

The Wisdom Council

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How can we help an entire organization reflect together, and obtain new insights? How can we shine light on the blind spots within a large system, and enhance everyone's ability to think well about them? And how can we do this simply and quickly - within two to three hours, instead of with a two-day large-group conference? The Wisdom Council, a tool based on Dynamic Facilitation and developed by Jim Rough, is a highly effective way we can do all this, and more

However, do entire organizations really need to reflect together? Is it not enough for the right insights to emerge at the top, and then be disseminated throughout? No, it is not enough, because organizations can often develop dysfunctional patterns of thought and behavior, which cannot be easily changed by the leadership even when they become aware of them. For example, a pattern that has become engrained in countless organizations could be named the culture of "whoever stops to take a breath, loses." By this we mean the phenomenon where people in organizations are often continuously spinning their wheels, working at a hectic pace and feeling scattered, with barely any time to pause (whether alone or with their teams) to take a breath and reflect, to look at the bigger picture, to consider possible improvements to their working methods, and to adapt proactively to the future.

In such organizations, "pausing and reflecting" is usually not considered work. What counts is only what appears efficient and is closely measured by the clock - what "looks like work" in the conventional sense. Jim Rough facilitated a Wisdom Council in a bank, where this exact pattern was identified by the Council. Afterward, it was presented to all of the employees, along with the Council's findings and recommendations for reflection (Rough 2002). The several hundred employees of the bank only came together for one and a half hours. However, as a result there were some significant changes in the bank. Many departments and teams drew significant implications for making much-needed changes to their everyday operations.

The Wisdom Council as a catalyst

How can so much be achieved by an entire system in under two hours? The key is the intensive work that has been done beforehand by a small group, the Wisdom Council. This Council has met for one or one and a half days in advance of the large group meeting, exploring a variety of different perspectives, and arriving at the insights that will then serve as a catalyst for the reflection process in the larger group. How exactly does this Wisdom Council work?

Typically, once or twice a year, 12 employees from the entire workforce are drawn at random. These 12 participants, including a mix of managers and employees from different functions and hierarchical levels according to the laws of probability, meet for one or one and a half days. They begin by exploring one or more issues on which there seems to be room for improvement. In the beginning, it's fine for the issues to be ill defined, seemingly unsolvable, emotionally charged or even taboo. The only guideline is that the topics be significant ones that affect many within the organization. Over the course of their time together, the Council develops the perspectives on these topics that it wants to convey to the entire organization.

The content that the Wisdom Council explores is not directed or restricted in any way. Participants choose the topics for themselves. Participants also decide how many issues to explore and how many solutions they want to find. There is only one proviso: all of the results, which are to be presented later, need to have the full consent of all 12 participants. This ensures that the perspectives of each participant are taken seriously and are integrated into something that is perceived as a shared and coherent solution. And so the Wisdom Council's findings and recommendations are able to "strike a chord" that evokes a positive resonance from the entire staff or members of the organization. When the members of the Wisdom Council report back on how they arrived at their findings, what they thought at the beginning, what dead ends they ran up against, what insights they found, and what shared

solutions they finally arrived at, the larger group usually responds with a spontaneous "Yes, that's it, exactly."

For example, in one IT company, the participants of a Wisdom Council wanted to find ways to reduce what they perceived as an extremely high level of complexity, which was caused by a variety of customers with different requirements. Hours were spent exploring possible ways to simplify things. But with each new proposal, there were others in the group who could clearly explain why it was important to maintain the complexity in that particular area. At the end of the first afternoon, the group arrived at their first major breakthrough. Someone in the group said, "We have been working on the completely wrong question. This complexity will not allow itself to be reduced. Instead, we have to learn how to better deal with it. Let's figure out how to do that." The group agreed spontaneously and then began searching for ways they could work more effectively with the inevitable complexity. Later, to the larger group of employees, the Wisdom Council presented not only their recommendations, but also the path they had taken to arrive there. As a result, a large number of employees, who had earlier been complaining about the high levels of complexity along with everyone else, now began to realize how and why this complexity was indeed necessary. And so they responded to the Wisdom Council's recommendations with "Yes, that's it, exactly."

A Wisdom Council can only arrive at unanimously supported insights and recommendations as a result of engaging in a very high-quality conversation – what we like to call an "extraordinary conversation." This high-quality dialogue is made possible by a process called Dynamic Facilitation. It is the shared breakthroughs arrived at through the conversation, that will later be offered as shared insights and recommendations to the larger system.

Communicating the results to colleagues

"Later" is, at best, no later than the next day. This allows the Council participants to report to the larger group in a vibrant and inspired manner. They will still have vivid

memories of how they have been talking with one another during the previous day or two – such as, for example, that they have been engaging in an unusually respectful and productive exchange. They will let the large group know, how much they have appreciated this. The listeners receive the enthusiasm of the Council members, and realize that they have been working in a free and unconstrained manner. The lack of any significant gap between the Wisdom Council meeting and the large group meeting, also forestalls any suspicion that management might have censored the results in any way.

The Wisdom Council usually presents its results at a two- to three- hour event that is attended by as many employees as possible. At this event, the Council introduces their findings and their recommendations. The presentation is not done by a single representative of the Council, but instead by the entire group. Usually several participants describe their lived experience of the conversation that took place in the Wisdom Council, and as a result the atmosphere of the Council is also felt in the larger meeting. Often the presentation is done in a creative or even humorous form, for example with a skit.

In one bank, the Wisdom Council showed, among other things, how the branch employees were being flooded with huge amounts of information. The system was set up so that not only the messages from the central office, but also any messages from any of the branches that were addressed "to all", would enter a common system. This meant that whenever any branch employee turned on their PC in the morning, their screen would display a long list of messages, so many that it was simply indigestible.

The system itself was not bad, but it was being used in an unconscious manner by those who were entering information into it. For the Wisdom Council's presentation, members prepared photos showing how employees sat with horrified eyes in front of the screen as they tore at their hair or tried to bite the keyboard in despair. The larger group laughed heartily when they saw the photos; at the same time, they understood what a collective problem was being created for everyone, by the cumulative effect of each person's actions.

After the Wisdom Council's presentation, the large group also has the opportunity to reflect on the results. Participants in the larger group can talk about whether they share similar insights, whether they agree with the perspectives or recommendations, and what implications those recommendations might entail. To facilitate this conversation, it is helpful to reconfigure the larger group into many smaller groups of 4 or 5 participants each. The World Café method is well-suited for "digesting" the results of the Wisdom Council. It allows participants to explore the Council's insights and recommendations in several rounds of small-group conversation, followed by a large-group conversation for harvest and closure.

The purpose is to allow all participants to better understand the insights of the Wisdom Council, not to plan concrete actions. That would hardly be possible in such a short time. Rather, each one is called on to continue exploring the issues and to draw their own conclusions about what actions should follow. Each work unit is also called upon to take some time within the next few days, to explore what actions they want to take as a result. Of course, this is also true for management. Thus, concrete measures are encouraged and are developed afterwards.

Sometimes the concrete measures will need to be invented from scratch. Jim Rough reports an example of a Wisdom Council in the steam power plant of a paper mill (Rough 1995). This Council initially listed topics such as "Communications between Production and Maintenance" and "Training." But then it became clear that there was another topic that no one had dared to name. It was the ash that was polluting the air inside the power plant and affecting the health of the workers.

Everyone knew that the paper mill's competitive advantage was due to the fact that they were working at twice the throughput for which the plant had originally been designed. Yet one consequence of this, was the black ash that hung in the air. No one believed that anything could be done about this, because the engineers had studied the problem for years without finding a solution. The problem with the ash had receded to the background of everyone's consciousness, until the Wisdom Council placed it squarely back on the table. The fact that the issue was being presented to the larger whole, gave rise to a new-found

determination to address the problem; it did not take long until a good solution was found to this previously "impossible-to-solve" problem.

Each Wisdom Council meets only once. After the Council has formulated and presented their recommendations, it is dissolved and replaced by a new one. A new Wisdom Council will be formed six months later, sometimes a year later. The new Council will have the choice of working on the same issues, or looking for a new set of issues. It can choose to modify the findings and recommendations of the previous Council, or to create completely new ones.

Although the Wisdom Council does not have any formal power, it does have significant influence: it has been authorized to shine a light throughout the company on organizational issues that are being perceived as essential, and to bring its findings to an open setting where they can be reflected upon by many. The Council creates new awareness among leadership as well as throughout the organization, and thus sets a great deal of change in motion. Thus, the next Wisdom Council will not usually need to monitor the previous Council's findings and recommendations, since by then the organization will have already undertaken significant changes.

Illuminating the blind spot

The Wisdom Council often brings up a topic that represents a blind spot of the organization – an area the employees as a collective are not perceiving, or an area where they are creating a reality that they do not want nor intend to create. Often the Wisdom Council opens employees' eyes to how a problem they have been blaming on "the system", is actually being created by their own actions. This catalyzes a significant "Aha!" insight. This is a frequent outcome of the Wisdom Council approach. This process of discovering a blind spot generally begins with the members of the Wisdom Council complaining about an issue, which is resolved through the unusually good ("extraordinary") conversation that takes place within the Wisdom Council.

For example, at one company, the Council included two executives. At first, the conversation circled around the topic that employees were being badly managed. Various Council members complained and complained that they were not being listened to enough by their managers, that they were able to notice problems much earlier than the managers and offer good solutions for these problems, yet their input was not being received, etc. This was of course a one-sided perspective, which, while reflecting a generally prevailing mood, also hinted at a blind spot. For almost a half hour, statements were repeatedly made in this direction. Yet when a group is guided with Dynamic Facilitation to engage in a really good dialogue, a breakthrough in awareness inevitably arises that illuminates the blind spot. In this case, one participant finally declared with great passion, that the responsibility did not only lie with the executives, but that the employees themselves would need to show much more courage: courage to do the things that they thought were right, courage to take a stand, courage to reach out with determination to the leaders. It was palpable how this insight landed for all of the participants in the Wisdom Council, who afterwards formulated a unanimous recommendation that the company's employees needed to show more courage, along with particular examples of specific actions that employees should feel encouraged to take. This resulted in a subsequent wave of bold action throughout this company.

Sometimes, a Wisdom Council offers very concrete recommendations for action directed at the executive team, and the situation is one where it is sufficient for the executive team to respond. In other cases, Councils direct their recommendations to the community of all managers. One Wisdom Council created a set of recommendations for project management, yet specified that only the executives, not the employees, should implement these recommendations. This Wisdom Council, therefore, needed an additional opportunity for presenting these results to the company's executives.

Yet in most cases, the results of the Wisdom Council are more comprehensive and involve the entire organization. As Jim Rough writes, it is often the existential issues rather than the strategic ones that are taken up by a Wisdom Council. The strategic issues are usually left to the leadership. However, an existential question may include whether the organization is really making a contribution to society and whether employees can feel

proud to work for it or not. A Wisdom Council can offer an in-depth exploration of these kinds of fundamental questions.

The Intricacies of implementation

The concept of the Wisdom Council is simple. Nonetheless, there are always questions with regard to specific implementation issues. For example, what do we do if the employees do not all work at one location? How can we implement this approach in very large companies? For example, one company that implemented the Wisdom Council had about 2,000 employees spread across ten different locations. It would have been very difficult to bring all these employees together for two hours. The solution here was to have the Wisdom Council present successively at each of the ten sites, and have their findings and recommendations discussed by the employees at each site. The first presentation was filmed and then shown at each of the other sites. This way all 12 of the original participants in the Wisdom Council did not have to travel to each site, yet we made sure that a few of them were present for each large-group event .

Participants who really want to be there

What do we need to do, to ensure that the Wisdom Council works well? One key is to make sure that those who are participating in the process, truly want to be there. After selecting Council members at random, the next step is to let them know how the process will work and ask them if they are willing to participate. One possibility is to draw 25 lots instead of just 12, and then announce to the first 12 that there are substitutes, in case they are not truly willing to participate. Alternatively, you can first ask for volunteers to sign up, and then choose randomly among them.

One company, as a first step, contacted all employees and invited all who were interested to sign up. About 80 employees came to an information meeting at which the Wisdom Council was explained in detail. 70 of them chose to continue to participate at that point. From these, 12 were drawn by lot, using a large "wheel of fortune" in the presence of

the entire group of 80 that had assembled. This drawing was filmed and published on the company's intranet. This approach emphasized the fact that the Wisdom Council was comprised of participants who were concerned about helping the whole organization take a step forward - an important prerequisite for success.

The right amount of topics

Often the members of a Wisdom Council are excited by the opportunity to present their findings to a large group, and to be heard by many, including management. As a result, sometimes they want to offer many concrete recommendations. Yet offering too much can easily backfire, as the large group can really only digest a limited number of points in the presentation and subsequent reflection. It is therefore the task of the facilitator to help the Wisdom Council members realize that that they can limit their own effectiveness by offering too much. Sometimes it may even make sense to offer the large group only one well-thought-out point.

Effective presentations

The effectiveness of the Wisdom Council's message is greater, the more impressively it is presented. However, sometimes Councils create presentations that do not sufficiently reflect the considerations that led them to their specific recommendations. Here, too, the facilitator has a significant role to play. Toward the end of the Wisdom Council's work, the facilitator becomes the presentation coach, encouraging the group to choose a humorous and unusual format for their presentation. While this encouragement may not always be followed, often the group finds it helpful. They may, for example, prepare a skit or quickly build a model of something. In this role of presentation coach, the facilitator supports the group to have their presentation tell an impactful story.

Topics that are of interest to all

The role of the Wisdom Council is to develop recommendations to benefit the larger whole. In some cases, this might include recommendations which are intended only for the executive team or for all managers. Yet even in these cases, the Wisdom Council needs to have the well-being of all of employees in mind. It can be helpful to remind participants that they have the opportunity to influence the thinking and actions of many people, by choosing topics that have a wide-spread impact.

Getting the whole system together for the presentation

In some organizations such as manufacturing, it can be particularly difficult to bring everyone together, because many employees are working in shifts. More than one presentation may be needed. It would be unfortunate if important messages only reach those employees who are able to be present due to the timing of their shift, or else who are having to come in voluntarily on their own time. In one manufacturing plant, the Wisdom Council developed recommendations for all workers to adhere to, so that the entire operation could run more smoothly. They were basically simple things: everyone needs to consistently perform the operator inspection at the beginning of the shift, everyone needs to consistently stamp orders, everyone needs to enter feedback consistently in the EDP, everyone needs to throw metal scrap into the right container. The value here was that this time, it was not the supervisors, but rather a circle of 12 colleagues who were sharing their insights with all of the workers and letting them know what was needed from them. Thus, it was truly important to find ways to bring everyone together.

Defining the system correctly

Is it always appropriate to convene a Wisdom Council for the entire organization? Especially with very large organizations, it can be hard to imagine doing so. In our experience, it is important that the members of the Wisdom Council and their later "audience" perceive themselves as living in the same world. That is, all participants experience their shared organization in similar ways and can therefore do something with

the insights and recommendations of the Wisdom Council. This was the case in a bank with 600 employees, as well as an IT company with 3000 employees. In the case of the bank, it was a company specializing in private funds and limited to a particular region. While an organization may be distributed across multiple sites, it may still be experienced in similar ways by all. Conversely, there can be mid-sized companies with a single location, where this kind of commonality is not the case. For instance, in a medium-sized manufacturing company with 1000 employees and 800 of them in production, the area of production may comprise an entirely different world. In such cases, it may be useful to convene a Wisdom Council only for production, as well as a second one for all other areas, possibly including also the production managers.

Selecting participants by lot

Sometimes it is particularly important in convening a Wisdom Council, to have proportional representation of all of the relevant parts of the organization. For example, in a school you may want to have equal proportions of students and teachers on the Council; in a hospital, equal proportions of nurses, doctors and administrators; in a company, employees and executives. In these cases you can create a stratified random sample; that is, for each subgroup, the participants for the Wisdom Council will be drawn at random, yet separately.

Fear of presenting to a group

In the best case scenario, all members of a Wisdom Council present the results together. But sometimes individual participants are anxious about speaking to a large group of, say, 500 people. If the group has developed an exciting presentation, many of the participants will choose to overcome their anxiety and present, regardless. However, if there are some people who are clearly refusing to present, one should not pressure them to do so.

Even with an assigned topic?

Is it also possible to specify the topic for a Wisdom Council? Yes, it is possible, yet this is a significant difference which needs to be communicated clearly to avoid confusion. It can be helpful to give this different kind of Council another name; Jim Rough speaks in this case of a Creative Insight Council.

At the manufacturing plant of a vaccine producer, a Creative Insight Council was convened on the topic of "Training." This was an important issue in this field, as complex biological processes require very accurate work that follows sophisticated operating procedures. The Creative Insight Council developed several innovative recommendations; in this particular case, they were not initially presented to all the staff, but instead to the community of executives.

During the Council's preliminary work, they had been exploring the topic of the extensive and detailed work instructions that staff were required to follow as part of their work. The breakthrough came when one of the participants described the instructions for the famous board game "Settlers of Catan." This game won an award in 1995 for its three-layered game instructions. To understand the game, it is sufficient to read a single, visually well-prepared page. Then in order to really play, there is a set of three pages you can read. For advanced users, there is a whole booklet with examples of game variations. The Council's recommendation to the executives was that the SOP's (standard operating procedures) for vaccine manufacturing should be structured in a similar way.

For the presentation, the bewildered executives were asked to sit in small groups, each of which received a "Settlers of Catan" game along with the sets of game instructions. Then they were asked to start playing the game, as quickly as possible. The impact of this learning experience was profound.

Conclusion

The Wisdom Council is a method that makes it possible to generate reflection and learning throughout a large organization within a relatively short amount of time. It can be used at regular intervals to support an ongoing collective learning process and to keep it in

motion. Companies that host an annual Kick-Off with all staff, can build in as part of this yearly event, the opportunity to hear and reflect upon the outcomes of a Wisdom Council. In many organizations, it may even be advisable to create a Council every six months. The Wisdom Council then serves as a regularly-occurring container for collective reflection. It thus creates the optimum conditions for evolving greater self-organization throughout the whole organization, without additional top-down control. With the Wisdom Council, it is always possible for the organization to develop insights that were previously unavailable – and thus within a short period of time, to take a significant step toward raising the quality of thinking throughout the larger whole.

References

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