciative Inquiry for high engagement, whole system change. Publications include *The Power of Appreciative Inquiry*, *Appreciative Leadership*, *Appreciative Team Building*, the *Encyclopedia of Positive Questions* and numerous articles.
Contact: amandatrostenbloom@me.com

Sarah Noll Wilson
Sarah develops highly innovate, experiential organization and leadership development programs to maximize performance. With over 13 years of experience, she currently serves as Talent Development Business Partner at ARAG, adjunct leadership development faculty for Drake University, and guest lecturer at the University of Northern Iowa.
Contact: Sarah.NollWilson@ARAGlegal.com

Kevin Real
Kevin is an associate professor of Communication at the University of Kentucky and Director of the Center for Appreciative Research. His research examines communication in organizational and healthcare settings using quantitative and qualitative methodology. His work has been published in numerous academic journals and edited books.
Contact: kevin.real@uky.edu

From 'Best' to 'Even Better'
Rapid Relational Results at ARAG North America

In anticipation of exponential growth and sweeping market changes, ARAG® North America launched Transformation 2020: a cultural intervention designed to leverage the company's existing 'best place to work' status while preparing its workforce for radical innovation and rapid growth. A mere twelve months into this AI-based initiative, employees reported across-the-board improvements in cross-team collaboration, ownership and accountability, creativity, and engagement.

Over a period of years, the US insurance marketplace evolved both radically and rapidly. The mode in which employers offered insurance benefits changed greatly with the advent of digital platforms (exchanges) that enabled employees to purchase insurance online. Simultaneously, fierce competition emerged from multi-line insurance carriers that offered legal insurance along with additional benefits. These and other challenges motivated ARAG to launch a process to transform the way people think and work, in a manner that built upon the very positive, high-performing culture that had already earned the company "Best Place to Work" awards from 2009 to 2014.

Seeking an approach that was different than anything they had used before, leaders retained Corporation for Positive Change to support an Appreciative Inquiry process dubbed Transformation 2020. Its purpose was to acknowledge the best of our past and recognize our potential to not only hope for more – but to achieve it. Working together, we'll create an organizational culture that can adapt, innovate and grow at the pace our market demands.

The process
In November 2013, the team got to work. Recognizing culture transformation to be a three- to five-year process they initiated a highly expedited whole system Appreciative Inquiry (AI) process designed to both launch and anchor work that would continue over an extended period of time. This article highlights the first nine months of that process, which was designed around the following goals:

Culture Champions selecting topics for the whole-company inquiry

- Engage every team member in the discussion. ("Who is ARAG? What do we want ARAG to become?")

- Define the culture. ("How can we explore and leverage the best of ARAG, even as we better clarify our direction?")

- Model and reinforce new, desired behaviors. (Cross-functional collaboration, stronger connection to the cause and increased experimentation.)

- Push team members beyond their comfort zone (while helping them manage the stress of transformation.)

- Build internal capacity. (Use external consultants as partners, trainers and coaches, rather than "experts". Identify and develop internal change agents to support the ongoing transformation.)

Preparation

Focusing in particular on the goal of building internal capacity, they identified and recruited a group of 18 culture champions: formal and informal leaders drawn from all levels of the organization, as well as a variety of locations. Participation in this team was described as both a privilege and a responsibility: it would require participation in several days of training and planning, hands-on facilitation of several key activities, and the willingness to provide ongoing support and facilitation as needed in the future. Despite the demands, team members readily and enthusiastically agreed.

The first culture champion gathering lasted for three days. Participants learned some basic AI theory, and conducted mini-interviews to explore the best of their current culture and their dreams for the future. From these interviews, three topics emerged:

Dreaming a bold new future at the Core
Visioning Meeting

- Empowered people – extraordinary outcomes.

- Courageous. Authentic. Connections.

- Daring dreams. Bold reality.

They crafted questions, drafted an interview guide and organized into two-person facilitation teams to practice co-facilitating, using materials that had been prepared in advance by the consultant and the HR team. Based on their experiences with the draft materials, they recommended final refinements and made plans for carrying the process forward.

Discovery

Thus began the Discovery phase of the Transformation 2020 initiative. With a goal of engaging the entire organization in the discussion, ARAG initiated a series of structured four-hour gatherings ("community conversations") that took place both in-person and virtually. In a process described in the second edition of *The Power of Appreciative Inquiry*, conversation participants were strategically pre-assigned to enable rich cross-functional, cross-level dialogue.

AI Tool Community conversations: 'they came together to talk about what ARAG did well, and their visions for the future'

Negative past experiences had soured people's interest in "off the shelf" practices and theory-based models. Though Appreciative Inquiry was the backbone of the conversations, participants never heard about it. Instead, they came together to talk about what ARAG did well, and their visions for the future.

Each community conversation followed the same agenda:

- One-on-one appreciative interviews (using the guide developed by the culture champions)

- Narrative analysis of stories

- Individual and small group "dreaming"

- Capturing of themes

Upon completion of a conversation, culture champions/facilitators compiled participant data (interview guides, flip charts, sticky notes, visual depictions of the future). Reading over individual interview guides, they also completed summary sheets exploring powerful stories about ARAG's positive core, compelling images of the future, and wonderful ideas pertaining to each of the three topics.

In a period of only two weeks, every member of ARAG's workforce took part in one of these conversations – and patterns began to emerge. The company was abuzz with powerful new relationships and positive, hopeful conversations.

Dream
A mere six weeks after the launch, a group of 35 senior leaders and culture champions convened to reflect on what they had learned and make choices for the future. Over the course of two days, participants reviewed and made meaning of team members' insights regarding ARAG's strengths and future potential. From this reflection, five compelling futures emerged – all of which they explored through creative enactments.

AI Tool Creative enactments

They collectively identified key cultural elements that were embedded in these futures, then drafted design statements describing what people would do and how they would do it, in order to achieve their dreams.

Design
With design statements in hand, leaders formally and informally re-engaged the broader workforce to affirm, embellish and prioritize the cultural elements they had identified as vital to their future. This feedback enabled a subgroup of the visioning meeting to translate the design statements into cultural competencies:

- *Be original*. Use your creativity to anticipate what your customers – internal or external – need before they know they need it.

- *Be kind*. Exhibit a genuine desire to help your colleagues and customers.

- *Be bold*. Take risks. Do the unexpected. Make ARAG the best it can be.

- *Be yourself*. Understand that it all starts with you.

- *Be cooperative*. Cooperate with your colleagues and customers openly and honestly.

Culture Champions learned - then
presented - key phases of the AI process

As the cultural competencies were being finalized, a second leadership subgroup revisited the existing business strategy through the lens of what they had learned and imagined during the visioning meeting. Finding significant areas of overlap (and in some cases innovative new directions), they articulated strategic focus areas to guide future action.

Destiny

The culture champions' work had just begun. Having experienced and facilitated an AI 4D process, they came together for two additional days of training to prepare them for their ongoing role in supporting ARAG's culture transformation.

The session began with an experiential review of basic AI theory, along with a recap of what had already taken place. Recognizing that teaching is often the best way to learn or imprint a skill, they organized to teach one another how to creatively apply AI to future challenges.

AI Tool Appreciative
Facilitation tips

Self-organizing into teaching teams, they were given a series of appreciative facilitation tips which they were expected to practice, along with guidelines for their presentations. They began by talking within teams to discern how their assigned phase would work, along with how and why they might apply different approaches. When teaching the larger group, they did so in a manner that was experiential and engaging, and that connected them to the process they'd experienced over the previous months.

Upon completion of their teaching, culture champions organized to implement the Destiny phase of ARAG's 4D process, and identify further applications of AI within ARAG, along with their role going forward. Some of the activities described below were envisioned and endorsed during the final culture champion training, while others

A culture card from the deck given team members to encourage regular implementation of cultural competencies

emerged as team members considered over time how to model and reinforce the culture.

Re-engagement

Community conversations – Round two. Input had been received and decisions made. It was now time to build whole-system engagement and alignment around the company's future direction. In a second round of community conversations, culture champions and leaders shared the cultural competencies and strategic focus sreas and encouraged participation in their implementation. Team members took time to share stories about changes they had already observed (since starting the transformation). Finally, they were introduced to the upcoming "all company brainstorm" (described below), whose purpose would be the identify specific projects that would enable the company to achieve each of its five compelling futures.

Wherever possible, people returned to their original conversation groups. This reinforced and built upon the positive cross-functional relationships that had originally formed, while also "moving the needle" on ultimate implementation.

All company brainstorm. Next, with culture champions' support, each and every team member participated in a massive brainstorming event. The goal of this gathering was not necessarily to come up with the best idea, but rather to strengthen people's capacities for idea generation, collaboration and innovation.

In small, self-organized groups, people explored new ideas and potential objectives related to each of the strategic focus areas. In all, 132 ideas were generated – several of which were targeted for further development.

Enhancing innovation

Innovation champions. Following the all-company brainstorm and building upon the future vision, a five-person cross-functional group of innovation champions formed to articulate ARAG's innovation strategy and drive success.

ARAG Ideas site. Building upon best practices from other companies, they also launched the ARAG Ideas site: a site in their salesforce suite where people could share ideas. Anyone in the company could post an idea, vote on an idea or help build those ideas. The basic process was to 1) share your idea; 2) vote on the ideas; 3) explore the ideas; and 4) see the idea either implemented or put on standby. Depending on the scope, an idea could become the focus of an "innovation jam": a structured gathering to guide all those who chose to participate in determining how best to bring the idea to fruition.

Since its launch in October 2014, the ARAG Ideas site has surfaced a number of great ideas, several of which have already been implemented.

Ideas helpers. Both the innovation champions' work and the ARAG Ideas site were supported by a group of idea helpers: subject matter experts in all areas who could

mentor new ideas to fruition. Their job was not to decide what on good idea versus bad idea, but rather to help team members expand and explore their ideas, to understand who they need to work with and what they need to consider in order to move an idea forward. Every idea submitted to the ARAG Ideas site was set up with two idea helpers.

Maintaining community

Chatter. The company identified and launched a powerful social networking platform called Chatter. A kind of internal Facebook site, Chatter allowed for real-time sharing of information, collaboration across teams, and sharing of successes. In addition to fostering collaboration, this tool enabled people to find like-minded people interested in exploring topics such as wellness, environmental sustainability or personal leadership. It even helped people to form book clubs!

Monthly Culture Champion gatherings. Knowing how easy it is to fall back into old habits, they created a monthly "touch base" for all culture champions. Beginning as brown bag lunches, these eventually morphed into early evening happy hour gatherings. In each meeting people shared what they were seeing, what they were doing and what they might yet do. After a few months, champions decided to invite others to join them, and initiated a "BYOB" (bring your own buddy) policy. Each culture champion invited someone from outside the group to join for conversation and celebration.

Training and development

Culture cards. To encourage regular, daily implementation of the cultural competencies, each team member received a deck of culture cards. Each package included: suggestions for how to use the cards; three different cards for each of the five competencies; and two blank cards that people could create for themselves.

Each card included a thought (e.g., "Writing helps you clarify, articulate and release emotion – and gives you a renewed perspective.") and something people might do to enact the thought (e.g., "Create a daily practice of journaling to prepare you for the day.") Together, the seventeen cards encouraged team members to be the change they wanted to see in ARAG.

New-hire orientation. Prior to Transformation 2020, steps had been taken to improve the company's onboarding experience; but having clarity around the culture offered additional direction. Members of the HR team reviewed the current onboarding experience using a mini AI session with select team members. From there, they began to enhance the onboarding experience in a manner that both introduced and modeled the company's key cultural competencies.

Some changes to the system have included:

- A new-hire mentor/buddy system

- A pre-employment video, sent to new team members before they start, that welcomes them and introduces them to the ARAG culture

- An e-learning module that imprints the ARAG culture through stories from team members illustrating ARAG at its Best.

Personal development programs. Learning and development at ARAG is built upon the idea that learning is a process, not an event. To help reinforce and model the new cultural competencies, the company piloted three new learning communities: groups of people actively engaged in learning together and from each other about a particular topic of interest.

The first community was focused on mindfulness; the second group committed to learn more about Appreciative Inquiry; and the third learning community was targeted towards personal leadership.

When the communities launched, they advertised space for 30 people. Over 50% of the workforce applied to participate.

As is the case with most long-term AI initiatives, ARAG's journey has been – and will continue to be – a complex one. Having built their internal capacity to design, facilitate and adapt AI processes to a variety of change agendas, they have made rapid and stunning progress towards creating a culture characterized by: radical engagement; clear, regular, open communication; whole system ownership; and innovation.

Plans for the immediate future include: leadership development and alignment; creation of an online recognition program; enhancing and growing the innovation pipeline; and implementing an ongoing version of the personal development programs that were piloted during this first year.

Feedback and results

One of the many challenges of culture transformation is that it is difficult to evaluate. It is a long-term process that unfolds over an extended period of time, and incremental changes sometimes pass by unrecognized. Further, the processes we might use to measure or assess changes are themselves an "intervention".

This being said, the company took steps before they began to clarify what they were trying to achieve so they could assess and celebrate progress ... even redirect their efforts along the way, if needed.

Key areas that they chose to explore included:

Quantitative results
Before the first community conversation took place, a written survey was distributed to every team member, exploring people's experience of the following:

'People are speaking up, contributing new ideas and doing things differently.'

- Cross-level/cross-functional collaboration

- Feedback

- Information sharing

- Reflection

- Voice

- Risk taking

- Relationships and connections

- Organizational citizenship

- Interpersonal adaptability

- Engagement

- Willingness to go "above and beyond"

- Psychological ownership

An identical survey was distributed roughly 15 months after the work began, whose across-the-board improvements have been documented in a yet-to-be-released, peer-reviewed article.

'The people who've taken risks or tried new things weren't appointed or high ranking. They simply did it – so people think, "Why can't I?"' Culture champion

Qualitative results

To compensate for the necessary delay in soliciting quantitative feedback, the company took a qualitative "snapshot" of the culture transformation nine months into the effort. Culture champions came together to reflect upon and celebrate the changes that they had already seen and experienced. The process – which included whole group feedback, small group conversation and feedback, and an individual sentence completion activity – was designed and facilitated by the consultants, and took a total of 90 minutes.

Participants described changes they had seen or experienced as a result of their work, including an increased sense of ownership and creativity across the workforce. "People are speaking up, contributing new ideas and doing things differently," said one participant. "We're more focused on what ARAG is trying to accomplish, and asking how can we achieve this."

> People are more willing to share their time and talent more than they were before," said another culture champion. "People's sense of ownership has gone from maybe a 2 on a 10 point scale to a 3½ or 4 ... maybe even a 5. This is no longer a spectator sport!

The stories people shared of things they had personally done differently as a result of things they'd experienced or learned through the Transformation 2020 process illustrated improved relationships, increased engagement, and a greater sense of accountability – to the company, and to one another.

For example, one participant described how she intentionally included people in a project, in ways she would not have in the past. "It was cool to see how excited they got about the work when I took the time to involve them. In general, I'm being more intentional about collaborating."

Another participant told how his increased capacity to ask questions, be open to feedback, mirror, validate and redirect negative feedback enabled him to transform an aggressive and challenging customer experience into an opportunity for growth.

> Previously, I might have cried or walked away, when she dressed us down like this. Instead, I asked questions – without arming or protecting myself. I listened to what she had expected, and accepted her feedback as an unfulfilled image of what might have been possible. We'll do it differently next time ... and the customer will still be "on our team" when we do.

Other participants described encounters they'd had with co-workers, and with one another. "We're gradually learning to have difficult or uncomfortable conversations, rather than avoid them. Being kind is not the same as being nice. These changes in the way people talk are very important to our business."

AI Tool Internal social networking site

Many participants acknowledged that Chatter – their internal social networking site – enabled them to regularly and meaningfully exchange stories of successful work practices. "We have started communicating more often, and more transparently," said one person. "Between emails, the intranet, company meetings and updates with managers, people know what's going on. This promotes higher levels of trust."

Chatter has also supported increased cross-team collaboration and engagement. Periodic calls for volunteers or requests for ideas and input often receive robust responses. This was particularly evident in a number of the innovation teams that spun off of the whole system Appreciative Inquiry.

Culture champions described increased risk-taking, referring in particular to implementation of the ARAG Ideas site (where innovation teams are proposed, reflected upon and launched). Along with this, they cited implementation of a number of personal development programs designed to imprint the cultural competencies. "The people who've taken risks or tried new things weren't appointed or high ranking. They simply did it – so people think, 'Why can't I?'"

Next steps – and reflections

Leadership is now one of the next frontiers in this ongoing process of transformation. In an effort to grow their capacities to support and promote the cultural changes they have envisioned, key executives have already initiated relationships with personal coaches. In addition, every organizational leader participated in a comprehensive leadership development process that began in May, 2015. Together (and with input from the broader organization) all those serving in managerial/supervisory capacities will in the future:

- Identify and articulate key competencies from leading within the new ARAG culture

- Determine the optimal leadership structure

- Discover and align their personal leadership strengths in service of the organization's mission, vision and goals

Over the past 18 months, ARAG has initiated a comprehensive culture transformation process to change the way people think and work in a manner that builds upon past cultural strengths. Though the process is far from complete, they have made great progress towards their goals.

Fortunately for the field, they plan to continue examining, celebrating and sharing all that learning in a manner that elevates our collective understanding of how to design, implement and sustain positive change.

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