

*The search conference is a proven method to get people thinking outside of the box...*

# The search for effective strategic planning is over

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*It is now possible to create organizations in which individuals can fully utilize their mind, heart and spirit; where the values, expectations and highest ideals of individual members are embodied in the structure and mission of the organization.*

**T**oday, people are also able to transform their enterprises into ones that continually reinvent themselves and improve performance via a learning process that produces an ongoing and *active adaptive relationship* between itself and its ever changing uncertain environment. **I** We can now transform maladapted bureaucratic, hierarchical, autocratic organizations into highly innovative, flexible and adaptive organizations because of two practical and field tested methods: participative design and the search conference.

Over the past forty years we have conducted both theory development and field research (begun by Fred Emery) which have now produced these two methods which create effective, flexible and adaptive organizations. These methods use outside consultants only to help your organization gain access to and reliance upon your own resources and capabilities.

**The search conference and participative design** — In a prior issue of this journal we discussed the principles of participative design and recounted how it can and has been applied to redesign a number of organizations.\* In this and the following article (by Steve Cabana and Janet Fiero) we share the field tested principles and theory which make the search conference, as we have developed it, a highly effective method to create strategic plans.

If you are tired of magical visions, losing market-share, plans that sit in file drawers, people working at cross purposes, treading water and going nowhere, then the search conference will by-pass these problems. It is systemic, reliable, replicable and will produce plans that will work — plans that people will want to implement. The search conference will give you the capability to discern the meaningful variables (and relevant trends) and successfully adapt your enterprise to the turbulent and uncertain environment of today and the foreseeable future.

To assert that we have a method to help people deal with environmental uncertainty and turbulence is of little use unless we share a common understanding of this uncertainty. Therefore we will begin by sharing our understanding of uncertainty in the environment of business, government, society and communities.

## **Turbulent, uncertain environments**

What do we mean when we talk about turbulence and uncertainty? Perhaps a recent story would help.

*The cassava are dying!* A few years ago agricultural scientists were scurrying around quite troubled about a food crisis in Africa. The scientists were concerned because in a region larger than the United States the cassava crop (a staple food for the continent) had been devastated by an insect pest called the *mealy bug*.

\* Fred Emery and Steve Cabana in the January/February, 1995 issue of *The Journal for Quality and Participation*.

The bug had seemingly come out of nowhere. It threatened starvation for millions of people if it could not be stopped. The countries in its path were poor and had little infrastructure, insecticides were therefore hard to use and had little effect on this resilient pest.

Another group of scientists thought that since cassava were also grown in South America that perhaps they could locate a stable environment wherein the mealy bug was naturally controlled. Through a good deal of intense field research they found a few of the mealy bugs in Paraguay where it had caused so little trouble that it was not even a recognized species. They discovered there a small wasp which laid its eggs in the mealy bug for its larvae to use as food during maturation.

After they had raised hundreds of thousands of wasps and released them from airplanes across the continent, in an amazingly short time the wasps did their job and the cassava environment was once again stable. And so it would be expected to remain; at least until another discontinuity suddenly appeared to threaten food sources in an another unexpected way.

**What we mean by environment** — Fred Emery and Eric Trist said in a 1965 article in *Human Relation* that they worked out some important distinctions about systems and their environments:

1. That there is a thing which you can call the *environment* which is separate and distinct from any particular system within it.

When you think of a system it could be your family, your enterprise (or a sub-component of it), your community or even your nation. The environment of the particular system you now have in mind has a myriad of people, variables, structures, rules, relationships, et cetera within it which change and shift over time.

This global environment of the enterprise is similar to the full context from which a quote is often extracted — accurately or inaccurately. Planning without having a good understanding of how your organization's global environment has changed or what new or previously undetected opportunities or threats are present is like depending on a quote out of context as a guide to decision making or action. Some systems may, in addition, have to examine their task environment\*\*

### Adaptive relationships are key to understanding organizations as systems...

There are three adaptive relationships which determine the long term survival of any form of enterprise. When these relationships are aligned in the same direction you have an effective, flexible and adaptive organization.

When they are not aligned or ignored they produce decreased productivity, quality, commitment to work, and apathy and cynicism. The flavor of the month and buzzword management is the result of ignoring these relationships.

1. The relationship between the individual and the values and expectations that come from society and their life experience.
2. The relationship between the work of the individual and their contribution to the product or service which the organization produces.
3. The relationship between the enterprise and its environment.

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2. To have an effective strategic planning function you will need to be able to perceive and learn exactly what is going on in your environment at any point in time. And the nature of the environment itself will have a major impact on those strategic plans.

*The nature of the environment* ..In a 1965 article on causal texture, Fred Emery and Eric Trist first used the word *turbulent* to describe what was then a barely visible emerging environment — the one which we are all so familiar with and live and work in today. Uncertainty is the essential condition within a turbulent environment. Uncertainty is produced by a dynamic and changing environment, wherein there are frequent and dramatic shifts in social values that foster instability.

*But only yesterday things were different...* In an uncertain and turbulent environment discontinuities can seemingly come out of nowhere to throw everything into chaos for any particular system within that environment. Current stability is no guarantee that tomorrow or the next day will turn out as you expected. What we now understand is that systems and their environments co-evolve together. That means you can influence your environment by developing strategies which stabilize some of its parameters. The global environment is still uncertain but for you with your plan it becomes understood and much more manageable.

\*\* The task environment is a sub-component of the global environment. It might be an industry with its competitors, suppliers, customers, and may include the larger organization surrounding the unit doing the planning. It is, in turn, connected to the global environment in all its complexity.

**“Most enterprises are still trying to analyze their environment with tools and processes designed for understanding a competitive environment instead of today’s uncertain and turbulent environment. This is about as effective as using a candle to find your way in the middle of a force ten gale.”**

**So how/why did things change?** Prior to the full emergence of our current turbulent and uncertain environment much of the developed and less developed world had experienced a competitive environment and planned accordingly. In this competitive environment two or more systems of a similar type such as the old *Big Three* automakers, the AP, UP and Reuters news services, or the old PanAm, American, United, Eastern fearsome flying foursome competed for the same finite resources and customers. This competitive environment, as Fred Emery noted in the 1977 book, *Futures We Are In*, and its social values were essentially stable, and industry structures only changed incrementally over time.

*Strategic planning in a competitive environment...* In a competitive environment it makes good sense to simply look at past performance of your enterprise and that of your current competitors to predict the future. <sup>2</sup>

In a competitive environment you could rely on problem solving and experts to define, in technical and financial terms, the steps which would take you to your next set of predetermined end points — that was also how you needed to learn in that environment. As such, it made good sense to concentrate power at the top with the CEO and perhaps a few trusted advisors functioning as the brain of the firm — nurtured by expert information supplied by specialists and consultants. With a predetermined destination you were only concerned with the means to arrive there.

*Why are so many in trouble today?* Most enterprises are still trying to analyze their environment with tools and processes designed for understanding a competitive environment instead of today’s uncertain and turbulent environment. This is about as effective as using a candle to find your way in the middle of a force ten gale.

*Things fall apart...* Up through the late 1960s and early 1970s it was workable to pretend organizations were *closed systems*. But we would all have to be ostriches with heads in the sand to not recognize that our organizations are dynamically interconnected with the environment. Consider this short list of changes intruding from the global environment and recall how they have impacted on your enterprise:

- The resurgence of the European and Japanese manufacturing capabilities (with all new capital stock and technologies from the mid-1960s to the present...

## Planning in competitive and turbulent,

### Competitive environment

*The mindset...*

- **Hierarchical control:** Top management commitment will automatically generate acceptance of and successful implementation of strategic plans.
- **Linear historical projection of trends:** Looking at a few selected historical performance and market criteria to extrapolate into the future on a linear timeline will produce incremental improvement in market share and position.
- **Analysis is more important than synthesis:** Process, consolidate, and aggregate hard data based solely on technical and economic criteria using analytical techniques developed and managed by experts.
- **Money controls performance:** People’s performance can be centrally controlled by a set of numbers tied to a compensation package based on competition between individual members of the enterprise, as well as units of the enterprise.
- **The firm as a machine:** External complexity and uncertainty is managed by reducing the enterprise into strategic business units (parts), developing plans for each one, adding them up and ignoring the interactions across unit boundaries.
- **People are cogs constrained by the machine.** Problem solving and improvement in technical processes are adequate to adapt the business to its environment.

*People act as if...*

- **Stability is a given:** The enterprise’s environment (task and global) is stable and unchanging — until it’s hit by a discontinuity like a mealy bug, a Sony, a Toyota or a CNN.
- **The old ways are the right ways:** Unspoken assumptions about how we can continue to be successful (embedded in unit boundaries, budgeting, rewards, information systems etc.) need not be explored.
- **Problem-solving is enough.** Success comes from reacting resourcefully to problems within predefined and unchangeable endpoints.
- **Thought separate from action:** Responsibility for thinking and doing are divided over and over again as one steps from one level of the hierarchy to another.
- **Cooperation can be mandated:** Political in-fighting and fiefdoms are part of human nature and must be dealt with by savvy managers. They can motivate people to act by telling them to be committed.
- **One right way:** Reducing a leader’s flexibility of response with financial controls/administrative procedures will establish a clear direction within which resources can be committed in a coordinated way.

2

- The US dollar goes off the gold standard, floats and is devalued in 1973...
- The oil price crisis and power of OPEC from the mid-1970s to the late 1980s...
- The rapid acceptance of imported consumer electronics and automobiles in the US market from the late 1960s to the present...
- The explosion of desktop computers and the software industry since the mid-1980s...

## uncertain environments compared...

### Turbulent, uncertain environment

#### *The mindset...*

- **Distributed control:** Commitment is earned through participatory strategic planning combined with responsibility for implementation of plans.
- **Creative synthesis of trends and desired future:** We encapsulate the past and expected future in the present to design a desired future. Basic continuities are carried forward while environmental constraints are indirectly overcome.
- **Analysis flows into synthesis:** The integration of analysis from multiple sources with direct perception arising from interaction with customers, associates, suppliers, etc. produces a synthesis or a holistic view of the environment.
- **Determined, inspired people control their own performance:** Energy, commitment and initiative are captured when people's ideals are embedded in their plans for the future.
- **The firm is a human community:** External complexity and uncertainty can be managed by building adaptive capacity into the organization, its planning and all the people within the enterprise.
- **People are flexible within an adaptive enterprise:** The ability to plan and respond quickly overcomes uncertainty and becomes an in-built capacity.

#### *People act as if...*

- **Discontinuities are to be expected and searched for:** The environment (industry and global) can shift and change at any moment.
- **Constant vigilance is necessary:** Assumptions of how to be successful in our industry and global environment must be continuously surfaced, updated and built into our internal systems to conform with the external reality.
- **They are actively adaptive:** Success comes from sensing trends and initiating change by exploring all possibilities since the achievement of specific endpoints is uncertain.
- **Devolution of authority:** Those responsible for different aspects of the business plan for and have the necessary authority to implement those plans.
- **Cooperation requires processes for managing conflict:** Sorting out what is agreed/not agreed and integrating work across groups makes us one community that will be able to cooperate to bring plans into action.
- **Many paths to success:** People are purposeful. They can be responsibly creative to produce a desirable set of goals and be actively adaptive to achieve their endpoints with flexible behavior.

- The GATT agreements since the 1960s and now NAFTA...
- The compression of time by first the fax and then by the internet.
- Increased Federal and state activity and regulation as represented by civil rights laws, the EPA and OSHA.

*How shall we act?* In today's uncertain environment it is important that people recognize that their enterprise must learn and plan as an open system to survive. This requires you to continuously scan the global environment, so when you do notice a mealy bug in or about to enter your cassava patch system, you will be able to adjust your plans accordingly. In an open system enterprise, every one of your enterprise's autonomous components should be able to function as a learning, planning community fully capable of adapting and fitting its new strategies to those of the larger system and the external environment.

*The steady straight arrow of the past can't hit the target anymore...* In a competitive environment, like Robin Hood, you could simply string an arrow, sight the target and let fire. In a turbulent, uncertain environment the target (consumer acceptance of products or services) is rarely stationary and in fact the target may change shape and location in relatively short periods of time.

Uncertainty and the interdependencies among and between systems created by it mean that a change in the nature of one system sets off changes in another which sets off another and on and on. Any new state of affairs must be jointly determined by your system in relationship to the larger environment whether you do so passively (your probable future) or actively (moving toward your desirable future) so that you have some influence in a co-evolutionary process.

Under these circumstances organizations must be able to travel along with the arrow and rapidly change course along the way as the target changes its shape and location. The subtle but important shift in attitude here is that your skills of dealing with uncertainty must be directed at achieving a successful endpoint with flexible adaptive behavior not in selecting a specific and unchanging endpoint.

- The collapse and break up of the Soviet Union and end of communist dictatorships in Eastern Europe...
- The rapid emergence of satellite communications...
- The almost overnight emergence of the little tigers (Taiwan, South Korea, Hong Kong and Singapore) in Asia as manufacturing giants...

**“(Y)our skills of dealing with uncertainty must be directed at achieving a successful endpoint with flexible adaptive behavior not in selecting a specific and unchanging endpoint.”**

*Increased stability, yes but more uncertainty is to be expected...* When you do strategic planning, using the search conference as Fred and Merrelyn Emery have developed it, you will be able to establish a greater degree of stability in your environment, but discontinuities will continue to surface. Many parameters will still change and/or disappear entirely. The breakup of the Soviet Union, destruction of the vinyl disk recording by the CD or the recasting of network television by the advent of CNN, cable networks and FOX Broadcasting are just three examples of rapid change in the global environment.

*The key is being able to adjust and redefine the path to the target as you go...* People are successful in this type of environment when they are all involved in implementing their plans and stay actively adaptive. A sketch map of the immediate terrain is often the best you can manage along the way. Those who pay close attention to the terrain rather than relying on the map of how they succeeded in the past are those most likely to succeed.

*It's time for a wake up call!* It's time to throw away our information junk food and stop relying solely on experts and set plans based on linear, mechanical views of the environment. Actions based upon such data will be born out of incomplete perceptions of the environment and will not only miss the mark, they will actually increase the uncertainty of your task environment.

*Strategic planning, survival and ongoing success...* Recall, if you will, that we said in the opening of this article that it is possible to work in organizations that continually reinvent themselves and improve performance via a continual learning process that produces an active adaptive relationship between itself and its changing uncertain environment. To produce a successful alignment of this important adaptive relationship each organization must ask itself:

- Where do you want to be ten years from now and how do you get there?

## The search conference

Merrelyn and Fred have spent the last 25 years developing the search conference, making it more reliable and replicable and teaching it to others. It has been used throughout the world for participative strategic planning for a variety of levels of organization:

- An entire industry...
- A whole corporation...
- A division, plant or function.

The search conference has also been used to resolve and plan the future for a variety of issues:

- Changing the rules of the game in an industry environment/system relationship...
- Creating alliances within and across industry boundaries...
- Creating partnership with customers, suppliers or government regulators, etc.

One of the most powerful applications of the search conference is that it can enable enterprises seeking to create partnership or alliances to discover areas of agreement/disagreement and to rationalize the areas of disagreements, thus making their relationship sustainable.

The search conference has been used to bring into being:

- New organizations or networks to plan for emergent niches or needs related to emergent issues...
- New policy making which involves the setting of guidelines, in governing institutions or organizations...
- New processes to help manage conflict productively (community futures, environment and development, merging separate organizational cultures in hospitals, corporations etc.).

*Where does its versatility come from?* It comes from an understanding of systems in their environments and the laws which govern the nature of the system, the nature of the environment and their relationship (the laws governing an uncertain/turbulent versus a competitive environment are different).

**Is the search best for large or small systems?** The search conference may be used for nearly any size or type of system you may choose to focus upon:

- You could place a boundary around a large multi-billion dollar corporation, a division of it, the corporation and an alliance partner or an individual facility within it.
- A customer business unit and a set of important customers and suppliers could be the system under consideration provided your purpose was to create a new system out of the previously separate systems.
- You could place a boundary around the medicare system in a particular state and bring together the people with the capacity to influence the future direction of that system.
- A group of drug companies and the EPA could conduct participative strategic planning to influence the future of the drug approval process.

The key, again, is aligning the adaptive relationship between the system you are focusing on and its environment. Through the search conference you are able to establish a system principle which will operate between a system and its environment. That principle looks like a set of purposes and may be translated into a mission statement (a mission statement, however, is an oversimplification of a required set of purposes or strategic goals).

Once you know that set of purposes your task becomes making action plans to set up an active adaptive relationship between that system and its environment; making it work and keeping it adaptive over time. And you can expect as discontinuities appear that a particular strategic goal may be added, changed or dropped to keep the adaptive relationship aligned.

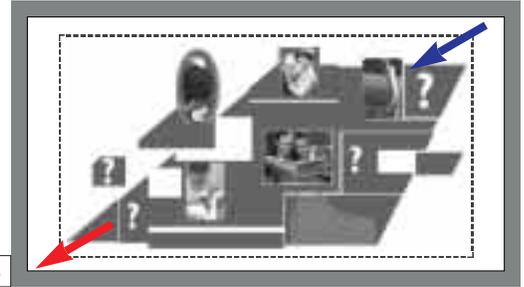
**Vital pre-steps to the search conference —** Even before your enterprise is ready to begin the search conference there will be much preparation:

- A most critical element is the selection of participants for participative planning.
- Interaction between the enterprise's leader and search conference managers identifies research and data collection needs. For example: interviews with critical customers and a full range of the enterprise's employees on their perceptions of the task environment are often conducted.

### Using a community reference system for selecting participants in a community search conference...

The community determines its own members whether it is a geopolitical, professional or issue related community. There are seven distinct steps to locating individuals to include in the search conference:

1. Research a rough social map.
2. Decide relevant criteria:
  - Known to be actively concerned about X.
  - Other as relevant to X.
3. Pick a starting point in each section of the map.
4. Ask each starting point for two or three names that fit criteria.
5. Ask each of the new names to give you two or three names that fit criteria.
6. After 1, 2, or 3 iterations the same names should appear.
7. Select from the total list (cover total map — jigsaw).



- Conference managers will brief the senior manager about the process and the participants' role. Out of this discussion will emerge a workable design and an understanding of who ought to participate in the conference.
- Collecting all reports, statistics, customer input, employee insights and information about the system as it really works and expert information relevant to your enterprise and its environment.

*The choice of participants...* The selection of participants is always critical but will vary depending on the type of search conference you are running. In an organization the people who attend the search conference are those who are paid to take responsibility for the overall direction of the entire organization. In other types of searches you need to use a process called a community reference system. <sup>3</sup>

When those people are brought together in a search conference, they become equals, regardless of formal status differences. The participants are responsible for all content work and to make the plan happen. The participants are also responsible for controlling and coordinating their own work as a large self-managing group after the planning process. This group will then have to involve other organizational members whose abilities can contribute to making that future a reality.

## One production manager's reaction to the Emery search conference and participative design...

### Jim Heckel, production manager at Hewlett Packard's Greeley, Colorado facility...

"We used the search conference to develop a plan to build manufacturing flexibility by developing a workplace where employees are supported by management to act as if they are owners.

We brought together all of management in manufacturing and a selected cross-section of employees (which would work as self-managing teams) to establish six *Year 2,000* initiatives for employees acting as owners:

- Rethinking our compensation/recognition system...
- Centering on key core manufacturing competencies...
- Get closer to customer needs...
- Exploring information technologies for those which will help make us more productive...
- Promoting awareness of diversity issues...
- Redesign and restructuring the workplace.

Participative design, or *turbocharged STS* as I call it, was selected for redesigning and restructuring the workplace because it is faster and more participative — which leads to higher commitment and some, but much less, resistance than traditional design. It is also less consultant dependent and the boundary of analysis can be very small (a single team) or very large (whole division of plant) which gives us tremendous flexibility.

The design component of participative design was new for us, but not its philosophy — we were already a *Theory Z* organization. I believe participative design will help us operate smarter by giving our people the ability to control and coordinate their work from the perspective of being owners."

4

\* This is not a puzzle in the sense of a board game where all the parameters can be known. It is a puzzle in the sense that you must get to know all of the parameters so you can establish a desirable set of strategic goals.

\*\* Note: facilitators are expected by a group to occupy the role of supervisor and frequently produce the same dependency behavior.

And when the planning itself is temporarily finished these people will continue to scan the environment and adjust their plans accordingly.

*Interaction between top management and the search conference managers...* Creating an active adapting enterprise begins with top management, as they are responsible for the strategic direction of the enterprise. They know the puzzle which has to be solved and the people who carry the knowledge in their heads who can solve that puzzle.\*

*The tasks of top management and the conference manager...* The task of top management is to bring together 20 to 40 of those people who carry the strategic knowledge of their organization.

The conference manager's task is to collaboratively design and manage the learning environment, the process and the structure of the puzzle solving process.

**The search conference goals** — Successful implementation of plans and a continuing adaptive capacity is the true test of this method. To get to that point, the search conference is structured to achieve one primary goal:

- To assist the enterprise in creating strategies and action plans which will enable it to attain and maintain a flexible and proactively adaptive relationship between itself and its environment.

There are also two important process goals:

- To sustain for two and 1/2 days a fully democratic/participative dialogue among the people responsible for the strategic direction of the enterprise.
- To go beyond that democratic dialogue and create a uniquely open and safe atmosphere which ensures that out of the box thinking can occur.

*Sustaining a fully democratic dialogue requires trust...* An absolutely essential part of the search concerns creating the conditions for trust between participants. This means that the planning environment must contain the following elements:

- People are encouraged to be and supported for being open with each other (no secrets, all information is available)...
- Official status differences are kept out of the conference; that is, no one-up/one-down or any condescension of any kind (that means we are all inherently equal)...
- Participants experience through the sharing of information and scanning of their organization and its global and task environment that their world is ordered and knowable.

*Out of the box thinking and who leads?*

The design of the search conference is significantly influenced by research done by Bion, (reported in his 1952 book, *Group Dynamics*) at the Tavistock Institute on what happens when groups come together to do creative work.

When groups come together for creative work, such as strategic planning, the usual tendency is that a leader has already been selected or the group elects a leader. Bureaucratic society (it's institutions, schools, government, enterprises, large conference gatherings etc.) organizes its work by freezing people within one role — dependency (people are given a supervisor to whom they look for all the directions and solutions while they devalue their own and other's abilities).

Another research finding of Bion's is that when a group elects a leader (or has one selected for it), it may then unconsciously perceive that person as dangerous to the group's existence and fight with or, more commonly, withdraw from them into apathy and low energy for the task at hand.

These tendencies can be avoided if you keep a group responsible for control and coordination of its own work. The trust necessary for a fresh reading of your organization and its global and task environments cannot be built and maintained if a parent/child or expert leader/unknowledgeable follower relationship dominates the search process. \*\*

This also sets the stage for a permanent dropping of these types of relationships throughout the organization if the search and strategic planning process is followed by a participative design process. **4**

**Stages of the search conference** — The process consists of three basic stages:

1. Learning about the environment...
2. Learning about our system or organization...
3. Learning about how to put those together; how to integrate the system and the environment with a set of action plans that produces an active adaptive relationship.

*Learning about the environment, your system and how to align the two...* The search uses a very different form of learning than you find in conventional *open-their-heads-and-pour-it-in* education. The evidence is quite clear that organizations which rely solely on pre-processed information junk food (meaning that experts have analyzed it and served it up to you), with its inherent time delays and incomplete quantitative information, are in the long term less profitable. It is when we search through all the possibilities with a well chosen group of people that we arrive at implementable plans.

Our capacity for adaptation is a function of our perceptive ability. We have the inherent capacity to scan the system/environment relationship and we can redevelop our creative capacity to arrive at implementable plans and reawaken the learning abilities we all had as children. We can derive these directly from perception and ecological learning. That means that all reports, statistics and expert information relevant to your enterprise must be collected prior to the search conference.

### A word of caution on seeing all search conferences as being alike...

The search conference under discussion here is the one which Fred and Merrelyn Emery developed in Australia. It is not the *future search* conference associated with Marvin Weisbord. Weisbord's approach is an elaboration of the *Schindler-Rainman and Lippitt collaborative community design* (dropping small group facilitators and the skill training component). It lacks many of the aspects of our model to arrive at implementable plans:

- Stakeholders from outside the system (as defined) are included in planning which conflicts with our understanding of open systems thinking and the principle that the group *doing and implementing* the planning is responsible for controlling and coordinating its own work.
- There is no process for integrating the work of groups or for making any conflict rational and understood.

It is these two processes of integration and sorting out in a precise way what is agreed to and what is not which ensures that a community comes into existence. Without these processes people may either revert to dependent behavior or withdraw into apathy and low energy. The Emery search conference allots a third of its time to the system's leaders developing detailed comprehensive action plans. When a *search* includes stakeholders it can hamper or endanger the development of a fully implementable set of action plans.

The search is a process for evaluating the importance and meaning of this material, as well as perceiving and making meaning of the natural and social environment.

*Managing the search conference...* It is easy for an inexperienced or unmentored search conference manager to slip into dependency creating behavior and prevent a group from thinking *outside the box*. The search conference requires able and skilled conference management. We have found it is best to have two conference managers given the complexity of the task. (*Merrelyn Emery has developed a training program to teach this process.*) Even after such a training program it is best to apprentice under the guidance of a skilled conference manager with a thorough understanding of theory and ample practical experience.

The success of this process depends on the practical experience and knowledge of the conference manager. It would be wise to check references with past clients when you consider this method, to make sure they had a satisfactory experience — particularly those who have had a year or so to implement their plans.

*Sustaining momentum and fully implementing the strategic plan...* After the search conference is concluded, the participants make their



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Merrelyn Emery has been involved in the development of the search conference and participative design methodology for over thirty years. Her most recent efforts have focused on the development and refinement of effective training programs for both methods. Her upcoming (co-authored) book *Search Conferences in Action: Learning and Planning Our Way to Desirable Futures*, will be published in the Spring of 1996 by Jossey-Bass.



Fred Emery, is a pioneer of self-management, and democratization of workplace structures and processes. His work presently consists of mentoring participative design practitioners and working on a new book on systems thinking.

plan happen and do so in a democratic/participative/trust building manner:

1. The search conference participants are responsible for their own work, its outcomes and the implementation of their action plans. Self-management is critical to maintaining an adaptive relationship with the environment...
2. They will then seek to involve other organizational members whose abilities can contribute to making that future a reality...
3. When they have made progress toward achieving their strategic goals and have reached a breathing place, the group needs to continue to scan the environment and adjust their plans accordingly.

(The increase in an enterprise's ability to create some order and certainty out of their uncertain environment lasts only as long as it increases its ability to continuously scan and adjust to its environment.)...

4. Clearly the commitment of top management or policy makers is essential to the implementation of plans but the rest of the organization must be committed as well. The search conference must be followed by processes in which the rest of the organization can participate fully in the implementation of the new direction. This is usually done through participative design sessions which make it possible for the organization to generate continuously adaptive structures and behaviors.

### Final thoughts

Corporations, school systems, governments, healthcare networks and non-profits are all feeling the pinch of change and uncertainty. They are all less able to adapt and respond to the environment's apparent uncertainty and chaos.

It is time to restore sanity to your planning methods. It is foolish to continue separating thinking from doing; you end up with weak, maladaptive plans or poor implementation.

The search conference is the most effective method we have encountered to restore an adaptive relationship between any organization and its environment. It offers leaders a reliable way of dealing with their uncertain environment.

You cannot continue to perceive planning as being in conflict with the content and processes of management, thus requiring expert planning staff or consultants to control the scanning process — the critical knowledge to your enterprise's success is not in their heads, it's in yours. Experts can be helpful, but they belong in a supporting role.

Commitment is earned through participative planning, not analytical detachment. It is the joy people experience in the creative working mode, while engaged in self-management, and the attachment of their deepest ideals into their plans which generates a sustainable energy to go forward.

It is foolish to continue dependence on the phantom of Taylorism and to rely upon the machine age nonsense that planning can be done by separating the enterprise into its parts and the detached rational integration of those parts into a comprehensive plan with one correct path to its accomplishment. Planning is a synthetic activity, of seeing wholes or gestalts, which the search conference was designed to accomplish. ♦

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**Co-authors Fred and Merrelyn Emery's note:** Fred and I want to thank Marvin Weisbord for his efforts to raise awareness of the Emery search methodology. We wrote this article to make a clear distinction between the direction Marvin took after studying the search methodology with us and the proven, practical path we have developed through iterative interaction between theory and practice and in collaboration with thousands of participants in search conferences over the past 30 years.

## The search conference method for effective strategic planning: Its purpose and design and a condensed history of its development...

**Purpose and design** — The search conference is designed to identify within turbulent and uncertain environments a desired direction or end for the organization (specific endpoints are not achievable in uncertain environments because of the continuous shifts within it) and increase the effectiveness of strategic planning and its implementation by giving the people — those actually affected by change — more control over long term purposes and directions:

- In a search conference participants are searching for the most adaptive relationship between themselves and their environment.
- The process helps organizations to break through limiting assumptions and creates an environment which supports innovative learning.
- In the environment created during the search:
  - People can accurately discern (from what had seemed a chaotic field of variables and factors) the possibilities or desirable trends and the limitations or constraints in their environment...
  - Consider their shared history...
  - And then develop plans and strategies which take advantage of the desirable trends and get around or ameliorate limiting factors and trends (strategies which may transform apparent limitations into advantages are also made more apparent during a search conference).

**1960** — Fred Emery and Eric Trist created the first participative strategic planning method and field tested it in 1960 with the Bristol Siddeley Aircraft Engine Company in Great Britain. They called the method and process *SEARCHING*, or the search conference.

**1965** — Emery and Trist publish a ground breaking causal texture article in *Human Relations*. Their message: The environment is an entity which changes its nature over time. A change in the environment effects the systems within it in ways different from that of the previous environment:

- Bureaucratic organizations were introduced to produce a competitive advantage in a stable competitive environment whose reign is ending. These bureaucratic structures were successful and viable for a time, however they did not meet people's critical requirements for work. The result was that people felt alienated and unsatisfied at work.
- We are in a turbulent and uncertain environment where the bureaucratic, hierarchical structures and principles are more and more out of place and dysfunctional.
- In an uncertain environment you need flexible, adaptive behavior and the capacity for the continuous redesign of work and adjustment to strategic plans.

**1970s** — Fred and Merrelyn Emery elaborated upon open systems theory to strengthen the method. During this period more than 300 search conferences were held in Australia. It was during this intense research and application period that the method was further developed with its strong theoretical base. Evolution of the method continues today through the interplay between theoretical understanding and application.

**1980s** — During the early 80s the search was brought to Canada, and in 1982, the Emerys brought it to the US.

**1993** — Fred and Merrelyn Emery began sharing their approach with practitioners at a series of seminars and conducted a search on the future of participative democracy in US, Canadian and Mexican workplaces.