

Better Data, Better Decisions: Learning About Appreciative Inquiry



HIGHLIGHTS

- To define Appreciative Inquiry, Shelly broke down the definition of both words. To appreciate is to value and recognize. To inquire is to explore and discover. These two definitions together encapsulate the theory and the process.
- Appreciative Inquiry starts from the premise that something in the past works or has worked. It requires leaving behind the old “baggage” and moving towards a mental model that shifts the focus away from what does not work and moves towards behaviors and activities that do work. Change can occur in two ways: cataclysmic (a death or divorce or firing, etc.) or intentional. It is far more desirable to bring forth change intentionally. Appreciative Inquiry is a tool that can be used to develop intention to change a mental model.
- Using both qualitative and quantitative data in concert will yield a different lens from which to look at a subject. Quantitative data gives hard data, but qualitative processes give context. Appreciative Inquiry is all about building context and trying to find the commonality between people, particularly between people who think they have nothing in common.

SPEAKERS

Shelly Alcorn,
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COMPETENCIES

Metrics and
Measurement

MATURITY PHASES

CMM1, CMM2, CMM3,
CMM4

OVERVIEW

Shelly's Background: Shelly is a Principal in Alcorn Associates Management Consulting. Her specialty is non-profit trade and professional associations. She designs tactical strategic solutions and speaks on critical issues faced by the association community.

- Shelly's blog is called [Association Subculture](#).
- Shelly believes that Appreciative Inquiry is a process that can change an organization faster than any other change initiative.

Appreciative Inquiry Defined: Shelly wanted to define Appreciative Inquiry by grounding it into the two terms:

- Appreciate: Valuing: the act of recognizing the best in people or the world around us: affirming past and present strengths, successes and potentials.
- Inquire: The act of exploration and discovery. To ask questions; to be open to seeing new potentials and possibilities.
 - These two definitions together encapsulate the theory and the process.

About Appreciative Inquiry: Shelly believes that there is a bias in the marketplace for quantitative data over qualitative data. However, one is not necessarily better than the other. Using both approaches in concert will yield a different lens from which to look at a subject. Quantitative data gives hard data, but qualitative processes give context. Appreciative Inquiry is all about building context and trying to find out where to find the commonality between people, particularly between people who think they have nothing in common.



Shelly Alcorn

OVERVIEW

Changing Thought: Using Appreciative Inquiry means changing thought. Human beings use mental models to help them navigate the world. Mental models can be helpful, but they can be a hindrance if they cloud the lens or eliminate other options from the beholder's view.

Mental models are constantly and naturally shifting. However, there is a bias towards confirming the model that has been established because it is more comfortable to affirm than to challenge the bias. That is why truly momentous shifts usually occur through two particular events. The first is a cataclysmic event like a death, a divorce, a firing, an attack, etc. The second is when the model is intentionally changed. Shelly believes that, obviously, it is much better to manage change in a disruptive world through intention vs. chaos. Appreciative Inquiry is a tool that can be used to develop intention to change a mental model.

Perspective Trumps Facts: When people become ideologically dug in their mental models, they refuse to look at the facts because it does not match their perspective or their mental model. That is a problem, especially when attempting to build communications and bridges between diverse populations and to foster inclusion. For example, if someone decides that a co-worker is a slacker, he/she will tend to look for ways to validate that belief – even if it is not necessarily the truth. Assumptions should be continuously challenged in order to help initiate change. Appreciative Inquiry can help with this effort.

Organizational Culture Shifts: Organizational culture shifts occur as individuals begin to shift their personal perspectives. In order to do this, new stories need to be created about the organization because in Shelly's opinion, organizational culture shifts happen when the narrative changes. Quantitative data is not the catalyst that creates organizational change. However, qualitative data helps to write that new story.

- The industrial revolution created a business story and organizations have held to that story, even though it does not necessary work any longer. Shelly believes that in order to truly change the organization today, new stories need to be told from a perspective that is closer to the worldview as it exists today. That means eliciting input from employees from a positive perspective because future organizations need to be more organic. Future organizations need to facilitate human connection more than the assembly line process that has been developed since the industrial revolution.
- With Appreciative Inquiry, the goal is getting to “yes”, i.e. getting to the positive, to the possible and the commonality. Remember that appreciating comes down to “yes” because with “yes”, people can agree, which leads to possibility.

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Constructionist Theory: Applying these concepts requires a shift in both personal and organizational perspective. A theory to help with this is the application of constructionist theory. In short, constructionist theory boils down to two different ways of looking at the world:

- I think, therefore I am: This is embedded in western culture.
- I communicate, therefore I am: Shelly believes that this is a much more accurate depiction of human society and culture. Shelly does not believe that thoughts make the person. The person comes to be when he/she expresses those thoughts to others and either has those thoughts reflected back or has new thoughts shared to allow for the creation of new thoughts.
 - Human beings are social beings. Ideas are a social contagion. There has been plenty of work done on mirroring neurons and people are reflections of the world around us. Language was the technology developed to implant one person's thoughts into another's mind. When speaking to each other, people are intentionally implanting thoughts in each other's minds. Each mind has the choice to accept, reject or modify that implantation and send it back, i.e. idea exchange.
 - Individual attitudes have a radical impact on what happens next. That is why Appreciative Inquiry is so important because it forces individuals to focus on the positive and not the negative.

Focus Equals Reality: Appreciative Inquiry helps to focus the inquiry, i.e. to get the ultimate result from the question. Focusing on the desired outcome helps to shift the behaviors to the desired reality.

- Shelly shared a story to help illustrate this point. David Cooperrider (Founder of Appreciative Inquiry Theory) was asked to improve the morale within an emergency room of a hospital. What he noticed was that the problem of low morale cannot be solved by focusing on morale. Distrust cannot be eradicated by focusing on distrust. Instead, something else in the environment needs to change. Therefore, instead of solving the problem of morale, he began looking at what happened when people were at their best. He encouraged people to do more of what helped them to be at their best.
- Not surprisingly, patient outcomes improved, others within the hospital started to respect this group more and suddenly the morale problem disappeared. It makes sense, but our educational system has taught us to diagnose the problem and then fix the problem. However, humans are not machines. It is more effective to focus on the positive so that it can counter balance, reduce or eliminate the problem. That is a completely different way to go about solving a problem than has been the norm.

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- **Focus on What has Worked in the Past:** Appreciative Inquiry starts from the premise that something in the past works or has worked. It requires leaving behind the old “baggage” to move towards a mental model that shifts the focus away from what does not work and moves towards behaviors and activities that do work.
 - Jumping into this type of new thinking makes people nervous. Therefore, structure is needed to make that leap. Appreciative Inquiry provides that structure. It provides processes that produce legitimate results that have traction.
- **Where to Use Appreciative Inquiry:** Shelly believes that Appreciative Inquiry is very effective for the following tasks:
 - Visioning
 - Organizational design
 - Restructuring
 - Inclusion efforts
 - Evaluation efforts
 - Process redesign
 - Coaching
 - Teambuilding
 - In any process where people are “stuck”

BEST PRACTICES

Understand Shelly's Modified Appreciative Inquiry Model: Shelly shared a step-by-step process of Appreciative Inquiry that has worked successfully for her:

- **Identify Topics:** The idea is to minimize the focus on the negative problems by focusing on areas or topics that get people excited and happy.
- **Devise Questions:** In concert with the conflict resolution process, Shelly would simultaneously engage another, more positive process. This involves devising the right questions. These questions should be critical, neutral to a point, and lead without leading. For example: "If we weren't busy arguing with each other, what would we be doing?" or "What's the best experience?"
 - There should not be any more than ten questions – six is ideal. See what type of context can be built. For example, a visioning project would necessitate digging back to the best experience that a person has ever had with the group/company, etc. Ask: "When did you feel most involved? Most engaged? What were those things happening around you that allowed you to feel that way?" Then, do more of those things. Next question: "What's next? In 10 years, what would we be doing?" Help push people in that direction.
- **Identify Interviewees:** Identify the interviewees. The more diversity within those chosen, the better. When Shelly works with associations, she makes sure that she does not interview more than one or two board members, only a few committee members and only a few chapters. She wants to focus on members and non-members. Without diversity, the themes developed from the interviews will likely be more homogenous and, therefore, less trusted. Ideally, it is best if many diverse people are interviewed and a common theme arises among them.
- **Conduct Interviews:** Interviews are critical for two reasons. One is context. Two is clarification. While going through the socialization and social contagion part of this process (reflections of yourself), ensure that people's comments are clarified. Survey Monkey does not give the option to clarify and understand the comments. That can only happen through conversation. Survey Monkey should only be a last resort.

BEST PRACTICES

- Ensure plenty of interviews to make sure that you have the most social connection and the most community building opportunities built inside of the process as possible.
- Assure everyone that the interview process is confidential. Never reveal anyone's input. Always ensure safety in the responses.
- From the positive perspective, ensure that interviewers evoke memories. When people remember good things, good things happen.
- Compile Interview Data: Compiling interview data means data transcription. Break each sentence down into concepts. A single answer to a single question may have multiple concepts built into it because a conversation is occurring.
 - Break each concept down. Take notice when multiple concepts are found. It may be that a particular theme reoccurs for an individual across a number of different answers to a number of different questions. Count each time that concept arises. That will help to determine the concepts that came up the most and those in the mid-range. That will help to assess themes that occur within the data.
- Analyze and Identify "Themes": To identify themes, look at the concept list discussed above. The interviewer will need to take some artistic license and interpretation for how to lay out the themes in language form. Personal biases will need to be challenged. For this reason, Shelly recommends that the person who reports on the themes not be involved in the interview process because by conducting the interviews, biases automatically develop.
 - Next, bring the themes back to the group. The more people who participate, the better.

BEST PRACTICES

- **Devise Provocative Proposals for Change:** Provocative proposals are where the rubber meets the road. The conversations have occurred from a positive perspective, themes arose and now changes need to be made. However, before changes can be made, Shelly likes to look at it through a “what if” lens when brainstorming because it gives people permission to shoot for the stars.
- **Describe Idealized Outcome:** By looking at the provocative proposals that emerged from the themes, an idealized outcome is manifested. Describe the change. That will be the new story that is created. It will give the community permission to start making intentional changes in order to achieve the idealized outcome. The problems will suddenly begin to dissipate. Recognize that at this point – in order to achieve the idealized outcome – some decisions may be difficult decisions, such as personnel decisions.
 - Shelly stated that when it comes to testing the provocative proposition, people may still be leery. She advises explaining the process (without identifying any individuals), talking about what happened, what was discovered, what was heard and then test the “what if” ideas. If it has been done correctly, Appreciative Inquiry allows this process to be grounded in real experiences. It develops witnesses and testimonies to the statement “Yes, when I did this, I felt this”. That is evidence. “What ifs” come from experiences that really happened.
- **Beware of the Pitfalls:** Shelly cautioned against the following potential pitfalls of this process:
 - **Less Successful in a Closed Culture:** This process is less successful if the organization is not open to experimentation and innovation. If the culture is closed and does not have an appetite for positive ideas and concepts, Appreciative Inquiry can help shift that mindset, However, it probably will not create dramatic results overnight unless leaders truly buy into it.
 - **Less Successful with a Lack of Commitment:** There can be an inability from organization leaders to see through the deficit/problem-solving model, which is common in organizations today.
 - **Less Successful if There are Not Enough Interviews:** Shelly believes that the more people interviewed, the better. Five to ten people will yield very little information. An interview in the range of 50 or 60 is a solid number.
 - **Once Triggered, it is Difficult to Stop:** Once this process is triggered, change is hard to stop. If the organization is not ready to change and this process is started, people will become very excited and then shut down because management refuses to move. That will cause conflict and dissatisfaction. Hopefully, leaders will see this and be willing to move.

LESSONS LEARNED

- Referencing the low morale problem example, Rachel asked if it starts with the problem of low morale or thinking about the output of the low morale problem. Shelly replied that it starts with the development of topics. With low morale and/or distrust or some of the dysfunctions that are commonly seen in communities, look at what else is happening that would make morale go up. It is not about fixing morale (telling people to be more positive), but rather to focus on the changes that are needed to make the problem irrelevant. That means looking at performance and/or a new direction for the team. To do that means digging backwards into what has been successful in the past and then projecting forward into the desired outcome for the future. It is a process of looking at the problem, looking at how to do things better, what has been done in the past and then reaching out for ideas that bring about improvement.
- Rachel commented that it is easy to find frustrated people to interview and inspire. She asked which characteristics in leadership constitute a readiness for change. Shelly replied that what she recognizes as a sign is when leaders are beyond mad and they are depressed and confused. The naysayers are actually some of the best people to enlist as interviewers and interviewees. However, make sure that these people are targeted to either conduct interviews or be interviewed because when they get on track with questions about best possible outcomes, they can become infected with a positive bias. This would be ideal.
 - Rachel added that this actually goes against what has been discussed previously within the membership, which is not to spend too much time on the people who are overly resistant. Rachel found Shelly's comments interesting.
 - Shelly believes that when baggage is involved, the frustration came from somewhere. The naysayers are usually the ones that had positive experiences and do not feel positive any more. Now they are entrenched in negativity. Some will never be swayed, but the active inclusion of those voices and forcing them to answer a positive question about what is best shows that they were included. Therefore, Shelly recommends including the critics. They provide great information. If they can be converted, all the better. This process works to infect these naysayers with positivity.
 - Another participant added that by including the naysayers, it demonstrates to others that this process was not just focused on the positive ones in the organization. The good and bad stories have been told. Shelly agreed because that is how legitimacy is established. Legitimacy cannot be established if only the positive people with a similar outlook are interviewed.

LESSONS LEARNED

- Shelly stated that if a group can be interviewed that feels that they have nothing in common – but they can be shown themes and concepts that they actually do have in common – that is gold. It helps them to feel like a team if they realize that others actually think like they do, too.
 - Rachel agreed. When someone is in a culture that is similar, all that is seen is the differences. However, when immersed in a completely dissimilar culture, many of the similarities are noticed. That is why it is so important to travel and be immersed in a culture that is completely different because those similarities stand out; what connects us is more than what divides us. That is difficult to see when everyone in the group is similar.
- One participant wondered if this model could be used externally with customers. Shelly replied that it can be used both internally and externally and even simultaneously, depending on how the questions are crafted. If examining innovation or customer experience, the best thing to hear is a positive story about another organization, i.e. the best customer service experience ever with another company. An organization that cannot recognize itself in that positive customer story has the impetus to spur change.
- Maddie asked for Shelly’s advice on working with small groups in order to still get the right information as would be garnered from a large pool of respondents. Shelly’s advice is to use tight, specific questions and only use four or five of them because a small group is already homogenous. Furthermore, try to craft questions that will elicit as much difference and diversity as possible. In larger groups the questions can be more general and open-ended because there is more room to play.

RESOURCES

- Shelly can be reached at: <https://twitter.com/shellyalcorn> or shelly@alcornassociates.com or [@shellyalcorn](https://www.instagram.com/shellyalcorn)
- As mentioned in the discussion: <http://www.associationsubcultureblog.com/>
- As mentioned in the discussion: <http://www.davidcooperrider.com/>
- As mentioned in the chat: <https://medium.com/mother-jones/the-science-of-why-we-dont-believe-science-adfa0d026a7e>
- As mentioned in the chat: <http://www.businessinnovationfactory.com/summit/video/angela-blanchard-you-cant-tweet-change#.VG0PwzCJOuY>
- As mentioned in the chat: <http://www.businessinnovationfactory.com/summit/video/angela-blanchard-you-cant-tweet-change#.VG4ikYel0ro>
- As mentioned in the chat: <http://www.amazon.com/Obliquity-Goals-Best-Achieved-Indirectly/dp/0143120557>
- As mentioned in the chat: <http://www.amazon.com/Resilience-Why-Things-Bounce-Back/dp/1451683812>
- As mentioned in the chat: http://www.amazon.com/Art-Possibility-Transforming-Professional-Personal/dp/0142001104/ref=sr_1_1?s=books&ie=UTF8&qid=1416504341&sr=1-1&keywords=the+art+of+possibility
- As mentioned in the chat: <https://twitter.com/tracymaurer>
- As mentioned in the chat: http://www.jimcollins.com/article_topics/articles/good-to-great.html
- As mentioned in the chat: http://community.community-roundtable.com/group/culture/forum/topics/report-undeniable-story-the-science-and-intuition-of-engagement?xq_source=activity
- As mentioned in the chat: <http://johnstepper.com/2011/07/30/the-grass-ceiling-limits-to-grass-roots-initiatives-and-what-to-do-about-them/>