



Ilene Wasserman (as of 2003)

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Enhancing Profitability Through Business Process Excellence: The Green Mountain Coffee Roasters' Story

We appreciate the opportunity to reflect back on our consultation with Green Mountain Coffee Roasters over 15 years ago. At that time, not many had taken an Appreciative Inquiry approach to process redesign and systems change. Ilene had been working with Bob Stiller, CEO and President, and his leadership team and, in the process introduced them to AI. Bob was a more than willing partner and quickly expressed the desire to champion a process of introducing appreciative inquiry to the whole organization in the process.

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This article provides a snapshot of the unique approach to the Design phase of the Appreciative Inquiry methodology as the company sought to: discover the organization's core strengths and capacities; envision opportunities for positive change; design the change into the organization's systems, structures, products and culture, and implement sustaining change. Included in this story is who was involved, the steps in the process, what we studied, and what was unique about the process, as well as our approach to Design, and what the organization learned about the Design phase of Appreciative Inquiry such as conditions for success is highlighted.

Bob Stiller, the CEO/president of the organization, was the champion of the overall process. Bob is a leader who believes strongly in engaging all the members of the organization in creating and executing the vision, and encourages continuous learning while doing so. With a spiritual base to his leadership, he saw Appreciative Inquiry (AI) as consistent with his commitment to build from strengths to create a better future. Over the course of seven months, approximately 60 people learned the foundations of AI, and then conducted six inquiries focused on business processes, and one company-wide inquiry focused on organizational excellence. The inquiry touched most employees, as interviewers or interviewees, as well as a sampling of customers, board members and other stakeholders.

In the course of the first summit, this group spontaneously organized itself around the topic of communication.

What was unique about the approach we took?

This project was unique in several ways. First, we brought together multiple teams (organized, for the most part, by business processes) to learn AI and engage in parallel inquiries. Though each team had its own topics and protocols, all shared common questions related to the company's culture and strategic direction. Thus, each inquiry was both separate from and connected to every other inquiry.

Second, following an initial period of Discovery, the seven different teams came together during a summit to Dream and Design in community. Bringing all of the teams together for this activity ignited broader and overlapping conversations within a strategic perspective. Everyone had the opportunity to have input on everybody else's designs.

Third, we used both process mapping and Design principles as tools for designing what should be, first within business processes, and then on a broader organizational basis.

What did we study?

Every team opened its inquiry with questions about people's beginnings with the company, and ended with questions of strategic direction. Between opening and closing, however, each team studied different topics that were uniquely related to their particular business process and to cost reduction within that process.

- Faster, Better, Cheaper – from the Procure to Pay team
- Customer Delight – from the Order to Cash team, in its effort to enhance the quality of Service
- Everyday Customer Amazement – from the Market to Sell team, in its effort to enhance Brilliant Process Management (from the Products and Promotions team)
- Customized Relationships – from the Order to Cash team
- Excellence in Execution – from the Plan to Produce team)

In addition to the members of the six teams above, there was one group of people who were unaffiliated with any process team. In the course of the first summit, this group spontaneously organized itself around the topic of communication. Though this conversation was neither officially authorized nor anticipated, this particular group's conversations inspired emergent enhancements to communication that are clearly evident in the company today.

During the Dream phase, everybody went through the same activity of looking at GMCR in the future.

Once the maps were complete, the teams went on 'map tours' of the other processes.

What – and how – did we design?

During the Discovery phase, teams used parallel processes to gather and make meaning of their information. They conducted interviews, and then met as process teams to discuss what they were learning. They created storyboards to capture themes and inspirations, and updated those storyboards every couple of weeks throughout the inquiry. (These storyboards, together with the stories that they documented, were shared with other teams during the first few hours of the summit.)

During the Dream phase, everybody went through the same activity of looking at Green Mountain Coffee Roasters (GMCR) in the future – though the details of what they imagined reflected the uniqueness of what they had learned about their particular business process.

As stated earlier, we used “process maps” as the central activity of the Design phase of the Inquiry. Having created maps of their current processes as part of the Discovery phase, process teams now created “enhanced” maps that described how their business processes would incorporate the transformations they had determined through their inquiry to be both possible and desirable.

Once the maps were complete, the teams went on “map tours” of the other processes. Each team left one member behind to tell their story and present their enhanced process map. Everyone else migrated to other teams to hear their insights, gather inspiration, and make suggestions that would strengthen the enhanced processes even further. By encouraging these cross-team conversations we stimulated further enhancements and built full-company support for the pending changes.

Once they completed the map tours, participants returned to their original process teams and finalized their process maps. Then as a group, with guidance from the team of “free agents” who had studied the topic of Connected Communication, every participant in the summit participated in the crafting of overarching principles of process excellence, which incorporated what all six process teams had learned. These principles came to serve as guideposts against which all other business processes – both present and future – could be measured.

Upon completion of this summit, a smaller group (consisting of representatives from each process team) gathered to make meaning of the inquiry data that had pertained to strategic direction and organizational excellence. In that mini-summit, the Design phase involved crafting of Provocative Propositions that described GMCR at its best.

An AI initiative is only 'right' when it is home-grown.

What did we learn about facilitating the Design phase of AI?

Change begins the moment you ask a question. The very process of planning the inquiry prompted the process teams to reflect on what aspect of the business they wanted to enhance and how. Having clarified what they were seeking, people began organically to organize in that direction.

Changes in conversations lead to changes in culture. The Discovery phase of the inquiry challenged certain unspoken norms regarding who talks to whom about what. People had the opportunity to place faces with names in an organization that had only recently grown beyond the size of everyone knowing each other. Given the opportunity to talk to people in other functions, roles became people. Given the opportunity to talk to people outside the organization, interviewers gained new insight both from what they learned from the interview and from knowing themselves as they represented the organization in a different way than they were accustomed to.

An AI initiative is only “right” when it is home-grown. The people who participated in the GMCR inquiry took great pride in owning the overall purpose and design of this initiative. While the AI methodology offered us certain suggestions about how it should be organized, GMCR created its own nuances about how to adapt AI to its particular organization and culture.

Topic choice is fateful. As theory suggests, organizations will begin to move in the direction of what they study, the moment they have selected inquiry topics. In this case, there were some wonderful surprises springing from the topic selection process. Initially, the leadership had intended to study the entire organization, as well as business process teams. Despite a subsequent decision to focus the inquiry exclusively on business processes, the original topics (shared vision and clear focus; mind-blowing innovation and positive transformation; and personal connections as competitive advantage) continued to influence the work of the process teams. These, in turn, helped to surface the essence of GMCR when it is at its best, which became the foundation for Design in the second AI (mini-)summit.

Similarly, a topic that was initially identified for purely educational purposes became central to the design of the process teams' inquiry. As we mentioned earlier, in the initial AI training (foundations-level course), a group of participants who were unaffiliated with a process team chose the topic of “connected communications” in order to give themselves a hands-on experience of the AI process. What they and others learned through their mini-inquiry provided subliminal guidance as we brought people together in the summit to redesign their business processes. It prompted the implementation of the “map tours” as well as the creation of overarching principles of process excellence.

The process works best when the senior leadership team represents themselves as unified in their support for the process

Conditions for success

We learn from our triumphs and our mistakes. In this case, our learnings were rich at both ends of the scale. At its best, the inquiry has potential to feed a culture for continuous learning (Wasserman, 2002). In order to realize the full potential of this and any other organization-wide intervention one needs.

- **Clear commitment and alignment of all the senior leaders:** The AI methodology is a high-engagement process. For many leaders, this is a shift from business as usual. If one person is not in agreement with the value of a high-engagement methodology, their adherence to an old and contrasting paradigm can undermine the energy and the process. The process works best when the senior leadership team represents themselves as unified in their support for the process and what it activates.
- **Engagement of representatives from different perspectives:** Knowing and welcoming the value of engagement of all voices at all levels in the organization and beyond, e.g. stakeholders and customers, is critical to leveraging what comes from the inquiry. Being open, curious and prepared to welcome what comes of engaging multiple perspectives is critical to success.
- **Having ongoing rituals, processes and structures that reinforce the process and the principles of excellence.** An organization is in a constant state of emergence. The tasks and activities might change, the names of the business processes that drive success may change, but the principles of process excellence and organizational excellence will continue to provide a compass for success.

Ilene Wasserman (2017)

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2017: Lessons learned: Revisiting the Green Mountain Coffee Story Fourteen Years Later

In May 2003, we wrote an article for *AI Practitioner*, called: “Enhancing Profitability through Business Process Excellence: The Green Mountain Coffee Roasters Story.” The article detailed lessons we had learned from our unique approach to Design, introduced as part of an AI-based process improvement initiative. Now, fourteen years later, we reflect again – this time on what we learned from that collaboration, and how the GMCR experience has influenced our ongoing development as practitioners. The key lessons we learned are highlighted below.

We begin with a brief introduction to our role as consultants: what brought us to the client, how AI informed our work, and subsequently influenced the client. We then reflect on what we learned from this project, and how it has informed our practices years later.

*Today, we would have begun
with a far simpler process*

Our role

From the start, our intention was to provide the client with the best external resources possible to achieve the organization's purpose in a manner that would strengthen internal capacity. Ilene Wasserman (lead consultant) was already consulting with Bob Stiller (then CEO) and his leadership team. When she introduced Bob to AI as a process for engagement, he chose to engage the entire organization. Together, Ilene and the leadership team decided that it was best to align the process with an initiative already underway: Business Process Redesign. Ilene invited Amanda Trosten-Bloom and Alex Moss to join the consulting team, based on their respective experiences with AI-based process improvement and high-engagement practices that build business literacy.

As is outlined in our 2003 article, in addition to training GMCR team members and helping them apply AI to the task at hand, we facilitated whole-system integration of the outcomes into the company's strategic plan. We also helped GMCR design an internal organisational design (OD) function, assisted in the hiring process and encouraged members of the core team to meet and continue to learn with David Cooperrider. From that time until the present, Bob Stiller and GMCR have been internationally recognized ambassadors for AI. Most recently, Bob has helped Appreciative Inquiry go viral through a major gift to Champlain College.

The design – Lessons learned

When we introduced AI to Green Mountain Coffee Roasters in 1999, we were both relatively new AI practitioners. Despite this, looking back on our approach and decisions we made along the way, we appreciate many of the choices we made. At the same time, years of additional experience and experimentation have sharpened our vision to see options that were not clear to us at the time of the engagement. The key lessons we highlight here include *leadership as champion*, the notion that *less is more*, the *consultant's influence* and the *consultant's presence*.

Leadership as champion: Bob Stiller embodied the principles of AI. He encouraged engagement of the whole system, and was committed to GMCR becoming a learning organization. He was a full partner in an emergent process. Members of the senior leadership team were largely supportive of Bob's commitment, and most team members enthusiastically supported AI as a way of achieving their goals. Most consultants would agree that strong alignment among leaders is a predictor of success in any large change initiative. Had GMCR leaders been universally aligned, the outcome would have been even more powerful and positive.

Less is more: At the time, we agreed to focus on Business Process Redesign because it was a current initiative. Since six business process teams had already been

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formed, we designed six simultaneous inquiries (one with each of the business process teams) then added a closing question focused on the whole organization.

Today, we would have begun with a far simpler process: perhaps choosing one or two business processes; or perhaps even a whole-system inquiry around process excellence. This would have produced integrated process changes, introduced the organization to a more holistic way of organizing, and built internal capacity enabling transformation to “cascade” through the organization. While the process we introduced produced exceptional results, including a 25% bottom line improvement in the cost of production, we recognize in retrospect that the complexity may have been more taxing on the system than necessary.

Consultant’s influence: Because members of the administrative staff not attached to any of the business process teams wanted to participate, the senior leadership team encouraged these staff members to self-organize. Together, members of this diverse team chose to inquire into communication. What emerged from their inquiry, however, were recommendations regarding diversity and inclusion. Though we did nothing deliberate to influence their choice of topic, we wonder whether Ilene’s background with diversity and inclusion, the ways in which we carried ourselves with the team, and/or the conversational space we created might have played an unintentional role.

Consultant’s presence: With this initiative as backdrop, we have continued to grow and develop as AI practitioners. In particular, we continue to be mindful to:

- Value agility, flexibility and simplicity;
- Remain authentically open and vulnerable with colleagues and clients alike;
- Remain appreciative, curious and focused on the system’s potential – especially in challenging moments;
- Engage with simple elegance: staying true to AI principles and the 4D framework without being wedded to the formula.

In sum, though we might have approached this initiative differently today, the work we did paved the way for ongoing personal, professional and organizational growth for the two of us *and for GMCR*. We will forever treasure this enlightening and generative engagement, and the opportunity to be part of a process whose effects have rippled through the organization, its community and beyond.

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