Case studies

Getting Out of the Way. An Executive Retreat Facilitation Experience using SF

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Abstract

How Solution Focus (SF) can be used to effectively lead a corporate retreat. Having executives fully engage in the process using SF group activities, the facilitators can quickly make themselves irrelevant and witness the experienced participants actively shaping their own future and their own team dynamics.

Context

The client, an executive in the pharmaceutical industry, originally hired me in my capacity of executive coach. It turned out one SF session was all he needed. He contacted me again after a few weeks. I assumed he would be requesting a follow-up. He surprised me by asking instead if I could help with an organisational issue. He was wondering if I would be interested in facilitating a corporate retreat using the same "style" (his words) I used during the successful SF coaching session he experienced. I accepted.

Background

The client is a senior vice-president in charge of clinical development for an international pharmaceutical company. As such, he has a group of managers reporting directly to him, a team

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of twelve people. They are located mainly in the US and Europe while managing worldwide operations. The corporate retreat is a recently established tradition that takes place annually. It consists of two days of work. The first day is usually focused on numbers and indicators: business results, business goals, market trends, strategic opportunities. The second day is usually about the team and its dynamics. The objective of the second day is to develop the cohesiveness of the team.

Request

The client asked me to help facilitate the one day of the retreat dedicated to the team's reflections on its own dynamics. The client did that on his own the previous year by using a SWOT format to structure conversations, and he was unhappy with the results. The client's main concern regarding his team was its slow pace in implementing changes once it was decided a change was needed.

Contract and objectives

The contract was negotiated with the client over a half-hour Skype session and follow-up emails. The title of the one-day event was set as: "Productive Change Now ... and Tomorrow". The objective was worded as:

> "within a safe and constructive framework provided by the facilitator, help participants shift their conversations about change from "why we can't" to "what can we do (differently or more of) to make it happen". Initiate those conversations during the event, starting to identify small next steps towards the desired future."

Planned workshop

We decided to have the workshop dedicated to the team's dynamics on the first day of the retreat while moving the business development related part of the retreat to day two, the

rationale being that if day one was successful, its positive effects would carry over on day two.

My strategic plan for the day was as follows:

- from start at 8 AM until mid-morning coffee break: focus on creating a shared SF mindset;
- from end of mid-morning coffee break to lunchtime: focus on exploring the preferred future;
- from end of lunch-break to 5 PM (scheduled end of event): focus on working on "next small steps".

Actual workshop

No plan survives contact with reality. Here is how the workshop unfolded, stage by stage.

1) **Setting the stage** focused on creating a shared SF mindset. I was very happy about the first part of the workshop.
   The key activities I had the team engage in:
   a) Resource Gossip Exercise. I learned this very effective group activity from Peter Szabó. The idea is to invite participants to take turns and gossip about each other, but stating only positive things. This activity helped put into practice the SF concept of "addressing people in their resources first". It created a positive mood right at the very beginning.
   b) Working in pairs on the desired outcome, as an elaboration of the scenario: "suppose this meeting was extremely useful for you, and for your team, in dealing with change productively". The scenario would be articulated by answering the more specific questions: "how would you know by the end of the day?"; "what would be the first small signs during the day?".
   Participants were given a lot of time to work on this, and they embraced this task. It implicitly highlighted the fact that they were the experts. Moreover, it increased their sense of accountability as co-creators of the workshop.

2) **Exploring the preferred future** proved to be the most exciting but also the most challenging part of the day.

  a) The opening gambit I used to have them shape the preferred future was based on a brilliant suggestion by Haesun Moon (private communication). I asked the participants what they would notice as they go visit "the best team ever", and I led them as a group in adding layers upon layers of behavioural details by asking more and more questions. I got a lot of momentum right there. Every single participant was very engaged in "creating" the "perfect" team, having fun while painting a compelling vision, comment after comment. On a scale from one to ten regarding effectiveness, I would rate this activity as a nine plus.

  b) I then decided to formulate the Miracle Question directly to the group and have them write down answers individually on sticky notes of different colours. My intent was to help them find a way to transfer the "perfect team" behaviours to their own reality.

  So, after crafting the MQ in a way that was as engaging and relevant to them as possible, my sequence of questions was:

  – "what would be the first small signs that you would notice as you go through the day that would tell you a Miracle has happened?" (yellow post-its);

  – "what would you be catching yourself doing differently that would tell you a Miracle has happened?" (green post-its);

  – "what would your boss notice that would tell him a Miracle has happened?" (red post-its);

  – "have there been times recently when bits and pieces of the Miracle have been happening already, maybe just a little bit?" (blue post-its).

  I then invited each of them to find a spot on the walls and put up the sticky notes of their Miracle picture.

  In terms of effectiveness, using the same scale mentioned above, I would rate this activity as a seven.

It did still work and momentum was maintained, mainly thanks to the fact that the group was invested in making the workshop succeed.

Among the signs that asking the MQ in that way worked:

– as soon as people put their post-its on the walls, they started mingling and checking each other's Miracle picture. This led to impromptu conversations in small groups. I meant to ask them to do just that, but there was no need for me to. They did so spontaneously.

– one participant told me a "Miracle already happened" because during these informal conversations another participant told him something he was hoping to hear from him.

Among the signs that asking the MQ in that way might not have been the ideal choice:

– their responses lacked behavioural details. Left to their own devices in writing answers on the sticky notes, they used generalisations more often than not.

– while the general momentum gained with the "visit to the best team" activity was kept, it felt as if I failed to significantly build on it.

3) **Focusing on the first small steps.** This is when the workshop really came into its own, and everything clicked. After the lunch break, I invited the team to work on the observational task sent them via email a couple of weeks before.

The task was included in a individually addressed invitation letter I had the client send each one of them on my behalf. The idea of a pre-workshop task assignment and the very wording of such an invitation both come from the work of Jesper Hankovszky Christiansen, the specifics of which can be found on his website (http://greatgatherings.net/book/begin/).

Here is how the task was phrased in the letter I sent them: "From now on and until we meet, please notice any small signs at your work that indicate that this team has the

potential to become even more effective in delivering value to investigators, sponsors and shareholders."

That afternoon, in inviting them to work on this, I added a couple of twists. In informal communications during the day, some participants had characterised the team as made up of an "old guard" and a "new guard" which did not mix up with each other, so I introduced the activity as follows:

a) "*you all know who you need to talk to* today to make this retreat extremely useful. . ." (engaging their sense of accountability by linking the upcoming activity to the activity in the morning where they explored how to make this retreat successful);

b). . . " so with that person go over what you noticed and explore *what makes the episodes you observed a sign* you are moving in the right direction".

To their credit, they all jumped at the opportunity of having a potentially difficult conversation with people other than those with whom they were comfortable with. This task contributed decisively to making the day so successful.

At the end of this activity, the shift in energy and purposefulness was tangible (e.g., "we discovered we were more aligned than we thought", marvelled a participant of the "new guard" sharing with the group the conversation he had with someone from the "old guard").

Next, I invited them to follow-up with some scaling questions. More specifically, I used a "walking scale" regarding "usefulness of the workshop so far": as a group, I asked them to stand where they thought they were at that point. They aggregated in a cluster between the numbers seven and eight.

I then asked the team what was there between one and seven, and we talked about it in the plenary for a few minutes, consolidating what had been working.

Next, I invited them to work, in small groups of three, on how they would know that "they had made a small step forward".

By then they were on their own, leading their own workshop and owning their group dynamics. That is when the highlight of the workshop (for me) took place.

While I was checking in on participants' working, the following conversation took place:

- participant, addressing me and momentarily interrupting a very engaged conversation with two others: "we totally ignored your instructions, but we are making a lot of progress!"
- me: "well, if it is working for you, I am very happy you ignored my instructions!"
- participant: "It is working extremely well!".

That was the sign I reached my goal to make myself irrelevant to the proceedings – time to get myself out of their way.

So I disregarded the temptation to follow up with some more pre-scripted scaling questions. Instead, my next "assignment" to the group was "to do whatever you feel it is best for you to do in the remaining forty five minutes to make this day even more useful for you".

They took the invitation and rolled with it. A pair went on a walk (and I knew they were each other's nemesis – I am happy to report they both checked in later, very satisfied with the conversation they had. No one ended up in the Potomac). A group of four started brainstorming about how to keep these conversations going in the next few days. And so on.

It was deeply rewarding to witness their energy and to see the new connections taking shape right there and then.

What I think I did best, and will do more of in the future

– Allocating a lot of time for participants to work on setting their own goals for the day.
– Treating them as experts from the very beginning. The activity which shifted the whole dynamics was introduced as: "*You all know* who you need to talk to today to make this retreat extremely useful . . .".
– Exploring exceptions with the question: "What tells you this would be a sign the team is moving in the right direction" – it turned out to be a way for them to express their assumptions about what useful change would look like.
– Using a walking scale to assess progress and their confidence about building on it in the days ahead.
– Getting myself out of the way once it was clear they were moving forward productively on their own terms.

What I would do differently next time

– Using a different process to elaborate on the MQ. While I liked the idea of the sticky notes, the follow-up to the MQ needs to be more focused on behavioural details and specific examples. One idea would be to distribute a template to participants on how to write their answers on the sticky notes. For example, the template for answering the question about the first small signs they would notice could be in the form: "The first small sign I would notice would be X doing Y when Z". Templates like this could work to keep them away from generalisations, I think. Something to be tested out in the future.

What I think is important about this work

– Starting before the workshop begins by using the invitation letter to suggest to participants to work on an observational task. It proved to be a very useful "anchor" to their actual work challenges. Moreover, they noticed some bright spots happening even before I met them. This was

powerful to foster their sense of ownership of the positive frame I meant to put in place during the day.

– Inviting participants to work on the "preferred future" by using a third-party perspective (the participants visiting the "best team ever"). I think it definitely helped them to paint a more vivid picture of the preferred future, without reservations or "reality-based" constraints.

– Giving up on any kind of structure in the last stretch of the workshop, leaving participants to work on their goals in any way they would see fit.

Follow-up

Unfortunately I do not have any hard data regarding the workshop outcome, but I did follow-up.

Among indicators of the workshop success: compliments to the facilitator expressed immediately after the workshop by individual participants; personal emails of appreciation from some participants in the days following the event.

A Skype follow-up conversation with the client took place two weeks after the workshop. He reported smooth sailing during the second day of the retreat, which was about more specific business related topics. The group seemed to be more positive and more engaged. Something had shifted. However, he also reported instances of yet again some managers "dragging their feet" once back to their workplace.

After a brief SF overview of the situation, the client was quick to notice many signs of progress, especially in the following areas: proactivity of the group, alignment of the group, more positive communication, more engagement (especially with him).

On a general scale about "productive change", according to him, the team moved from a five/six to an eight.

On a confidence scale that the team had reached a critical mass that would enable it to have a different attitude / behaviours regarding change, the client reported a nine and a half.

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