





By Janet White Bardwell

# OPEN FOR BUSINESS

Looking for a powerful meeting solution to add to your planning arsenal? For some companies and associations, **Open Space Technology** creates an environment where innovation blooms, morale soars and big problems are solved fast. The best part? It's virtually free.

**F**or Diane Leaker, director of quality and organizational development for Marchese Health Care in Hamilton, Ont., bringing Open Space Technology (OST) into the corporate setting was sparked by fantastic growth. Since its humble beginnings in 2000 as a 17-person operation, the health-care services and products provider has expanded exponentially to hit 90-plus employees this year. "With growth and success, there was concern about the change of culture that may occur with the growth of separate departments working in a variety of physical spaces," says Leaker. "Marchese is known for its family environment, where everyone knows everyone. The company wanted to preserve the intimate, caring environment."

Photo: Getty/Daily & Newton

In search of a meeting solution to help achieve that goal, Leaker decided to try out OST. Created in the early '90s by Harrison Owen of Potomac, Md., OST started as a simple but transformative meeting structure that aimed to inject conference sessions with the same energy and creativity Owen noticed from attendees during conference coffee breaks. After much initial success, Owen penned a book called *Open Space Technology: A User's Guide*, which quickly gained a passionate following worldwide and has garnered much praise for its almost "magical" results. Some of the more high-profile OST success stories include: Boeing, which used a series of OST meetings to facilitate a cross-functional design and problem-solving process; Rockport Shoes, which held a two-day OST meeting for all 350 people in its workforce that led directly to a

new product range that generates about \$20-million in sales annually; and Honeywell, which used OST to help employees come to terms with restructuring.

Sounds impressive for a structure that Owen says he created one evening in his backyard after a martini or two as he contemplated the boredom and frustration he was feeling with the organizational process of a conference he was producing. "At the time, it didn't occur to me that it was that significant, but it's shocking to see that groups can get so much done and really have fun doing it. That's the power of self-organization," says Owen. Many say its brilliance is its simple structure and complex subtleties that create the environment that finds untapped potential.

In the corporate and association world, figuring out if opening a space for participation is right for your business must be decided first, says Larry

Peterson, owner of Associates in Transformation, in Toronto. The corporate leaders must want to hear the opinions of participants and be ready to learn from them and adopt their solutions and ideas. "When working with a CEO or a senior team, part of the question is the readiness of the senior team to open a space; to create a place where emergent leadership is honoured, appreciated and desired. If a senior leader does not want to do that, then open space isn't the appropriate tool to use," he says. "I've been in some settings where people wanted to try it, and they've opened the space. But afterwards, they realized that they weren't quite ready for that level of participation."

Innovative corporations such as Google and Gortex, says Peterson, are the ones that do want that type of initiative from internal leadership. "When executing OST, having some of those conversations

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with the CEO or the planning team is necessary, so they are prepared to take full advantage of what emerges," he says.

The actual technology of OST meetings is quite simple. Here's a simplified description of the process: Once a topic is chosen (the broader the better, say the experts), management does the prep

## PARADIGM SHIFT

The critical subtleties lay in the preparation work, the facilitation throughout the meeting, and the follow-up procedures, says Diane Gibeault, owner of Diane Gibeault & Associés.es-Associates, an Ottawa-based bilingual consultant, who specializes in participatory methods for

becomes virtually invisible to the group," she says.

For Marchese Health Care, this strategy has hit the spot. "Using an Open Space approach, each employee has the chance to talk about what matters most to them and to be heard," says Leaker. "We are focused on promoting the concept of lead-

"I love it most when, at the beginning of the meeting, people are rolling their eyes, saying: 'What is this circle? What do you mean I have to create the agenda?' And by the end of it, the people who seemed least engaged often have the most profound insights. Watching barriers melt when people realize that they all have a common vision and goal is a thrill."

work to give the meeting focus and boundaries to ensure all participants know what is and is not possible. Participants form a circle of chairs and the facilitator warms the group up ("opens the space") with a quick review of the topic, how the process will go, an exercise to help the group focus, and lays the ground rules. Then the group members self-identify the urgent topics and issues for discussion in relation to the agreed-to theme or purpose. These topics are written on paper and posted on a board.

Each of these topics becomes the focus for a breakout session that will generate ideas and suggestions for immediate action and larger, longer-term fixes that can be considered when the resources are available. The group determines priorities for action and, if required, organizes project teams to continue the work started at the session. Commitment and ownership are critical to the success of OST events. The reports of each breakout group discussion form the proceedings of the meeting. These are available to all participants very soon after the session is completed. These proceedings, owned by all present, become the foundation for future action.

facilitating meetings, conferences, change processes and training. "It's really important that you have a facilitator who has been trained, or who has learned one way or another and understands the principles and the philosophies of the approach, because it's very different from traditional facilitation," says Gibeault, who has facilitated Open Space meetings for groups as large as 450 and says the results are continuously impressive. In traditional meetings, the onus is on the facilitator to keep everyone in line and happy, says Gibeault. With Open Space, the role of the facilitator is to create the conditions where the group can take ownership of what it wants to address. "The facilitator is there to support certain aspects, such as the production of the reports of discussion, but does not interfere in the groups. It's a self-managed process, with some structure to guide participants on how to get organized, and some principles that are very important, because they guide the behaviour. The role of the facilitator is not to entertain; it's to reassure people about how it all works, to make them comfortable with it. Within an hour, the facilitator

ership amongst all employees and, while the role of manager does encompass being final decision makers, managers are expected to come to decisions by drawing on the wisdom of their teams."

Michelle Cooper, owner of Ancaster, Ont.-based Integral Visions Consulting, Inc., facilitated Marchese's OST experiences and has used OST in her practice since 1995, when she took part in a course facilitated by Owen.

"I love working with OST," she says. "I love it most when, at the beginning of the meeting, people are rolling their eyes, saying: 'What is this circle? What do you mean I have to create the agenda?' And by the end of it, the people who seemed least engaged often have the most profound insights. Watching barriers melt when people realize that they all have a common vision and goal is a thrill."

Leaker says the OST style of meeting has also changed the way Marchese employees interact and relate to each other in more traditional, structured meetings. "There seems to have been a spillover, and our staff who are involved in the Open Space meetings are noted for their comfort in speaking up in an open and appreciative way in regular

meetings, rather than just listening to managers talk at them," she says.

## TOPICS FOR OPEN SPACE

Professional facilitators say it's a model that fits any purpose of meeting, as long as there's a real reason to meet and there is real interest. More specifically,

if you want to accelerate projects, this structure makes it possible, because you have the whole system in the room. It can also be used to strengthen teams, to realign the direction of the organization, team or group, for strategic planning or planning a new product. "But you must also be open to outcomes,"

say Gibeault. "When you don't have a fixed outcome that you are clinging to, that's when OST will work."

Cooper says she recommends OST whenever one of her clients can best achieve a solution to a problem by tapping into the collective intelligence of its workforce. She has also used OST when a company is facing a financial crisis or a downturn in business. "This tool is great for bringing people together to come up with ideas for overcoming the challenge," she says. "I worked with a group that was looking at layoffs – one of the solutions was that full-time staff offered to work a four-day work week in order to keep the talented staff that they had and be ready for the upswing."

The time needed for an effective OST meeting is also an issue in the corporate world. Experts recommend anywhere from three hours to a number of days, depending on the complexity of the issue. "It's a difficult one, because the pressure is constantly on from large organizations to do things in a very short time frame," says Peterson. "But if there's no sense of spaciousness, if there's not enough time to actually have a conversation, to take some initiative, to explore possibilities, then it's not appropriate to use this approach."

At Marchese Health Care, it has not only helped employees navigate the waters of intense growth, but has also helped the company foster a culture of leadership. Leaker adds, "The major benefit of bringing in an Open Space approach is the impact on the culture of the organization that provides a way for capitalizing on the wisdom of all the employees. The leadership needs to be willing to share their problems, barriers and concerns and be open to listening. It goes without saying, that employees who feel they make a difference and are valued also tend to be healthier and happier in their work – and the result is a more humane environment." ■

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– Janet White Bardwell is a Guelph, Ont.-based freelance writer and former editor of M&IT.

## TIPS FROM THE EXPERTS

*Here's how to help make your Open Space experience the best it can be.*

**1. Make Your Invitation Count.** The preparation of the invitation is very important, says Diane Gibeault, owner of Diane Gibeault & Associés.es-Associates, an Ottawa-based bilingual consultant who specializes in participatory methods for facilitating meetings, conferences, change processes and training. "It has to fit the tone of the meeting and let people know what to expect and what will be expected from them," she says. "They have to feel safe and passionate about the theme of the meeting or else the process won't work as well as it could."

**2. Don't Skimp on the Prep Work.** Part of the pre-work is to discuss what the givens are for the meeting, or the non-negotiables, says Michelle Cooper, owner of Ancaster, Ont.-based Integral Visions Consulting, Inc. "For me, it defines the container within which participants know they are free to act," she says. "I have found it far more damaging to invite people to think out of the box, anything is possible and then at the end say...oh no, we can't do that." Gibeault agrees. "In the corporate world, one of the important roles of the sponsor is to set the framework, the sandbox within which the group is working, what's open for discussion and what's not. Having been given that, people don't come up with priorities that are off the wall. There are some safeguards that help the leaders to contain the event so you don't end up where you can't possibly end up," she says.

**3. Circulate Post-Meeting Reports, Pronto.** The post-meeting reports and the decisions that are made going forward – if that is one of the goals of opening the space – must be followed through for the process to be truly successful, says Larry Peterson, owner, Associates in Transformation, in Toronto. "It's called convergence – looking at concrete results and taking the time to look at what has emerged and be clear about what's going to get support, moving forward, and how that support is going to manifest and what role senior management play in helping ideas move forward – all are critical elements," he says.

**4. Watch Your Time and Theme.** OST also has to have the right theme at the right time, says Cooper. "You would not want a theme about the future if you have just had a major layoff," she says. "You also want to have the right length of time for the OST for the purpose. For example, OST is a great vehicle for preventing conflict and working with conflicted groups. However, if you do not have sufficient time allocated to the OST, the conflict issues will be raised, but they may not have time to be resolved. In this situation, a two-day event or an event that has an overnight break that allows people to work towards resolution, would be important. A theme that is too broad in a short time frame can be challenging as well."

**5. Consider Hiring a Professional.** While the structure of OST looks simple, there is complexity underlying it that an experienced facilitator can manage. "There can be pitfalls if the facilitator is not prepared to hold space, gets in the way of participants or closes space. An experienced facilitator also recognizes when to intervene to keep space open," says Cooper.