

Leadership Development Employing Café Conversations

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Background

We have been engaged in designing and delivering customized leadership development programs for a number of clients. In reflecting on these programs we have noticed some common themes in the desired outcomes. This paper discusses how we have approached delivering these outcomes through systems thinking and specifically how we have employed a variant of the 'World Café' termed the *Strategy Café*.

The companies included in this paper are all large, multi-business unit organizations. The participants identified for these programs are high potential employees designated as having the capability to rise to the most senior levels of their companies within two to five years. Given the diverse participant backgrounds, the desire to expand their knowledge base to enable success at elevated levels in the company and a desire to strengthen corporate affiliation, clients have been interested in building a common foundation with respect to company history, culture and values. They are also interested in building a broad business perspective, including strengths, weaknesses, opportunities and threats to markets, services and products.

Since these elements involve intimate knowledge of the company, we believe it is imperative that senior executives, including the CEO and direct reports be engaged in the activities. Active participation by senior levels demonstrates their commitment to the program, gives the participants an opportunity for dialogue on important subjects in a 'safe' setting and gives the senior leaders an opportunity to view the participants in new, non-routine situations. In addition, the open exchanges offer the opportunity to ensure alignment between senior and mid-level leaders on new ideas, perspectives and approaches. This also tends to strengthen affiliation with the company on the part of participants. Senior level involvement requires that the program be held near the offices of the executives to facilitate effective use of their time.

Clients also want the participants to build a collegial network of relationships that will last beyond the program such that the participants can depend on each other for advice, support and cooperation as their careers progress. Assigning a challenging project for the sub-groups to complete during the week is particularly effective in building these relationships as it provides opportunities for both socialization and goal accomplishment together.



Macro Design

These leadership development programs involve up to 20 participants and are usually multi-week (two to four) spread over the course of a year. To maintain continuity between these weeks, connecting activities are included that require ongoing application of concepts and interaction between the participants. A typical week begins with a get-together on Sunday evening and runs through mid-day Friday. Since history, culture and broad business perspective serve as the common foundation from which additional learning is built these topics are addressed during the first week, specifically Monday, Tuesday and Friday. The Wednesday and Thursday segments are used for skill-building courses in areas deemed important to future success; typically relationship centered leadership (Emotional Intelligence) and increased financial literacy. A design for week one is shown in figure one. These courses are custom tailored to suit the client's needs and are delivered by facilitators with expertise specific to these topics.

Time	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
M O R N I N G		Timeline	1st Presentation to Senior Panel	Custom Course Work	Custom Course Work	2nd Presentation to Senior Panel
		The Business we are in	Culture and Values			Reflections and Closing
A F T E R N O O N	Welcoming Activities / Social	Strategy Café				
E V E N I N G			Group Work	Group Work (as scheduled by the teams)	Group Work (as scheduled by the teams)	Group Work (as scheduled by the teams) & Closing Dinner

Figure 1-Typical Design for Week One

The red thread that ties together the individual course modules is the evening group work. Pre-assigned teams collaborate nightly to resolve the challenges assigned on Monday and Tuesday. Participants are expected to actively share knowledge from their different skill sets and company vantage points. They improve their work each evening by incorporating relevant portions of the day's learning into their final recommendations. The participants cross the goal line on Friday morning with team presentations demonstrating their learning as both teams and individuals.



In contrast to leadership development experiences where only one or two attendees from a company attend along with participants from a mix of other companies, this design enables a critical mass of participants to bring their learning back to the company, create internal partners that help to keep it alive and avoids a pitfall of external programs, namely the 'only you heard it and no one else cares' syndrome.

Detailed Design

Monday begins with a *Timeline* exercise, which serves multiple purposes. In addition to the inclusive nature of the assignment it jump-starts the relationship formation process, especially among participants unfamiliar with one another. It also forms the platform for the company history and culture modules that follow. The *Timeline* exercise is relatively simple, only requiring the preparation of a four foot wide by twenty foot long banner as shown in figure two.

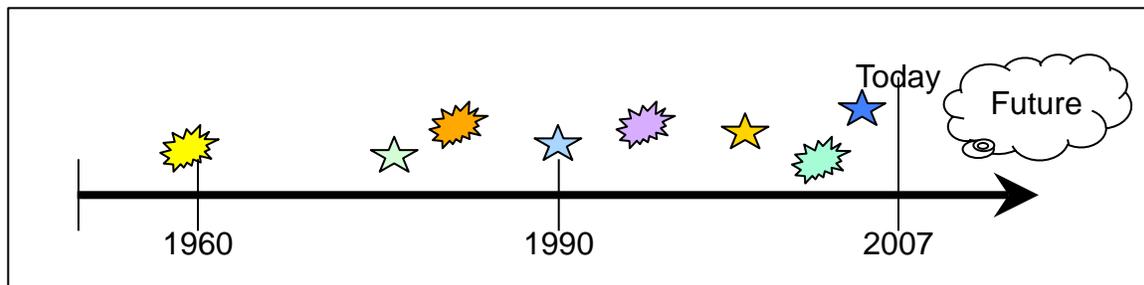


Figure 2 - *Timeline* Exercise

The participants are asked to think about significant company or personal career events, accomplishments and changes. Using materials such as construction paper, scissors and markers the participants are asked to create milestones documenting the events and to post them on the timeline. The participants are typically very tentative at the beginning. Once a few of the extroverts begin to write, cut and post the quiet room comes alive as participants read one another's creations and begin learning about each another. The learning process is further enhanced with a facilitated debrief of the completed timeline. One takeaway from this debrief is recognizing the constancy of change. This realization allows participants to feel more confident in their roles as participants in and leaders of change.

The design of the next program module depends on the availability and capability of the senior executive team. We like to use the timeline as a backdrop for a facilitated conversation between the participants and company leaders that considers the past as foundation for the present day company. In addition, this conversation can focus on good decisions, lessons learned and consistent cultural elements in the foundation, such as integrity. This examination of history ends with discussion of the present and is followed by senior executives using custom-



designed exercises or questions to lead an exploration into the vision for the future.

Strategy Café

The purpose of the *Strategy Café* is to engage the participants in defining and analyzing the current business situation through a process of strategic thinking and dialog. This analysis will be used throughout the week to create a strategic definition of the business, a collective vision of success and descriptions of their future roles in ensuring success. The *café* leads to evening team work and team presentations on days two and five to senior executives, creating *raison d'être* for full individual engagement and competitive spirit among the teams. The *Strategy Café* consists of five parts: (1) Pre-work, (2) The *Café*, (3) Evening team dialog, (4) First presentation to senior executives, and (5) Second presentation to senior executives.

A pre-work assignment is provided to the participants a month prior to arrival. The participants are asked to invest the equivalent of up to a day collecting and assimilating facts and trend data in one of three strategic areas important to the company's current internal or external environment, i.e. *People and Organization*. Every attempt is made to get a balanced number of participants investigating each area. They are provided with examples, thought starters and forms to record the information.

The *Strategy Café* begins Monday afternoon and just as with any *café*, environment contributes to experience. It is important to create a setting that supports the mindset desired for the exercise. It is also important to indicate immediately that something different is about to take place that in turn encourages participants to think differently. For one client, we chose to create a *café* that symbolized elevating perspectives, innovation, free expression and learning through practice. The room was decorated to resemble the artists square at Montmartre, Paris. Montmartre is the highest elevation in Paris, where it is possible to look out and survey the City of Lights complete with the Eiffel tower. On the way to the artists square in Montmartre one will find mimes entertaining through pantomime. In the square there are artists with easels using oils, watercolors, pastels and charcoal creating portraits of tourists. Artists roam the square with scissors and cut paper silhouettes of anyone standing still. Montmartre is alive with observation, creativity and wonder. The participants in the *Strategy Café* enter the room to find three tables covered with checkered table cloths, wine glasses and flowers in vases. Images of Montmartre are projected on the screen. Each table has two flip chart easels decorated with artists' palettes and paintbrushes to simulate an artist's easel and canvas. Smocks are available for recorders and contributors to wear. The *café* opens with a description of Montmartre, its spirit of creativity, the numerous



art forms created and practiced there as well as the famous artists that once collaborated there. The metaphor facilitates the assignment to collectively paint a holistic and realistic picture of the current business situation that their company is experiencing on the canvas or flip charts.

The *café* design incorporates three rotations or rounds to maximize participant contribution and learning as the three topical areas assigned in the pre-work are addressed.

In Round One of the *café* participants with the same pre-work topic meet at a table. The pre-designated table anchor identifies a recorder. The table anchor leads the participants through a process of distilling the facts and trends collected in the pre-work assignment. As each participant reviews their facts and trends the recorder builds a consolidated list on a flip chart. When the facts and trends are exhausted the table anchor will review the consolidated list with the table. The participants are asked to state the business issues and opportunities that can be drawn from the facts and trends. The participants are asked to minimize analytical discussion of the information at this point although questions for understanding are encouraged. Instead, they are asked to think about *"What key Issues and Opportunities for the business and organization are suggested by the data"* and write their thoughts on post-it notes in the form of *"How will we..."* questions. They are also encouraged to keep a rapid pace as they are given about sixty minutes to complete Round One.

In a pre-determined rotation pattern most of the participants move to a new table (see figure 3 for one possible pattern). The table anchor remains at the original table and leads a new group of participants through a review of the facts, trends, business issues and opportunities. The new table participants are encouraged to add their own relevant facts and trends to the list. Again, the participants are asked to minimize discussion of the information at this point and instead write additional *"How will we..."* questions. When the review has run its course the participants are directed to move to their pre-assigned Round Three table.

In Round Three new pre-designated table anchors identify recorders and the process conducted in Round Two is repeated. Once the review is exhausted each table begins creating their SWOT (strengths, weaknesses, opportunities and threats) analysis from the list of facts and trends identified.

The Round Three table assignments become fixed for the remainder of the *Café* steps. Careful examination of the *Café* participant rotation in figure three reveals that the participants in Round Three end up at tables with different topics than the pre-work topic they had prepared for. This is intentional by design.



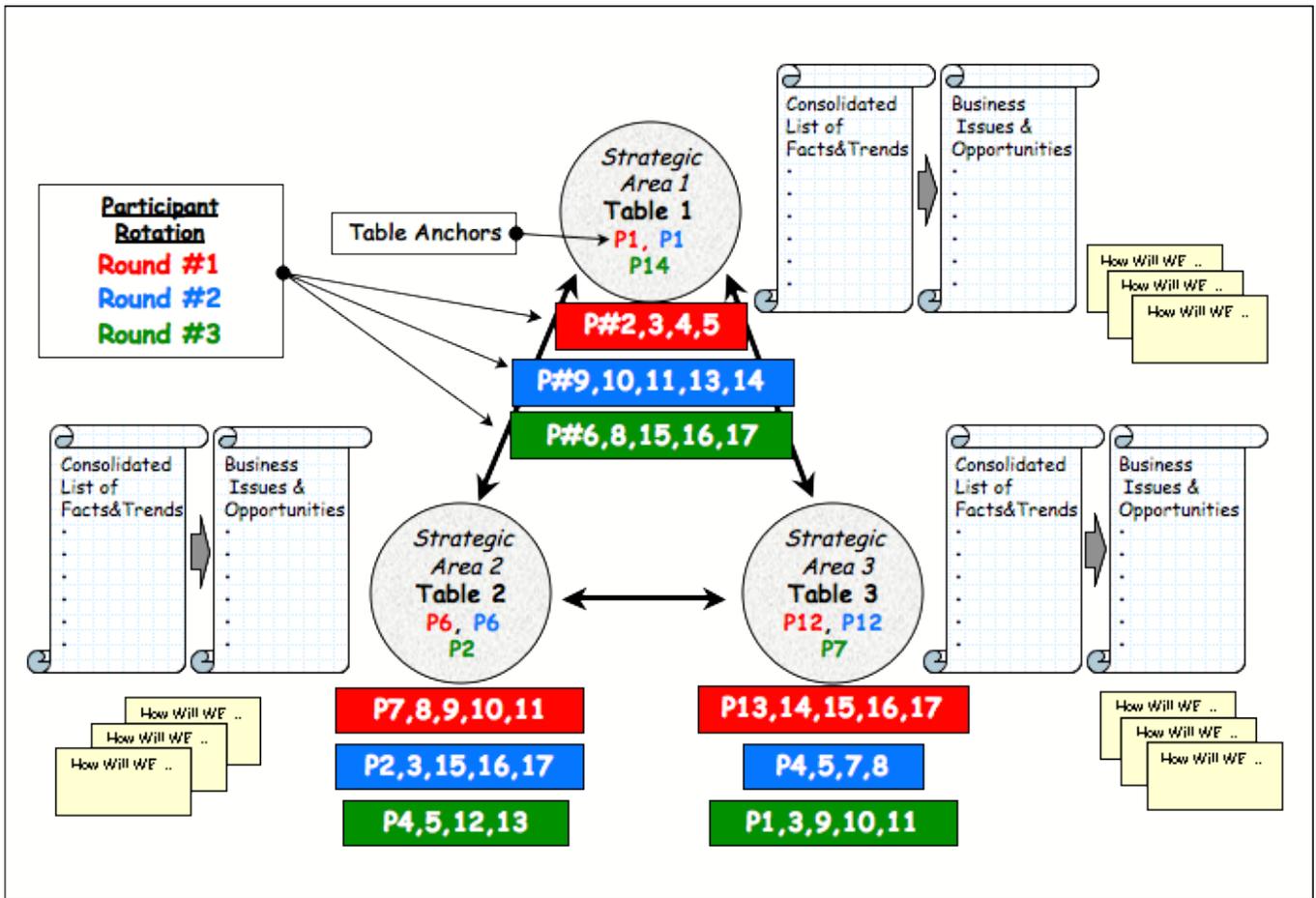


Figure 3 – *Strategy Cafe* Design for Rounds One, Two and Three

Leaders rarely have all of the facts, data and information desired prior to making important decisions. Further, they have to delegate the collection and analysis of data to others. This leadership simulation is typically met with frustration and resistance by the participants. Facing up to this frustration and overcoming it is usually the first step in the participants coalescing as a team.

Proper design of the participant rotation requires careful consideration and collaboration with the client. The key to determining the participant assignment to topics is to decide the make up of the teams for round three first since it is the round three teams that remain together for the duration of the week. Once the round three team members are determined, a rotation plan can be designed that will enable all participants to contribute to at least two of the three topics; most contribute to all three and wind up at the appropriate Round Three table. It is desirable to balance the backgrounds and skill sets of the participants on each team. Consideration should also be given to the opportunities offered by the team leader roles to develop or challenge certain participants. One should also consider the formation of key relationships that can occur as a result of participants working together for the week.



The SWOT analysis begins with instructing the participants to review the list of *Business Issues and Opportunities*. As each item is reviewed it must be designated as a strength, weakness, opportunity or threat. Many times participants are tempted to assign items to multiple categories. Thus, it is important to encourage the participants to continue their discussion until they can agree on one and only one category for each item. The list is then reconstructed into the four categories as shown in figure four.

The participants then create additional “*How will we...*” questions as shown in figure four and

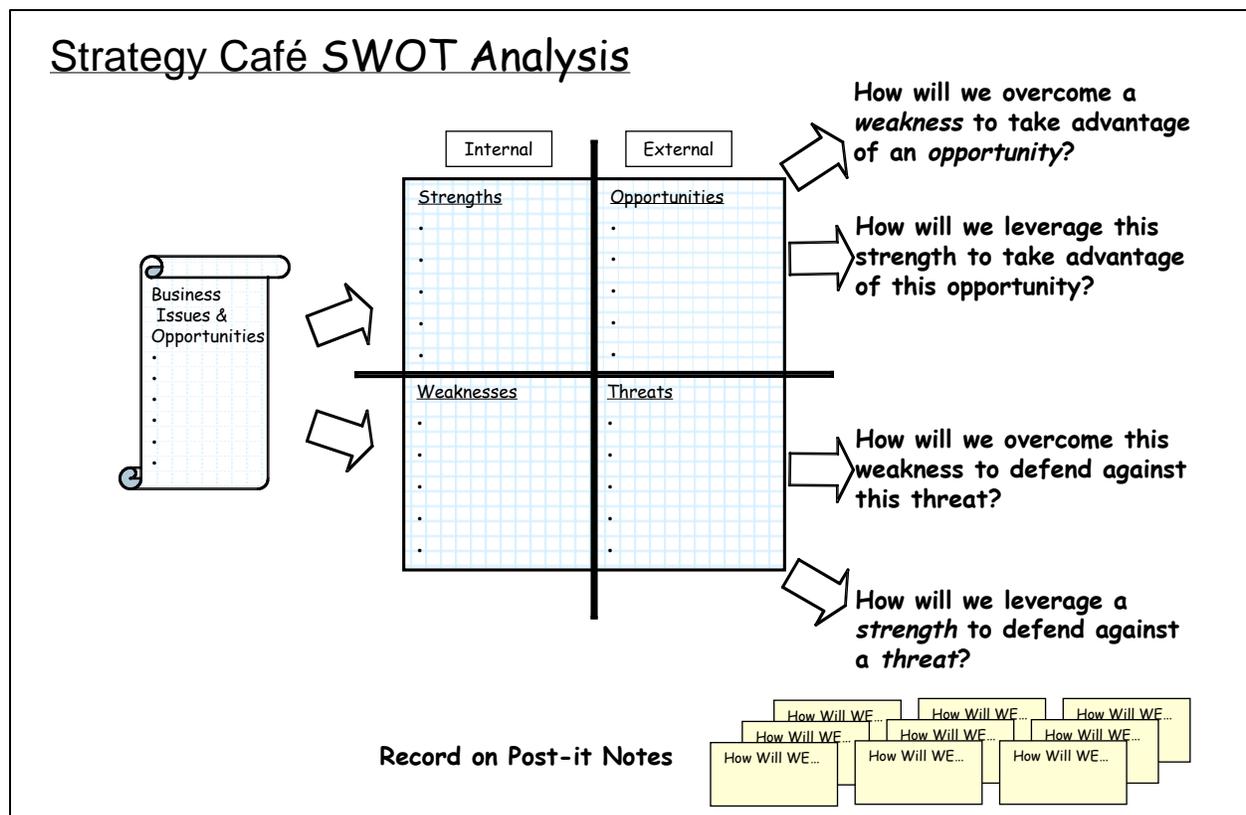


Figure 4 – SWOT Analysis

record them on Post-it notes. These “*How will we...*” questions are consolidated with the questions previously created during rounds one, two and three.

Participants in the *Café* are now ready to affinity diagram the “*How will we...*” questions as shown in figure 5. They are encouraged to continue sorting until three to five broad affinity groups result.

At this point the assignment is given for the Monday evening group work.

The teams are instructed to go back to the facts and trends accumulated during the *Café* rounds and review their work. The groups are usually under time pressure and are unfamiliar with this process. Further, the quality of their work may have been affected by the sheer volume of information delivered as well as their ability to function as a team. The review gives them a second chance to



Affinity Diagramming :

All the *How will we ... ?*'s from a topic are sorted into groups bearing similarity.

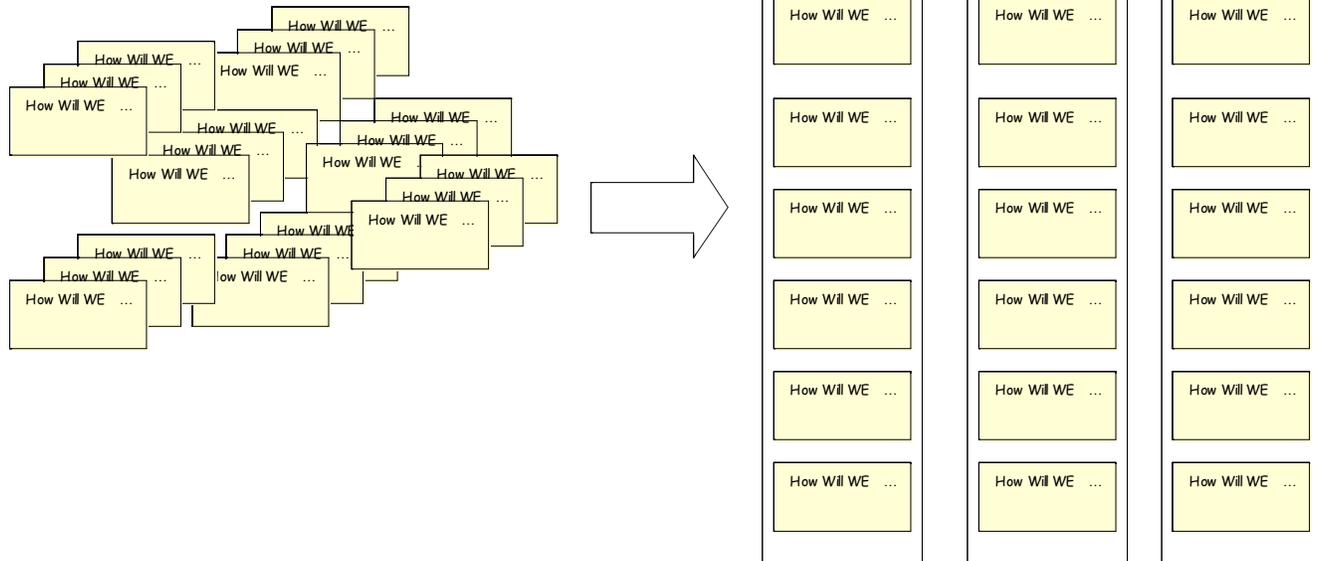


Figure 5 – Affinity Diagramming

reflect, think and learn on a deeper level than they may have at the outset. Once they are satisfied that they have captured all of the information available on the *Business Issues and Opportunities*, generated sufficient “*How will we...*” questions and repeated the affinity diagramming, the task is to create broad “*How will we...*” questions from the affinity categories. The broad “*How will we...*” questions need to capture the essence of the thoughts contained on the individual post-it notes.

These questions become the subject of the team presentations and dialog with senior leaders the following morning. The presentation must be largely oral, as visual aids are limited to flip charts. We want the participants to focus their time on content and minimize time spent on form. The participants are informed that the presentations will take place first thing on Tuesday morning.

We have found it very beneficial to hold an information meeting with the participating senior executives in advance of the program. At this session, the senior executives are informed of the process that the participants will follow and they are coached on their roles as facilitators and teachers rather than as decision makers. The executives are also given some practice with appreciative inquiry techniques, i.e. the effective use of questions to stimulate dialog with the participants.

The remainder of Tuesday is focused on Culture and Values. This module

first explores culture as a leader's greatest challenge to effectiveness as well as their lasting organizational legacy. It next explores the intersection of that organization's history, culture and values; how they affect today's strategic, tactical and organizational outcomes, how they will strengthen or inhibit future success, and how they may need to evolve in order to meet future demands. It probes how multiple cultures developed within the organization, and explores how these differences can work to strengthen or weaken the organization as a whole.

Our clients have requested that these topics be taught as part of their leadership programs. We have found the café format to be highly effective as an authentic way to surface and explore these deeply internal organizational issues. Participants are typically anxious to discuss these normally undiscussable topics and the café format is a structured way to exchange observations, stories and questions between participants and across different business units. Through these exchanges, organization-wide awareness grows and questions to consider during the evening group work emerge. Examples of "How Will We..." questions that have emerged for further consideration during evening work include, "How will we use the rock bottom foundation that binds us together to help us succeed?", "How will we recognize our multiple cultures and reconcile them to succeed against our strategy?", and "How do we learn?"

The second and concluding team assignment is made prior to closing the day on Tuesday. The assignment involves three steps and requires the development of: (1) *Vision of Success*, (2) "We will..." statements and (3) Major strategies. To create the "Vision of Success" the teams are instructed to fast forward the calendar five years into the future and collaboratively imagine and then describe what their world would be like if they were able to successfully leverage the strengths and opportunities and respond to the weaknesses and threats identified earlier. This description becomes the "Vision of Success". The next step is to reflect on what they would have to do to achieve the "Vision of Success" in the form of three to five broad "We will..." statements. The final step is to agree upon major strategies and tactics necessary that could deliver the "We will..." statements created. All of this becomes the content for the Friday morning presentations and dialog.

We know through observation and anecdotes that the participants experience significant learning and bonding throughout this process. The participants get deeply engaged in the assignment and designing their Friday morning presentations. They invest a significant amount of time and are usually up late Thursday night preparing their presentations. They always find clever ways to bend the flip chart only rule for visual aids when delivering their presentations. We are always



amazed at the creativity and passion that results from this experience.

The senior executives who support the program throughout the week are similarly affected, with many expressing an almost speechless enthusiasm at the quality of ideas, camaraderie and confidence delivered by their participants. Best of all, there is excitement that the process itself can be sustained and spread by those who have experienced it during the week. In addition to the individual skill-building, strategic discussions and heightened organizational awareness, the value of questions and good conversation is a lasting takeaway for all involved.

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