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The Dynamic Teaming Handbook

(World Café*)

in

support of

Virtual Enterprising and Knowledge Networking

by

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*Note: Juanita Brown created the phrase "World Café" and she and David Isaacs have created a very special model and community. www.theworldcafe.com/ There are some similarities between dynamic teaming and the World Café, but there are also major differences from which we are all learning.

Introduction

In the Industrial Era we assumed the task was to *divide and subdivide* work processes into tiny steps to cut training time and to better use the dexterity of human hands in production. This approach worked extremely well when the tasks were to take the wealth of nature, the productions of farming and mining and to transform them into finished goods, i.e. from cotton to clothing and iron ore to cars.

As we transition into the Knowledge Era, where we are working with raw ideas as much if not more so than with raw materials, the task is to *combine and recombine* our thinking in new and different ways. Our task is now to use the dexterity of human minds within a context of ever changing business opportunities.

In the Industrial Era we needed equipment, looms and refineries, to transform raw materials. In the Knowledge Era we also need ways of working which help us refine and weave ideas together. Our new looms and refineries are not based upon capital equipment, but intellectual and emotional capital, culture, our values and capability to value one another.

In the Industrial Era we need managers to coordinate well-known activities and to solve problems. In the Knowledge Era we need leaders who thrive on the unknown and who excel in discovering and seizing opportunities. The former thrive on routine, the new leaders know how to master the non-routine. Instead of direct commands, they use well-focused questions. Instead of orders, they know how to order the environment and culture to bring forth the best in individuals.

A Knowledge Era enterprise provides an opportunity for its executives, managers and professionals to learn to operate in the new environment, and to operate by the new business rules.

In the Industrial Era people were *told* what to do. In the Knowledge Era we *listen* and *learn*. We discover "patterns of possibilities" and we then weave together our capabilities and aspirations to deliver on these opportunities.

This *dynamic teaming* process is the new engine that drives business in the 21st Century. It makes possible the teaming and re-teaming of resources, both within a company and between companies. This requires a new leadership style, a new way of shaping the work context and a new way of creating a collaborative and honest atmosphere in the company.

It was Juanita Brown's genius to take a suggestion that I made at an Intellectual Capital Pioneer's event and call it the "World Café." Since this event, Juanita, David Isaacs and others have created a very significant process for discussion "questions that matter." See: www.theworldcafe.com/.

The dynamic teaming process described here is build upon the work I have done on "human time consciousness" described in *Fifth Generation Management*. It is one other approach to creating quality dialogue within and between companies.

More and more, companies are regrouping around their core competencies, and then teaming with other companies to seize ever changing market opportunities. This we call *virtual enterprising*. The coalition of companies last only as long as the opportunity, then they recombine in some new coalition for the next opportunity. Do we have leaders who can manage these processes with ease? We have ways to quickly spot and growth opportunities?

What are these companies leveraging? They are leveraging one another's knowledge as much, if not more so, than their capital assets. *Knowledge networking* is the process of combining and recombining, teaming and re-teaming, focusing and refocusing capabilities and aspirations in ever changing clusters of competencies. In order to experience these processes, we have developed a number of simple, yet engaging exercises.

Background to the Exercises

The following are a series of exercises designed to introduce individuals, companies and teams of companies to new ways of working together. Very little explanation is needed at the beginning of the exercises. In fact, it is better to go through the first two steps, and then ask the participants to identify their own "lessons learned." This is a much more successful way of helping people understand the new model than just telling them. Why? Because they have to both experience and feel the new model with their heads and hearts before they begin to understand how different it is from the traditional ways of working.

There are four concrete goals for these exercises:

- To experience and learn the dynamic teaming, virtual enterprising and knowledge networking processes;
- To learn to identify and build upon the strengths of others, other individuals and other companies;
- To identify challenging and profitable project opportunities and to discover significant patterns between them; and
- To build relations of trust and openness so that the participants can do real business together now and in the future.

The approach builds upon the natural intelligence, energy and capabilities of the participants. We work in teams of four persons to make it easy to discovery one another's capabilities and aspirations and to discover opportunities and build businesses together. We move people between tables to show how the *outsider* is a really a valuable *insider* who can bring new ideas, impulses and energy to our efforts. We also discover ways to build working relationships between tables, symbolic of the ways we can build working relationships between our actual companies.

These processes are designed to demonstrate dynamic teaming, virtual enterprising and knowledge networking. Instead of the traditional value chain, we work the "valuing cluster," the dynamic interrelationships between company, suppliers, customers and customers' customers.

> Instead of focusing on what does not work, the deficiencies of the other, and their problems, we focus on their strengths and ours. *How can we use our strengths to strengthen our customers' capabilities so they better meet their aspirations towards their customers?*

Typically concrete business opportunities are born in the space between our customers and their customers. As we team our capabilities and aspirations, we can, in concrete ways, use our strengths to help enhance the capabilities of our customers, allowing them to be more successful with their customers. This process is driven by the excitement of discovery and accomplishment. It thrives as we identify, seize and deliver on concrete opportunities.

These exercises give the participants a first hand experience of an open, trusting and dynamic environment where the unexpected possibilities can continually fuel new insights, initiatives and innovations. When people and companies feel valued, they are able to value others and to experience the fluidity of continual movement and accomplishment. They are also open to sharing their aspirations, the seed corn of new economic activity.

Capabilities, Aspirations and Opportunities

Why the focus on capabilities, aspirations and opportunities?

In the Industrial Era we focused on predefined tasks, needs and problems. People have done jobs and they have "played" roles based on position and rank.

In the Knowledge Era we want to use the full range of potential of our human potential. We, as people, develop over the years a wide range of capabilities. Moreover, we are continually striving to use what we know in new ways. Our aspirations inspire us to test ourselves and to find new opportunities in working with other people and organizations. If our capabilities are the product of past efforts, our aspirations point us to the future. Our challenge is to dynamically combine our past capabilities and future aspirations: as individuals, teams, and companies.

The key question: *Can we work in a synergistic and collaborative manner to seize and deliver on these opportunities together with our customers and suppliers?*

Life is so much more than playing a role; instead it is an opportunity to be creative and authentic together, creating things, moments, events, capabilities, visions, dreams and ultimately through these ourselves. The ultimate goal of these exercises is to identify two to four concrete opportunities that focus and energize the collaboration within and between companies. We will then create the appropriate teams to deliver.

The teams should also include persons from our supplier and customer communities. Working together they will soon learn how to co-create and co-innovate.

As these teams learn to build off one another's capabilities, and become energized by one another's aspirations, we will also learn how to roll into our work a stream of continuous learning that can nurture and refresh our efforts. We are, in essence, prototyping modes of working together for the 21st Century, key to company's future success.

The World Café approach helps us get beyond the false dichotomy between "individuals" vs. the "team." Good teaming can only work if individual capabilities, unique nesses, and passion are recognized and actively appreciated. Good teaming (as opposed to having teams) can bring out the very best in each of us, intellectually and emotionally.

The Dynamic Teaming & Knowledge Networking Process
(Note: There are some PowerPoint slides that are used with this process. If you are interested in seeing them, please send me an email.)

Round One ... (Discovering Individual Capabilities and Aspirations, Figure 1)

1. Seat people at tables of four:

How do we master the process of transforming raw ideas into powerful products, services and/or events?

To experience this process, participants are randomized in their seating at tables of four. Various methods can be used. For example, all those whose mother was born in January would sit at table one, etc... Or those whose home phone number ends in a one would go to table one, etc... Randomization is an important part of the process and sets people at ease as to why they are sitting where they are.

2. Four overlapping circles (Figure 1):

Everyone is given Figure 1 with the four overlapping circles. These circles are divided by a dashed line into two sections, one for capabilities and the other for aspirations. The participants put the names of the four persons at their table onto the four blank lines. As they listen to their partner's stories, they are to add two to four bullets within the person's circle that captures their partner's capabilities and aspirations.

3. Sharing a story:

The participants are asked to think of something they have done in the last year or two about which they feel good (it could be something they have done at work, in the community or at home).

Ask people to sit quietly (in silence) for a few minutes to think of their story and make some notes. Let the story announce itself rather than being forced. (Also, this allows people a little time to get in touch with themselves, an important part of the overall process).

4. Sharing the story (first person):

Participants work in pairs at their tables, each telling his or her partner their story within eight minutes. Each partner listens very carefully, and by inference, picks out the capabilities of their partner that made it possible for them to have accomplished what they did, and also the aspirations, the impulses that drove them to do what they did.

Each person, as his or her partner is telling the story, notes down within the partner's circle the two to four capabilities and the two to four aspirations inferred by the story.

5. Sharing the story (second person):

After eight minutes, they switch and the listener tells his or her story and the other of the partner listens and notes this partner's capabilities and aspirations on the circle on the handout (Figure 1).

It is important the participants help to manage their time; otherwise some are still talking while others have finished.

At this point in the process, each person should have filled in one circle in with capabilities and aspirations of their partner.

6. Sharing capabilities and aspirations around the table:

Each person at the table shares the two to four capabilities and the two to four aspirations he or she gleaned from his or her partner's story. They should not repeat their partner's story, although it is useful to summarize in one or two sentences the focus of the story.

As one person is talking the other three (including the person being talked about) are filling in that person's circle, creating bullets for the capabilities and aspirations.

The four participants should finish this phase of the process with all four circles filled in. This becomes a valuable inventory of the talents at the table.

(Option: If the participants would like a listing of everyone's capabilities and aspirations, then hand out small cards and ask each person to list their partners name and their capabilities and aspirations. The cards can be alphabetize and type up for distribution. This listing can serve as a "yellow pages" of the group's capabilities and aspirations. In the phone book yellow pages provide very short descriptions of companies are included. Do these descriptions include all the company can do? Not by a long shot, but they point to actual or potential capabilities, products and services which we can seek out. We do not need to know everything about our colleagues, but we need a few handles or signposts and can then take the relationship further based on these. Certainly one does not discover all of a partner's capabilities and aspirations from a short eight-minute story, but that is not important. The story telling does yield much more information than most would imagine, and it is rich and valuable information.)

A Brief Note on Capabilities and Aspirations

A brief word about capabilities and aspirations is in order. It is fairly easy to identify general skills, like one's partner is a good planner, organizer, communicator, etc. These are high-level abstractions. What is much more interesting is to identify more specific talents, competencies and capabilities of one's partner that are truly unique. For example, one's partner is excellent in planning events that foster quality dialogue, or is a person who can create an environment where communication is at a deeper level because of the quality questions she asks.

Identifying aspirations can be more of a challenge. Aspirations are not just goals, but they point to where the person has his or her passion, source of energy, intent, and focus. Aspirations are the outward manifestations of deeper inner values. They really point to the dynamo that drives the person. Very careful listening is necessary to identify these. Each person has an inner motivator that drives him or herself. People feel excited when they notice their colleagues are taking them seriously in terms of the capabilities and aspirations. In fact, in our process people feel affirmed twice, first when they are listened to and secondly when their colleague is talking about them in public at the table and in a very positive manner.

After the inventory of Capabilities and Aspirations has been complete at the table, each team is ready for the next step. What can they do with all the talents they have discovered at their table? *Note: for a fuller discussion, please see Fifth Generation Management.*

Round Two ... (Creating a Business, Figure 2)

7. Creating a business:

The participants are now asked to co-create a company together, using the only real asset they have, their capabilities and aspirations (Figure 1).

Using Figure 2, each group of four should create a company, it is best that this company have nothing to do with their own business. This eliminates all the typical frustrations one feels for one's own company. It is important that ideas flow freely and creatively, and that each team not get bogged down trying to solve the problems of the companies they work for.

They should identify a business and give it a name. Then they should list the relevant capabilities and aspirations of their own team, and then imagine what the capabilities and aspirations of their suppliers, customers and customers' customers might be, noting these on Figure 2.

This should be an interactive process, not a linear process. Feel free to jump around, because one idea sparks another and gradually the picture emerges.

Key: Each team should identify how they will use their own capabilities to strengthen the capabilities of their customers so they can become more responsive to their customers (customers' customers).

Traditionally we have just focused on our customers (as a part of the linear value chain), and have not really understood our customer in the context of their customers. Second, we typically look for the weaknesses and needs of our customer, so we can "solve their problems." Although this is still important, it is even more important to work from strengths to strengths.

Notice the interplay between our customers and their customers, this space becomes the "field of opportunities." These small opportunities are like the grains of sand in an oyster. They are like the small initial conditions in a chaotic situation that can influence the unfolding of the process, like the beating of the butterfly wings in Hong Kong that creates a storm in New York. Remember how a few deft computer keystrokes of Lessing in Singapore brought down the most noble of banks in London. Small initial conditions do not have to just be destructive; they can indeed be the seeds around which we team our talents to create so much more positive opportunities. In physics, Heisenberg recognized that the way we do experiments influences the reality upon which we are experimenting. Likewise, the way we interact with our customers' influences the level to which we can co-create together.

8. Filling in the overlaps:

As each team creates its own company, it fills in the capabilities and aspirations in the four circles. Usually they ignore the areas of overlap between the circles, yet these areas of overlap reveal the synergy between the four circles.

For example, Skandia Insurance in Sweden sells annuity insurance. They have developed a model where about 2,600 Skandia people service about 85,000 external brokers and sales agents. These agents sell to about 1.4 million persons. The money they invest in the policies is management by 85 funds managers external to Skandia. Skandia's challenge is to work the dynamics of the interaction among and between themselves, their suppliers (funds managers), customers (brokers) and customers' customers (policyholders). It is not surprising that Human Resources reports to the VP of Marketing, because most of the company's human resources are outside their own company. Skandia is able to manage this model because they pay careful attention to the overlaps between the four circles.

Skandia focuses not just on their customers, but works to understand their customers' customers needs and aspirations for supplemental retirement income within the context of uncertain national social security systems. They support the interaction of their customers (brokers) and their customers through the development of laptop sales software. They bring their customers (brokers) and suppliers (funds managers) together periodically, which helps to increase the mystique of working with Skandia. And Skandia has to be very good at selecting these funds managers. Notice there is at least one major undertaking in the overlap between each circle. The real challenge comes at the overlap of all four circles, where Skandia's top executives much understand and lead this whole process.

Each team should identify one or two key element on Figure 2 at the points of overlap. They should also identify one or more key opportunities in the overlap between their customers and their customers (customers' customers).

9. Visiting other teams:

Then each team now sends two people to the next two tables. For example, team one sends someone to table two and to table three. The two people remaining at each table are to explain their company and its business idea to their visitors. The visitors are now co-participants on the team at this table and are expect to help contribute to the further development of the business in a creative way. The visitors will often see possibilities not seen by the original four on the team. This is a way of stretching people's thinking.

The visitors' tasks are two, first to understand and help enhance the company that they are visiting. Second, they are to think through ways their three companies (from the three tables represented at each table) might collaborate.

10. Return to home teams:

After about fifteen minutes, people return to their original tables and debrief. They should discover ways their business model changed thanks to the visitors. And they should discuss ways they can collaborate with the other teams.

They should prepare a brief summary on an overhead of the following:

- What are the business drivers (around what opportunities is the business organized)?
- How is the company leveraging its knowledge (capabilities and aspirations)? And that of the three other participants (suppliers, customers, and customers' customers)?
- How is the company strengthening the capabilities of its customers so you can better seize the opportunities they have with their customers?
- What might your company measure (four to six measurements) which will tell you whether you are reaching your objectives in working the four overlapping circles?
- What six values do you assume people need to have to be able to work collaboratively within and between organizations? and
- Lessons learned from this exercise that can be applied in your concrete project work in the Management Learning program?

11. Share their summaries:

If the total number of participants is relatively small, from 8 to 16, then each team can share their four answers with the entire group. If the total group is larger, then it would be best if the teams work in clusters of four tables, with each table making a short presentation to the other three tables.

The key values and lessons learned should be captured on a flip chart and typed up and given back to the whole group.

Now it is time to repeat the processes above, but to do it in such a way as to identify concrete project opportunities.

Round Three ... (Developing Specific Business Projects, Figure 3)

12. Team seating.

At this point, people should sit at new tables, this time using another randomizing algorithm. For example, we may use a father's birth month to distribute people. The participants welcome sitting with new people. And this time, because they have been through the process once, and have learned its dynamics, it becomes even more interesting. I is like learning to ride a bike (the first time around), but now they know how to do it, so they can sail along.

13. Identifying Organizational Capabilities and Aspirations (Figure 3)

Again people will be working in teams of four. They will again begin in pairs at their tables. And they will tell stories of something their organization or function has done in the last year or two that reveals the capabilities and aspirations of this group. Each will tell a story for about eight minutes and the other will listed, noting the capabilities and aspirations within the round circles. Then they reverse and repeat this process.

14. Sharing the capabilities and aspirations of the organizations around the table:

As in the first round, each person will summarize their partner's story in a sentence or two (no more), and then list the capabilities and aspirations of their partner's organization. The other three will write.

15. Develop specific project outlines using the four circles, Figure 4:

At this time, the participants will likely have an idea of their potential project or business opportunity. In order to develop an understanding of the dynamics of this project, they will identify the capabilities and aspirations of each of the four circles, their project or business opportunity, their suppliers, their customers and their customers' customers. The will then identify the opportunities being addressed by the project as well as one or two key element in each of the overlaps, as they did with their businesses in the previous exercise.

In working through these elements, they will also do the following:

- Envision the project as having been successfully completed, what are the major steps you will have undertaken to achieve this success?
- What measurement will help you move towards success?
- What unique leadership capabilities are needed to succeed?
- What six lived values will help you succeed?
- What on going capabilities do you expect to be able to implement within their companies so others can build off your learnings?

16. Visiting other teams:

Again, two members of each team will move to the next two tables to review their project approach and to discuss their thoughts on the items above. The also explore the interrelationship of the various projects. This step can take 30 to 45 minutes. Then everyone returns to their home teams and debriefs.

17. Summary reports:

Each team prepares on a transparency a summary of their project or business opportunity, its key elements and their thoughts on the points above and then these reports are shared by the group. They also begin to discuss the interrelationships between their various projects. Someone captures both the lessons and the issues on a flip chart during the presentations.

18. Group debrief:

A skilled facilitator now takes the entire group through a review of the underlying themes of their projects or business opportunities, the interrelationships of these projects, the leadership challenges, the values necessary for success and the payback to their companies for these projects or business opportunities. The participants are asked to reflect on the areas where they want to further develop their own leadership skills, and to take time to discuss these with a partner at the table (10 to 20 minutes). They are then given another 15 minutes to develop their own leadership development plan, and to identify ways they can support the development of their colleagues on the team.

Each team is then asked to identify one or two capabilities that may come out of their project work that will significantly benefit the capabilities of their company.

Some thoughts on the Dynamic Teaming and Knowledge Networking Processes:

The Setting:

Select a large airy room with natural lighting. Set up the room with tables for four persons. We have found four to be a magic number. It is small enough for intimacy, and large enough to offer variety. It is also easy to work in pairs at a table with four, move two people to other tables, etc. We have found that groups of three are generally too small, and it is often two against one. With groups larger than four an audience is created and people tend to talk to an audience differently than to colleagues in a small setting.

We have found it best to randomize participants, allowing fate to determine who is sitting with whom. By using a process which everyone understands, the acceptance of seating works smoothly. Depending on the number of participants, I often use the mother's birth month (could be birthday). For example, if my mother was born in January, I would go to table one. Of if there are only six tables, then those whose mother was born in January and February would go to table one. If the table is full, then the person should go to the next table up. Other ways to randomize the participants may be based on the last digit of a home phone numbers, the last digit of a badge numbers, etc.

The Dynamics of Story Telling:

We are using story telling to convey meaning. It is amazing how much we can put in our stories. Also, we all have unique stories to tell, but hardly someone ready to listen. So it is a real treat for most to have an active listener to their story.

Second, everyone is in a mode of careful listening. This is also a new experience for many. We are usually thinking about what we will be saying next instead of carefully listening to the other. In a deeper level, we are creating the conditions for a genuine "dialogue" rather than just a discussion.

Third, it is very nice to have someone talk positively about ourselves in front of others.

This is another dimension that I have discovered. When people come to a meeting they feel a need to establish their identity. In typical meetings they have to be assertive in some way. But through the valuing process, they feel valued and listened to. This has a wonderful impact at putting people at ease with one another. It makes it much easier for ideas to flow. People are less pre-occupied with what ideas they own. In fact, they quickly loose the trace of who owns what, because they will have experienced in the next part of the exercise the process of adding to and enriching one another's thoughts and ideas.