



How Collaborative Planning Improves Organizational Capability and Performance

by Shem Cohen

Collaborative planning creates conditions for people to discover their greatest potential for partnership and action. This approach to convening important conversations and collaborative decision-making is at the heart of the most successful multi-stakeholder and community-building initiatives and, when applied to strategic planning or organizational change, helps planners generate the best-informed decisions possible and mobilizes unprecedented high-levels of commitment to act.

Collaborative planning isn't a set program per se, but a 'scaffold' from which to facilitate remarkably productive meetings and change initiatives. It's a framework built on a hundred years of behavioral science and organizational systems research to make it most possible for people to:

- Come together productively;
- Talk about what's most important for them;
- Learn about themselves and the larger system of which they are a part;
- Navigate the many realities existing among stakeholders;
- Create vision;
- Discover common ground for action;
- Achieve a significant alignment of goals and values, unprecedented commitment to act.

These outcomes are within reach even with groups about whom others say, "You can't bring these folks into the same room at the same time." This is because the design and facilitation of a collaborative initiative is based on fundamental principles, values and methods which invite people to bring the best within themselves forward. They learn from each other and collectively discover shared meaning, values and interests. Applied to business planning and change, these methods align a workforce around mission, vision, strategy, solutions and values like no other method can. Applied to team interventions or conflict resolution, there is no better process to discover common ground.

In order to understand this scaffold and how it creates such great value, one has to be able to take a 'systems view' of their organization and environment and also bring into focus the human side of enterprise – what matters most to people and what moves us to action.

The Systems View

Every organization can be seen to be made up of four realms which shape a landscape of interdependent forces that determine the life, quality and success of a company.

The *technical realm* is the actual work performed through the series of activities that make up the value chain of the

business. This realm is defined through the capabilities, expertise and quality of commitment of the people who do the work, and the systems, policies and processes unique to the organization. Having (and keeping) the 'right people on the bus' and creating the right context/systems for people to do their best work is crucial.

The *political realm* is the realm of power and influence – who has it, how they use it. This includes both people with formal authority and informal leaders who influence people/systems and what inevitably gets done (or not) in the organization. A too-heavily politicized environment compromises an organization's effectiveness. A well-balanced political arena brings wider perspectives to the table, builds empowered coalitions and sets a best-informed path for the business.

The *social realm* relates to the quality of relationships throughout the organization. Organizations are made up of people. People do the work, create the value. The quality of professional relationships between people and across groups determines how well they partner, team up and deliver business results. A house divided can't integrate its value chain; respond well to customer's needs or propel the organization successfully into the future.

These realms both inform and influence each other in a dynamic interplay and shape the organization's culture (best described as, "the way things work around here"). A positive culture engenders high-performance; a culture of fear, mistrust or that supports mediocrity limits this potential.

All of this is part of an even larger system called *the environment* – customers/markets, shareholders, suppliers, competitors, regulators and stakeholders. Everything is connected, everything influences everything else. Like a playful mobile hanging above the crib, pull one string and everything else moves.

The Human Side of Enterprise

What matters most to people and what moves us to action? There is no secret about what matters most to people. After our needs for physical/emotional safety are met, the emphasis is on belonging, self esteem and growing to our highest potential. What moves us to action isn't money or benefits or a productive work climate – these are maintenance factors which need to meet a minimum baseline to avoid dissatisfaction. What motivates us are those things which offer avenues for growth – responsibility, achievement, recognition, an interest in the work and the promise of a better future. Paying more money is not a motivator; being involved meaningfully, achieving results and being recognized for one's contributions are.

The Power of Collaborative Planning

The power of collaborative planning rests in the ways conversations are designed and the ways these conversations are held. Quite different than traditional day-to-day meetings, this way of convening rests more in principles and values than tools or techniques. The principles inform the conversation design and process. Being values-driven opens a path of meaning, shared responsibility and collaboration. Together they create conditions to help people move beyond boundary feuds, silos and protecting special interests to discovering common ground on shared interests, goals, strategies and values. The result is highly-committed, concerted action and a milestone experience people remember as incredibly productive.

While these principles and values are drawn from large group planning methodologies (a great deal from Future Search), they are applicable to any situation where complex issues are calling for attention and a meeting of the minds is needed. If you're a leader, manager, supervisor, employee, family-member or friend, knowing how to apply these principles and values to important conversations will consistently bring remarkable value.

Principles

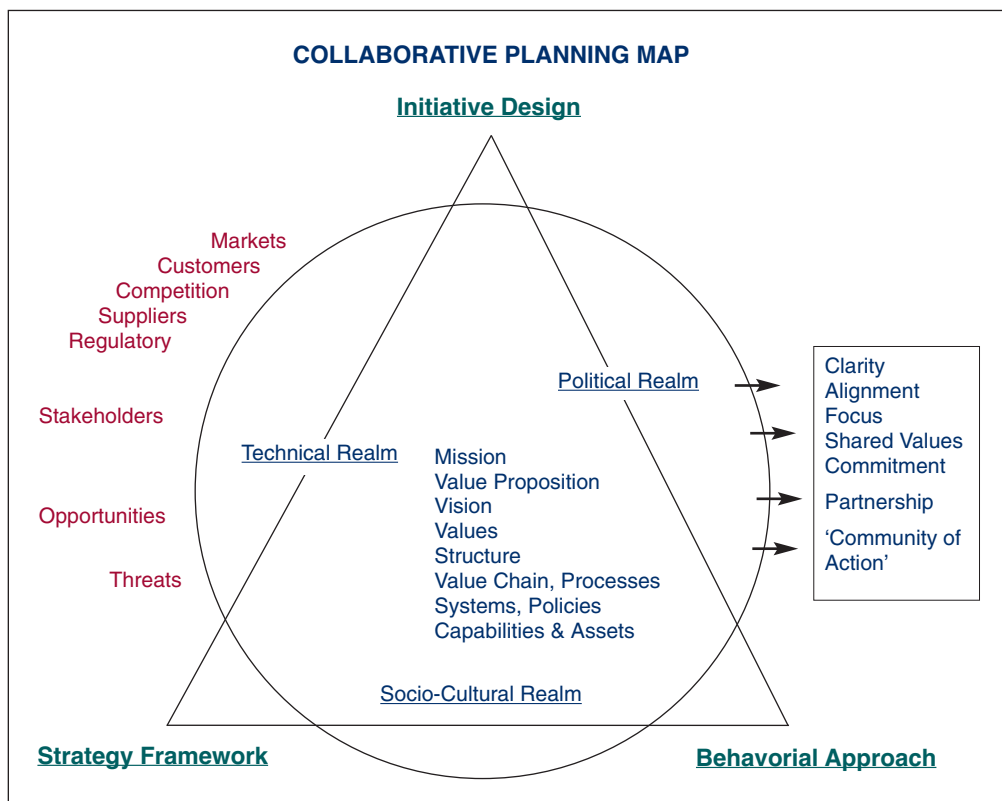
1) Think global, act local. Explore wider perspectives relating to the concerns at hand through engaging key people/groups across the organization to learn, create best-informed decisions and encourage partnerships that will be needed for future action. "How is this issue or change goal nesting in the system? Beyond? Who has information, authority, resources and a stake in the issue? Who will be needed on board to enact solutions?"

2) Explore the relationship of target issues/goals across the technical realm (how work gets done within/across groups); the political realm (how decisions are made) and the social realm (quality of relationships). Identify leverage points that will not only drive solutions, but will also create greater understanding, agreement, partnership and/or improvements across these realms.

3) Maintain a focus on the future and on common ground, treating issues and conflicts as information versus agendas to work.

4) Allow for healthy differentiation to take place. Common ground (what we all want to see/make happen) can only be fully achieved through first exploring our differences, then integrating around what we all hold in common.

5) Encourage self-management and responsibility for both the status quo and for taking action. Ask for public commitments to act.



Values

Lead with curiosity, hold conversations in which people are invited to contribute meaningfully, are honored for what they bring to the table; Develop a 'systems-thinking' view of the issues at hand; Focus on collectively shaping a picture of a more-desirable future and on action. Support what emerges.

In today's complex business environment, tapping the fullest potential of people to make best-informed decisions and generate the highest possible alignment and commitment is crucial towards creating value and gaining competitive advantage. Collaborative planning is so powerful because this approach, closer akin to ancient traditions of 'holding council' than simply being another meeting technique, rests in principles and values versus tools and techniques. This way of conducting strategic planning, change initiatives or team interventions sets up a process that enables a free flow of information in all directions and creates ways for people/groups to experience themselves in relation to the whole. It invites people to accept each other and listen rather than insist that others have to change first in order to see something successfully through. And, most importantly, it provides ways for people to share responsibility for what happens now and what happens next. As famed consultant and author, Marvin Weisbord says, "Each time we do principles over techniques, whatever the time frame, we make the world a little better than it was the day before." ♣

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