



Article

Liberating structures: innovating by including and unleashing everyone

Authors

Henri Lipmanowicz is one of the founders of the Plexus Institute and Chairman of its Board. He retired in 1998 after a 30-year career at Merck, where he held positions ranging from Managing Director in Finland to President of the Intercontinental Region and Japan (all countries outside of the US and Western Europe) and was a member of the Management Committee. Henri is French and resides in the US and France. He is engaged in spreading Liberating Structures in the US, Latin America, Africa, Asia and Europe. He served as coach in a multi-center Positive Deviance Initiative to prevent the spread of MRSA infections in the US.

Keith McCandless is a founding partner of the Social Invention Group. His diverse skills are grounded in organizational development, strategic planning, management and complexity science. He describes himself as a structured improvisationalist. He has served on the governing boards of the Plexus Institute (the Board of Directors and Science Advisory Board) and has a master's degree from the Heller School for Advance Studies in Social Welfare at Brandeis University in Boston. Keith is engaged in three bold, transformational initiatives: the Innovation Learning Network (including large health systems in the US); Liberating Structures in Latin America, the US and Europe; and Positive Deviance, preventing the spread of "superbugs" in the US and Canada.

The complex problems of today cannot be solved by the same restrictive structures that created them.

Imagine a world where:

- ▶ Customers reach out to you with gratitude
- ▶ Employees are highly engaged, take responsibility and speak up freely
- ▶ Meetings are not boring, but instead are productive and enjoyable
- ▶ Collaboration across functions is effortless and not stifled by silos
- ▶ Innovation flourishes at all levels of the organization and includes customers
- ▶ Results are surprisingly better than expected

Five years ago, the VP of a major pharmaceutical company invited Plexus Institute to discover new ways for his sales organizations to interact with doctors. We assembled a collection of methods that we called “**Liberating Structures**” (LS), and then invented an effective scheme to internalize and spread those methods easily and inexpensively through the organizations.

Starting with the narrow objective of stimulating frontline innovation, and expanding dramatically in breadth and depth, the scheme culminated in an effective way of unleashing the collective wisdom and creativity of nearly everyone in the organization. The same approach is useful for stimulating innovation at the level of single projects, single meetings, single departments, single functions or entire organizations. LS can be scaled up and down with little need for central control and tight coordination.

By now, LS have been introduced in some 20 different countries. The response has been enthusiastic in every culture, which is strong evidence of effectiveness. The enthusiasm comes not just from inside companies, but also from customers. Internally, employees at all levels have, on their own initiative, adopted and adapted LS to transform how they work together and innovate. Senior managers have changed how they interact with others and revised leadership principles. Frontline

workers have experimented in a variety of customer settings. Doctors have welcomed the transformation and frequently expressed their appreciation. Some have taken the initiative to learn and use LS for their own purposes.

Customers and stakeholders have spontaneously reported that these approaches positively differentiate the organizations that use them. Measures of employee engagement and morale have increased dramatically and exceeded benchmarks. Business results and market share alike have confirmed the effectiveness of the changes unleashed.

Since nothing about LS is specific to the pharmaceutical industry, similar results can be achieved in other environments. On a smaller scale, we have seen much the same progress in hospitals, nongovernmental organizations (NGOs), government agencies and academic institutions.

This article describes some of the main stages of this surprising journey – with no end in sight.

The initial challenge

Like many initiatives, this one started with a dinner conversation that morphed from the casual to the serious. Here are snippets of a dialog with the VP.

"More and more doctors are getting fed up with too many medical representatives visiting them with repetitive messages about the same product! So more and more doctors are restricting access. It is not a sustainable approach."

"There has to be a better way of interacting with doctors. Something new has to be invented!"

"Where will new ideas come from? Not from the top; the top doesn't know what to do, and my country managing directors don't either. The ideas have to come from the front-line."

"It makes sense. The reps interact with doctors daily and are the only ones who know what is really going on at the point of contact."

"They will also be the ones who will implement new approaches so they'd better be involved in the experiments from the beginning so that they truly own the solutions."

"Experimenting! That's the opposite of what we have been telling the reps to do for years! That is a radical change. If we want them to start innovating, experimenting and taking risks we have to give them and their managers tools and support for figuring out what to do and how to do it."

The first engagement and discovery steps

This innovation initiative was started at the regional level. However, change was needed at the sales level in many countries. Stimulating frontline innovation calls for a bottom-up process with support from the top. That means making every possible effort to avoid imposing anything from the top and staying well away from the usual top-down implementation cascade. Instead, we envisaged connected Communities of Practice (COP), one COP at the regional level connecting to COPs at the country level; which in turn would connect with frontline COPs (see Figure 1).

The first Innovation Regional COP was started at the invitation of the those most interested sales executives. They formed a regional design team composed of diverse functions and levels including the Regional VP. In keeping with the principle of not imposing from the top, their first meeting was a two-day workshop with no predetermined outcomes.

The design employed various LS to generate 100% engagement and unleash

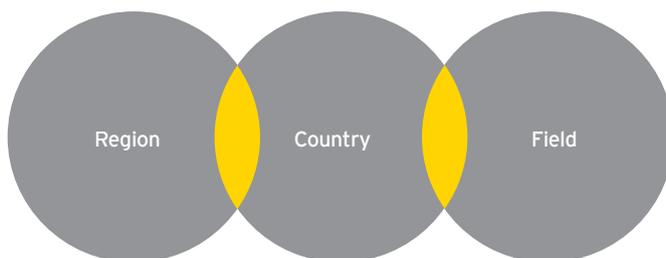
joint discovery around one question, how do we move forward toward stimulating frontline innovation."

This was the participants' first exposure to LS. The meeting was an intense and highly enjoyable experience, unlike any other. They were amazed by what they were able to accomplish in such a short time, including:

- ▶ A totally new purpose statement for the region: "to make a difference in helping people live longer and healthier lives by engaging as a unique and respected partner in the healthcare community"
- ▶ A list of dos and don'ts essential for achieving this purpose
- ▶ A review of all the players that needed to be included
- ▶ A list of "next steps"

The regional COP was surprised by the power of the unusual LS methods compared with their traditional meetings. This positive experience led them to decide that the local design teams should organize similar workshops at the country level in order to move the innovation initiative down in the same discovery mode.

Figure 1. COP at different levels



Source: Own research

Liberating structures: definition and background

LS are a growing collection of 31 or so group processes and methods (listed below) that make it easy and quick for any size group to radically change how they interact and work together. Their purpose is to liberate energy, tap into collective intelligence, stimulate creativity and get surprisingly better results by engaging people and unleashing the power of self-organization.

1. 1-2-4-Whole group
2. 15% solutions
3. 5 whys and 10 hows
4. Agreement/uncertainty matrix
5. Appreciative interviews
6. Celebrity interview
7. Chunking via rapid prototyping
8. Conversation café dialog
9. Creative destruction
10. Debrief (what, so what, now what?)
11. Discovery and action dialog
12. Ecocycle sifting and gathering
13. Fishbowl
14. Generative relationships
15. Impromptu speed networking
16. Improve prototyping
17. Minimum specifications
18. Need exchanges

19. Open space technology
20. Panarchy: cross-scale change
21. Pattern recognition
22. Positive deviance
23. Purpose-to-practice design
24. Scenario-planning critical uncertainties
25. Smart network mapping
26. Story-boarding agendas
27. Storytelling
28. Three levels of knowledge
29. Troika consulting
30. Wicked questions
31. Wise crowds group consultation

Inspired by pioneering work in the US among Plexus Institute members,¹ the methods have evolved with new users and new applications.

The generative qualities of LS cannot be adequately described in writing, rather they need to be experienced in person. Many are counter intuitive; who, for instance, would believe that the most productive meeting can be one that starts without any agenda? Other practices may seem too simple – can one minute of silent reflection change the outcome of a meeting?

Why do we call these methods “Liberating Structures?” Let’s contrast two scenarios. The first is a standard meeting with a dozen participants and a manager as its chair. Following a PowerPoint presentation,

the manager initiates a group discussion by inviting comments from everyone. In the second scenario, the manager acts as facilitator/participant. He asks the group to first spend a moment in quiet reflection, then to discuss their observations in pairs for a couple of minutes, then in groups of four for a few more minutes. He too forms a part of and takes part in a quartet. Only after this does he start a whole group discussion by inviting comments from the various quartets.

We call the combination of pairs, quartets and timing a “structure” because it is a constraint imposed on the participants. We call such a structure “liberating” because it also unleashes people to engage, in pairs and quartets, in conversations and exchanges that would not happen going directly into the whole group discussion. People in pairs automatically talk to each other; this immediately creates engagement of all participants. Groups of two create several spaces for speaking up that are much safer than the whole group. Quartets deepen the pairs’ exchanges in mostly safe spaces. These additional conversations will frequently lead to significantly different outcomes. LS do not create a “free-for-all” environment; rather the facilitator maintains a well-defined but minimal structure, and freedom flourishes within its confines.

This example illustrates how the same people and the same initial presentation generate different outcomes because LS changed the interactions between the participants.

¹ Brenda Zimmerman, Curt Lindberg, and Paul Plsek, *EdgeWare: Insights from Complexity Science for Health Care Leaders* (VHA, Inc., 1998). Publication of *Edgeware* helped to coalesce pioneers in “applied complexity science.”

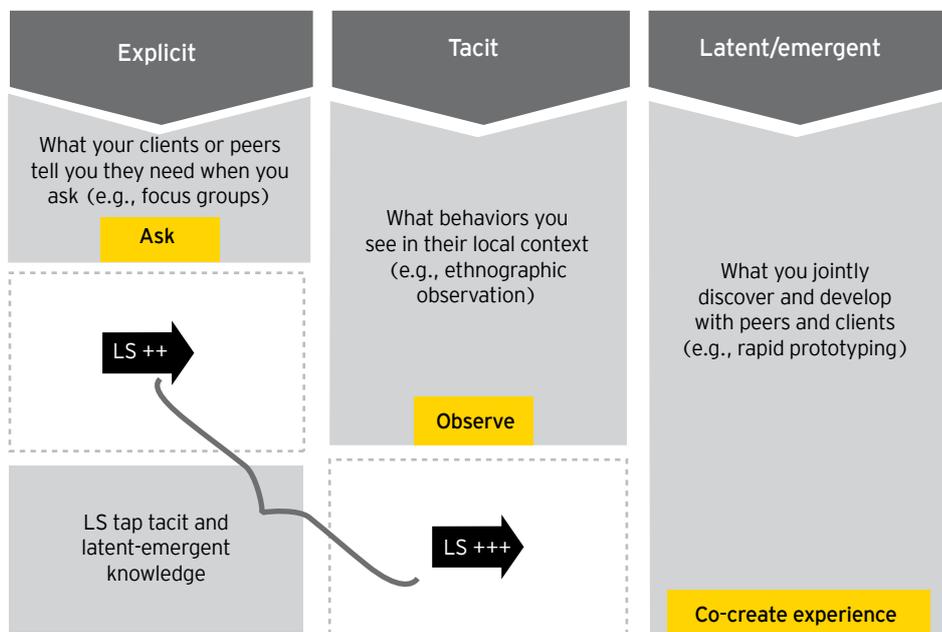
This is the fundamental mechanism by which LS impact the results of organizations: they change the pattern of interactions. Many of them create spaces for people and conversations to self-organize and discover latent innovations that remain hidden when too many decisions and controls are imposed from the top. They make it easy for people at all levels to speak up, participate and contribute.

When LS is used in local settings, tacit behaviors that solve problems are discovered. Furthermore, because attention is paid to local, frontline wisdom, latent solutions are jointly invented. The conceptual model for tapping this resource is illustrated in Figure 2.

Complexity science is the conceptual background and inspiration for LS. Organizations are complex systems where all the parts – people individually or in groups – interact and affect each other’s behaviors. By changing patterns of interactions, LS make it possible to positively influence results in a complex system. Specifically, LS:

- ▶ Distribute power and influence more widely by engaging nearly everyone
- ▶ Invite self-organization to flourish by letting go of over-control
- ▶ Expand and connect networks by breaking down silos
- ▶ Increase transparency and the rapid reciprocal flow of information
- ▶ Build new sets of feedback loops via many new forms of interaction
- ▶ Increase diversity by engaging more people and perspectives

Figure 2. Source of knowledge and innovation



Adapted from Alan Duncan, MD (Mayo Clinic)
Source: Own research

- ▶ Create favorable conditions for emergence through joint discovery in groups
- ▶ Generate non-linear impacts as small changes yield surprisingly big effects

As these changes take place and generate positive results, they cultivate greater trust and create a self-reinforcing virtuous circle.

While LS are difficult to describe, they are easy to learn in practice, since one or two experiences are enough for anyone to start experimenting with them. They can be used routinely, enabling anyone at any level to act in a manner that is congruent with complexity theory without having to know anything about complexity science. Those who use LS simply “act their way into a

new way of thinking”² that is compatible with the realities of a complex world.

Why liberating structures?

Organizations operate in a top-down fashion for the most part, and this is reflected in the way working together is usually organized.

Participation in meetings is restricted and often standardized; agendas and discussions are controlled by a few; meeting formats and designs tend to be nearly always the same (sometimes for decades) – dominated by PowerPoint presentations followed by some form of managed discussion. The decisions, made by a few, depend on the vast majority for implementation – the vast majority that

² A catchphrase used by the late Jerry Sternin of the Positive Deviance Initiative.

wasn't included in the decision-making process.

Two implicit assumptions underpin these top-down traditions:

1. The vast majority has nothing to contribute that could make a significant difference (bottom-up is useless).
2. The vast majority will be willing and capable of rapidly and effectively implementing decisions from which it was excluded (with no resistance to change).

Since these assumptions are clearly not valid, significant opportunities exist for organizations to find ways to effectively and authentically engage their vast majority (including, in many cases, their customers).

By offering new ways of working together, LS provide answers to the question: "How can we engage the vast majority practically and cost-effectively?"

First experiments

The first experiment addressed a common sales issue. A major product in a large market was showing erratic performance across districts: market share was excellent in some areas, but mediocre in others. Using a process called positive deviance (PD),³ the community of medical representatives worked together to discover the "positive practices" that could have caused the differences, and then developed a program to spread

their adoption. Sales and market share improved dramatically.

What most impressed those involved was that the work had been entirely carried out by field personnel with only minimum outside facilitation and little or no involvement of more senior leaders. We called the sales director towards the end of the project. He had introduced the idea of using PD and started the project with his district managers. When asked what was happening, he said, "I was very involved at the start, but now I don't know any details. My district managers kicked me out of the project. They say they don't need my help any more. They just come to me when they need approvals for something."

Asked how he felt, he replied, "Great ... and terrible. Great because the district managers are thrilled and are making good progress on their own; terrible because I feel useless. But I am very excited about what I learned. I can see that the most important long-term benefit is that the relationships between the district managers were transformed: they

learned to work together as peers. This has been truly a bottom-up innovation and performance improvement. It is making me rethink how I should do my job, much less top-down and inviting more bottom-up contributions."

The second field experiment emerged from a managing director's invitation to organize and facilitate a special event with the objective of energizing the whole organization. She chose to have a three-day open-space workshop with all personnel of the subsidiary. Open space is a liberating structure at its most pronounced. It facilitates self-organization and action more than any other technique. The theme selected for the event was: "How do we transform ourselves from being a product-oriented organization to a customer-oriented organization?"

The timing was impeccable. We arrived the week after an unexpected 25% downsizing of the subsidiary. The starting atmosphere was grim, but open space was quickly demonstrated as highly effective



3 Positive Deviance Initiative
<http://www.positivedeviance.org>.



at including and unleashing. More than 200 participants created an amazing agenda from scratch within one hour by volunteering to convene 71 sessions. They addressed every issue that participants considered important for improving the performance of the company. Everyone was free to participate in the sessions that interested him or her. The amount of energy liberated by such an agenda blew away all the clouds, and 17 self-organized project teams emerged from the workshop.

One participant commented, "I have worked for this company for more than 20 years and this is the first time I feel that I am truly listened to."

After three days in open space, the gloom had evaporated and been replaced by enthusiasm loudly displayed during a lively party to celebrate the results achieved during the workshop.

From the open space success, there emerged a clear interest for using more LS on a regular basis. The first major opportunity was provided by the annual sales convention scheduled a few months later. We helped the management team to redesign most of the sessions with the objective of fully engaging the medical representatives. It meant eliminating many traditional one-way presentations and replacing them with highly interactive sessions. Understandably this generated a fair amount of trepidation. What was going to happen? How were the reps going to

react? The following exchange between our team and the management team illustrates the concerns.

"Can you send this material in advance to the representatives?"

"If we send it in advance, how can we be sure that they will all read this material carefully?"

"You can't."

"That's right and that is why we have to present it at the conference."

"How can you be sure that they will be listening carefully?"

After a long silence, "OK, we get your point. We will send the study and slides in advance."

The sales convention was a second success; the worries about representatives proved groundless. They loved the new approaches because, for the first time, they were fully included in the proceedings; their voices were heard. The nervousness of all the directors quickly evaporated when they saw the results and discovered how easy to implement and forgiving the various LS were. The managing director was elated; for this group, there was no turning back.

By the end of the sales convention, some were already talking about the next step: how to start using LS with customers.

The first liberating structures workshop

As news about the open space and the sales convention started spreading to other countries through the grapevine, the first two experiments showed how rapidly progress could be achieved when we worked directly with a country and provided a modest amount of on-site support. It was time to develop a country strategy.

"There is growing interest and curiosity about Liberating Structures, but people won't use them because they don't know how. We have to arrange some workshops for people to experience Liberating Structures in their countries and in their language."

"Okay, I prefer to start with a country volunteering for hosting the first workshop. Let me find out who wants to do it."

In parallel, we were having our own conversations:

"Keith, what are your ideas about this workshop?"

"I don't know. I don't have much interest in training. I am a consultant and a facilitator. I am not keen to spend time in the role of a trainer!"

"I am a retired senior executive. I am not interested in training either. But I think this is different. We will not be training people; we will instead create an experience, a liberating experience! Participants don't have to become experts. All they need is to learn just enough about LS during that first experience so that they are motivated to try some in practice."

"We need a big bang to get this rolling and create the critical mass of people needed for the use of Liberating Structures to expand in that first country. Large groups of people will have to change the way they work together, so they need to learn together."

"Medical representatives will need to learn about Liberating Structures so that they can use them to experiment and innovate in the field. So we need to have a few of them in the workshop. If they are there then their managers have to be there as well. At the other end, we need the involvement and support of the senior management team otherwise nothing will happen. So they have to be there as well."

"How many Liberating Structures do we need to include in the workshop for a big bang?"

"Twenty? Twenty-five?"

"You are crazy!"

"I know, but I can't think of any other way to create a big bang and to expose everybody to such a wide variety of methods that it will be impossible for anyone to say that there is nothing that could be useful."

"That will take a minimum of three days, probably more"

Our final agenda included 18 LS methods. Importantly, in addition to the management team, participants from all levels and all functions, including medical representatives, were invited to the workshop.

One key element was added to complement the workshop: two days after the workshop we were given the opportunity to provide individual one-hour consulting sessions to whomever was interested in using LS. This anticipated the need to bridge gaps between what would be learned during the workshop and what individuals needed for immediate implementation.

The first LS workshop took place in a location away from any interruption, with about 75 participants. We had no idea what was going to happen and its resounding success took all of us by surprise.

The managing director expressed his satisfaction: "I have never seen an entire contingent of participants so engaged from beginning to end. All of them together made this workshop very dynamic and totally different from our usual meetings. As for me, I learned a lot and had a ball!"

One thing impressed us tremendously; the medical representatives gradually found their voice and contributed more and more to the workshop. At the start, intimidated by five levels of management, including the regional VP, and by proceedings in English with simultaneous translations in three languages, they were very quiet. By the end of the first day, they felt comfortable to give their opinion and participate on equal footing with everyone else.

Bottom-up contributions were happening before our eyes!

The two days of consulting sessions proved to be a popular and very useful addition to the program. People came individually or in groups with a wide variety of challenges and projects.

- ▶ How can we launch a new product without medical representatives?
- ▶ How can we improve work-life balance?
- ▶ How do we market a product that is too expensive for more than 90% of those who need it?
- ▶ How do we rethink the purpose and design of sales force meetings?
- ▶ How can we attract independent doctors to a community of practice via the internet?
- ▶ How do we increase the number or women, minorities and disabled in management positions?
- ▶ How do I have to rethink my role as leader if I want to use LS?

In each session, opportunities were found to make a difference by using one or more LS.

Confirmation of the workshop's impact came immediately when a handful of participants started experimenting with LS literally the next day. A few months later, LS were used extensively during the annual sales convention, a big event that involved several hundred people and nearly the whole organization.

From a sample of one to a pattern of success

News of the workshop spread quickly through the region and we were immediately asked to run a second one, this time for a group of six small countries with quite a diverse cultural mix of participants. The response to this second workshop was just as enthusiastic and the cumulative impact of both workshops started to be felt. Early adopters jumped on the opportunity to innovate and experiments started popping up, none of them imposed.

More requests led to a succession of five more workshops. Well received in five different countries, they confirmed the robustness of our approach.

Although LS was an orchestrated corporate initiative, news about it was spread outside the region and across divisions only by word of mouth. "Viral spread" proved sufficient to attract the interest of leaders on another continent and we received invitations to conduct more workshops. This second round introduced LS to nine more countries and widened the range of cultural environments.

As our experience grew, we began to realize that the whole was more than the sum of the parts. It was the combination of all the elements that made a relatively small one-time intervention powerful enough to generate a large and long-lasting impact (see Figure 3). The LS bundle was emerging as an innovative tool that could transform organizations.

The important elements of the bundle are:

- ▶ **The nature of the workshop:** an intense series of practical experiences with many methods applied to a variety of issues relevant to the group.
- ▶ **The number/composition of participants:** from top to bottom; the managing director, the entire management team plus 50 to 100 others from all functions and levels.
- ▶ **The length of the workshop:** two and one half days plus a half-day of action planning.
- ▶ **The number of consulting sessions after the workshop:** two to three days of one-hour coaching sessions offered to volunteers who want to develop LS applications.
- ▶ **Immediate experiments:** no delay for going into practice.

The second wave of experiments

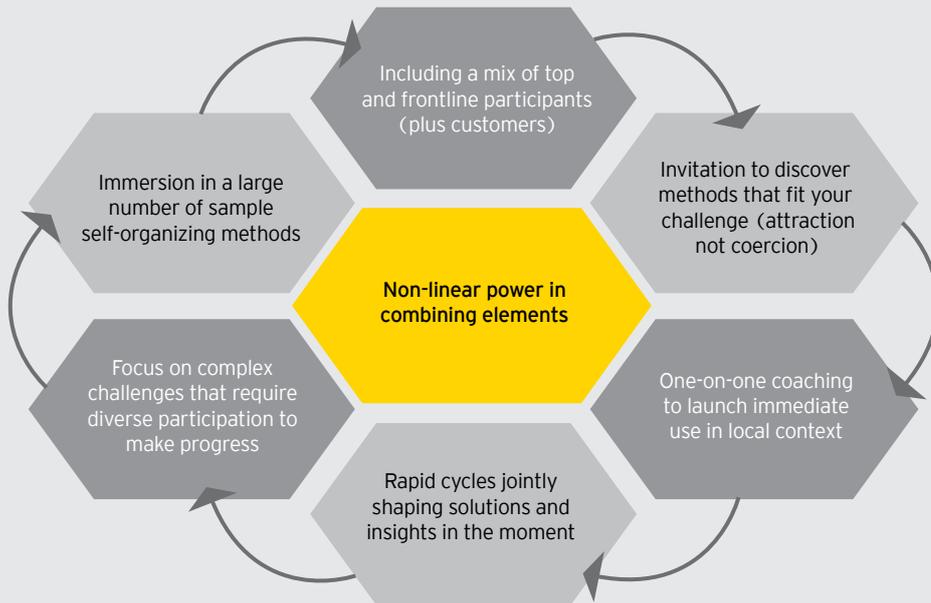
Twenty new approaches in the hands of 20 to 50 people in each country was a good formula to trigger a stream of experiments. For the most part, they addressed thorny issues, but many were designed to improve everyday activities:

- ▶ I have just been appointed Managing Director in this country. There is a fully unionized sales force with major performance and cultural problems. What should I do when I meet face-to-face with the whole group for the first time?
- ▶ We have a big symposium coming soon. From our experience, we know that doctors do not pay much attention, spend time on their BlackBerries, walk in and

out, etc. So we would like to change the format and engage the audience of doctors instead of keeping all the action at the front with the expert panel.

- ▶ I have a director reporting to me who doesn't get along with one of his subordinates. They are both very competent. I have tried everything and don't know what to do anymore.
 - ▶ We have a new product that is an important but small niche product. How do we launch it with a tiny budget and almost no manpower?
 - ▶ The patent of one of our major product is expiring. We have spent years building our presence in this market sector. We have about two years before we get a new product for this therapeutic category. How do we avoid losing contact with our customers when we have nothing to talk about and therefore no reason to visit them for two years?
 - ▶ I am a product manager responsible for launching a new product. At the next sales convention, I will have 45 minutes to present the marketing program to 300 people. My objective is to have everybody full of enthusiasm at the end.
 - ▶ I just attended a divisional meeting. I counted that I was treated to more than 1,000 slides in three days. It was mind-numbing. We have to find another way!
 - ▶ We are not getting new or useful information from focus groups and market research. How can we work directly with our customers to address deeper, unarticulated needs?
- We now had enough information to start making sense of our experiences.

Figure 3. Non-linear power in combining elements



Source: Own research

Sample of workshop agenda

Sensing opportunities Making space for innovation Day I	Building prototypes Unleashing self-organization Day II	Sharing and acting All together now Day III
<p>Impromptu networking Focusing on people and purpose</p> <p>Agreement-and-certainty matching matrix Matching simple, complicated and complex approaches to specific challenges</p> <p>Making space Designing a system to make space for innovation</p> <p>Conversation café dialog Making sense of and forming consensual hunches about big challenges</p> <p>Appreciative interviews Creating momentum by building on and designing with what works now</p> <p>1-2-4 progressive, rapid-cycle conversation Conversing in rapid cycles: self-reflection, pairs and small group</p> <p>5 whys, 10 hows Becoming clear about purpose</p> <p>Ecocycle planning Engaging groups in growing and sifting their portfolio of activities</p>	<p>Min specs Unleashing innovation and action by specifying only "must-dos" and "must-not-dos"</p> <p>Wicked questions Framing a paradoxical challenge that engages everyone's imagination</p> <p>Design party debrief Reflecting on your design-in-progress and making adjustments as you go</p> <p>Discovery and action dialog (Positive deviance) discovering solutions to big challenges in plain sight</p> <p>Chunking – user research and rapid prototyping Tapping tacit and latent knowledge in seriously playful rapid cycles</p> <p>Social webbing Noticing how informal connections matter</p> <p>Fishbowl conversations: what I need from you Surfacing and working improvisationally through shared challenges</p>	<p>Wise crowds group consultation Tapping the wisdom of crowds to solve problems together</p> <p>Graphic storyboarding Illustrating and detailing a design process for key meetings</p> <p>Generative relationships Understanding patterns in relationships that create surprising new sources of value</p> <p>Scenario planning Preparing and practicing strategy-making for surprising-yet-plausible futures</p> <p>Smart networks Weaving social connections and informal networks to advance practice</p> <p>Open space technology Liberating inherent creativity and leadership in large groups with an action-orientation</p> <p>15% solutions Noticing the influence, discretion and power individuals have right now</p> <p>.....</p> <p>Day IV and Day V One-on-one coaching sessions</p>

How and why the workshops are transformative

Content-sensitive but process-blind

The workshops revealed a fundamental gap: participants did not know how to tap into the wisdom of crowds. As in other companies, the vast majority of participants had never before been offered any practical group process training. Their knowledge came from attending meetings. Since meeting design is nearly always the same (PowerPoint after PowerPoint), the wisdom of crowds becomes invisible. It is also not a topic of discussion. Agendas, objectives, schedules and participants are discussed, but not the designs of meetings. It just is what it always is at all levels, including the highest ones. Hence, people become process-blind.

Sharing the experience of a wide range of new processes together with a large group of colleagues was transformative and opened up a new set of opportunities for the participants.

Let there be joy! Serious play!

The vast majority of participants appreciated the utility of the workshop and they loved it because it was fun. Many of them told us that LS filled a basic human need they had for more lively, engaging, meaningful and interesting meetings to replace the many less stimulating ones they have to attend daily.

The turtle and the rabbit

While the level of enthusiasm during the workshop was similar across countries, the rate and breadth of adoption of LS varied significantly from country to country.

The following factors contributed to the differences.

- ▶ **Leadership use:** where the senior team embraced the use of LS in their own meetings, LS quickly became a way of life for the entire organization. In those cases, the management style and practices were transformed rather dramatically.
- ▶ **Early adopters:** the early adopters and champions, and their freedom to experiment, blazed the trail for others in the organization. Where their experiments were recognized and celebrated, adoption was accelerated as others sought their help.
- ▶ **Letting go of over-control:** LS call for a willingness to trust the process and the people. In those countries where temperaments at the top leaned more towards command and control, the adoption of LS lagged.

Rushing out or not?

Each country had its own debate about how long they needed to use LS internally before venturing to use them outside with customers. At one end of the scale, there were countries where LS were immediately used inside and outside simultaneously. At the other end, there were countries where their usage was restricted to internal meetings for a long period. There is no evidence that one strategy yielded better results than the other.

“Best practice” trap

Countries that made a deliberate effort to facilitate the sharing of experiences and peer-to-peer learning accelerated both their speed and breadth of adoption. They avoided freezing progress by staying away

from “best practice” protocols that would impose the use of LS in repetitive fashion. Storytelling and shared experiences were used instead to inspire new experiments rather than repetition.

Struggling with bottom-up but it’s worth it

LS are like a set of clever tools; each one can be used for many purposes and combining them yields an endless number of options (combining is encouraged). We purposely provided no guidance so that people would use LS only where they found them effective and not where they had been told to do so. This encouraged bottom-up dissemination that was prompted by good results.

Today a few, tomorrow everyone

Because LS are easy to learn and use, “Seeing one, doing one, teaching one” can be done in very rapid cycles, particularly when encouraged. All it takes is an invitation from those who have the authority to issue them. Seeing one is also the way LS was migrated across borders between organizational silos through accidental exposures.

Serendipity is often the mother of invention

In every country, serendipity played a significant role as so-called mistakes or mishaps yielded surprising results that opened the door to new ideas. Thus “try, observe, debrief, adjust” became one of the valid strategies adopted by many to practice and learn.

Sticky top-down reflexes

Not telling people when and how to use LS was a challenge for management, to varying degrees, in every country. Bottom-up innovation and letting go of over-control may be attractive ideas but stopping one’s age-old top-down reflexes is not easy.

We found that paying attention to language helped many in this transition. Words/expressions that are signals of top-down thinking are, for instance “convincing everybody,” “making sure,” “must get the buy-in,” “selling the idea,” “telling people to,” “getting the message across.” In contrast, words like “engaging,” “listening,” “achieving ownership,” “joint-discovery,” “peer-to-peer learning,” help to redirect minds towards bottom-up approaches like LS.

It should have been a mess, but it wasn't ...

One key reason why LS worked and spread easily is that it nearly always generated satisfying or useful results, even when misused. We heard lots of surprising stories and came to the conclusion that even a “messed up” LS will engage participants much more than the usual meeting, thus yielding more positive outcomes. It means there is little risk in letting people use LS before they become so-called experts.

What do you mean “get up and move”? This is my chair!

Senior managers are used to chairing meetings and having others present to them. Using LS requires breaking these old habits. This requires a commitment to stick through the transition until the new way becomes the comfortable norm. Often, it is more senior people who have most difficulty in submitting themselves to process discipline.

This challenge is one key reason why it is important that the initial workshop include the whole senior management team together with a representative sample of the rest of the organization. This provides the critical mass needed for all to reach agreement on what they will have to do in order to learn to use what they experienced during the workshop.

It takes a lifetime

While it is easy to use LS, discovering all the subtle possibilities can take a long time. We, too, are still learning.



Hope has never trickled down. It has always sprung up.

Studs Terkel

Restoring joy, hope and trust

Including and unleashing everyone brings hope and trust back to organizational life – for the users and the consultants. It seems impossible to verify and perfectly naïve to put this into words. However, it is the nearly universal experience of people who are introduced to LS. After some initial doubts, a giddy optimism unfolds.

Many bright new paths are illuminated via mutual and simultaneous action. In the blink of an eye, participants discover what they can do now to make progress together. There is newfound confidence. Participants remember they are smarter together, wiser as a group.

The use of minimal structuring, open inviting and genuine unleashing comes in

waves. As early adopters generate results from all corners of the organization, people start to rely on and expect more from each other. Gaining confidence, widening the invitation to unleash reinforces a virtuous cycle of exploration and action.

The most challenging aspect of LS is unlearning control behaviors. Often, these are the very behaviors that helped people get promoted and that they see modeled all around them: knowing all the answers yourself, telling subordinates what to do, quickly offering expertise, taking on more tasks, avoiding showing any vulnerability and bringing best practices from outside sources.

LS create the conditions for creative managers to let go of over-control and

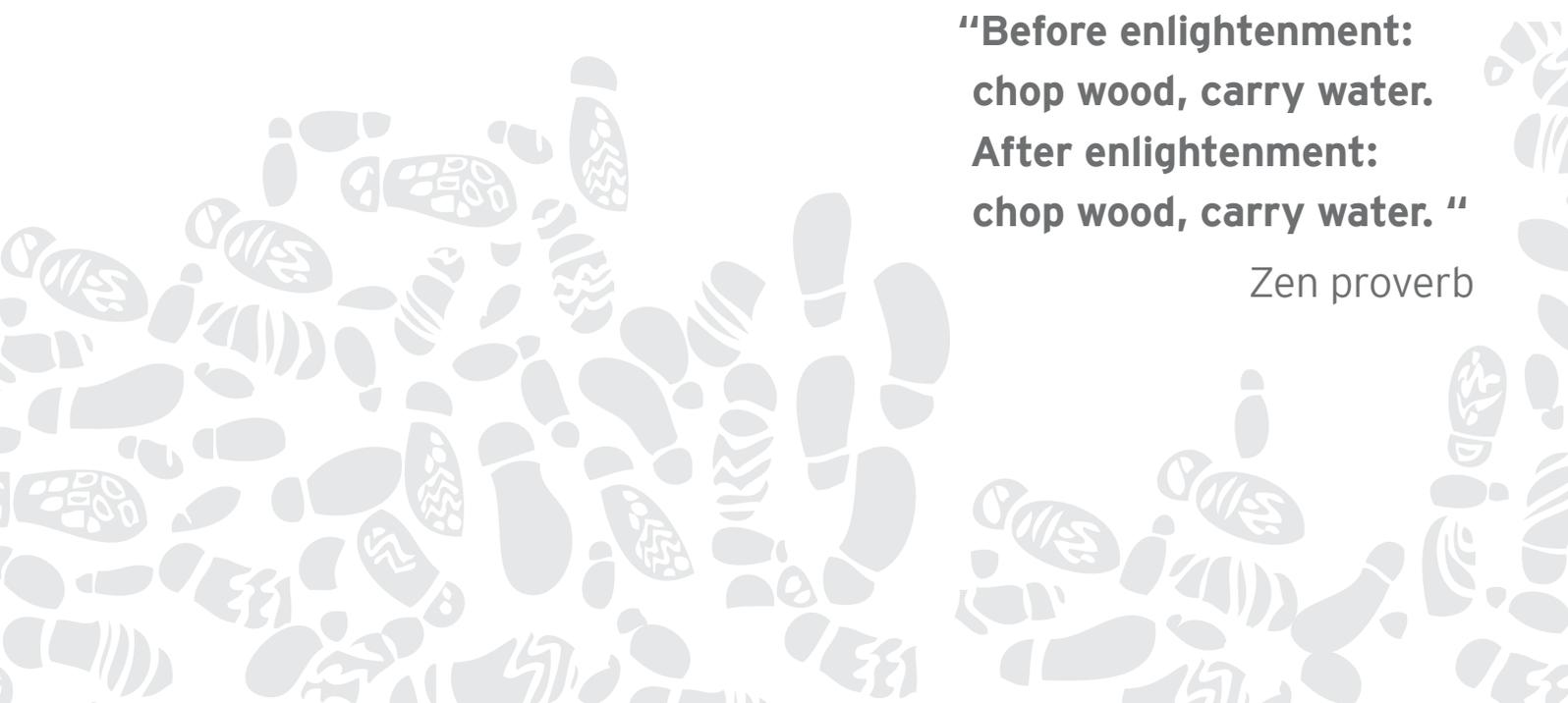
for eager frontline staff to safely take on more responsibility. Both freedom and responsibility are amplified. Hierarchical roles are turned upside down and sideways.

With roles slightly askew, a fresh view of relationships blossoms out of the joint efforts to tackle complex challenges. A door opens. More courage emerges. LS are clearly not merely a collection of problem-solving processes, but rather a way to quickly unleash and tap vast reserves of talent and energy. LS transform how people in the organization relate to each other and their customers.

As users start to get serious results, it is difficult to identify a single leverage point that makes a clear difference. Words fall

**“Before enlightenment:
chop wood, carry water.
After enlightenment:
chop wood, carry water. ”**

Zen proverb





short. Everything is different, but it is hard to say how. It feels more like being part of movement than managing a project.

Many small changes in who is included and how multiple actions are unleashed simultaneously have shifted the way things are done. The pattern of interaction and inclusion across the organization has quietly shifted. A transformation has emerged unannounced from the ground up. Surprise! Stealthy and seriously playful, LS are as powerful as they are subtle.

More joy, hope and trust have sprung up alongside better performance.