

Appreciative Inquiry

Session 2 of 2



Participate
Perform
Produce

Leader Guide

This guide is a resource for small group leaders.
It accompanies Group Session 11 of the eLearning Series,
CultureEX™ Guided Transformation Process



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Pre-Group Session Prep

Time: _____ minutes

ACTIONS

- COMPLETE** watching *your own* individual training module and filling out *your own* workbook answers.
 - NAVIGATE** entire group session at least once. Ensure the technology works.
 - STOP** when you reach a slide with a green continue button. These correlate with a section in the leader guide.
 - ANSWER** all questions yourself to use as an example.
 - PREPARE** using the *notes* section for your answers, examples or clarifications so you can model/start the conversation.
 - FOLLOW** instructions in each section in order given.
 - OPEN** document "[*Alternative ways to communicate about purpose and values.*](#)" to create what you will do regarding *PURPOSE* and *VALUES* during the session.
 - SEND** a confirmation email a week prior to the group session if you wish. (see below)
- ◆ **TIPS** for you to remember as group facilitator:
1. Demonstrate full commitment. Your intention and modeling matter!
 2. Start and end on time no matter who is or is not there. Ask for timeliness from your team.
 3. Maintain pacing as best you can for time you've allotted for each section. You can skip answers and bullet points if needed to stay on track.
 4. **Total Time** = Time *suggested* for each section.
 5. **Pre-Vid** = Time video precedes before starting the facilitation of each section.
 6. **Cumulative time** = Time elapsed in total for the session, at the end of each section.

EMAIL SAMPLE (Optional)

Hi everyone!

I'm looking forward to seeing you on (Day, Date, Time) for our group LifeWork Systems review session. Please be on time and ready because we have a lot of ground to cover and we will start and end on time. Don't forget to:

- Bring your completed workbook as ***we will be reading our answers from them.***
- Make sure you have completed your post-training survey so I can see your input in advance of this session.
- Let me know if you need anything from me beforehand.

I look forward to seeing you soon!

(Your name)

NOTES

Section 1: We Always Begin With...Purpose

Time: **10** minutes

For the leader: your intention in this section is to help the group learn that a. purpose is #1 and b. INVITE them to commit to it. c. values are behaviors that serve *to make sure purpose happens*. d. focus on one trust value and e. Review helpful tips.

POST or visually have open your organization's blueprint on a browser tab.

READ Goal: "My first goal is to *set the stage* for this session by beginning with our purpose and values."

READ bullet points below (Pull up your organization's blueprint)

- Our *purpose* is always THE highest priority; it shifts us from being **reactive** to **proactive**
- You are in charge of YOUR thoughts, feelings, and actions *no matter what*.
- *Purpose* is what we cause for ourselves and for others; purpose connects us to our internal motivation, our **WHY**.



READ your organization's **PURPOSE** on the blueprint. Next, *share your unique way to highlight it*. (use "*Alternative ways to communicate purpose and values*") This could be a quote, story, video clip, meme, poem, question, etc.

READ these *rhetorical* questions about **PURPOSE** (tell them **no out-loud answer is required**):

1. Will YOU intentionally focus on our purpose and commit to representing it?
2. Will YOU remain committed even if OTHERS drop their commitment to our purpose?

READ About CORE VALUES (direct them to the core values in your blueprint) **Say:** "Our *core values* are behaviors we engage in to achieve our *purpose*." **These are NOT the 8 values that build trust.**

REVIEW this trust value receptivity (**#2 on the blueprint under 8 values that build trust**). **Say:** "*Receptivity is listening with an open mind and considering what another person is saying.*" **Ask EVERYONE, "When is it hard to exercise receptivity?"**

READ the following 5 helpful tips with your group when you as you end this section:

1. Speak in first person (use "*I*"). It will feel and be more *responsible*. I'll say "first person" if you forget.
2. "Stay in your yard," share only your experiences, opinions, and feelings.
3. Take initiative in participating. This supports your leader. Don't wait to be called on.
4. Keep your answers somewhat brief.
5. Write down all aha's and questions you think of along the way.

FINAL WORD "The main point of section is that **intention** is the most important thing to do in every moment."

NOTES

Section 2: The Appreciative Interview

Time: **20** minutes

Time is 20m (3m pre- vid + 17m) Cumulative Time: 30m

ACTIONS

SHOW up to this slide with a green continue button →

READ section **GOAL**: *My goal for this section is to help you understand and experience an appreciative inquiry interview.*

READ **bullet points** (sharing bullet points below is optional but recommended when time allows)

- An appreciative interview is a deep listening and exploring activity.
- It's most like the stage "empty" in building authentic teamwork.
- You ask questions that allow the other person to fully "paint the picture" of what they're saying.
- Questions relate to all their senses, feelings and what makes them happy and proud.
- It stretches people beyond their usual comfort level and opens them to new possibilities.

ASK the following question of this group. Say, *"This question is NOT in the workbook"* (2m)

1. What are some interview tips you learned about and should keep in mind for an effective appreciative interview?

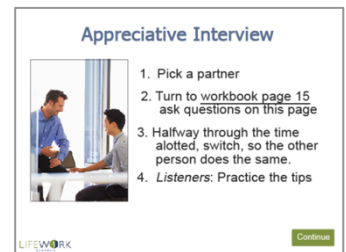
Read the ones **messed after they answer** as many as they can remember. Read #3 completely)

Interview tips

1. Focus on what's working
2. Avoid negativity and analysis
3. Probe relentlessly (ask for the "story". For example, "What did you – and/or others - hear, see, think, say, do, feel?")
4. Listen intently
5. Use the interview protocol questions
6. Have fun!

BREAKOUT the group into partners and explain all instructions. *"Share answers you wrote on workbook page 15. You have **14m** total (adjust timing as needed). Use the interview tips and switch with your partner halfway through."*

FINAL WORD *"An appreciative inquiry interview, when done well, involves disclosing and deep listening. It encourages open-hearted sharing. The interviews are uplifting and nurture psychological safety, intrinsic motivation, and the evolution of each person and the group."*



NOTES

Section 3: The 4-D Cycle

Time: **10** minutes

Time is 10m (2m pre- vid + 8m) Cumulative Time: 40m

ACTIONS

SHOW up to this slide with a green continue button →

READ section **GOAL**: *My goal for this section is to help you understand the 4 parts of the 4-D cycle at a high level, including the purpose of each phase.*

READ **bullet points** (sharing bullet points below is optional but recommended when time allows)

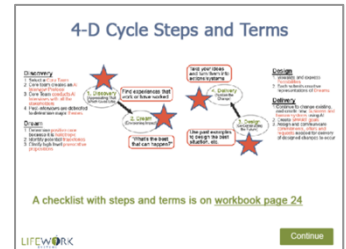
- The 4-D cycle is a structure that gives you understanding of the steps and tasks of the appreciative inquiry process
- The 4-D model allows you to have consistency and scalability throughout the appreciative inquiry process.

READ this way of understanding all 4 parts of the 4-D model using this example of a couple going to marriage counseling:

1. **DISCOVERY**: In the example, if a counselor asks a couple, *“tell me the stories of when you were most in love. What did you like about each other, about yourself? What were some of the great things you did for each other or together? What is working well in your marriage right now?”* These are questions related to **discovery** because they remind people of strengths, talents, contributions, and existing or desired success.
2. **DREAM**: If a counselor asked, *“What would your marriage be like at its best? What would you be doing, saying, and thinking?”* These are questions related to **dream** because they establish what matters and is most desired.
3. **DESIGN**: If a counselor asked, *“In the best possible marriage, paint the picture of what’s happening. What are you doing? Saying? What’s ideal in your day-to-day life and your long-term future? What specifics like travel, home, money, or children?”* These are possible questions related to **design** because they help you to move in the direction of drilling down into the details and results from the dream, so you can picture specific outcomes and results.
4. **DELIVERY**: If a counselor asked, *“Now, what goals will you set? How will you start defining strategies, procedures, and roles?”* These are possible questions related to **delivery** because they move you into action, including commitments, offers, and requests.

INSTRUCT them, *“Turn to workbook page 24 and notice all the terms and definitions shown there in a checklist.”*

FINAL WORD *“The main point of this short section is to give you the comfort of this 4-D process, that when done in order and completely, creates a collaborative experience that everyone loves, is strengthened by, and helps you meet high vision together.”*



NOTES

Section 4: Discovery

Time: **25** minutes

Time is 25m (4m pre- vid + 21m) Cumulative Time: 1 hour, 5m

ACTIONS

□ **SHOW** up to this slide →

□ **READ** section **GOAL**: “My goal for this section is to help you to consider the discovery phase, it’s tasks and purpose.”

□ **READ** **bullet points** (sharing bullet points below is optional but recommended when time allows)

- A core team is selected. It must be big enough to represent and interview all stakeholders.
- They create a document called the appreciative inquiry interview protocol (there’s a sample of one in your workbook).
- The more stakeholders involved in the interview process, the better the buy-in and success.
- Success breeds more success and involving everyone makes success likely, including everyone being wildly successful!
- In the US, we reward independence, self-reliance, individualism; they should never exclude community/collaboration.

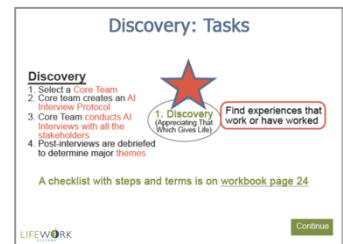
□ **ASK** the following questions (explain these are NOT in the workbook). **(8m)** *Read answers only after they answer.*

1. **What is the main benefit of the *discovery* phase?** (Possible answer: The benefits of this phase are that you start from a place of strength and confidence in self and others because you are focusing on strengths, successes and talents from the past.)
2. **Who should be on the core team and why?** (Possible answer: Enough people to do all the interviews and those who represent various interests in the group, department or organization and a small enough group to debrief efficiently)
3. **What happens when ALL (or most) stakeholders are interviewed?** (Possible answer: Everyone feels included and encouraged)
4. **What is important about creating critical mass and engaging all stakeholders?** (Possible answer: Buy-in is stronger as well as enthusiasm and willingness to get involved and help)
5. **What are likely dangers when you or others hold back unique ideas and desires?** (Possible answer: People feel left out and excellent ideas or those that might end up as such will be lost)
6. **What are likely benefits for everyone sharing them?** (Possible answer: Richer discussions, people feel safe to disclose their thoughts and feelings too)

□ **BREAKOUT** as a group (explain all of these instructions). “Please share answers you have written about the 4 generic questions shown on workbook page 3. You have **10m** total (adjust timing if needed) for sharing by both partners.”

□ **DISCUSS** (briefly) “What themes emerged from this discussion?” Notice if there are any common ones. **(2m)**

□ **FINAL WORD** “The main idea of this section is to focus on strengths, successes and common desires. Then you can build a caring community focused on highest visions full of joy and meaning.”



The slide titled "Discovery: Tasks" lists four steps: 1. Select a Core Team, 2. Core team creates an AI Interview Protocol, 3. Core Team conducts AI Interviews with all the stakeholders, and 4. Post-interviews are debriefed to determine major themes. A red star highlights step 1, with a callout box that says "1. Discovery (Appreciating That Which Gives Life) Find experiences that work or have worked". A note at the bottom states "A checklist with steps and terms is on workbook page 24". The slide includes the LifeWork logo and a "Continue" button.

NOTES

Section 5: Dream

Time: **20** minutes

Time is 20m (2m pre- vid + 18m) Cumulative Time: 1 hour, 25m

ACTIONS

SHOW up to this slide →

READ section **GOAL**: “My goal for this section is to make sure you understand the purpose of the dream phase and the steps within it.”

READ **bullet points** (sharing bullet points below is optional but recommended when time allows)

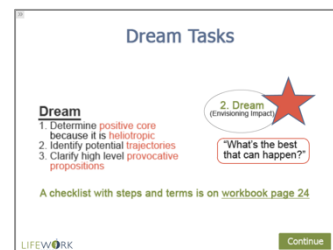
- Dream includes the positive core. To us, this is **purpose**; what we *cause* at our BEST, most expanded, and connected.
- The dream phase is very important and yet often skipped.
- People fear they cannot dream because they might get their hopes up and then fail or be disappointed.
- They wrongly worry THEY are expected to figure out HOW and accomplish dreams on their own or at their initiative.
- Dreaming is about drawing forth all provocative ideas and possibilities and imagining them.
- Creativity brings about inspirations, aspirations, emotions, and mobilizes our *senses of meaningfulness and choice*.
- We are often afraid to dream because we are afraid to be *unbridled* in living our lives.

BREAKOUT the group into partners and instruct them, “Share your answers to the 3 questions on workbook pages 7. You have **(10m)**.”

ASK the following questions (explain these are NOT in the workbook). **(5m)** (do not read **possible answers** below until after the some of the group gives answers.)

1. **What are some benefits of the *dream* phase?** (**Possible answer**: The benefits of the *dream* phase are that you can begin to take *why* the dream matters forward without being hindered by the *how*. The dream tasks help you to dive into the intrinsic motivators of *meaningfulness* and *choice*.)
2. **What is *heliotropic*?** (**Possible answer**: Heliotropic is like plants growing towards sunlight. Our dreams are heliotropic because they are easy to move towards. They are intrinsically motivating and give us life.)
3. **What are *trajectories* and how do they fit into the dream phase?** (**Possible answer**: Trajectories are milestones and outcomes that are tangible and can be measured or paced. In the example of the dream home, it may be that first the land is selected, then the house is built, then the swimming pool is next, then the pool table, etc. These are outcomes again, without specific design or how to deliver them.)
4. **A *provocative proposition* is a stretch vision and outcome that creates a wow experience. Give a work example.**

FINAL WORD “The main idea of this section is that time and attention must be given to imagine the story of your dreams without understanding or focusing on if they are reasonable or how they could come about. We did this well as kids.”



NOTES

Section 6: Design

Time: **15** minutes

Time is 15m (2m pre-vid + 13m) Cumulative Time: 1 hour, 40m

ACTIONS

SHOW up to this slide →

READ section **GOAL**: “My goal for this section is to help you become aware of the specific value in the design phase.”

READ **bullet points** (sharing bullet points below is optional but recommended when time allows)

- In the *design* phase you are not actually assembling anything yet. You’re drilling down on some of the specifics.
- Design is taking that time needed to really see the total picture of what you want before getting into specific goals.
- Design is as important as dream because you are clarifying, which builds your enthusiasm and resolve for desires.
- While *design* might be about past examples, it can be totally new ideas you come up with or see others have.
- Design causes us to consider the why for anything we create so the design meets the big picture outcomes we want.

ASK the following questions (explain these are NOT in the workbook). (2m) (do not read possible answers below until after the some of the group gives answers.)

1. **What are the benefits of the *design* phase?** (Possible answer: The benefits of the *design* phase are that you spend time imagining and capturing nuances of the overarching thing you have dreamt but are not quite ready to build. You clothe it and express what is important in the details.)
2. **How does expressing dreams creatively help bring about positive momentum?** (Possible answer: When we express dreams, we often feel our emotions and because they are positive, they are contagious and inspire mutual enthusiasm.)

DIVIDE the group into partners. Explain all instructions: “Turn to workbook page 19. Share your answers to question 5 and 6 and **THEN** read your vision on that same page. You have **10m**.”

FINAL WORD “The main point of this session is that design (like dream) should be given plenty of time to be thoroughly explored and communicated. Design makes the outcomes of the entire effort much more likely to be an over-the-top, fulfilling success.”



NOTES

Section 7: Delivery

Time: **10** minutes

Total Time: 10m (3m pre-vid + 7m) Cumulative Time: 1 hour, 50m

ACTIONS

SHOW up to this slide →

READ section **GOAL**: “My goal for this section is to help you become aware of the importance of intentionally moving from concepts to action.”

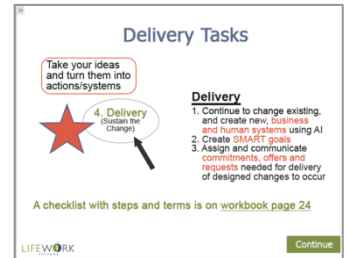
READ **bullet points** (sharing bullet points below is optional but recommended when time allows)

- Delivery causes each person to consider *our* role, needs, and ways we can contribute.
- In *delivery*, the rubber hits the road. Goethe wrote, “**until one commits, then** providence moves.”
- We’ve all experienced healthy *delivery* when our hearts are in a fund-raiser, planning a celebration or holiday.
- *Delivery* is when we commit to participate, move into action. It’s intentions = results.
- Our results reflect what we are and have been purposeful in making happen.
- If we resist acting, it’s possible we may just need more time in *discovery*, *dream*, and *design* phases.
- The more who participate in *delivery*, the greater the exponential growth, and positive impacts.

ASK the following: (explain these are NOT in the workbook). (6m)

1. **Share an example of putting a stake in the ground and moving into action, including what it did for you personally.**
2. **What could be a reason we resist making commitments, offers and requests?**
3. **What’s the greatest compliment you’ve received for something you successfully delivered?**

FINAL WORD “The importance of the *delivery* step in the 4-D process is generally fun, friendly and exciting, especially if the *discovery*, *dream* and *design* steps have been successfully engaged in and shared by all.”



NOTES

Section 9: It Just Got Real

Time: **10** minutes

For group leader: This section is about helping participants realize that this form whether in the back of each workbook or in the end of a group session, is about **grounding** what's been REALIZED by sharing it out loud. It's also about NEXT STEPS.

Total Time: 10m (0m pre-vid) Cumulative Time: 2 hours

ACTIONS

SHOW up to this slide →

READ section **GOAL:** *“My goal is to help you to leave this session grounding the information you’ve been learning. By reflecting on it, clarifying it, practicing it, and sharing it multiple times, you’re likely to remember, own, and apply what you’ve learned.”*

READ about bullet points (sharing bullet points below is optional but recommended when time allows)

- People don't sustain real or lasting change without discussing what is newly learned
- Committing to sharing at least some of your *ah-ha's*, *barriers* and *next steps* is crucial to long-term retentions.

ASK the following questions. Have EVERYONE share briefly*:

1. **One new idea or ah-ha gained from this session that was not fully known or understood before it started.**
2. **One next step to apply something learned.** (This need not be related to their aha's)

FINAL WORD (*Thank them sincerely in your own words!*)

A screenshot of a digital form titled "It Just Got Real!". The form has a header with a green icon and the title. Below the header, there are two main sections, labeled "1" and "2". Each section contains a "Title" field and a "Description" field. At the bottom right of the form, there is a green "Continue" button. The form is displayed on a tablet or smartphone screen.

NOTES

If you run out of time by this section, assign the 2 questions to them to do sometime throughout the day and **email their answers to you. This helps them retain what they learn.*