

# THE ORGANISATION DEVELOPMENT SYMPOSIUM:

## IMPROVING AGILITY, LEARNING AND ACTION

On 10<sup>th</sup> June 2021, CRF members gathered for **The Organisation Development Symposium: Improving Agility, Learning and Action**, an event that built on our 2019 [\*OD Manifesto\*](#) by exploring organisation change and transformation as we begin to exit the pandemic and move to a permanently flexible way of working.

Chaired by Rupert Morrison, CEO of orgvue, and featuring contributions from Dr. Mee-Yan Cheung-Judge, Professor Joseph Perfetti, and Professor Dave Snowden, attendees had the opportunity to:

- Encounter new knowledge and concepts
- Learn, collaborate, and develop
- Work with frameworks that deliver improved organisational effectiveness
- Leave energised and ready for further action.

These Post Meeting Notes summarise speakers' sessions, key takeaways from the day, and links to further resources.



**WATCH A FULL RECORDING OF THE EVENT HERE:**



### VIDEO TIME REFS:



**OD Competencies To Go Forward or Not?**

0:00:09

Dr. Mee-Yan Cheung-Judge



**The Agile Dashboard Lessons from the Pandemic**

0:57:14

Prof. Joseph Perfetti



**The Cynefin Framework**

1:47:09

Prof. Dave Snowden

# THE ORGANISATION DEVELOPMENT SYMPOSIUM: IMPROVING AGILITY, LEARNING AND ACTION

**1** Agreeing OD standards has been a long journey with no resolution (as yet). We are grappling with the challenge of how to **take a body of OD knowledge and codify it.** How do we say what mastery is? One solution may be to let mastery emerge through informal networks.




**2** **Increased uncertainty is creating decision chaos** – the world has moved from complicated (problems were ultimately solvable – a strategy could be plotted, like chess) to complex (like poker, we now have to make a decision before we see the next card), and many organisations and their leaders are paralysed by this uncertainty and the risk it entails.




**3** **Organisations must adopt forward-looking metrics (speed, interaction time, pivot) in order to enact strategic agility.**




**4** We can't act without information, but in today's complex world we must be **prepared to act with 70%** of information, accept there will be some failures, and then adapt and learn from those failures.




**5** **There is a challenge for the OD community to help CFOs understand complexity, networks, and how to evolve through informal networks.**



**6** The **value of uncertainty is tremendous,** and this is where entrepreneurs thrive.



**7** **Decision-making is shaped by context,** so we must have a good understanding of different contexts (clear, complicated, complex, chaotic, and confused) and their relationship to cause and effect.



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### OD COMPETENCIES: TO GO FORWARD OR NOT?

**Dr. Mee-Yan Cheung-Judge**

Additional publications and reports can be found [here](#).  
Slides can be accessed [here](#).



#### DR. MEE-YAN CHEUNG-JUDGE

is a Senior Fellow of Singapore Civil Service College, Duke University Exec. Programme and the NTL Institute, where she was Dean. Mee-Yan was a trustee on the Board of the ODN and founded the OD Network in Europe. The author of numerous articles, books and reports, she is also a member of the board of the Journal of OD Practitioner.

The purpose of any competence standard is to ensure those who wear the label of a professional in the field have a certain degree of proficiency in their practice, and to chart ways to develop further specialist expertise. Why, therefore, does Organisation Development not have a set of standards?

In this session, Dr. Mee-Yan Cheung-Judge explored the barriers to agreeing standards, whether OD necessarily requires them, what core standards should be versus specialist competencies, and the benefits of bringing these standards in.

#### Should OD have standards?

The OD field has been debating the establishment of competencies since the 1950s. Seventy years later, there is still no joint agreement across agencies and professional organisations as to what results in a competent ODP.

Much of the debate centres on whether OD should go down the certification and standardisation route or the developmental route. Few professional organisations tried the certification and standardisation route, and gave up with no uptake.

There are several barriers to agreeing standards.

- OD professional associations do not have the mandate to be a quality assurance professional body.
- The global spread of the field ('contextual differences') means that different countries want the agency to determine their own standards.
- There is an inability to manage the tensions between the developmental and certification focuses.
- The field is very diverse and has many specialisations.
- Specialism rather than the holistic integrity of the field takes central stage.
- There are many power and politics minefields.

Having no standards does create negative consequences though.

- Academic programmes are in decline.
- Lots of 'amateurish' individuals or firms offer an OD education curriculum – making it hard to discern who is doing credible development and based on what criteria.
- Internal OD practitioners get more bad than good press, as clients, practitioners, and providers do not share the same concept of good practice or fair/consistent standards.

#### What are the benefits of OD standards?

OD is a democratic field that centres the value of human beings. It seeks to enable every individual to be able to create, adapt, remain resilient, and thrive. It aims to help people to have the sustainable capability to create and lead healthy organisations.

Standards can help to move OD forward because:

- A field cannot develop without some sort of consistent/quality practice based on 'foundational competencies' or 'field standards' to guide credible practices.
- Those foundational standards are needed as a credible guide for curriculum design for those who are responsible for developing OD professional/academic programmes.
- There has to be a consistent narrative of what 'masterful practitioners' look like to guide individual practitioners to manage their own continuous development.
- They help organisations to manage the recruitment, selection, performance management, and continuous career development of their internal OD resources.





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### Q&A:

#### DR. MEE-YAN CHEUNG-JUDGE

- Q** There was a good degree of consensus in the poll on key competencies, so why is it so hard to agree these across the OD professional community? Is it power and politics? Is this holding back the function?
- A** *Politics play a role, but another factor is the diversity of OD practice within companies (HR/Strategy/commercial business/change departments). All relevant functions (which vary by company) need to collaborate in order to carry out the OD discipline successfully. And a third factor is that competencies must be appropriate to the context and challenge. This is difficult as it's hard to match a team's skills to every challenge. It's difficult to get the balance of the OD team right.*
- Q** Definitions of competency are about character, yet the competencies we named are more about skills – is that distinction important?
- A** *Let's take the competency 'Theory and Applied Behavioural Science'. The primary part is knowledge attainment. But this will depend on our desire to learn/grow, to be credible in our practice, our view of what constitutes good service, our value of having integrity in our information sharing. So while the key component of this competency is knowledge, using this competency will involve the skill of translating theory into shaping the design of any intervention...etc. Underpinning this is our desire to serve well. Can one grow this? My answer is a cautious yes, as given the right field, the individual will want to modify their innate orientation as they see the utility in doing this.*
- Q** It is difficult to get a large, diverse group of people to agree competencies. Mee-Yan, have you tried to put standards out there anyway?
- A** *Yes, and I have failed, for all the reasons discussed. I am now building an app based on my work in the area. Getting agreement on a set of competencies is going to be difficult because people and organisations are power-hungry. We are not building bridges. So perhaps letting the individual practitioner define for themselves from a menu of competencies, and then enlisting the help of a coach to achieve mastery, is our best bet going forward.*

## THE AGILE DASHBOARD LESSONS FROM THE PANDEMIC

**Professor Joseph Perfetti**

Slides can be accessed [here](#).



**PROF. JOSEPH PERFETTI** is a speaker, consultant and expert in corporate finance and strategy. He has delivered more than 2,000 executive teaching days over the past 25 years for organisations such as McKinsey, Google, Santander, Merck and Nokia. Joe currently serves as a Lecturer at the RH Smith School of Business at the University of Maryland, where he is also Professor of Finance.

You can't drive a car looking in the rear-view mirror. Traditional metrics are backward looking. They keep score. What did you do last month, last quarter and last year? Companies need to keep score to assess performance: growth, margin, return on equity, and total shareholder return are common metrics. But they do not tell you how the company will do in the future, and value is about the future.

In his session, Professor Joe Perfetti introduced the Agile Dashboard.

We are in the age of agile. Agility is all about systems – market, human, organisational. Market systems often move faster than the other two systems. If you can't keep up, you won't be successful. Strategic agility means the rate of change inside the organisation keeps up with – stays ahead of – the rate of change outside. Building strategic agility requires a systemic approach, and the human system (culture, teams, etc.) is one of its three pillars (alongside market and organisational pillars).

Thus, in the age of agile, companies need to put forward-looking and predictive metrics on their dashboards. The Agile Dashboard was researched and developed to help organisations (and their leaders) address this gap. It helps us understand and deal with complexity.

The Agile Dashboard asks:

- Can I **S**can the environment to see the road ahead?
- Can I **U**nderstand what I am looking at and make sense of the information?

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- Can I **D**iscern the choices by creating options and flexibility?
- Can I **D**ecide and take action with imperfect information?

It answers these questions by looking at three categories of metrics: Speed, Interaction Time, and Pivot.

- **Speed** – How fast your organisation can move
- **Interaction Time** – The rate at which your organisation can **S**can, **U**nderstand, **D**iscern and **D**ecide (**SUDD**)
- **Pivot** – the ability to act and execute a change in direction.

These are critical elements for leaders to monitor whether their organisations are prepared to operate successfully in an uncertain future.

Joe explained that increased uncertainty is creating decision chaos – the world has moved from complicated (problems were ultimately solvable – a strategy could be plotted, like chess) to complex (like poker, we now have to make a decision before we see the next card), and many organisations and their leaders are paralysed by this uncertainty and the risk it entails. Paralysis leads to waiting to move, but this is the worst thing an organisation can do in a complex world. Instead, organisations need to get information, decide fast and execute.

- In a complex, rapidly changing environment, we have to do more testing and learning. Fail well (not fail fast).
- Knowledge is the next source of competitive advantage – the Agile Dashboard helps us to incorporate knowledge quickly into our organisations.
- We can't act without information. But we can't wait for 90% information. It takes too long in today's complex world. So we must be prepared to act with 70% of information, accept there will be some failures, and then adapt and learn from those failures.

What does all this mean for leaders?

- Leaders have to set the context.
- They have to be more transparent than ever before.
- They have to provide clarity (in simple, clear language).
- They have to manage capabilities and help the organisation deal with uncertainty. As agility architects, they provide a single source of truth and common definitions to the organisation.

Joe concluded his session by having attendees do an exercise in which they analysed their organisation's core, edge, and capability gaps.

### Q&A: PROFESSOR JOSEPH PERFETTI

**Q** Are there good examples of organisations that have successfully shifted away from a 'rigid' culture to a culture of experimentation? How did they do it?

**A** Yes. Necessity drives this, for many organisations. Lots of innovation occurs when people have a gun to their head (such as during the pandemic). Crisis presents an opportunity to do things you've never done before; it is very freeing to have nothing left to lose. For example, the travel industry was decimated by the pandemic – the quarterly results are so bad that many companies in this industry have nothing to lose. One airline has really taken this opportunity to experiment and change. A crisis accelerates things. Therefore, a key question is: How can leaders accelerate things without crisis? This is what separates the really good organisations.

**Q** What are you learning about applying all this in practice as a CFO?

**A** One key learning is that the importance of the culture and people side in these decisions cannot be underestimated. Culture and people can really get in the way of making decisions. As CFO, I want to move faster than the organisation. But everybody wants to think it through and slow it down. So we need to understand how critical the culture is to being agile. Some organisations get it, some don't. Yet culture eats not only strategy, but also agility for breakfast. The other big lesson is the fear of failure. Everyone is so afraid to fail in their organisation. But you should measure yourself on whether you made a good decision, not whether you failed. You can't make the right decision every time. Good decisions sustained over time equal success.

## THE ORGANISATION DEVELOPMENT SYMPOSIUM IMPROVING AGILITY, LEARNING AND ACTION

### THE CYNEFIN FRAMEWORK

**Professor Dave Snowden**

Blog posts can be found [here](#).



**PROF. DAVE SNOWDEN** is the founding Chief Scientific Officer of Cognitive Edge and Founding Director of the Centre for Applied Complexity at the University of Wales. His work covers government and industry, looking at complex issues relating to strategy and decision-making. He has held significant academic appointments worldwide and founded the Cynefin Centre for Organisational Complexity.

The Cynefin framework identifies five different contexts for decision-making, each context related to different relationships between cause and effect:

- **CLEAR:** the domain of BEST practice. Where the relationship is not only obvious to everyone, but all reasonable people buy into the consequences. So in the UK we drive on the left, in Germany they drive on the right. Of course, this is not absolute – if a child runs onto the road, you do whatever is necessary to avoid killing them.
- **COMPLICATED:** the domain of GOOD practice. Where the relationship can be known, but only through analysis or expertise and which may not be fully accepted by all actors. Within boundaries, there is no need to validate expert opinion – even if there are different practices.
- **COMPLEX:** the domain of EXAPTIVE (radical repurposing) practice. Complex adaptive systems are deeply entangled, everything is connected with everything else, small changes magnify quickly, and unintended consequences are the norm. In this domain, we gain insight by conducting small, parallel, safe-to-fail experiments around any coherent idea of what to do next.
- **CHAOTIC:** the domain of stress-induced NOVEL practice. Only ever a temporary state in any human system, but always stressful. However, for those able to react quickly and appropriately, a domain where considerable change is possible. Used deliberately, it also allows distributed decision-making using whole of workforce engagement.

- **CONFUSED:** the central and starting domain for use of Cynefin. Entered accidentally this is a disaster, but deliberately (known as APORETIC) it is a state of suspended disbelief from which actions in the other four domains can be initiated.

Cynefin is one of a body of methods and frameworks in the wider field of *naturalising sense-making*, defined as *how do we make sense of the world so that we can act in it*. *Naturalising* refers to the use of natural science as an overall constraint on the valid use of methods and tools.

In his session, Professor Dave Snowden pointed to inattentional blindness as one example of the use of science to gain insight into what is and is not possible. In a famous experiment, radiologists were asked to spot anomalies in a batch of X-Rays, but 83% failed to see a picture of a gorilla, 48 times the size of a cancer nodule, which was in plain sight on the final X-Ray. You can't train people not to make this error, so you have to build systems that make the 17% visible to leaders before they conform to the majority belief.

#### USES

Dave talked through the use of Cynefin in the recently published [EU Field Guide to Complexity and Crisis Management](#). The Field Guide provides an easy-to-follow route map for executives, both to assess how they have responded to the current COVID crisis and how they can create a resilient organisation able to survive future, largely unpredictable events. An opportunity to think anew and act anew, to paraphrase a famous speech by Abraham Lincoln.

Cynefin has many uses around the world, including being incorporated into military training in all of the US Armed Forces (it was used by McCrystal of *Team of Teams* fame), as well as the UK, Sweden, Australia and elsewhere. It has been used in many different ways in industry as well as government, health services worldwide, and the not-for-profit sector. It is the dominant framework in use within the Agile movement to determine a multi-method, multi-vendor approach to change.

It is linked to a body of work that Dave led in attitudinal mapping (attitudes are lead indicators; compliance is a lag indicator) and weak signal detection. This has major applications in, for example, cultural change programmes and issues such as safety and cyber-security. Current work includes consolidating a body of over two hundred methods and tools into an approach to strategy that seeks to start journeys with a sense of direction, open to emergent possibilities that could not be anticipated in advance.



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### Q&A: PROFESSOR DAVE SNOWDEN

**Q** Is sense-making something we are born with? Do we develop it? How do we as practitioners step into that space more effectively?

**A** *In North America and Northern Europe, the focus is on talking then doing. In virtually every other culture, it's doing then talking. We have much to learn from other cultures' approach. The other key thing to consider is social atomism versus communitarianism. In socially atomic cultures, the primary unit of analysis is the individual, and the approach is to change the system by changing the individual. In communitarian cultures, the primary identity is the community/clan. To change things, you change the people with whom you interact. Think in terms of crews, not individuals or teams. Design the interactions between roles. Crews have capacity greater than the sum of their parts. You can change interactions and goals, but you can't change 'mindset', which isn't a scientifically valid concept anyway.*

**Q** What are your views on learning? What do you think about how organisations are approaching learning?

**A** *Poorly, because most human knowledge comes through the transfer of micro-narratives rather than formal documents. Furthermore, the engineering metaphor isn't helpful. 'What do people need to do and how do we train them to do it' isn't a useful approach. We are still relying on a competence-based, structural model instead of organic learning. An ecological model that favours critical thinking from multiple perspectives is what is needed, with a focus on the process through which we develop critical thinking skills.*

**Q** What has replaced behavioural economics?

**A** *It hasn't been replaced yet, which is part of the problem. Behavioural science has been subordinated to neoliberal economics – behavioural science is important, but the manipulation of it is problematic.*

**Q** The science you describe has moved on but organisational practice hasn't. Practically, where do you start, when so many sacred cows are flawed in basic design?

**A** *Start from where people are, not from where you want them to be. Don't decide where you want to be and try to close the gap (as many organisations do). Map where people presently are and create trajectories instead. Start with the intractable problem to get people engaged in a different way of working.*

**Q** What will be the result of the effects that the pandemic has had on informal networks in the future?

**A** *We are moving toward hybrid organisations. The pandemic offers a huge opportunity to redesign how people work. For example, we can redesign so that people work in diverse trios with tasks to run. We can integrate across silos without destroying the silos, thus creating cross-silo knowledge and capabilities. Increasing cross-silo network density decreases pressure on organisations as a whole. Everything you do in complex conditions has multiple outcomes, because you are changing the ecosystem.*

**Q** How do you enable people to open their thinking towards creating a diverse informal network, and avoid the bias inherent in more traditional networks? And how do you avoid group think with informal networks without direct inference, which then makes it a formal network?

**A** *If you try to formalise, it won't work anymore. People have a need for natural communication. In entangled trios, you make a logical pair and then they can choose a diverse third. Then you change those trios – for example, in some work I am doing we flex the trios every three months. The focus is on how the roles are connected. You have to change the dynamics of the system to allow things to emerge. It's not about designing the system you want; it's about creating the conditions for what you want to emerge. This is a big shift in thinking for many people.*



## THE ORGANISATION DEVELOPMENT SYMPOSIUM IMPROVING AGILITY, LEARNING AND ACTION

### FURTHER READING

Cheung-Judge, Mee-Yan. 2020. **Organisation Development Core Principles, Competency, and the Way Forward?** *Organization Development Review* 52: 3. [https://static1.squarespace.com/static/545a8a95e4b09bbf6a28a9e4/t/609107dc2c4dd36deb0b103f/1620117469423/ODReview\\_vol52\\_no3-Cheung-Judge\\_and\\_Responses.pdf](https://static1.squarespace.com/static/545a8a95e4b09bbf6a28a9e4/t/609107dc2c4dd36deb0b103f/1620117469423/ODReview_vol52_no3-Cheung-Judge_and_Responses.pdf)

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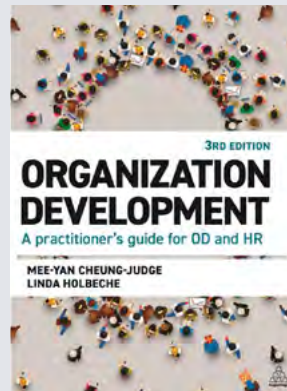
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*"Organisation Development is needed now more than ever, and professionals in the HR function need to understand how OD works. In this practitioner-friendly book, Mee-Yan Cheung-Judge and Linda Holbeche make the most of their broad experience to build out the necessary competencies and promote sustainable organisation change."*

You can order a discounted copy directly from [Kogan Page](https://www.koganpage.com/), using discount code **AHR20** at checkout, which will give you 20% off your order.

**Chris Worley, Research Professor of Management, Pepperdine Graziadio Business School**

### crf UPCOMING CRF EVENTS

-  **ONLINE WORKSHOP:**  
**Design Thinking for HR Leaders**  
 29<sup>th</sup> June, 30<sup>th</sup> June and 6<sup>th</sup> July  
 13.00 – 17.00 BST (Each day)
-  **ONLINE SUMMER LECTURE:**  
**Education: A Manifesto for Change**  
 8<sup>th</sup> July 12.00 – 13.30 BST
-  **ONLINE MASTERCLASS:**  
**Thrive: A Vision for the Future**  
 15<sup>th</sup> July 11.00 – 14.00 BST

### crf learning ON DEMAND

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