Boundary Spanning Leadership
Toolkit™

The tools in this toolkit are from a variety of sources which we gratefully acknowledge. All of them have been adapted by the Center for Creative Leadership specifically for use in boundary spanning leadership. All materials are copyrights of the Center for Creative Leadership, 2011, all rights reserved. We welcome inquiries about the tools, their sources, stories of applications, and suggestions for improvement. Contact Diane Reinhold at reinholdd@ccl.org.

In your organization or community, do you want to ...

- Understand issues better by surfacing all assumptions and perspectives resulting in more inclusive decisions with greater levels of commitment?
- Align resources and actions across multiple groups?
- Identify new options and creative solutions?
- Break down silos that are getting in the way of resolving issues and functioning effectively?
- Have more meaningful, open relationships with your clients, constituents, and partners?
- Adapt a new technology or practice that requires new ways of working?

These types of common and very complex challenges require leaders to work across wide-ranging boundaries. Boundary spanning leadership is the process of creating direction, alignment, and commitment across boundaries in service of a shared vision or goal.

This toolkit was made to help you do just that.

This Boundary Spanning Leadership Toolkit provides step-by-step instructions for leaders who must work across boundaries and bring groups together to find solutions to complex and ambiguous challenges. It is designed to be used in a wide variety of contexts including business, community, not for profit, educational, government, military, and youth leadership.

The tools are based on the concepts introduced in the book *Boundary Spanning Leadership: Six Practices for Solving Problems, Driving Innovation, and Transforming Organizations* by Chris Ernst and Donna Chrobot-Mason. It is recommended that you become familiar with these concepts either by reading the book, attending a CCL Boundary Spanning presentation or workshop, or by reviewing the materials and tools available on www.spanboundaries.com before using this toolkit. One tool on the web site, Boundary Explorer™, is designed specifically to help you understand, teach, and begin applying the concepts of boundary spanning leadership.

The tools are designed to be user-friendly and many require little facilitation expertise. The tools are categorized as easy, moderate, or advanced to help you select one appropriate for your comfort level.

This guide is divided into three sections:

1. Understanding Facilitation Basics
2. Selecting the Right Tool
3. Pulling It Together

Understanding Facilitation Basics

The facilitator's role is to help groups learn from their experience so they can improve the ways they work together. Facilitation calls for a blend of making tangible suggestions and asking thoughtful questions that allow the groups to figure out on their own how to proceed in these areas:

- Process - Introduce new ways of working on tasks together
- Learning - Encourage learning as an integral part of the group's work
- Relationships - Examine different perspectives among the group members

It can be effective to work in pairs, as co-facilitators, especially when working with multiple groups.

1

There are three strategies facilitators should keep in mind. The first facilitation strategy is interjecting questions and observations during the group's interactions. In-the-moment questions and observations help to make the work of the groups more visible and invite reflection at times when the group is struggling to make progress. For example, group members are often absorbed in their work and need to be encouraged to step back and review their assumptions, or a group may need prompting to slow down and examine what is happening from different perspectives. *Be sure to ask open-ended questions about what is happening in the group.*

Your job is to help the groups identify the factors that are helping and hindering them from working together and move them to shared outcomes. Check in with the group throughout your session to ensure the process is understood and that they can see the progress they are making.

2

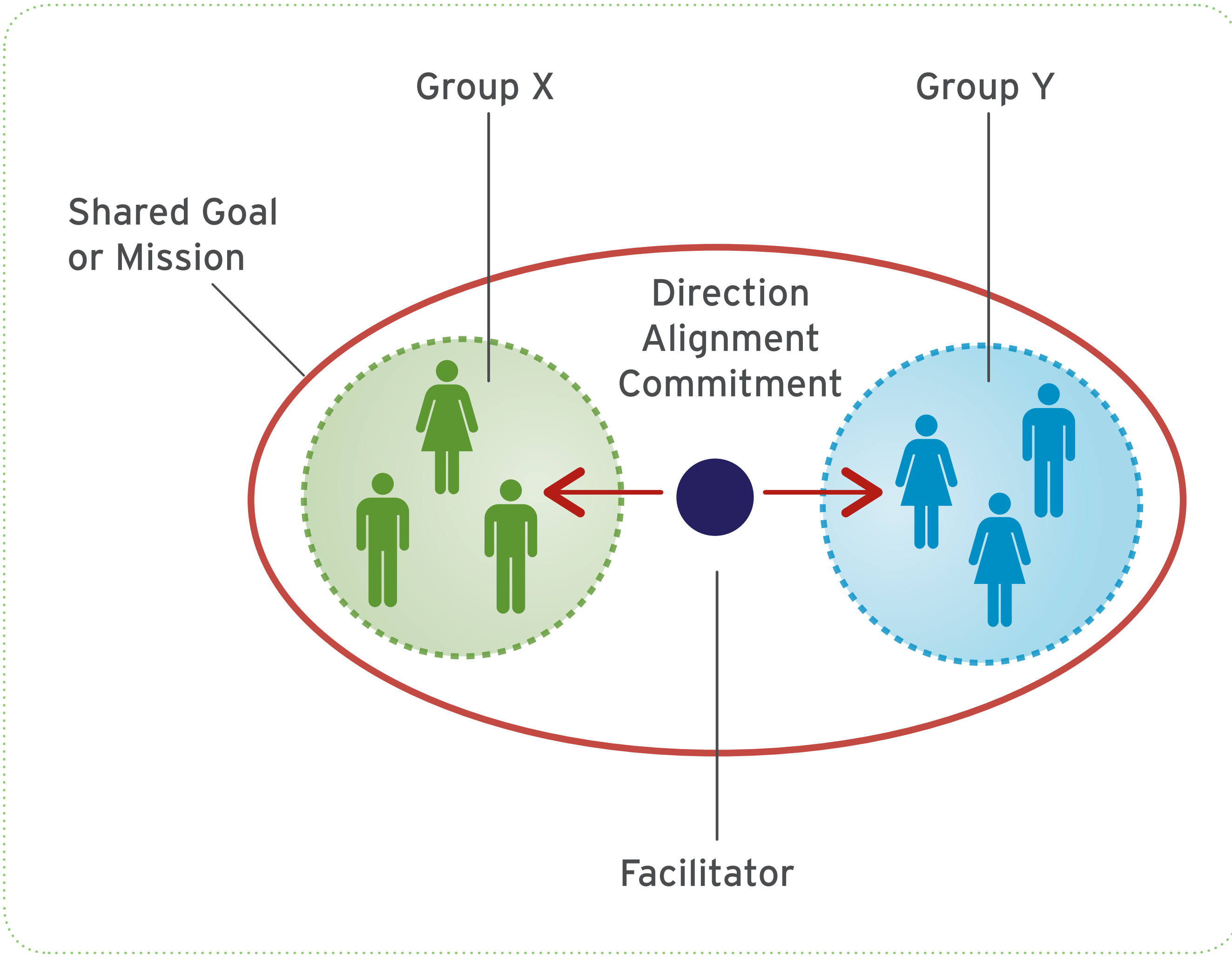
The second strategy is building learning processes into meetings to help the group think about the experience, capture lessons learned, and discuss needed improvements. As groups experience the value of setting aside time to learn and improve, the responsibility will shift from the facilitator to the group itself. *Be sure to include time at the end of group meetings or after key milestones for capturing the lessons of their experience.*

A boundary spanning facilitator helps create a safe space for groups to span the boundaries between them by drawing out and recording others' ideas. The immediate acknowledgement of being heard encourages individuals to contribute and increases trust in the group. *Be authentic and discuss your own mistakes and misgivings about your joint challenge — let your behaviors serve as a model for openness and trust.*

3

The third facilitation strategy is introducing and encouraging the continued use of facilitation tools (like the ones in this toolkit). A tool is introduced when it can help the group carry out a specific task in support of boundary spanning. You should practice using the tools on your own or with a colleague before using it with your group. Also consider customizing the tools for your situation by changing the terms to ones that are more familiar to your group.

The tools in this toolkit are specifically designed for facilitators who are trying to create direction, alignment, and commitment between groups to achieve a higher purpose. This dynamic is captured in the illustration below.



These facilitation tools can help you guide groups through the boundary spanning practices, make changes, and get results. The tools will help groups:

- Understand the unique role of each group and its members
- Understand issues better by surfacing assumptions and perspectives
- Develop deeper person-to-person relationships across group boundaries
- Clarify goals within and across groups
- Align resources and actions across groups
- Identify new options and creative solutions
- Make smarter and more inclusive decisions
- Gain commitment required for effective action

Selecting the right tool

The following guidelines are to help you select a tool that will work for you. First you should consider if you have a boundary spanning challenge. If your challenge does not require two or more groups to work together, this toolkit may not be the right solution for you. You know you have a boundary spanning challenge if the groups have shared work and are having trouble making progress because:

1. It is not clear which group is responsible for specific activities.
2. There is little respect or trust between the groups.
3. They have different work cultures that do not blend together well.
4. The groups have differences in dominance, status, and power and one group does not feel heard.
5. The groups have different values and different ways of seeing the world.

Next, consider what aspects of the environment will impact how these groups address the challenge. Is the shared task important enough that the group members are willing to make this investment in time and effort? What does success look like in terms of progress on a shared task? What does success look like in terms of the ways in which the groups work together? Are key leaders engaged and committed to working across boundaries to accomplish the shared goals? If answers to these questions suggest difficulties, then more work is needed behind the scenes to prepare the groups to work together successfully.

Finally, identify the groups that need to be included. There are five different types of boundaries often found in organizations that should be considered when selecting who should participate.

Vertical — Across levels & authority

Horizontal — Across function & expertise

Stakeholder — Across external groups & interests

Demographic — Across diverse groups & differences

Geographic — Across markets & distance

Review each of the boundary types and consider what boundaries are most relevant to your challenge:

1. What levels of hierarchy must I involve in this challenge?
2. What departments or groups need to be involved?
3. Are there people outside of the organization who need to be included?
4. What demographic groups and personality types do I need to address this challenge?
5. What geographic regions will this project touch?

Now, identify the boundary spanning practices you need to facilitate.

1. Evaluate each item below by checking the number that best describes the extent that the groups exhibit the behavior effectively. (1 = Not at All; 5 = A Very Great Extent)
2. After rating each item, put a check mark by the boundary spanning practice that is most important to the groups' success given the challenge.

	Not at All				A Very Great Extent
Buffering Creates Safety					
Group members feel a strong connection to the group and identify with its mission and goals.	①	②	③	④	⑤
There is a clear distinction between the identities of each group; each knows what it stands for and what it is responsible for accomplishing.	①	②	③	④	⑤
Groups are protected and shielded from external threats.	①	②	③	④	⑤
Reflecting Fosters Respect					
Group members understand the similarities and differences that exist between groups.	①	②	③	④	⑤
Similarities and differences in values, perspectives, backgrounds, and beliefs are honored.	①	②	③	④	⑤
Groups treat one another with positive regard.	①	②	③	④	⑤
Connecting Builds Trust					
Strong person-to-person relationships exist across groups.	①	②	③	④	⑤
There is mutual confidence between groups; each group is confident that others will consider its needs, values and interests.	①	②	③	④	⑤
There is integrity between groups; interaction across groups is characterized by candor and sincerity.	①	②	③	④	⑤
Mobilizing Develops Community					
Common purpose exists between groups, such as common vision, mission, goal, or strategy.	①	②	③	④	⑤
There is a mutual feeling of belonging. Each group believes it is part of a larger collective.	①	②	③	④	⑤
Groups feel a collective ownership. Each group is committed to taking joint action on behalf of a common purpose.	①	②	③	④	⑤
Weaving Advances Interdependence					
Groups are mutually dependent; each group recognized that it must rely on other groups to resolve issues.	①	②	③	④	⑤
There is an affinity for differences; groups actively seek to explore, understand, and capitalize on their differences.	①	②	③	④	⑤
Groups engage in collective learning; people inquire and actively seek information across groups.	①	②	③	④	⑤
Transforming Enables Reinvention					
Groups take advantage of opportunities for in-depth interactions, recognizing existing constraints and creating a different future.	①	②	③	④	⑤
Identity-based values, beliefs, and perspectives of multiple groups are open to inquiry and transformation.	①	②	③	④	⑤
Groups invite opportunities for renewing and reimagining themselves as needs arise.	①	②	③	④	⑤

Scoring: Add scores for each 3-item set and place the combined number in the appropriate cell below (Range = 3 - 15)

	3 - 6 Area for Development	7 - 11 Area for Continuous Improvement	12 - 15 Area of Strength
Buffering			
Reflecting			
Connecting			
Mobilizing			
Weaving			
Transforming			

Lastly, consider what level of facilitation tool you would like to try – easy, moderate or advanced. The tools that are easier to facilitate are a great place to start. As you become more confident in your facilitation skills, try some of the more difficult tools required for the more advanced boundary spanning practices since they offer a higher potential of return.

The charts on the next few pages outline which tools should be used to foster each boundary spanning practice and its facilitation level.

Selecting a Boundary Spanning Tool by Strategies, Practices & Outcomes

Boundary Spanning Strategies	Boundary Spanning Practices	Success Criteria & Outcomes	Tool Options & Level
	Buffering	Safety	• Team Blueprint - E • Team Boundaries - E
	Reflecting	Respect	• Fishbowl - E • After-Action Review - E • Stop, Reflect, Write, Report - E
	Connecting	Trust	• Mementos - E • Stakeholder Mapping - M
	Mobilizing	Community	• Slogans - E • Storytelling - M • Visioning - M • Moviemaking - A
	Weaving	Interdependence	• Dialogue - M • Conflict Management Tool - M
	Transforming	Reinvention	• World Café - A • Open Space - A

Tool Levels: E = Easy M = Moderate A = Advanced

Selecting a Boundary Spanning Tool by Description & When to Use

	Tool (Source if not CCL)	Level	Description	When to use
Buffering	Team Blueprint	Easy	Defines the group's goals, project scope, roles and responsibilities, meeting processes, and how they will work together.	• At the start of a project to define scope, roles, processes, and group norms • To define and communicate the work of the group.
	Team Boundaries	Easy	Makes a group's boundaries and purpose explicit; defines key drivers required for a group's success.	• At the start of a project • To refocus the group on its objectives • Sets boundaries between groups that interface often
Reflecting	Fishbowl	Easy	Encourages the understanding of boundaries through listening to others' viewpoints. Observers find they listen better and inquire deeper when they focus on just those activities. Gives each group a chance to be heard.	• At the start of a project to define scope, roles, processes, and group norms • To define and communicate the work of the group.
	After-Action Review (originated by the US Army)	Easy	Provides an opportunity and structure for reflection. The process uncovers differences and similarities in the needs of individuals and groups.	• At the start of a project • To refocus the group on its objectives • Sets boundaries between groups that interface often
	Stop, Reflect, Write, Report (LIM Action Reflection Learning Toolkit)	Easy	Gets the group to step back and reflect on what they are doing. Allows group mates to collect and share their thoughts.	• At the start of a project • To refocus the group on its objectives • Sets boundaries between groups that interface often

Selecting a Boundary Spanning Tool by Description & When to Use

Tool (Source if not CCL)	Level	Description	When to use	
Mementoes (*The Leader's Edge* - Palus & Drath)	Easy	Each participant shares a memento – an object that holds personal significance – so others can learn more about their values and build connections and trust.	• At the start of a meeting or project • To learn about the group members at a deeper level and build connections	Connecting
Stakeholder Mapping	Moderate	Stakeholder mapping helps the group identify internal and external stakeholders, understand their interest and concerns, and create strategies on how to get their support.	• To identify potential supporters and opponents for your project • To create a plan to address stakeholder concerns • To build coalitions and connections between stakeholders and group members	Connecting
Slogans	Easy	Uses slogans to capture the essence of an idea. Consolidates a group's thinking and builds alignment.	• To capture and share the essence of an idea • To solidify the group and ensure that everyone is on the same page	Mobilizing
Storytelling	Moderate	Provides the narrative – the why and what if – that should accompany the what and how – to gain commitment for a change.	• To communicate a complex idea • To describe who we are and create a shared identity • To transmit values • To spark collective action	Mobilizing
Visioning	Moderate	Using storytelling, visioning inspires a shared purpose and group identity by combining two smaller groups into a larger more inclusive one.	• At the start of an initiative • To reframe an issue • To help identify the required support	Mobilizing
Moviemaking (*The Leader's Edge* - Palus & Drath)	Advanced	Each group animates a different scenario to help envision the future. A movie illustrates a story of the future, constructed on a wall-sized paper screen using collage.	• To imagine the future and think through a strategy • To prepare for unexpected events • To build interdependence	Mobilizing

Selecting a Boundary Spanning Tool by Description & When to Use

	Tool (Source if not CCL)	Level	Description	When to use
Weaving	Dialogue	Moderate	Encourages people to temporarily suspend their opinions and truly listen to other perspectives. The group explores basic assumptions and asks tough questions. It honors differences as the basis for building common ground.	• Apply to important issues or ones that are not well understood • To explore assumptions underlying a conflict • For intact groups that will remain together for a while • When participants are willing to shift perspectives and behaviors
Transforming	Conflict Management Tool	Moderate	A three-step approach to deciding when and how to intervene in a group conflict	• To remove obstacles • To reconcile different points of view • To synthesize different perspectives • To construct a group identity
	World Café (Juanita Brown www.theworldcafe.com/overview)	Advanced	A conversational process used to surface perspectives and concerns. Increases capacity for effective action in pursuit of a common goal.	• For major issues that require innovative solutions • To create a cross-pollination of perspectives and tap into a large group's best thinking • To support major change events
	Open Space Technology (OST) (*Open Space Technology: A User's Guide* - Owen)	Advanced	Creates a safe environment for open communication and community. Guided by the following concepts: • Whoever comes are the right people • Whatever happens is what was meant to • Whenever it starts is the right time • When it's over, it's over • If you feel you aren't contributing or learning go somewhere else	• To resolve major complex issues with high levels of diversity among the stakeholders, the potential of conflict, and a tight deadline • To experience a different way of working based on self-managed work groups and personal empowerment where leadership is a shared responsibility, and diversity of thought is a positive • To create a list of priorities with steps to help resolve the issue

Pulling It Together

Taking time for reflection is critical to improving your skills as a facilitator. After you use a tool, jot down what worked well and what you would do differently next time in the blank pages at the end of this guide.

Questions to consider after using a tool

- Describe the situation – Which tool did you use? With what groups? Why did you use it?
- What worked well?
- What would you do differently next time?
- Do you see any improvement with the group's ability to implement the boundary spanning practice?
- What did you learn about how the groups collaborate together?
- What is your comfort level with the tool?
- How did the groups feel about the activity?
- Would they be able to use the tool on their own?

Step-by-step instructions are provided for each tool to show how it can be used to implement a specific boundary spanning practice. You will also find that many of the tools can be used to support multiple boundary spanning practices. For example, Slogan can be used to buffer as well as mobilize two groups. You may want to start by implementing the tool as the instructions describe the first time and then customize it for your situation, much the way cooks makes recipes their own.

Keep in mind that some tools, like After-Action Review, can be used to measure differences over time. Some can help you create a vision for your desired results. In these ways, tools can be used to support *transformation* – a boundary spanning practice that occurs over time and is difficult to achieve in one short session.

As you become more comfortable with the tools, you are ready to start blending them together to help the groups move from one boundary spanning strategy to the next. Select a tool from each of the boundary spanning practices and move through them in sequence. These tools can also be combined with other approaches; the possibilities are endless and open to your imagination. So be creative in mixing these new tools with some of your more familiar methods – the best outcomes might come from unexpected combinations.

We look forward to hearing about your experience with the tools and hope you choose to join the community of boundary spanners on spanboundaries.com. Please feel free to contact Diane Reinhold at reinholdd@ccl.org if you would like to discuss your application or have any questions. I really enjoy hearing from our toolkit users.

About the Designers

Chris Ernst is a senior faculty member at the Center for Creative Leadership (CCL®). His work focuses on developing collaborative, boundary spanning leadership capabilities within individuals, organizations, and broader communities around the world. Currently, Chris is a core faculty member in CCL's Organizational Leadership Practice, chartered to develop more interdependent leadership talent, strategy, and culture through integrated approaches to leadership development. His research is widely published in articles, book chapters, and the popular press. In addition to coauthoring *Boundary Spanning Leadership: Six Practices for Solving Problems, Driving Innovation and Transforming Organizations* (McGraw-Hill Professional), Chris also coauthored *Success for the New Global Manager: How to Work Across Distance, Countries and Cultures* (Jossey-Bass/Wiley). Chris holds a Ph.D. in industrial and organizational psychology from North Carolina State University.

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About the Center for Creative Leadership

The Center for Creative Leadership is a top-ranked, global provider of executive education that accelerates strategy and business results by unlocking the leadership potential of individuals and organizations. Founded in 1970 as a nonprofit educational institution focused exclusively on leadership education and research, CCL helps clients worldwide cultivate creative leadership – the capacity to achieve more than imagined by thinking and acting beyond boundaries – through an array of programs, products and other services. Ranked among the world's Top 10 providers of executive education by *Bloomberg BusinessWeek* and the *Financial Times*, CCL is headquartered in Greensboro, NC, with campuses in Colorado Springs, CO; San Diego, CA; Brussels; Moscow; Singapore; Pune, India and Addis Ababa, Ethiopia. Its work is supported by 500 faculty members and staff.

Team Blueprint

Discuss each of these questions and, as a group, decide on what is the most appropriate approach for your situation.

Goals (Team Charter)

1. Team purpose – why does this team exist?
   - What are the critical success factors that will translate the purpose into action?
   - What do we want to change?
   - What are our core values?
   - What gives energy and urgency to the team?
2. Context – who are we accountable to and who do we need to connect with?
   - Who are our clients and customers?
   - What will they gain from this work?
   - How will we engage our stakeholders?
3. Goals – what specific outcomes will we achieve?
   - How will the team members be engaged in the goal creation process to increase their ownership of the outcomes?
   - How will team goals be shared with the organization?

Roles

1. Which team members fill what specific roles?
   - How is that information shared across the team?
2. Which team members complete what specific processes?
   - How will expectations be discussed to avoid duplication or overlooking specific tasks?
3. What are the skills within the team?
   - What are our unique capabilities?

Process

1. Meetings
   - Has the team agreed on frequency, time, and place?
   - What is the expectation for attendance, substitutions, and quorums?
   - Who ensures that the team has the needed equipment and materials?
   - Who manages the construction of the agenda, rules for presentations, and distributes information prior to the meeting?
   - Who facilitates the meeting?
2. Decision making and problem solving
   - How are decisions made by the group?
   - What problem-solving tools and processes are used by the group?

3. Communications and follow-up from the meeting
   - What are the expectations about communications from the meeting to missing team members and the rest of the organization?
   - How are key decisions, actions, and assignments tracked and communicated to those involved?
   - Is there any formal recording process such as minutes?
   - How are action items followed up and by whom?

Interpersonal

1. The team should establish norms on how to handle:
   - Candor and trust in communications and relationships
   - Flexibility when dealing with other team members
   - Sensitivity when dealing with other team members
   - Creativity when dealing with other team members
   - How to handle conflicts with other team members

Defining Team Boundaries

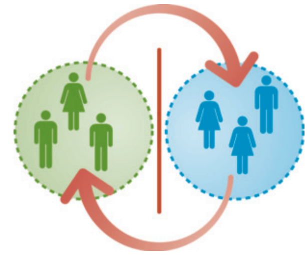
How to Use Defining Team Boundaries

For this process, you will need a flipchart, markers, and sticky notes. On the flipchart, draw the following diagram of a smaller shape inside of a larger shape (see example below). The area inside of the smaller shape is for tasks or work that belongs to the team and the larger shape is for tasks or work that you don't think belongs to you and falls "outside the work of the team."

1. State the team's purpose – why it exists and what it is designed to do.
2. Give each team member a pad of sticky notes, and invite members to write down the specific tasks or work that belongs within the boundaries of their team (each task on a separate sticky). Have them also identify work they think does not belong in their team (but sometimes creeps into their team's agendas) and to capture that on sticky notes.
3. Have team members put their stickies within the "belongs in our team" space, or "belongs outside our team" space. Through a facilitated discussion, move the stickies as necessary until the team is in agreement about the work that is theirs and the work that falls outside their boundaries.

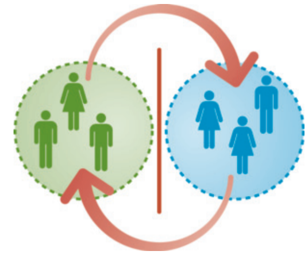
Buffering

Fishbowl



1. Determine the topic for conversation. Often a reflective question is most useful, such as, "What is it like for you to be a member of this group?" or "What are you most (or least) satisfied with about the work we are doing?"
2. Allow enough time for a rich discussion – at least 30 minutes.
3. Form two groups. Group A sits in the inner circle to respond to the reflective question; everyone in Group A should have the opportunity to speak.
4. Group B sits outside of the circle and observes Group A's conversation without talking themselves. Their job is to listen and learn; they will have an opportunity later to discuss their reactions to what they heard.
5. When Group A finishes, invite Group B to share their reactions.
6. Group B then moves into the inner circle and Group A becomes the observer group. Remind Group B that they are to talk about the reflective question itself and avoid continuing to debrief their reactions to Group A. [This is one of the tricky parts about Fishbowl that has to be carefully managed.]
7. After Group B finishes, ask Group A to talk about their reactions to what they heard.
8. Finally, open up the whole group to a conversation about the process, what they heard, and what they learned.
9. Provide the observers with an observation checklist comprised of questions about the content and/or process of the interaction. Sample questions include:
   - What was the issue being discussed?
   - Were any underlying issues raised?
   - What new perspectives and/or experiences did you hear?
   - What patterns and themes were raised by the members?
   - What did you learn about this issue?
   - What communication processes were used?
   - Were any decisions made? What decision-making processes were used?
   - What roles were played by the members of the group?

After-Action Review

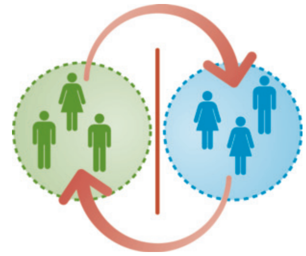


1. On a flipchart page, create the following diagram:

CRITICAL REFLECTION	
INTENDED	**ACTUAL**
LESSONS	**DO +/-**

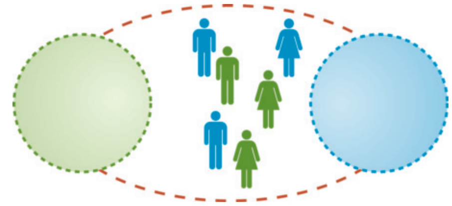
2. Through a facilitated discussion, invite team members to reflect on their work and consider:
   - What did we intend to do? (Intended)
   - What actually happened? (Actual)
   - What did we learn? (Lessons)
   - What will we do the same or differently to be more effective in the future? (Do +/-)
3. The facilitator captures the ideas that emerge on the flipchart.

Stop, Reflect, Write, Report



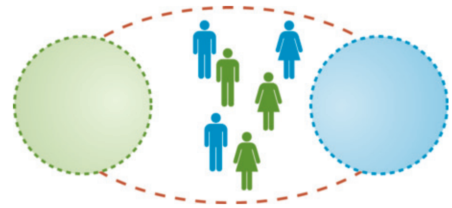
1. Be on the lookout for a good learning moment. Examples of good learning moments:
   - When the team is going in circles or not making progress
   - When people are not participating equally
   - When the norms are not being respected
   - When the agenda is not being respected
   - When there are communication problems
   - When the session is over and the team is ready to extract lessons
2. Frame the learning question. Examples of learning questions:
   - What are your expectations for today's meeting?
   - What do you value most when working with a team?
   - What could you do to help the group create direction, alignment, and commitment?
   - What emotions have you been experiencing today and why?
   - What would you like to see the team work on today?
   - What is on your mind today?
   - What are your current concerns or worries?
   - What did the team do especially well today? What could the team improve on next time?
3. Ask the group to take a moment to reflect on the question you have framed. Give them some time to write down their thoughts.
4. Ask individuals to read their answers verbatim so they can hear where they agree, as well as where they differ. Having them read verbatim also avoids groupthink, where individuals subtly alter their answers to fit with a prevailing mood. Thank each person after they read their answer.
5. After everyone has reported out, open things up to general conversation by asking something like, "What did you hear? What did you learn?"

Mementos



1. Create memento instructions that are relevant to your meeting's agenda. Here are examples:
    - Bring a memento – a physical object that holds personal significance for you – that illustrates one of your beliefs about leadership.
    - Or one that illustrates one of your most powerful learning experiences.
    - Or one that illustrates one of your most powerful team experiences.
2. Send the memento instructions to the team before its meeting so members will know to bring the object to the session.
3. Short version. The short version requires each member to state their name, affiliation, hold up their memento, briefly describe the memento ("this is the shirt I wore during a relay race in high school"), and then describe how it illustrates the phenomenon in question ("it represents the first time I really understood the importance of every team member's contribution, from our slowest runner to our fastest sprinter"). This process is then repeated by all remaining team members.
4. Long version. For the longer version, after the speaker describes how the memento illustrates the phenomenon in question, other members are invited to ask clarifying questions and/or reflect on a personal experience that the memento has triggered for them. The process is then repeated by all remaining team members.

Stakeholder Mapping



Filling in the Stakeholder Map

1. Using the attached form, brainstorm who the stakeholders are for your project, and fill in the first column. Try to be as inclusive as possible. If the list gets very long, put the stakeholders into categories.
2. Have the group identify the stakeholders' interests and concerns. These assumptions will need to be checked with the stakeholders.
3. Assess their level of power over the project as low, medium, or high.
4. Assess how well you believe the stakeholder to be aligned with the project goals – use the designations of low, medium, or high.
5. Rate the commitment level of the stakeholders as low, medium, or high.
6. Identify resources or support required from each stakeholder.

Analysis and Action

1. Use your completed Stakeholder Map to identify strong supporters and possible adversaries for your project. Consider the strategies the team will need to build stakeholder commitment by answering the following questions:
   a. Adversaries are individuals who disagree with your thinking, strategy, and implementation plans. Issues of commitment also exist. Identify stakeholders who are powerful and possibly (or actually) opposed. Are there ways the team can draw them in and increase the chances they will help?
      i. See if there are other stakeholders with an existing relationship with that person who may be able to help you influence them.
   b. Are there some stakeholders who might favor the change but are not particularly powerful? Is there a way to build their power (e.g., sharing information, building them into the change-implementation effort)?
   c. How can those with the most power and who are likely to be the most supportive be used to bring about change? How do you make sure you retain their support?
   d. Looking at all the interests displayed, especially among the powerful stakeholders, are there commonalities that might suggest coalitions you could develop? Are there striking differences that would suggest the need to find some common ground or at least prepare for conflict?
      i. Stakeholders increase their power and influence by forming coalitions. Using the stakeholder map, identify who influences each stakeholder. Keep in mind that there may be people or organizations that influence key stakeholders who are not on your stakeholder list. Identifying these individuals may be central to influencing the stakeholders you have identified.
   e. Are there stakeholders who are not likely to be engaged at present who you would like to become more active? How can you achieve this? What insights can you gain about stakeholder support? Where is key support missing?
2. Assign a team member to be the main contact with each stakeholder. Use this information to prepare for your first meeting with each stakeholder. Be sure to check your assumptions on their concerns and interest when you meet with them.

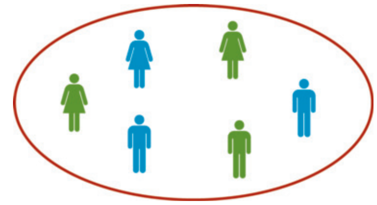
Options

- The sheets can be filled out individually, in pairs or triads, or with the entire team. When subgroups fill out the sheet, be sure to debrief as a large group.
- If any members of the team are a representative from a stakeholder group, ask them for their input on their groups.
- Return to your stakeholder map from time to time to assess its accuracy, identify changes you need to make in it, and use the revised map to generate new opportunities for action and learning.

STAKEHOLDER MAPPING

STAKEHOLDER	INTERESTS	CONCERNS	POWER TO AFFECT PROJECT (L-M-H)	ALIGNMENT WITH GOALS (L-M-H)	LEVEL OF TRUST (L-M-H)	PROJECT RESOURCES NEEDED	TEAM CONTACT	INFLUENCERS

Slogans

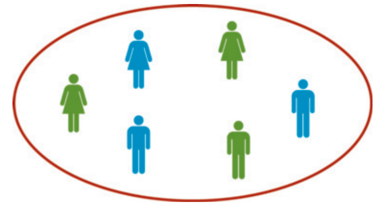


1. Each participant creates a symbol, logo, or catch phrase that embodies or visually portrays the essence of the idea.
2. Share your symbol, logo, or catch phrase with your group. What similarities do you see among the ideas? What differences are there?
3. Combine slogans or logos and choose one that best represents your group.
4. Each group presents their slogan to the other groups.
5. Be sure to debrief with the group and ask if the exercise helped them create a shared understanding of their group identity.

Options

- Slogans from popular ad campaigns can be used or adapted to fit the situation.

Storytelling



How to Use Storytelling

1. Identify the points you want to highlight, and frame in the context of a large-scale organizational change like a merger or acquisition.
2. Identify a provocative incident in which these points were in whole or in part successfully implemented.
3. Mine the incident for rich details and memorable images. Are there any artifacts from the incident you can use?
4. Craft the story from the perspective of a single protagonist – either yourself or an executive who is a peer of your audience.
5. Ask yourself how the story embodies new capabilities that people must adopt and what is needed to develop these capabilities.
6. Identify the emotional core of the story – where does the protagonist experience strong emotions like fear, joy, satisfaction, passion, vulnerability, etc.? What is your own emotional connection to the story?
7. Make it clear what would have happened *without* the new capabilities.
8. Now go back and strip the story down to the essentials – the essential details, images, emotions, and the key message.
9. End the story by linking it to the transformation, using phrases such as "what if ..." or "just imagine if ..."
10. Practice telling the story with someone who will give you their honest reactions (see the questions above that we will be asking the audience about *images, emotions,* and *messages*).

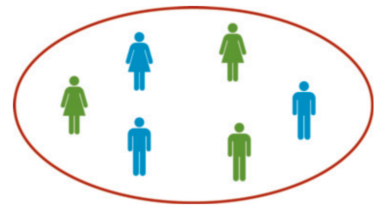
When listening effectively to other people's stories, as a listener, ask yourself:

- Where and how did the story connect with you *emotionally* or "in the gut"?
- What *images* did you experience as a listener?
- What particular *language or word choices* do they use? What does this say about the culture they come from and the values they hold?
- What *messages* did you get from the story?

The story guidelines are taken directly from two sources:

- *The Springboard Story: How Storytelling Ignites Action in Knowledge-Era Organizations*, © 2000 by Stephen Denning, Butterworth Heinemann.
- *Improving Your Storytelling: Beyond the Basics for All Who Tell Stories in Work or Play*, © 1999 by Doug Lipman, August House Publishers, Inc.

Visioning



1. To help create your vision, you will need to collect some information from the people involved in that work. First determine the focus for your vision – organization, division, team, or project. Identify a few different stakeholders to interview. Ask them:
   - Where would you like to see the organization/team two years from now?
   - What is the best possible outcome of working in this organization/team?
   - What is the biggest challenge for managing this organization/team?
   - What have been the big milestones/events that have directly influenced the members?
2. Think about how strong leaders convey their vision.
   - How do they communicate their vision?
   - What types of words do they use?
   - When do they take advantage of opportunities to express their vision?
   - Which vision statements have resonated with you and why?
3. Now use this information to craft your vision by filling in the attached worksheet on the next page.

Options

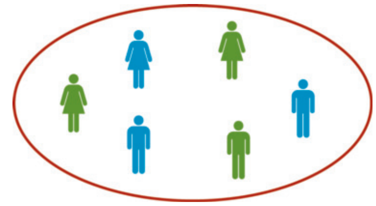
- Be sure to practice sharing your vision with a few trusted colleagues before sharing with a large group. Use their feedback to improve your delivery.
- Be sure to set actionable goals that express the vision you have created. Identify three ways that you will express your vision in the next few days.

VISIONING WORKSHEET

Use this worksheet to build the blocks for a compelling vision statement.

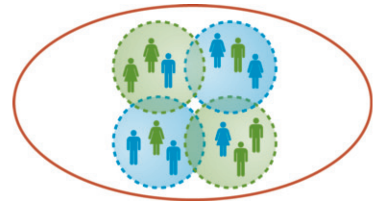
VISION ELEMENT	DEFINITION	IDEAS
1. The Big Idea	A general, fundamental, enduring ideal	
2. Clarity	Clear, unambiguous statements	
3. A Genuine Challenge	Language and ideas that motivate people	
4. The Values	Impact on humanity, role in society	
5. The Story	Provides a clue about the organization's past	
6. The Growth Factor	Expansion of business	
7. The Change Factor	Changing the current conditions	
8. Inspirational Image	Use of a dynamic interaction style	
9. Inclusive Language	Use of we, our	
10. Specific Tasks and Goals	Strategic and tactical plans	

Moviemaking



1. The first step is to craft different scenarios for the group to animate.
2. Prepare for the session by covering the walls with white rolls of paper and providing images from magazines, markers, colorful ribbons, glue sticks, stickers, string, rubber bands, and other craft stuff.
3. Divide the participants into groups and give each group a unique scenario to create into a story. Let them have 20 – 30 minutes to craft their story.
4. Each group presents their movie to the other groups.
5. Be sure to debrief with the group and ask them how they incorporated the various perspectives into the story and if that led to any insights.
6. The story board can be used to share the group's thinking across the organization. It can be created into a booklet or posted in a prominent place.

Dialogue



1. Organize the group members in a circle and introduce the dialogue model.
   - Dialogue is 90% inquiry, which includes asking questions, sharing observations, and reflections. When it is working well people are taking risks.
   - Dialogue is 10% advocacy, the process of integrating and discerning between multiple answers. Ask a simple question or two or offer a key observation for the group to ponder.
2. Ask the group to reflect on the question, ask their clarifying questions, and share their observations and reflections with the group. Facilitate the naturally emerging conversation.
3. Remind people that when they are anxiously waiting their turn to speak that they are entering into advocacy and are no longer participating in the interior work of inquiry with questions, observations, and reflections.
4. Intervene only to clarify what dialogue is, or to make an intervention that gets the group back on track in the process of dialogue. (You can participate like the other members.)
5. Make sure everyone has a chance to share their thoughts.
6. Near the end of the allotted time move the group from inquiry to advocacy if it hasn't already happened.
7. Debrief and flipchart or record on laptop the major insights and decisions about the original question and determine next steps.
8. Record major learnings about the process as well as the content of the discussion.

Conflict Management Tool

How to Use the Conflict Management Tool

1. The first step is critical: Observe.

   What are people actually saying or doing? What are you noticing in the tone of their voices or from their body language? Is a pattern emerging? Have you seen this behavior before? Why do you think you are paying attention to these behaviors? What are your observations saying about you?

2. The second step: Decide whether and how to intervene.

   The considerations you need to make include, but are not limited to the impact of the conflict on the team's effectiveness, how often these behaviors occur, or the timing of the conflict. You have four choices:

   - To do nothing all.
   - To let others manage the situation.
   - To manage the situation outside of the meeting.
   - To manage the situation in the meeting.

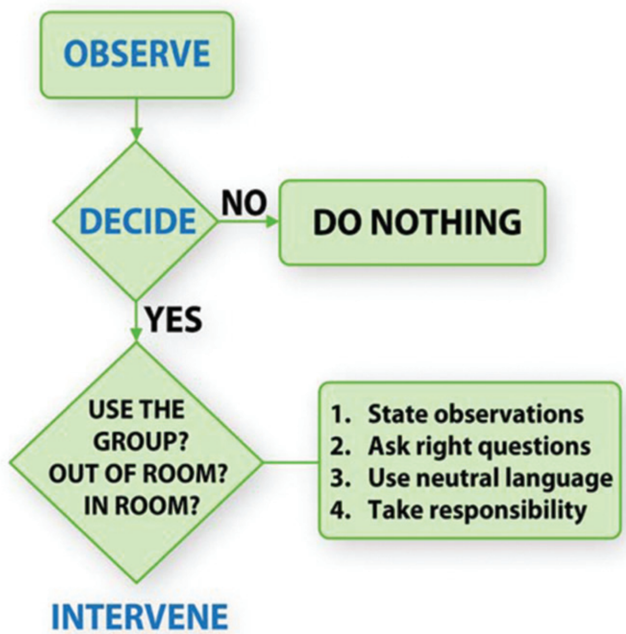
3. The third step: Intervene.

   Potential Interventions:

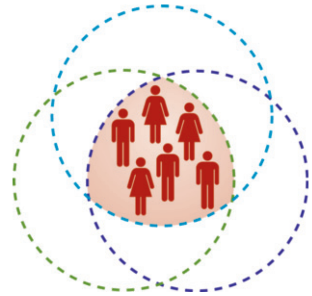
   - Revisit the team's task or purpose.
   - Review team agreements or norms.
   - Clear the air.
   - Surface undiscussables.
   - Mediate.
   - Play devil's advocate.
   - Take time out.
   - Start-Stop-Continue.

   Use Conflict Intervention Stems:

   - I'm noticing that...
   - I'm concerned that...
   - I would like to describe what I'm seeing...
   - I'm feeling some tension that I would like to explore...

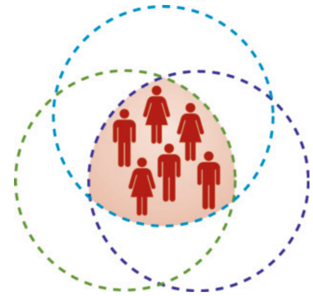


World Café



1. A small group of people sit at a café-style table or in a small conversation cluster to explore a question or issue that is important to them.
2. Other participants seated at nearby tables explore similar questions at the same time.
3. As they talk, participants are encouraged to write down key ideas on paper tablecloths.
4. After 20 to 30 minutes, participants are invited to change tables, carrying key ideas and insights from the last conversation into a newly formed small group. One host stays at each table to share key images, insights, and questions with the newly formed small group.
5. This process is repeated for several rounds (generally three).
6. The large group shares key points from their discussions and identifies themes and patterns across the discussions.

Open Space Technology



Preparation

- Invite the participants.
- Plan the logistics.
- Coach your organization's leadership on the new ways of working that will emerge and ask for their support of these new practices.

Facilitation

Day 1

- Seat the participants in a circle, welcome them, and review the four principles and one law of OST.
- Set the context and focus the group's intention on the issue; say just enough to evoke attention, while leaving sufficient space for the imagination to run wild.
- Participants enter the circle and post their topic; the idea is to get every issue of concern to anybody in the group on the board.
- Each concern is explained and discussed to make sure the group has a shared understanding of it. Participants select which issues they feel are most important using a process such as dot voting.

Day 2

- Small groups meet to inquire and advocate; to dialogue around each of the concerns deemed to be critical.
- Many small groups are meeting at the same time so multiple issues can be addressed.
- When a group finishes with an issue, they disband and join other groups.
- Individuals are free to leave one group and join another as they see fit.

Day 3

- Issues are prioritized and converged. Individuals are assigned follow-up tasks.

Follow-up

- Follow through on commitments.
- Bring the four principles and the law back to your groups.
- Support the emergence of innovation and maintain the spirit of the event.
- Assist the organization in working with the chaos of self-organization.
- Stay open to where the experience takes the organization.
- Support the outcomes.

References

Book: Harrison, Owen. *Open Space Technology A Users Guide* (4th ed.). (Berrett-Koehler, 1997), paperback, 200 pages. All you ever wanted to know about facilitating an Open Space event. Included are the specifics about time, place, logistics, invitation, and follow-up. Special attention is devoted to the preparation of the facilitator.

Web: http://www.openspaceworld.org/wiki/wiki/wiki.cgi