Amanda Trosten-Bloom (as of 2003)

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Evolving Approaches to Design at Hunter Douglas Window Fashions Division

Hunter Douglas Window Fashions Division in Broomfield, Colorado is a leading manufacturer of high-fashion, energy-efficient window coverings in the United States. In 1997, following a decade of explosive growth, the company's leadership launched an Appreciative Inquiry-based culture change initiative to engage and develop the company's fast-growing workforce. Over a five-year period, the principles of Appreciative Inquiry seeded a series of engagements for a variety of purposes, which together transformed the company's culture, strategies and business processes.

May 2003

The Hunter Douglas case study is one of the strongest on record demonstrating how an Appreciative Inquiry (AI) initiative can evolve over time. In addition, this case demonstrates how AI-based design can transform the business of a business in profound and sustained ways. The following article highlights the various manifestations of design over a five-year period of time. It also shows how tools that are traditionally associated with deficit-based design can be adapted to support organizations that are firmly committed to the philosophy and practice of Appreciative Inquiry.

Wave 1: Designing the preferred culture

The first wave of AI work – branded *Focus 2000* – had a threefold purpose:

- Foster cooperation, trust, and mutual support across silos and hierarchical boundaries;

- Build current and future leadership;

- Enhance creativity and commitment.

Focus 2000 was a whole-system 4D dialogue[1] culminating in a summit. Following one and a half days of Discovery and Dreaming, all 100 summit participants crafted Provocative Propositions (Design statements) on eight different topics. The first five were the same affirmative topics from the Discovery phase, since people believed these to be topics of vital importance to the emerging culture:

1 Whitney and Trosten-Bloom, 2003, 31–34.

Participants self-organized to work on the topics that most interested them.

- People

- Education

- Quality of work life

- Morale and recognition and

- Communication

The last three topics were elements of the company's social architecture that were identified through a process similar to Watkins' and Mohr's "goose egg": leadership, customers and products (Watkins and Mohr, 1999, 155).

Participants self-organized to work on the topics that most interested them. Each group reviewed data from the earlier phases of the process and drafted Design statements. Everyone in the room reviewed all eight Design statements by participating in a "gallery walk" activity.

Revolving groups of visiting authors discussed each Design statement, underlining key words and phrases that best reflected the spirit of what they'd learned through the inquiry. Then they offered up additional words, phrases and ideas that would help the Design statement "over the wall." Having offered feedback on each of the other seven statements, they returned to their original writing groups to finalize their materials.

Following are three of the eight resulting Design statements:

Education *(an original Discovery topic)*	Communication *(an original Discovery topic)*	Customer Relationships *(an element of social architecture)*
Education and training are cornerstones of Hunter Douglas. Individuals partner with the company to achieve a sense of inner purpose. This, in turn, nurtures the strength and confidence people need to achieve their full personal and professional potential.	Hunter Douglas demands an open, honest, high-quality and ongoing communication among its employees, business partners and communities. We provide all stakeholders the opportunity to express and be actively listened-to on all ideas and opinions. The organization:	Customers are Hunter Douglas's lifeblood and future. We delight customers (fabricators, dealers, consumers, suppliers, employees and the community) by understanding and exceeding their expectations in the areas of: • Product quality and innovation • Customer service and support

Our culture demands an atmosphere of respect, trust, integrity, honesty, reliability and responsibility.

Hunter Douglas sponsors a learning center, Hunter Douglas University (HDU) which provides such things as:

- Mentoring
- Customer training
- Career counselling
- Skills development

- Promotes continuous two-way exchange of information and ideas across all cultures and languages
- Actively shares the "big picture" through open access to all appropriate information about the company, its history and its business environment
- Maximizes use of the most effective communications tools
- Expects individual ownership of and responsibility for effective communication

- Customer relations
- Training and education
- Community involvement
- Promises kept

We provide professional and seamless service, create strong partnerships and significantly contribute to customer success. The Hunter Douglas family embraces customers through commitment to excellence, innovation, imagination, ideas and "small company values".

Our culture demands an atmosphere of respect, trust, integrity, honesty, reliability and responsibility. We expand our customer base by nurturing current and new relationships. Customers eagerly do business with us because we are easy to do business with.

We set the benchmark for others to follow!

These and other Design statements inspired a variety of short-term actions. In addition, however, the Communication and Customer relations statements inspired significant ongoing iterations of the 4D cycle that will be described in the balance of this article. In these subsequent iterations the company turned its attention to whole-system strategic and business planning, and the development of more streamlined, cost-effective, customer-friendly business processes.

Wave 2: Designing a shared vision for the future

In its second wave of inquiry, the company developed a whole-system strategic planning process that was implemented in two-year repeating cycles – beginning in 1998, and, as of 2003, still ongoing. Year One of the cycle involved division-level strategic planning. Year Two involved revisiting of the three-year division-level plan, as well as business unit-level strategic planning.

Both the business unit- and division-level planning processes involved a diverse representation of employees, customers and suppliers in:

- Discovery of internal and external best practices and positive deviancies

- Analysis of the positive core (core capabilities and competencies) and

- Envisioning the future (contemplation of strategic opportunities)

Each did so by engaging 50 to 150 employees in a two- to three-day summit, followed by a series of follow-up sessions. Each summit began with significant pre-summit Discovery, involving interviews, focus groups and other guided conversations with a broad cross-section of internal and external stakeholders. Each summit also provided user-friendly forums for non-leadership employees to elevate their level of business literacy in two ways:

Internally – by reading high-level company information (financial, operating, competition, new products, etc.), along with study guides to help make meaning of the data. [This broad dissemination of previously protected information was in direct response to the 1997 Communication Design statement: The organization actively shares the "big picture" through open access to all appropriate information about the company, its history and its business environment.]

Externally – by reading carefully selected articles and hearing meticulously choreographed presentations, describing external best practices in areas of vital importance during a particular planning cycle (e.g., strategy development, positioning, innovation, marketing, quality, etc.).

Upon completion of the summit, participants worked off-line to gather additional resources as required, finalize their materials, and generate tactical plans and budgets. Then, in a manner similar to more traditional strategic planning initiatives, they reconvened on a quarterly basis to make collective choices, share progress, offer ongoing support to one another – and celebrate accomplishments.

The Design phase of both the strategic and business planning initiatives took place on the second or third day of the summit. Following Discovery and

Each small group shared their drafts with the entire group, received validation and appreciative feedback, and then returned to their small groups to finalize materials.

Dreaming activities, participants collectively generated four to five topics for Design, through a whole-group process of guided conversation.

They moved to the topic that most interested them, then drafted Design statements, strategies and objectives for that topic. [After a year or so of work with AI, facilitation became unnecessary for this phase of the process. Many participants were familiar enough to work without outside support, and new employees received guidance from those who were more experienced.]

Each small group shared their drafts with the entire group, received validation and appreciative feedback, and then returned to their small groups to finalize materials. These Design statements, strategies and objectives then became the source of tactical plans, which were generated either as the final summit activity, or within a month of the summit.

Wave 3: Designing enhanced business processes

In the third wave of inquiry, the company turned its attention to creating an AI-based approach to ongoing business process improvement (see the Customer Relationships design statement – Customers eagerly do business with us because we are easy to do business with.)

The first phase of this work was a modified Positive Change Network.[2] It involved three different two- to three-day training programs, implemented over a two-month period and involving about 100 employees from a variety of positions. Participants in the training program first learned and then applied a Seven Step Model for Process Excellence to a particular business process.

The first segment of the training program focused on topic selection. Participants were given access to critical strategic and business information – again, as in the case of the strategic planning conference, in a very user-friendly format. Then they conducted a macro-level inquiry, through which they identified topics for Discovery that would both leverage the strengths of the existing business and enhance the overall organization. They self-organized to inquire into topics that interested them, identified who else (from outside the training) might make a worthwhile contribution to the task at hand, and formally organized themselves into process teams.

The second segment of the training was focused on Discovery. Newly-formed process teams were taught to use a combination of appreciative interviews, benchmarking, surveys and traditional process mapping (as described by Total Quality consultants and publications beginning in the 1940s), these teams engaged a variety of internal and external stakeholders in studying the work. This

2 Whitney and Trosten-Bloom, pp. 40–42.

These process maps became, in essence, a shared language for contemplating possibilities.

study, which took place over a period of weeks, culminated in identification of the key success factors that needed to be leveraged in any future design.

In the third training, teams participated in a Dreaming process, during which they imagined what their particular business processes might look like if they were perfect. Then they moved to AI-based design of the desired business processes. This involved talking about what they knew worked, contemplating together which choices would lead them to the desired state, and drawing maps of the enhanced processes. These process maps became, in essence, a shared language for contemplating possibilities.

Delivery phase

The Delivery phase, which involved testing and ultimately implementation of the enhanced business processes, extended over a period of months beyond the training. Once completed, final process maps were posted at workstations, to become the foundation for training, inspections and ongoing improvements.

Participants in these trainings reconvened approximately three months after the last work-shop – to share learnings and celebrate successes. Over the next 18 months, company trainers transported the process to the rest of the workforce. At the same time, an advisory team worked to ensure that: new teams received the guidance, support, and resources that would ensure their success; stories and successes were transported across the organization through a variety of mechanisms such as plant and department meetings, company newsletters, posters and recognition programs; the macro-level social architecture (leadership, compensation, rewards etc.) supported the grassroots-level changes; and inspiration and adaptation emerging from the teams was incorporated into the ongoing improvement process.

This AI-based process improvement work represented a unique kind of "merger" of traditional Total Quality methodologies with the AI philosophy and practice. These activities, together with spontaneous grassroots activities of process advancement teams, continue to pave the way for the company's triannual re-certification under ISO 9000:2000. In addition, as of January 2002 (approximately one year after the process improvement work was launched), the company documented approximately $3.5 million in savings related to this exceptional program. It did so by combining the rigor of Total Quality with the conversation, humanity and inspiration of AI.

Key learnings about AI-based design

The Hunter Douglas case shows us that organizations can be committed to Appreciative Inquiry as their primary process for fostering change and still

Broad-based inquiry into the positive core inspires and fosters positive organizational change.
Trosten-Bloom and Whitney

utilize traditional tools for business planning and design – even those that have conventionally been associated with deficit-based change. These adaptations are most effective when grounded in some of AI's foundational principles:

Broad-based inquiry into the positive core inspires and fosters positive organizational change (Trosten-Bloom and Whitney, 1999). Throughout an AI initiative, people discover, analyze and amplify their organization's often-undiscussed "positive core": the collective wisdom, knowledge and capabilities of the organization at its best. AI-based design consciously and deliberately strengthens that positive core. During the design phase, in particular, systemic changes are anchored in both past best practices (within and outside the organization) and the positive core of the existing organization. So long as this positive core is at the heart, any number of design methodologies may be employed.

Human systems move in the direction of their images of the future (Cooperrider, 1990). This being the case, each phase of the process must engage people in discovering and amplifying positive images that will draw the system forward for an extended period of time. In particular, the design phase must lead people through a process of articulating clear, detailed, compelling images of how the system will be and behave in the future.

Reality is co-constructed through dialogue and relationship (Gergen, 1999). An AI-based Design process – like the Discovery and Dream phases before it – is solidly anchored in conversation among improbable pairs of people. The crafting of Provocative Propositions, for example, brings a variety of people together to extensively retell stories, reflect on past experiences, and make choices about the future. Eventually, this conversation results in the creation of a new story line (articulated through the Provocative Proposition/Design Statements) that leads to positive transformation in the system. Other forms of AI-based Design – including crafting of principles, strategies, business processes, structures, etc. – also begin with extensive dialogue. This dialogue and relationship among the many – rather than analysis and counsel by the few – becomes the primary vehicle for creating and sustaining changes in organizational direction.

Adapting traditional approaches to fit evolving needs

With these three principles as reference points, organizations like Hunter Douglas Window Fashions Division can continually adapt more traditional approaches to design to fit their evolving business needs. The approaches that we used for strategic planning and process mapping, for example, were very close to their more mainstream variety, with three significant variations: They began with a rigorous inquiry into what works, and the data from that inquiry became the touchstone for subsequent choices related to Design.

Reality is co-constructed through dialogue and relationship.
Kenneth Gergen

Whatever final products were involved … were considered to be secondary to the conversations that had created them.

Amanda Trosten-Bloom (2017)

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The Design process itself was both conversational and grassroots. Whatever final products were involved (strategies, strategic objectives or process maps) were considered to be secondary to the conversations that had created them. And finally, whenever the final products were presented or referenced within the workforce, they were explicitly tied back to the stories and conversations on which they had originally been based.

So in the end, the Hunter Douglas case teaches us that we can both be committed to AI-based transformation and take advantage of the thoughtfully conceived tools that were originally meant for use in an environment of deficit-based change. We don't have to throw out the proverbial baby with the bath water! Instead, we need to rethink how we use these tools and methodologies, and find a different way of talking about our findings. This small but important shift in emphasis expands our capacity to nourish and sustain ongoing cultures of positive change that are directly tied to business excellence.

2017: Hunter Douglas in hindsight: A twenty-year retrospective

In 1997, Hunter Douglas Window Fashions Division embarked on a five-year journey with AI. One of the first American businesses to use AI for whole-system culture change, they also pioneered AI-based approaches to team building, strategic and tactical planning, and process/quality improvement. Their willingness to experiment, innovate and adapt AI – widely disseminated in presentations, articles, chapters and books[3] – fostered confidence and growth within the field, and informed a "next generation" of leaders and consultants committed to AI as a positive approach to organizational change.

The effects of our work with AI were instantaneous and profound. They ranged from radical reductions in turnover, to engagement of a new generation of formal and informal leaders, to creation of an on-site corporate university, to creation of a new strategic vision, to hundreds of thousands of dollars of bottom line savings. Rather than focusing on these effects, however, I choose to reflect on what I learned over the course of my work with this extraordinary company.

Not surprisingly, much of what I have learned about AI – what works well, and what isn't so effective – has its roots in Hunter Douglas. Below I highlight just a few of these take-aways.

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3 The Hunter Douglas case is the backbone of *The Power of Appreciative Inquiry: A Practical Guide to Positive Change*. In addition, it has been featured in two conferences (First International Conferences on Appreciative Inquiry, 2001; Creating Dynamic Destinies, 2007); *AI Practitioner*; in multiple popular books about Appreciative Inquiry (*Appreciative Inquiry and Organization Transformation*; *Appreciative Inquiry – A Positive Revolution in Change*; *Appreciative Inquiry Handbook*; *Appreciative Inquiry – Change at the Speed of Imagination*; *Appreciative Leaders In the Eye of the Beholder*; and *The Change Handbook*.

Had we been limited to a single wave of inquiry, this would have radically diminished the effectiveness of the effort.

Lean into others' experience: The Window Fashions Division was my first AI client and my first whole-system culture change project. Though I had several years of history working with the division's leadership, when we agreed to move forward with Focus 2000 (the first project), I had received all of two days of training in AI … largely focused on the Discovery phase of the work. The 4D cycle had only recently been articulated; and AI summits had yet to be identified as a viable approach to large scale change. (Case in point: the company's first AI summit was called an Appreciative Future Search Conference.) How, then, did we forge such a positive outcome? We agreed that I would be "on point" internally; but that I would have access to "shadow consulting" by more senior consultants. Thus, Diana Whitney became "consultant to the consultant", and she and David Cooperrider partnered to train our project team.

Beginnings matter: Today, when we initiate topic selection with a core team, we begin with a substantial "pre-interview" focused on the overall change agenda (e.g., culture transformation, strategic planning, customer service, etc.) When we began the work at Hunter Douglas, however, this was a phase I thought I understood – though in reality, this nuance had escaped me. Thus, I facilitated a 90-person "core team" (yes, 90 people!) as they selected topics based on a relatively generic interview guide (the "four core questions"). The stories that surfaced through this initial interview generated topics that I quickly experienced as both "flat" … and completely focused on the people side of the business (people, education, quality of work life, morale and recognition and communication). Had we been limited to a single wave of inquiry, this would have radically diminished the effectiveness of the effort. But because the division's leadership felt comfortable continuing the experiment and learning from how we'd started, the initial inquiry launched a groundswell of grassroots commitment and enthusiasm that paved the way for business-related transformation over the coming years.

Full voice for all: A primary benefit of AI is that it gives voice to those whose voices are not often heard. However, at Hunter Douglas we were reminded that the very best processes give voice to everyone: those in leadership and even consultants, as well as those "on the margins". How did we learn this? Our initial selection of topics took place by vote, rather than through deeper reflection or discussion. Had either the leaders or I felt comfortable raising questions or sharing relevant business information, I suspect the resulting topics would have been more robust … and the subsequent job of integrating the resulting "action teams" into the business would have been more straightforward.

Build internal capacity: From the beginning, a strong component of the Hunter Douglas work involved grassroots training and capacity-building. For example, before any of the work began I joined the four executive sponsors of the first AI effort as a participant in a five-day AI Foundations training (offered then by Diana

They created space and time for people to collaboratively envision new applications.

and David through The Taos Institute). Three months later, I offered a half day of training for approximately 200 interviewers, and 18 months into the effort Diana, David and I engaged all executives, directors and managers in a three-day AI-based leadership program. The trainings created strong internal capacity, which significantly contributed to the success of the initiatives. They created space and time for people to collaboratively envision new applications, and introduced skills that enabled team members to be full partners in the design of new initiatives.

Relationships are key: I now believe that the most vital practice in AI-based transformation involves changing who talks to whom, and what they talk about. These new conversations forge the relational infrastructure that enables people to give form to changes they have envisioned. For example, HDU had its roots in one-on-one relationships between Germaine Piper (a third-shift fabricator), the Lao and Cambodian employees she chose to interview, and the company's vice president of Human Resources. The interviews forged trust and empathy. This spawned courage and commitment. Germaine recognized a need and stepped out of her positional box to join a team that eventually created the corporate university. Here and elsewhere at Hunter Douglas, relationships made things happen.

Stay true to the principles: Even now, with dozens of books, workshops and guides to AI, experienced practitioners often describe it as more of an art than a science. Though we nearly always follow the flow of the 4D/5D cycle, we often experiment with new, perhaps untested practices over the course of an initiative. So how, then, do we know that what we're doing is "really AI"? The answer, for me, is this: It's AI if it's solidly grounded in AI's foundational principles. Indeed, this is a perspective I learned at Hunter Douglas, where so much of what we did was new and untested. Without a road map, we were left to make things up based on AI's basic principles, what we knew about organizational change, and what seemed to catch fire. Indeed, I have continued to operate in this way to this day.

How did these and other learnings influence my development as a practitioner?

They immediately informed the choices Ilene Wasserman and I made in our work with Green Mountain Coffee Roasters (see page 28).

Beyond this, I believe Diana's and my experiences at Hunter Douglas have informed the field of AI practice. When we began writing *The Power of Appreciative Inquiry*, we reflected deeply on our experience with Hunter Douglas, asking ourselves, "What worked in this organization – and why did it work?" And when something had a less-than-optimal outcome, we wondered how we might we have facilitated something better.

It seems probable that the Hunter Douglas Window Fashions case made a timely and significant contribution to the development of the fields of AI and positive change.

Much of the "step by step" guidance offered in that book – and in the many workshops we have since taught – came directly from these reflections. So, in the end, it seems probable that the Hunter Douglas Window Fashions case made a timely and significant contribution to the development of the fields of Appreciative Inquiry and positive change.

What was the long-term effect of our work?

Turnover dropped to a negligible level and remained there for nearly a dozen years. The division was identified as a "best company to work for" in Denver (2003) and Colorado (2006, 2007 and 2009). Its high-engagement, strengths-based culture, combined with exceptional benefits (many of which were birthed from the AI work) attracted people to come and remain for years at a time. Indeed, ten years after the work began, company employees still referred to the pivotal role AI had played in permanently and positively transforming the Hunter Douglas culture.[4]

And when the great recession of 2008 knocked the stuffing out of the housing industry (and subsequently the window coverings business), the company opted to launch an inquiry to discover an approach to layoffs that would leave the workforce "whole and healthy". Even in times of distress, it seemed that AI principles and practices – no longer directly associated with Appreciative Inquiry – influenced their choices.

So today, twenty years later, Hunter Douglas remains a powerful story of what is possible when positive change practices meet positive intent. May we remain curious, courageous and open to creative collaborations as we chart the course through Appreciative Inquiry's next frontiers.

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4 Whitney and Trosten-Bloom, 2010, p. 242..