

**Advanced Workshop in AI:  
Final Paper, Executive Summaries, Project Presentations, and BAWB Interview  
Submissions  
Daniel Touris**

- **Full description/documentation of the process, progress to date, and results of your positive change “experiment” using AI.**

**Company Background:**

Central Lanera Uruguay, (CLU) has 40 years of experience in the wool processing and marketing business. It is integrated by 2,200 producers and it exports 6 million kg. of wool/year.

It considers its values as one of its main assets: Solidarity – Justice – Commitment – Innovation – Professionalism.

One of the main characteristics of its system is the payment of wool based on the average price by fineness and per kg., calculated from tiered sales abroad.

In the 2004/05 season, we contributed in the implementation of a very aggressive marketing strategy, based on a customized sales manual. This effort consolidated an excellent season with the capture of new clients and the achievement of the highest market share in the company's history. After capturing the clients and processing the product, there was a sudden decrease in the price of the product in the international market, which was originated by lower demand by the purchasing economies, due to a strong recession in those markets.

The competitors of CLU, decided to treat that the decrease as circumstantial and they continued paying a high price per kg. of wool to the producers, so that they could “gain market share” by attracting producers from other systems such as CLU.

The Board of CLU, decided to face the situation with justice and commitment to the truth towards their producers, so they would continue paying a real and fair average price, even though it was lower to the one paid by the competition.

In April 2005, the Board had a meeting with its marketing team, which had promised their clients a short time before payment by average price and they told them that they should now communicate that they would receive a lower price to what the market was paying.

The marketing team felt frustrated even though they understood the decision, because they now had to take back what they had just communicated.

In May 2005, the General Manager decided to hold a Motivation Workshop for the marketing team and they called us to help with it. At that time they asked us to make a one-and-a-half-day activity with an initial “cathartic” instance where the members could vent all their feelings of frustration, so that they could then analyze the tools they would need to face the difficult dialogs with the producers.

In our consulting company, my partner and friend Gustavo was certified in AI and I had attended an activity with Ron Fry about the topic in my city, so we immediately decided to leave aside the “catharsis” process because we thought it would be a negative mental positioning which would be reflected in the thoughts and actions during all the activity.

### **Our counter proposal:**

We made our clients a counter-proposal: Using the Appreciative Inquiry technique to position the marketing team within their personal talents and the company's values, which were also theirs. Then from the spirit generated, we would analyze all the cases of dialogs they would likely have to face with their clients.

Another condition of our proposal was that all the members of the Board that had taken the decision would participate in the meeting. If they did not participate in the workshop due to prescheduled commitments or other priorities, we would not carry out the activity. Our proposal was accepted immediately with enthusiasm.

### **1) Preparation of the First Workshop 2005.**

#### **Leading team integration:**

We chose a group of 8 members of the marketing team (made up of 22 people, in addition to the General Manager) and we familiarized them with the methodological approach of AI. We then went through all the possible cases of difficult dialogs they would have to face with the clients. There was a total number of 22 cases in 2,200 producers which would be repeated. This activity took up a full 8-hour work day.

#### **Generation of the Topic and Protocol:**

We then started working on topic generation. We were clear that we could not focus on the difficult conversations that they would have to hold with the clients, so we started to think which would be the right topic. The first question we made was: What gives life to this organization? We realized that living the values they touted was the main source of life of the organization. Each important decision was taken based on the values that guided the organization. This made us realize that we were dealing with an organization that lives its values, so we started to wonder: what will happen if we connect the values of the organization with the values of its members?

So we thought values had to be included in the topic and protocol. The topic chosen was: **“The Power of Values in Difficult Times”** so that the participants would focus on the company's talents and values.

For the protocol we adapted the approach of Ken O'Donnell in *Living Values in Organizations*, where the author shows the fantastic results obtained in long term profitability and growth by organizations that live their values in decision making.

#### **Question development: First “D”**

We then started preparing the questions. Since we had worked with AI before, we decided it would be better to separate the first questions referred to the first “D”, Discovery, because on other occasions the participants had only concentrated on one or lost focus when faced with three questions. So we made two questions for the first “D”: The best moment of your life at the personal level, so they would then concentrate on: The best moment at the level (see annex 1.a).

Dynamics: The participants were divided in 6 teams of 8 people each who were given about 10 minutes for each pair for interviews and then 5 minutes each participant for the presentation to the team. Then each team made a short summary in 10 minutes and each team made a presentation of the summary. (See annex 1.b).

### **Question development: Second “D”**

We then prepared the Dream questions. In this question we used the same dynamics and times as in the other two, (see annex 1.c).

We thought it was very important to invest a lot of time in the dynamics of these two questions, because it is where the “positive anchoring” environment is generated, where each participant is loaded with a backpack of personal values and talents. These will open the door to a creative mood from a different outlook to the one that gives rise to the problem.

### **Changing the original AI dynamics to adapt them to the client’s situation.**

After this and still working with the same six teams, we handed out the 22 situations of difficult dialogs they would have to face with the producers in the next few days, giving 3 or 4 situations to each team.

The instructions were to work on the basis of the personal/team values and talents discovered in the previous exercise, in order to generate the most suitable dialogs that would lead to the best results with the producers. Then each team had to present the dialogs together (see annex 1.d)

### **Results of the Workshop:**

The results were amazing; all the teams applied AI in the dialogs changing a negative dialog situation, of reproaching and verbal aggression from the clients to an appreciative and value-loaded dialog. (See annex 1.e).

After the Workshop, there were testimonials where the participants stated that it had been the best workshop they had participated in because of the change in perception that they had achieved, *“we had come to the workshop with very low morale and afraid of the dialog with the producers and we are leaving with a wonderful enthusiasm and willingness to face the situation”*.

At the end of the workshop, we wrote a report with the results of the work in the teams.

### **Results for the company:**

The company went beyond the objectives proposed, maintaining their clients and adding new ones, and the image of the company as a responsible firm was maintained, strengthening the relationship with the producers.

The competition could not continue holding their high prices and they finally had to lower them, generating losses and thus affecting their competitiveness in the market.

### **Testimonials of two of the managers that participated in the workshop:**

***Evaluation of the methodology of appreciative dialogs and the workshop of 2005***  
***Agronomist Diego Saavedra, current General Manager of CLU (Central Lanera Uruguay).***  
***July 2007***

***Background and team morale***

- *The situation was really critical for the company, because the result of the season was viewed as very bad, and it compromised seriously the partners' wool commitments in the future, thus jeopardizing the supply of wool for our plant and the operation of all the company.*
- *From the point of view of the producers there was a loss of trust in the company, which might have a serious effect in the future because it prevented active listening in the producers. The loss of trust and the low morale due to the economic results hindered constructive dialog with the producers and prevented a deep analysis of the facts.*
- *Our first line of fire, those who are directly in touch with the producers –wool men (sales team) and CLU promoters – did not see a way out of the situation nor could picture bridges to establish effective communication and revert the process of diminishing trust in the company. The sales team's morale was worst hit, and it prevented the visualization of paths towards facing the situation successfully.*

***The Workshop and its Effects***

- *Morale and the perception of the situation changed a lot and very positively during the workshops. At the end each one of the sales team members had a positive mood and there was a lot of energy and willingness to face the problem.*
- *TA team spirit was also formed among all the workshop participants and a firm commitment with the solution of the problem. The commitment and attitude of the company managers to "face the issue" in a very difficult situation strengthened the team spirit.*
- *We could sum up by saying that the workshop brought out the best in everyone and it injected positive energies that enabled confronting the situation and having a successful outcome.*
- *The company's values were also strengthened and they were actually the filter through which the situation was analyzed and the solutions were built.*

***Results***

- *The results of this season had been the worst of all the company's history, and the possible consequences on the adherence of producers in the next season were the worst imaginable*
- *The most optimistic forecast in the company was made by the Head of Promotion, who expected to obtain 3 million kg. of wool. They finally were 50% over the most optimistic forecast!*

***Comments***

*After the workshop I remember telling Daniel, our facilitator, that if he could implement the Appreciative Inquiry tool in different areas, his future would be secured and he would make a great contribution to the country, because of the pessimistic and negative spirit that predominates in Uruguay; we could almost say that each Uruguayan is born with a tattoo on their skin saying "It can't be done". Appreciative Inquiry showed us that by giving the best in us everything or almost everything is possible.*

***Evaluation of the Methodology of "Appreciative Inquiry" by Mr. Ignacio Mullin, Head of Promotions, July 2007.***

---

## **Introduction**

*In 2005 I was working as a Promoter, selling our company's marketing service to the producers. The work requires a personalized relation, where the client deposits their trust on us, based on our offer as a marketing system.*

*,It was very hard for us to tell the producers at the time of payment that, because of the situation in the international market, their expectations in terms of prices would not be met and, even worse, that the competition had paid higher prices. At that time our "emotional account" with our clients was in the red.*

## **Evaluation of the methodology.**

*Due to the difficulties we envisioned, the company held a workshop with the entire sales team, so that we could be motivated to face the clients and recover their trust. It was very difficult to imagine how this could be done, but "Appreciative Inquiry" was enlightening. Personally, I've always considered myself a positive person and I think I always see the "glass half full", but the circumstances made it very difficult to see a way out.*

*During the workshop I was personally overcome from the beginning by a positive feeling. The way the methodology was developed caused an immediate change in all the participants and it generated a feeling of self worth and communion in the team as we shared with each other our positive experiences, based on common values. It was not about avoiding the negative; on the contrary, it was about having a positive attitude before a negative situation. This change of approach was the key to confronting the situation.*

## **Results.**

*We could recover the trust of our clients, which we then had to validate with facts.*

*Thanks to the experience we lived we could apply the methodology to the marketing work, and we thus could remain motivated to face situations with a positive attitude and conviction.*

## **Conclusions.**

*The methodology can be applied to any work or personal situation, as well as to any kind of company. We all have something good to tell and that makes it effective, even with the most skeptical.*

*After this experience and after becoming Head of Promotion, we have used the methodology on two other occasions with the sales team and both times we achieved positive results.*

## **Personal Message.**

*We will all face happy and sad situations, successes and failures, achievements and difficulties, many times. What matters is that we always learn something from each situation we live through, but only when we value ourselves positively will we be able to see what we did well and what we can improve on. The key is in opening up to that feedback. That's the only way we will grow inside.*

## **2) Second Workshop applying AI in CLU, May 2006.**

*In 2006 we were called by the Sales Manager to make a workshop, in order to enhance the use of a Sales Process Manual we had developed with the marketing team some time ago. The Manager was convinced that there were members of his team that used the Manual and*

that they achieved the greatest productivity in sales and there was another group of members who were not using it for some reason.

So we decided to use the AI approach once again by recalling the best sales experiences lived lately.

The idea was simple: As the sales reps with the greatest productivity recalled those successful experiences, they would refer to the process they had applied. If the process applied was connected to the use of the Sales Manual, its use would be "validated" by the successful experience. If the success was due to another cause or the use of another tool, we would learn from those experiences in order to enrich the Sales Process Manual. So either way the result would be positive for the team.

#### **Generation of the Topic and Protocol:**

The topic chosen was: "Achievements: Appreciating our best sales experiences", so that the participants would focus on those experiences of achievement that generated the most satisfaction for them.

To develop the protocol we used a communication process and effective listening analysis, without referring to the sales manual we had developed.

#### **Question development:**

As it was the second time we were applying AI with this group, we focused on the first "D" of discovering the best past sales experience (see annex 2 a)

We then chose 4 members from the ones with the greatest productivity in the team and we used them as "live cases" to analyze the process that they were applying as a group.

#### **Outcome of the Activity:**

We concluded that all the success cases were related to the tools described in the Sales Manual. We could also appreciate that the majority of the members of the sales team needed to develop sales-closing and post-sales skills. It became very clear that the use of an orderly sales process was linked to successful experiences.

### **3) Third Workshop applying AI in CLU, 2007:**

In May 2007 the company called us again to develop an activity to work on Service Quality Improvement. Service demand is currently increasing and the company does not have organized service processes; these are offered thanks to the good disposition of the marketing team. The risk in this situation is that an increase in sales there is a proportional increase of services and these can collapse in bottlenecks, because at those times it is not enough to for people to have a good disposition, there must also be clear processes with people in charge of each step.

#### **Generation of the Topic and Protocol:**

Once more we worked on the development of the topic and protocol with the Sales Manager. Through a “brainstorm” process, we decided that if we could achieve excellent service quality, we would be the best value proposition for clients in Uruguay and Argentina. So we decided the topic would be:

**“CLU, the Best Value Proposition in the Region for Sheep Production Marketing”**

To build the protocol, we used a metaphor of a fiber of wool as a “conducting fiber of positive energy for all the people in the organization”. A fiber that does not just connect all the people but it also connects us with the past and the best experiences and takes us all together towards the future.

Another important fact is that as I had just arrived from the first part of the AI Certificate, I set myself the goal of making **all the system participate**, so I had the Manager invite all the company departments (not just those that offer client service), wool producer clients and some suppliers and directors.

**Question development: First “D”**

We decided as usual to split the first two questions about discovery, one about personal life and the other referred to the work in the organization.

**Question development: Second “D”**

We always focus the question that refers to the Dream on the topic at hand so that the participants will focus on the issue that brings them together, in this case, the quality of client service and other services.

**Development of Questions 3 and 4:**

For time reasons (we only had two days for the workshop), we got questions 3 and 4 together in one exercise and we asked them to define the paths and develop the actions they thought were relevant. There were no problems generated by having several teams working on the same path; interest actions were confirmed and there were also more creative contributions in some teams. (See annex 3 a).

**Report of Workshop Results:**

At the end of the workshop, as usual, we sent a final report with the content of the exercises and our comments, which can include some follow-up activities to support the teams in the development of their actions.

**Results of the Workshop:**

Four paths were defined to develop the company as best value proposition, as described in the figure (see annex 3 b).

The Promotions and Services Manager is currently working in each one of the lines and actions that were defined in the workshop.

- **New insights and lessons learned – For example, how did it impact you as a change agent or your understanding of AI and its applications**

I can actually say that AI is increasingly becoming integral to my life. In each role I perform: Father – Husband – Brother – Son – Friend – Consultant, I apply an AI approach. This way of perceiving the world makes you see reality from an encouraging point of view, motivating achievements, strengthening relationships and contributing to developing our internal world.

I apply AI in all the consulting contacts with my clients. I used to ask questions filled with suspicion and arrogance, aiming to leave my client exposed and weak. I acted in a similar way in the meetings with my partners, speaking from my ego instead of my heart. I currently speak from another perspective, a humbler position trying to uncover the talents others do not see or are not willing to value.

- **Tools created (e.g. protocols, questions, worksheets, design agendas)**

Just some notes for reflection...

We have applied AI in over 10 projects in consulting in different industries and various topics:

Banco ABN leadership– Banco Santander BSCH sales plan– Hotel Conrad teamwork – Ogilvy sales plan – LOreal, teamwork - Elena Tejeira, Catering, company organization plan– Urufarma Laboratorio, communication – Hayman Laboratorios, sales – CLU, sales and customer service - Orofino, company organization - Afinidad AFAP, sales.

- From all these experiences we conclude:
- We will not participate in an activity if the CEO of the company is not involved.
- We will also involve a middle management team in the preparation of the previous work, Topic Definition, Protocol, etc.
- The staff of the company have to respect the times of the activities; it is not possible to make a summit **in?** one day. If the time is not available, it is preferable not to do the activity, or to choose another methodology.
- We separate the questions of the first “D” and we give time to present each one separately.
- Participants always find it difficult to separate the work of the “3D” and the “4D”; they think it is part of the same exercise. I think we have to present the presentation of these items.

- We make a final report with the conclusions of each question and reflections of our own, which we present in a final evaluation meeting.
  - **Personal reflections (your development, feelings, growth, etc. during the project)\***

I feel each time we have applied AI in companies we have improved:

- The way we apply it.
- The conclusions we reach.
- The value we add for the people we work for.
- The value we incorporate in ourselves.