Experian Computer Operations
Case Study

Four Years of Appreciative Inquiry Initiatives

Overview:

Experian is a leading global information services company, providing data and analytical tools to clients around the world. They help organizations to manage credit risk, prevent fraud, target marketing offers and automate decision-making.

At the time this work began many areas of Experian were experiencing significant change expectations as the result of new executive leadership charged with raising the overall organizational performance.

An area of the organization that manages the data center and Experian's enormous database was called the Command Center. The organization had approximately 90 people. Just prior to this intervention the organization had completed the building of a state of the art computer center that would withstand a stage 4 tornado. The building project was managed by a long term IT leader from California. At the completion of the project the project manager was named to lead the new Command Center. The current leader who had held this position for many years was given another assignment. The organization was fiercely loyal to him and the move was not popular.

In addition, the Command Center had moved to a 24 x 7 time frame. In response to this need, the new leader reorganized the center creating 5 shifts. The former vertical specialized structure was dissolved and the leaders of the new shifts came from the vertical specialties. This redesign was also not popular. Five managers were running their shifts in five different ways. The leader and one of his staff members had created a "strategy" to bring about the required level of performance. Some of the managers never saw or spoke to the other Command Center managers. This caused a lack of consistency across the shifts. Managers were presented with significant challenges and were paralyzed, unable to make any changes because of the overwhelming demands they faced. Not understanding how they would be affected by the impending changes, fear amongst employees was high.

As internal consultants we were working with the new leadership to achieve their objective. During a competency modeling initiative we had undertaken to profile the skills of future employees needed to achieve the new business strategy, we discovered that resistance to change was apparent when all managers did not show up for a competency validation meeting.
When asked why some of the leaders failed to join in the meeting, one of the leaders remarked "we are just not on the same page".

It was clear that the managers and employees were struggling to move ahead with this significant reorganization and performance improvement mandate. Coincidentally we were scheduled to attend Appreciative Inquiry (AI) training the following month. After our initial AI training, we met with the Command Center business leader and suggested that an approach for change using Appreciative Inquiry would help him move his organization forward. He agreed saying "nothing else that I am doing seems to be working".

Process

Given the issues we observed during the competency project, we felt that it was imperative that the leadership team buy into this new approach. We scheduled a leadership meeting where we shared a brief introduction to Appreciative Inquiry and gave them a short AI experience as a demonstration.

We had the management team conduct structured AI interviews amongst themselves (a group of approximately 12 people). As we debriefed the content of the interviews, a concrete list of actions emerged that were necessary to achieve their strategy. The list was so on point that the leader stood on a chair and shouted, "YES". In order to assure Command Center leadership commitment, we suggested that the team meet amongst themselves to decide whether this was the right approach. When we brought them back together, one of the shift leaders stood up and said; "We are 100% behind using Appreciative Inquiry.   We will give you 2 people per shift and the entire leadership team will attend a 4 day program". A surprising outcome of this management overview was the discovery that all managers understood and desired the proposed business strategy for the organization. This was already a significant step forward.

The next step was to get volunteers/nominations from all shifts for their representative participation in the AI sessions. Additionally, we invited people who were dedicated to supporting this organization such as trainers and human resources representatives. Since we were unable to have 100% of the Command Center attend the AI sessions, we designed the process to include all employees in the interview process. There were about 25 people included in this initial AI team and once the team was established, we scheduled the first 2 days of the AI process. The focus of the session was on achieving the Command Center performance improvement strategy. The first 2 days resulted in the creation of an interview guide used to interview the remaining Command Center organization. The guide included the following topics:

Career Destination
Collaboration
Empowerment
Structured Training Program

We planned for a month between sessions so that all employees could be interviewed. The second two days of the session were focused on debriefing the interviews and determining themes that resulted. Six themes were selected to become design elements for the future:

Recognition
Training Program
Standardization
Organizational Evolution
Communication
Teamwork

We had people self-select to their theme of choice and it became clear that we only had enough people in the room to work on 4 of the themes. Communication and teamwork were put aside for the time being.

Creative enactments were presented for the remaining themes, design statements written, innovation teams created and follow up activities outlined. The sessions were so successful that we held a surprise party at the end to celebrate their achievements.

Organizational Evolution: this theme became a design statement about the organization becoming an appreciative organization; using the principals of appreciative inquiry to continue to grow, evolve and move forward. They also believed that everyone in the Command Center should have a full 4D experience because of its transformational effect. They changed the name of many of their meetings and even their rooms. They no longer called their project debriefs 'post mortems." We discovered that simply calling yourself an 'appreciative organization' did not immediately change behaviors. Ongoing dialogue and use of AI in their day-to-day processes were important reminders to continue what they hoped to achieve. Their commitment to AI was clearly seen as the Command Center continued the use of the AI methodology for a number of years.

Recognition: A recognition team was created and led by a non-exempt employee. After a number of months of effort of attracting participation and gaining momentum a program called the 'High 5' was created. The High 5 program had differing levels of recognition built on a baseball analogy of singles, doubles, triples and home runs. It was highly successful with active participation throughout the Command Center including management involvement. The team kept the program alive with updates and redesigns. A year later the senior leader created his personal award called the Big Slugger award. The program became so successful and well known that the team was asked to help other parts of the company build their own recognition programs.

Standardization: A team was created to develop a set of standards for practices and documentation to be used across all shifts. An approach was designed for effective shift overlap and hand off. These practices were critical to create consistent seamless performance across all 5 shifts.

Training: A training program was developed for all employees to participate in over a thirteen-month time period. This training was conducted during regular work hours at no expense to the employee. It was highly successful in developing the necessary skills for the new performance requirements. This resulted in the ability of many of the their employees to move into the higher skilled jobs and greatly reduced the need to hire outside talent to fill these higher level positions.

Next Steps

In order to give everyone in the Command Center an experience with AI we decided to run back-to-back 1 ½ day sessions for the remaining themes of communication and teamwork. Employees who were not on the original AI team could choose which of the themes they wished to work on. This gave everyone in the organization a first hand experience with the 4 D model. Participants created Design statements for the two remaining themes and added these to the 4 previously developed design statements.

A newsletter called Blueprints was developed, produced and disseminated by employees in order to share information and progress with the Command Center AI initiative.

Enhanced communication and continued appreciative dialogue became a way of life for the organization.

Overall outcomes

The organization was able to reach the mandated performance targets in just over one year.

What had been a fearful, contentious organization was now a high functioning, collaborative team. The Command Center employees and management were aligned in their approach to achieving the performance mandates. Employee engagement was high. Communication and dialogue was significantly increased.

Continued use of appreciative inquiry as a valuable approach to achieving and accelerating organizational progress.

Over the next several years the following initiatives were held using Appreciative Inquiry as the methodology to bring about continued change.

Cross Organizational Collaboration:

A number of months from the initial Command Center Strategy Session one of the internal customers of the Command Center came to us and complained that they were not satisfied with the support

they were receiving from the Command Center and thought we might be able to help. In conversations with the senior VP's of the various areas it was believed that an AI event with Command Center employees and their internal customers might be helpful. A 1½-day session was held. Their design statement turned in to a visual depiction of how they viewed their relationships.
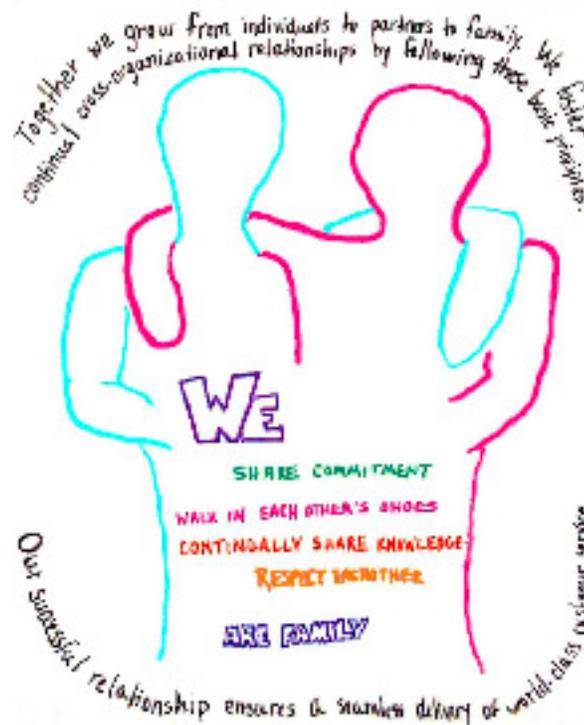
Relationships were strengthened, communication and overall performance improved.

Some months later the organization conducted a study with an outside consulting firm on the potential outsourcing of the IT organization. In one of the meetings with the outside consulting firm, the leader of the Command Center did not have to say a word in defense of the importance of the Command Center as all the internal partners defended its importance and performance.

The Shift "Problem"

After undergoing an organization-wide 10% headcount reduction a couple months after the initial AI sessions were completed, the Command Center was presented with the challenge of migrating from 5 shifts to 4 shifts. The Vice President of the Command Center used this opportunity to level skills across all of the shifts. The outcome was a major change in the shifts that people were working. This resulted in anger and angst amongst a large number of employees whose lives had been disrupted by being asked to work different shifts. In spite of their efforts to calm things down, the situation continued to escalate. We finally decided to see if AI could truly be used to solve this kind of conflict. We invited all interested parties to participate in a four hour 4D session that resulted in a design statement that described what a great shift design should be. We gave the organization 30 days to submit shift designs that would align with the design statement. We received 5 designs. A group from the team came together to review the various designs. Appreciative feedback on each design was collected. One was clearly a more beneficial and desired option. The result was the implementation of a creative shift design and the organization was again able to move beyond the conflict.

Appreciative Leadership

It became clear after the Appreciative Inquiry work that in spite of their fondness for the appreciative approach that many of their leadership practices were based on their history of being command and

control leaders. Their traditional leadership approaches were inhibiting the progress of the AI initiative and the performance of the organization.

We conducted a one-day Appreciative Leadership program to help the Command Center Leadership imagine and identify new and more positive approaches to leadership. This allowed the leadership team to envision an approach for becoming an appreciative organization and to achieve new performance targets. The team was able to realize that leadership is less about controlling people and more about liberating potential. They articulated a unified view of how leadership team would function. It enhanced their unity as a leadership team.

New System Implementation - Problem Management Ticket Software

The implementation of a new software program called Problem Tickets was having a difficult time gaining adoption. The command center VP thought an appreciative approach might generate more support. Twenty participants from across the organization participated in an intensive one-day AI session focused on Collaborating for Excellence. The outcomes of the session included the creation of four teams that were comprised of cross-organizational membership: Meaningful Metrics Team, Process Ownership, Design Processes Team and Management Support team.   A Project Charter was created with clearly defined outcome expectations and deliverables. This process significantly reduced resistance and increased the speed and quality of the implementation.

Testimonial

The above case study on the Experian Command Center is an accurate portrait of what my management team was up against in 2001. We had good people that had their "cheese" moved and my management team was having trouble explaining the new goals of the organization and subsequently we were all losing. Appreciative Inquiry was a new tool and it sounded like an approach that would work in our environment. People needed to see where their careers were going, where the organization wanted the team to go and how both the people and the organization could gain from the experience. These are fundamental attributes of good teams. AI allowed that vision to mesh into a workable step-by-step direction that we all could live with. The people themselves created the vision, the guidelines, the teams to execute, and the follow up to ensure progress was made. This included the six focus groups of Recognition, Training Program, Standardization, Organizational Evolution, Communication, and Teamwork (within the Command Center and all the organizations that the Command Center has to deal with). The AI tool allowed the people to create and own the change in direction. My biggest contribution was to be patient enough for the AI process to take hold and get started. Once it got off the ground it was easy to nurture it and see results. If it wasn't for AI my tenor as VP of the Experian Command Center would have been much shorter but more importantly it would not have been as rewarding as seeing how everyone advanced.

<div align="right">
Mike Koch
VP Experian Command Center (retired)
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This body of work initiated in January 2001 and continued into 2004.

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