



## **FACILITATING TEAM STRATEGY THROUGH CPS** **by Guido Prato Previde**

I was recently asked by a client to design and facilitate a strategic team intervention. During the program, I was able to apply the concept of Creative Problem Solving that I learned from my colleagues in Buffalo, and some of the tools related to it. It was a challenging opportunity because of the circumstances under which I was forced to work, and a fascinating experience because of the extraordinary impact the meeting had. The client and her group were so satisfied with the outcome of the meeting that they immediately wanted to make use of the findings for further decisions and actions!

Following is some background information about the application. Some key learnings are also presented.

The client was the Regional President of an important Public Health Care Regional Association employing Italian professionals in the field of nursing. I had already worked for the same Institution setting up and delivering a training program aimed at improving the culture and the skills of a small group of regional managers. The client is now in the position of leading the regional group that is made up of many local administrators managing their smaller organizations in accordance with the central guidelines. She said she has been trying for a long time to empower these people at the level of their local committees. Now was the time to make the key people of these structures more committed to a common goal and accountable for initiatives and actions on their own. The speed of change has accelerated, and the group as a whole must be more effective and consistent.

When she called me she had a precise idea: she wanted to involve the key people who manage the local committees of the association. Everyone should have time to debate productively about the actual situation and future orientations. She also said that it was important to motivate these people to articulate their opinions. It was therefore necessary to create a climate of trust and open communication. As far as I could understand after a first task appraisal interview by phone, she was thinking about a 1/2 day conference, or training session, for her key managers (30 people out of 90).

I immediately asked for more information about the historical background of the organization, the momentum, people's roles, main weaknesses, vision and mission. As I saw it, it was becoming clear that there was the need for some process consultation (French, Bell, 1995; Schein, 1987) to produce ideas and share consensus around strategic issues.

The association was founded in 1954 and is a large one, but now it risks becoming old-fashioned and bureaucratic. It needed to undergo a renewal process in order to be closer to the great number of associates and to influence them, and to be able to cope with the changing environment. Moreover, the role of these managers and their commitment to change was crucial. The leader of the group, who was my client, has tried many times to involve these people during formal settings, but the results were unproductive. Now, as the President of the group, she wanted to make a concrete change and strengthen the group, reinforcing her leadership.

When I matched my first conclusions with those of the client, it became clear that the aim of the meeting was both motivational and strategic, where the main part of the system had to be brought together in the meeting. They had to work together, analyzing and processing information about mission and vision, generating ideas and sharing priorities in order to make "a jump" both as individuals and as a group.

To meet the task at hand, I decided to use CPS tools within a 3/4 day meeting (from 9.00 a.m. to 3.00 p.m., including an hour and half break for lunch). I decided that I might combine a group facilitation experience with some training, in accordance with the expectations of my client.

In the meanwhile, I had the opportunity to develop more learning on CPS during my second course in Buffalo. I was also able to discuss my plan with Brian Dorval who helped me a great deal by giving suggestions and tips for the success of my initiative. At the same time, I received the confirmation that this meeting could be managed successfully through CPS methodology when task appraisal gives such results. It would be productive to use the method and the tools, because the job was a new one with a group who was supposed to take the lead in a changing environment, where strategic issues had to be openly and creatively identified and shared. From the process planning perspective, it seemed to me that the right way to act was entering the Problem Solving process at the first component ("understanding the problem"). It sounded like a "strategic problem finding session" where creativity is very much welcome!

I prepared to work with a group made up of about 30 people, where I would be the only facilitator in the classroom. I structured the meeting tightly and designed the agenda, taking into account all the elements I had. The tool for generation was Brainstorming with Post-Its™, while Highlighting and Hits would be used for focusing, both at a small group level and in the large group (Isaksen, Dorval, Treffinger, 1994). I planned to let the 3 sub-groups work in the same large classroom (about 10 people in each group). I was to act as a "cadre" facilitator. Being that it was impossible to have other colleagues assist me, I had

to call for three self-selected table facilitators at the beginning of the meeting, briefing them during a short break.

The expected outcome of the creative meeting was to get 4 to 6 relevant and shared "problems" on which to focus further work in order to improve the group's effectiveness and success. The planned statement read: "WIBNI we were able to optimize the strength of our group?"

I had to manage the whole process in a very structured way, keeping the large group together during common briefings for instructions and guidelines, while dividing them into small groups when generating and focusing. At each stage, table facilitators would present their group's results and share the experience, while the client was out of the small group activities. After the generating phase, they would have to restate the crucial topics, and organize and prioritize them within their small groups. In the end, after a clarification phase where the subgroup's spokesperson illustrated the meaning and the content of the identified priorities, the whole group was going to vote. Voting at the whole group level was aimed at getting two different perspectives: the first related to perceived organizational priorities (on an SML basis), the second related to a declared individual preference for one area where individuals were willing to contribute personally.

Everything was ready for the large meeting and I felt safe enough. Unfortunately, before the meeting, I had to cope with a couple of unscheduled events. It became impossible to brief the client personally before the meeting because, even though the date had been anticipated, the client acquired an important duty for the association. When I was finally able to develop some briefing by phone, a couple days before the meeting, she told me that the number of the participants would be 70 people! The program was so appealing that the client wanted to let all the managers and their direct staff into the class. I did not change the structure, but I had to conduct the small group activities differently. Now we would have to create at least six groups for generating and focusing and I was still the only facilitator. I chose to spend more time explaining roles and responsibilities before the creative session, so as to let participants know the required skills and facilitate correct self-selection.

Although it was a hard job, the meeting went well. After a short opening where the client articulated her expectations about the day and her vision of the future, I gave a short lecture on the management of change and leadership roles. It was an interactive session and it served as an icebreaker. The result was that participants' attention increased. They were asked to reflect on how their contribution might be valuable at this stage for their organization. Then I went back to the client's words and better explained the meaning of the day and the

agenda. It was then easy to write down the key background on a large whiteboard, where information about history, mission and vision statements, crucial challenges and roles was located. I checked with the client, and then started the scheduled session. At the end of the Creative Problem Solving session, I gave my debrief, including a short explanation about the concepts and tools. This was my first facilitation experience with a very large group applying CPS, and I could not believe, it was okay!

The meeting, of course, absorbed a lot of effort, but the outcome was very productive and enjoyable. It provided a lot of information that I have packed into a report for the client to share with the resource group. I know they have worked on that and approved further actions.

In accordance with this experience I brought away some key learnings. First, CPS concepts and tools are powerful when used appropriately. Task appraisal is fundamental to explore the objectives with the client and to focus the starting point. Process planning and tools selection must be prepared and developed with a clear objective (task statement and the invitational stem should be challenged and tested with your client before working with them). The more complex the group environment is, the more you have to make use of structure (phases and time, small group activities and large group activities). Flexibility, which was a key success factor for the meeting, is possible if the facilitator has a clear picture of what should happen and manages the process in a structured way. I cannot believe I had 70 people in the classroom and all of them contributed and felt at ease. Last, but not least, the report I wrote, containing both the background and the results, has been very much appreciated and it was really useful as a document for further work within the group.

## **REFERENCES:**

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