Major Techniques in Organization Development
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OD is short for Organization Development. This is not a new term. Behavioral scientists have been writing about Organization Development for over 30 years. The science has evolved into many different approaches all aimed at the same objective: to enable massive improvements in organizational performance through specific and planned interventions.

I have been involved with dozens of OD efforts over the past decades. Some of these have resulted in the desired improvement. Some have not. Let's review four major types of OD interventions (there are others, but they are usually variations or combinations of these four):

1. Action Search
2. Appreciative Inquiry
3. Future Search
4. Whole System Intervention

Although the objective of each of these is the same, the viewpoint and methodology for each is different. I will give my personal views of the strengths and problems with each method from my experience. All of these can work. The trick is to match the leadership style and organization culture so that the one selected has the best chance of success in a particular case.

Most OD work is performed with the assistance of trained facilitators. They have the professional training to lead groups through the chaos of change to arrive at the objective. Managers who attempt a "do it yourself" approach to OD work often create more turmoil and make things worse. This is especially true if the leadership dynamic is part of the problem (which is usually the case).

OD work is tricky. It requires the skill of someone trained in this field. Headstrong managers who decide to undertake massive organization change without help are like critically ill patients trying to remove their own appendix. It is not a smart strategy. The flip side is that the effort needs to be owned by the manager rather than the consultant. Leaders who abdicate their responsibility to be the spiritual leader of the organization pay for it with lower trust.

Action Search

Most organizations contemplating an OD initiative, do so because they are not satisfied with how things are going. If the current trajectory of business is meeting or exceeding goals, there is little impetus for change. The Action Search approach takes on a somewhat negative spin from the outset. The idea is to determine what is wrong and fix it quickly.

The first stage is to gather data. What areas of the business are falling short? How can these be changed to perform better? Unfortunately, many efforts using this technique become "witch hunts" where management looks for scapegoats. The process becomes one of uncovering ugly issues, followed by defensive tactics by those in charge.

Most of us have participated in this type of intervention. It takes place on a regular basis in some companies. Ask yourself how successful these programs have been in your experience. Do they produce positive change, or simply mask more underlying issues while creating interpersonal chaos? My experience indicates this technique should be used only under very tight constraints with ground rules supporting solid values. That does not happen very often. Hence, using Action Research has a real potential to backfire if not managed extremely well.

Appreciative Inquiry

This approach is the mirror image of the "action research" technique. The process starts by asking what is working well. Groups focus on what is going right rather than what is going wrong. The idea is to find ways of doing more of the right stuff, thus providing less reinforcement for doing the wrong stuff.

This is a much more pleasant process. It feels good to focus on strengths. It also provides a benchmark for improvement. The danger is that groups who are failing miserably can deceive themselves into thinking all they need do is clone the few bright spots to succeed.

I witnessed an example of this, years ago, and it was ugly. One business unit was on the verge of extinction, so they did a 3 day exercise in appreciative inquiry. By the end of the exercise, they were celebrating, dancing, and singing about their wonderful opportunities while they were actually going out of business. Six months after the crepe paper, helium balloons, high fives, and "jive dancing," they were all looking for new jobs.

I believe appreciative inquiry can be much more powerful than action research, but it needs to be tempered by reality. A combination of both methods can avoid a kind of "Pollyanna" view of reality.

Future Search

In this process, the focus is on the vision rather than the current state. The idea is to get groups engaged in defining a compelling view of the future. When compared to the present, this allows clarification of the gaps between current practices and organizational goals. Outstanding vision is the most powerful force for all individuals and organizations. Here are some comments on vision from my book (Whipple, 2003, p27).

Without a well-defined vision, the organization has no true direction. It is like a ship without a rudder, sailing around at the mercy of the wind, hoping to find a safe port with little chance of reaching one. Creating vision is absolutely essential for any group because it gives a common direction and provides a focus for energy.

Not all vision statements are helpful. Some are relegated to plaques on the wall and ignored. This is a tragedy because an uninspiring vision breeds apathy and is worse than no vision at all. If people point to the vision statement on the wall and say, "that is where we are supposed to be going but they don't act that way," you are in trouble.

Getting a great vision is not a 15-minute exercise. Some groups spend months working on developing a good vision statement. The process can get convoluted and burdensome if not handled correctly. If you are adept at facilitating group discussions, you may conduct this yourself. If not, a professional facilitator would be worth the investment. As the leader, even if you feel qualified to lead the discussion, you still may want to hire an outside person so you can become one of the people developing this material. The danger if you lead the discussion is that you could influence it too heavily.

In general, if a leader brings in a consultant to facilitate a discussion or to assist with a particular instrument or skill set, there is usually a high value. If the consultant is brought in to get into the trenches and do the dirty work of leadership, it is often a disaster because the consultant can undermine the leader. The leader calls in a consultant and says, "Things are a mess around here and I'm under a lot of pressure. Performance is horrible recently and morale is way down. I haven't time to fix the problem because I am overloaded just trying to run the business and I have to attend all these management meetings. I need you to assess what is wrong and recommend a program to get back on track. If my team buys into your recommendations, we will let you handle the program."

This leader probably has lost the ability to lead the organization effectively. As the consultant mucks around trying to understand problems, significant negative energy is unearthed but the consultant doesn't have the authority to fix these issues. Meanwhile, the leader is "busy running the business," and being micro-managed by superiors. Morale and performance go down even further until, finally, the leader is simply forced out.

This is why it is important for the leader to be the driving force in creating a vision for the organization. It cannot be delegated to a consultant or even a high-ranking lieutenant. The leader is responsible for making sure the vision statement is clear, compelling, memorable, actionable, and real.

Key ideas for developing a good vision statement:

Most importantly, make sure your vision tells everyone where the organization is going. A nice sounding phrase that doesn't have pull makes a poor vision. For a football team "We will be number one in the league within 3 years" is a better vision than "We will improve our position in the rankings every year until we become the top team in the league."

Avoid grandiose sweeping statements that are too broad. "We will become the best in the world at computer technology" would be too general and vast for a good vision statement. A better example might be "Our superior microchips will gain 90% market share with computer manufacturers in 5 years."

Make sure people can connect their everyday activities to the vision. "Every interface is a chance to bestow great customer service" would allow everyone to view daily activities with customer service getting top billing.

Keep it short and powerful. Avoid long lists of items that sound good but don't create a picture. For example, being "trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean, and reverent" may be a good motto for the Boy Scouts, but it would make a terrible vision statement.

Select colorful words that inspire rather than describe. "Our greeting cards melt the heart and transform the soul" would be superior to "Our greeting cards are better because they make people feel great."

Keep it short. The fewer words the better. "Absolutely, positively overnight" is better than "Our packages are guaranteed to arrive by the next day or your money back."

Use special words to emphasize your most significant point. "We will never, ever, run out of stock" is better than "We promise to keep our customers needs met by always having stock on hand."

Don't try to be abstract or cute in order to grab attention. "We have the softest software in the nation" might be a slogan helpful on Madison Avenue, but it makes a lousy vision. Instead try "Software delivered on time, every time!"

The initial thoughts often contain the seeds of the eventual finished product. Craft these thoughts into words and images. Sometimes a picture or logo can be enough to communicate a vision, like the Rock of Gibraltar for Prudential Insurance. Other times, it can be a slogan, such as Wegmans Market's "Every day you get our best" or General Electric's "We bring good things to life." The expression needs to have "pull"; it must provide forward momentum.

Communicate the organization's values and vision to everyone in it. Do this well and often, as it forms the basis of everything to come. Frequently demonstrate your alignment with the vision by naturally working it into conversations. You might say, "Well, let's call the customer and tell them about this situation. After all, our vision is to put the customer first."

Whole System Intervention

This is a kind of zero-based approach to OD. In this case, the activities of the organization are viewed through a "systems" approach. The emphasis is on getting a critical mass within the organization to redefine the business. Processes become the focal point for redesign efforts. This is less threatening than the action research technique because of focuses on the "what" and "how" rather than the "who."

The challenge with a systems approach is that can get pretty complicated. In systems thinking, we try to understand the interrelations between things. This is opposed to the usual linear way of thinking – If we do one thing it results in an effect. In systems thinking we need to understand not only the direct effect of actions but also the side effects. If leaders are unhappy with performance, they need to look at their system because it is perfectly designed to give exactly the result they are getting. Trying to untangle what is hurting the system and streamline the process for a better result can get convoluted.

The four OD interventions described in this paper are the cornerstones for organizational improvement. They need to be applied with care and judgment to be effective. When OD activities go awry, the "cure" is often worse than the "disease." With the health, or even survival, of the organization at stake, it is important to do this work carefully with the assistance of an expert.

*The preceding information was adapted from the book **The TRUST Factor: Advanced Leadership for Professionals**, by Robert Whipple. It is available on* www.leadergrow.com.

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