Grey Zone Change
The Workbook

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DEDICATION

*To those who point us to
new horizons by leading and facilitating
Grey Zone Change*

This is the accompanying workbook for the guidebook to navigating the Grey Zone of Change. The Guidebook is available on Amazon.

This workbook is intended to be used alongside the Grey Zone Change guidebook that can be found on Amazon. The workbook may also be used independently for those familiar with Organization Development (OD).

Figure 1: Model of the Grey Zone of Change

OVERVIEW

Have you ever found yourself in a scenario where:

1. Transformation is required in the way people work, think and behave

2. There are plenty of questions

3. There are no clear answers

4. There are new things to consider regularly

5. The end goal and solutions are unknown

6. Processes and progress are emergent

7. Many people are involved

8. Everything seems chaotic

This is the Grey Zone of Change.

A space between the current state and the emerging future that is undefined and unknowable.

SECTION 1:

Understanding the Grey Zone of Change

SECTION 1: *Understanding the Grey Zone of Change*

Summary

The Grey Zone of Change is the space in-between an existing system (System A) and an emerging or envisioned one (System B) that is undefined and unknowable. In the grey zone, three things need to happen before transformation can start to emerge: Transition, Learning & Synthesis and Group Development. I call these the sub-zone within the Grey Zone of Change. The transition sub-zone refers to the underlying psychological experience of change. As popularized by William Bridges, change is an event while transition is the individual psychological experience underlying the change event. The transition experience is marked by what is ending, the neutral zone and the new beginning. The learning sub-zone, is the space between not-knowing and knowing. The group development sub-zone indicated the need for transition and learning to happen at the whole system level, leading to group development.

The net effect of a system that has transitioned, learned well and developed together is transformation. It is a new state in which how the collective thinks and acts is fundamentally and qualitatively different than before.

Leaders and practitioners working to achieve transformational change must understand the individual psychodynamics, group and systems dynamics needed to achieve transformation. They must create the conditions for individual, group and collective transition and development. Navigating the grey zone to achieve all this—not just a successful change event or short-term behaviour change—is required. A Dialogic Organization Development (OD) mindset makes it possible for leaders and practitioners to navigate the complexity of the grey zone. Diagnostic orientations also have a place in the grey zone in terms of frameworks for tracking beginning and end states, measuring progress, managing incremental changes and tracking the evolution and development of the system.

SECTION 1: *Understanding the Grey Zone of Change*

Core Questions:

Here are 10 questions that may guide you in understanding and responding to the immediate experiences of the Grey Zone of Change:

1. How am I/are we experiencing the three sub-zones (transition, learning/synthesis and group development) of the Grey Zone of Change?

   a. What are the current transition experiences? (Are those involved predominantly in the ending zone (feelings of loss & stuck emotional responses), neutral zone (confusion and creativity) or new beginning (already operating at new normal)?

   b. What am I/we already learning/synthesizing in relation to the change?

   c. What is the level of group development I am experiencing?

      i. We are underdeveloped (unable to talk and plan together for the critical aspects of the change)

      ii. We are somewhat developed (able to talk and plan together for some but not all the critical aspects of the change)

      iii. We are developing through this change together (able to talk and plan together for most of the critical aspects of the change)

2. What transition role am I currently in: stabilizer of the old, bridge-builder between the old and new or creator of the new?

3. What do I/we stand to lose?

4. What do I/we stand to gain?

5. What questions, if answered will move us forward?

6. What elements of the 'old' culture need to be carried into the 'new'?

7. How do I/we need to develop in order to be prepared for what is emerging?

8. What containers (boundaries that hold a system together), differences (elements of diversity that exist within systems) and/or exchanges (information flows within and between systems) do I/we need to influence?

9. How might I/we manage our anxiety and reactivity in the grey zone in order to achieve transformation?

10. What (un)learning needs to happen for me, the group and in the system-wide context to sustain success?

Guidelines:

1. Create a wall/floor chart of the transition experiences by mapping your self-assessment of where you think people might be and then asking people where they place themselves.

    a. Are those involved predominantly in the ending zone (feelings of loss & stuck emotional responses), neutral zone (confusion and creativity) or new beginning (already operating at new normal)?). Discuss any discrepancies and help people think through options for helping people through the transition journey.

    b. Assess what roles people are exhibiting and determine which role(s) you may need to introduce to support further progress.

        i.   Stabilizers—maintaining the stability of the 'old' system

        ii. Bridge-builders—helping shepherd people from the old to the emerging future

        iii. Creators—Designing the 'new' system.

2. Determine the best mechanism to help you and the group reflect and synthesize what you are learning in the grey zone. That may include any form of debriefing, checking-in on lessons learned and open discussions of failures and what needs to be unlearned.

3. Create space to examine your group processes of communication, decision-making, member commitment to action and anything relevant to the group's effective functioning through the grey zone. This will enable to group to develop together as well as work on its dynamics.

4. Attend to anxiety and promote a non-anxious presence. Note it, normalize it & model a non-anxious presence. This will be harder for those with higher needs for certainty, clarity and planning. Psychometric assessments can help people understand themselves and others and interact with empathy and support for each other.

5. Use an understanding of systems dynamics (containers, differences and exchanges) to uncover, understand and influence patterns that are stuck and need to be shifted and patterns that are working that can be amplified. Ask: How well are our current containers serving us? What new containers might we need? How well are our current differences serving us? What differences might we need to introduce? How well are our current exchanges serving us? What new exchanges might we need to create? Encourage people and groups to self-organize to experiment with a variety of ways to shift or amplify patterns based on their responses to these questions.

Application:

1. Create a list of grey zone experiences you are currently in personally,
    professionally and socially.

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2. For each of the grey zone experiences, assess, discuss with others and make
    notes on the following. Note concrete observations/examples.

    a. What patterns are emerging in the grey zone?

    b. What psychodynamics—psychosocial, emotional and mental
        impacts—are you experiencing?

    c. What group dynamics are you observing?

    d. What is your current experience of the impacts of each of the grey zones?

    e. What new insights have you gained by using these ideas to understand your grey
        zone experiences?

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SECTION 1: *Understanding the Grey Zone of Change*

Application: *cont'…*

3. Brainstorm a list of actions that could help you create the Grey Zone of Change experience you want. Choose one that you will try immediately.

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SECTION 2:

Navigating in the Grey Zone of Change

SECTION 2: *Navigating the Grey Zone of Change*

Summary

Navigating the grey zone requires conscious attention, mindset shifts and a high level of skill and capability. Fundamentally, it requires a learner's mentality and the willingness to hold self and others accountable and capable of making the required shifts. The leader's challenge in navigating the Grey Zone of Change is fostering the conditions to define the way forward and be a partner in making that happen as opposed to being the architect and owner of the change effort. It requires practicing transformational leadership and fostering the conditions for emergence and generativity from the whole. The core challenge of this is giving up control and leading by the logic of attraction (inspiring and empowering others) rather than the logic of replacement (telling people what to do).

The change practitioner's role is perhaps the most involved role in the grey zone as it also nests the experience of individuals and leaders. In addition to a Dialogic OD mindset, successful change practitioners in the grey zone practice the principles of self-as-instrument of change.

A Dialogic OD mindset is the mindset and orientation from which an individual, practitioner or leader holds Dialogic OD assumptions and worldviews as their primary mental model for engaging with others. This mindset is present regardless of the methodology being used. Masterful Dialogic OD consulting is inclusive of the ideas of Schein's seminal works on process and humble consulting and Merron's masterful consulting. In regard to masterful consulting, I mean, like Merron, that "mastery is not a destination, nor is it a thing one does. Instead it is a journey of a lifetime that knows no ending point." Self-as-instrument is the idea that not only is everything happening externally and in the interactions between the practitioner and clients/ sponsors data, but so also is the practitioner's moment-to-moment experience. Masterful Dialogic OD consultants understand that their reactions and interventions directly affect change outcomes and they are part of and instrumental to the change process. If only three actions were practiced in the Grey Zone of Change, they would be: Listening deeply, Asking Powerful Questions, and Co-Creating Actions.

Core Questions:

I offer 10 questions for further inquiry in navigating the Grey Zone of Change as individuals, as leaders and as change practitioners who embody all three roles. In exploring each of these, I invite you to explore specific examples, observable behaviours or data that you are basing your responses on.

1. What response strategy is my Grey Zone of Change situated in?

    a. Reactive (crisis management/fire fighting)

    b. Status Quo (resist change by maintaining an attitude of "this is the way it's always been."

    c. Proactive (anticipate and design the emerging future)

2. What mindset shifts do I need to make?

3. How am I using my agency in the Grey Zone of Change?

4. How am I taking care of myself in the Grey Zone of Change?

5. What am I doing to foster conditions for generativity in the Grey Zone of Change?

6. Where am I using the logic of attraction?

7. Where am I using the logic of replacement?

8. How will engaging from a Dialogic OD mindset serve me?

9. What do I need to develop to practice masterful Dialogic OD Consulting?

10. How am I holding myself accountable to managing my reactivity (self as instrument) in the Grey Zone of Change?

Guidelines:

1. If you are in a leadership role, consider partnering with a Masterful Dialogic OD consultant to co-create your next adaptive action or move in your grey zone situation. Do this as frequently as needed as the situation evolves.

2. If you are a change practitioner get clear about what dialogic OD mindsets, masterful Dialogic OD consulting and self-as-instrument skills you need to develop. Create your development plan based on that. You may conduct a narrative feedback process where you directly interview your stakeholders or ask a change practitioner to do so on your behalf, to inquire into what you might further develop. The focus of the narrative feedback is learning, not diagnosis. You ask stakeholders from an appreciative perspective for stories or examples where you were at your best in navigating a grey zone situation. You then probe for what strengths they witnessed and what they would have wanted more of. You use that to determine your learning and development opportunities

3. Create your self-care plan. Answer:

    a. How will I manage my energy in the grey zone?

    b. How will I build in space for the things that renew me in the grey zone?

    c. Who are my support people and networks for self-care in the grey zone?

4. Create plans for developing the core minimum requirements for effectively navigating the grey zone. You can practice in day-to-day interactions:

    a. Listening deeply—practice listening fully to others in everyday conversations without interrupting.

    b. Asking Powerful Questions—Practice asking a question you are curious about after you have listened to others, without first sharing your own opinion in response.

    c. Co-Creating Actions—Focus on empowering others to choose their next adaptive action or move.

5. Practice managing your own reactivity by doing the following in day-to-day interactions. When you are triggered or notice you are acting reactively:

    a. Pay attention to interactions that you are triggered by or tend to be reactive in.

    b. Observe what others are saying or doing that is evoking the reactivity in you.

    c. Anticipate or observe the impact of your reactive response.

    d. Make a conscious choice to respond in ways that build co-creative empowering relationships.

Application:

Journal on your own or in the spirit of social construction, find a trusted partner, triad or group who have been in grey zone situation with you to discuss and provide you feedback on the following. Partners in this conversation should provide specific examples and observations to anchor their feedback. Journal your insights and determine one action that the insights call you to.

1. What is your experience of navigating the Grey Zone of Change as an individual? How do others experience you? What ideas from the Navigating section of the Grey Zone booklet most struck you?

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2. What is your experience of navigating the Grey Zone of Change as a leader? How do others experience you? What ideas from the Navigating section of the grey zone booklet most resonated with you?

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Application: *cont'…*

3. What is your experience of navigating the Grey Zone of Change as a practitioner? How do others experience you? What ideas from the Navigating section of the grey zone booklet most energized you?
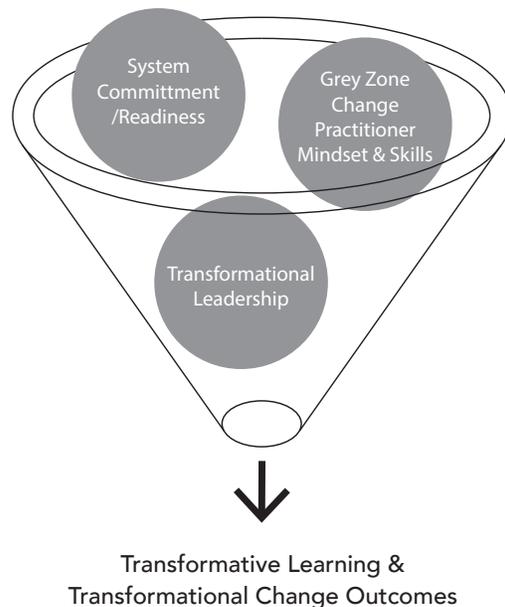
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SECTION 3:

Facilitating in the Grey Zone of Change

Summary

Facilitating transformation in the Grey Zone of Change requires strong commitment at all levels of the system, generative leadership and Masterful Dialogic OD consulting. These three conditions together form a strong container for leaders and practitioners to work effectively together to support groups to succeed with their transformational change goals.

Figure 3-1: Conditions for transformation in Grey Zone Change

System Committment /Readiness

Grey Zone Change Practitioner Mindset & Skills

Transformational Leadership

Transformative Learning & Transformational Change Outcomes

With these three conditions in place, each agent has a role to play. The practitioner assesses the situation, prepares the client and themselves for transformation and co-creates a contract that provides enough clarity to reduce client anxiety but is still realistic about emergence. The group does their generative work that comes with working through the sub-zones of the grey zone—transition, learning, synthesis and group development—and engaging in the transformation processes designed. The leader practices transformational leadership and fostering conditions for generativity by giving up control of the change design, while working to implement and make way for the experimentation, evaluation and amplification of the changes.

Throughout this process, the minimum shared practices by all involved are listening deeply, asking powerful questions and co-creating actions.

Core Questions:

I offer 10 questions for facilitating transformation in the Grey Zone of Change as leaders and as change practitioners for you to consider and start working through.

1. What are the core challenges with facilitating transformation in the grey zone of change?

2. How do I know if the client situation is ready? Who needs to be ready in the system?

3. What are the most important inquiry questions I must ask to prepare the various client(s) for transformation?

4. What personal transformations must I be ready to contend with in this grey zone situation?

5. What design will be most fit for function in this situation?

6. Where will I find my most suitable transformative learning community to support me through this grey zone experience?

7. What is needed to ensure the container remains safe throughout the process?

8. What is required to nurture changes in myself and the system?

9. What is required to embed the changes into the structures of the organization?

10. What skill(s) must I develop to model a Dialogic OD mindset throughout this grey zone?

SECTION 3: *Facilitating Transformation in the Grey Zone of Change*

Guidelines:

1. Review the comprehensive framework for facilitating transformation in the grey zone and consider your strengths and opportunities.

2. Use a past or current case to walkthrough each stage of the transformation process to identify possibilities for further action.

3. Consider engaging with other individuals, change practitioners and/or leaders you can walkthrough your case with, to generate further insights and clarify your next steps.

4. Use the framework to guide you through your next grey zone transformation.

Application:

Journal on your own or find a trusted partner or triad to discuss the following. Determine one action that the insights call you to.

1. What has been your best Grey Zone of Change experience?

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2. What has been your most challenging grey zone experience?

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Application: *cont'…*

3. What lessons are you taking forward from both types of Grey Zone of Change experiences?

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4. Practice Transformational Listening & Questioning in a group setting.
    Sit knee-to-knee and each:

    a. Share a story that most illustrates the lessons you are taking from your grey zone experiences.

    b. After each person shares, the others ask transformational questions that emerged from listening. Decide how many to ask each other depending on the time you have.

    c. After all have shared and asked questions, each share one new insight gained.

Lessons from the Grey Zone of Change

SECTION 4: *Lessons from the Grey Zone of Change*

Summary

This journey through my present understanding of the Grey Zone of Change has been reflective and illuminating. As I have made sense of my thinking and made meaning of my grey zone experiences, it reinforced the core lessons about the power of the dialogic mindset regardless of methodology and reminded me how much leader, practitioner and system readiness matter to transformation. Transformation can never be forced but it can be influenced in the direction of possibility, emergence and a new coherence, mainly by the choice to step out of comfort into deep change. Sometimes, internal and external pressures and the choices of others lead to a system bifurcation or a collective abandonment of transformation processes. Change practitioners need to be aware of this and willing to choose whether or not to engage further. All of us have a choice to examine our own ideologies and defenses when we stand questioning how, rather than choosing yes. I believe that for what matters, those ready will always find the doorway to yes and new possibilities.

Core Questions:

Here are 10 questions to consider overall when considering lessons and considerations in the Grey Zone of Change.

1. What are my choices when I (re)assess a client's readiness and find they may no longer be ready for transformational change?

2. How do I manage my experience of impatience if a client is slow to change or in hysteresis (a seeming regression from change progress)?

3. What might I do to reframe the pressure for performance and quick wins in the Grey Zone of Change?

4. What else can I do to expand a client or group's vision of possibility when they appear to be moving away from the Dialogic OD mindset/approach to transformation?

5. How do I hold the tension of understanding others' free will when working with groups or on a cause that matter to me?

6. How do I like to be supported when I am in the Grey Zone of Change?

7. What support can I offer others in the Grey Zone of Change?

8. What (re)humanizing practices might enhance my practice in the Grey Zone of Change?

9. How might I use narrative methods to support emergence and transformation?

10. What is required of me?

Guidelines:

1. Amplify narratives and narrative elements (e.g. metaphors, symbols, imagery etc.) that point to the emerging future or that offer generativity in the grey zone. Remember that narrative elements form a culture.

2. Review your grey zone situations for signs of inertia, entropy and hysteresis. Host conversations with the client and groups involved and explore questions like the following to see what emerges to amplify the changes underway and rejuvenate the transformation.

    a. What stories signify that there is progress? Ensure they share and harvest the conditions from the stories that are supporting progress.

    b. How might we create more of the conditions supporting our progress?

    c. What is needed to keep the transformation progressing?

    d. What feels stuck?
        Explore this if the group dynamics require that what is stuck be directly named and addressed, otherwise work on amplifying progress as per a to c above.

    e. Test commitments to the transformation – use the Yes questions from Peter Block's: The Answer to How is Yes: in Table 4-1 to facilitate conversation in small or large groups and determine as a collective the commitment of the group. This dialogue in itself will create change by shifting awareness within the group of where they are individually and collectively. This will create the context for where the group needs to go next.

3. Engage anxious clients in a timely manner with the purpose of triggering learning and co-creating action to manage the anxiety.

    a. What is your current experience of the grey zone?

    b. How are you feeling about the situation?

    c. What do you need more of and less of?

    d. What worry is underlying the anxiety experience?

    e. What assumptions do your worries imply?

    f. What do you have control of in the situation?

    g. What do you need to let go of?

    h. What are you learning about yourself and your leadership style in the Grey Zone of Change?

    i. What next adaptive move is emerging?

Courage Required:
It all Matters

What courage is required of you as you work for transformation in your Grey Zones of Change?

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Application

Personal Reflection:

1. What grey zone change challenges matter most to you right now?

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2. Using your list from #1, work through the Peter Block questions in
    Table 7 below to discover your *yes* in areas you find yourself asking *how*. Journal:

HOW?	YES!
How do you do it?	What refusal have I been postponing?
How long will it take?	What commitment am I willing to make?
How much does it cost?	What is the price I am willing to pay?
How do you get those people to change?	What is my contribution to the problem I am concerned with?
How do we measure it?	What is the crossroad at which I find myself at this point in my life/work?
How are other people doing it successfully?	What do we want to create together?

3. What courage is required of you?

    a. What narrative do you want for yourself a year from now?

    b. What first steps might you take to get there?

    c. What support might you need?

    d. Consider reaching out to a trusted patterner, colleague or community of learning to share the results of this exercise.

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About the Author

Dr Yabome Gilpin-Jackson considers herself a dreamer, doer and storyteller, committed to imagining and leading the futures we want. She is an applied social scientist, working in the areas of human development & leadership/organization development as a scholar, consultant, writer. She has over 15 years' experience consulting across the private, public, and nonprofit sectors and executive leadership roles in the field. Dr. Yabome Gilpin-Jackson teaches undergraduate and graduate courses in her areas of expertise. She was named an Institute for Social Innovation Scholar at Fielding Graduate University, CA for her published research into the transformational leadership of war-affected peoples from Africa and was a contributor to the ground-breaking book: Dialogic Organization Development: The Theory and Practice of Transformational Change (Berrett-Koehler, 2015). She has written journal articles about the Grey Zone of Change and Organization Development Practice. She has also been awarded International African Woman of the Year by UK-based Women4Africa and was the first ever recipient of the US-based Organization Development Network's Emerging Organization Development Practitioner award. She has received the prestigious Harry Jerome Professional Excellence Award in Canada.

In addition to peer-reviewed publications, she is author of Identities & Ancestries, short story collections about global African experiences and Lead Editor of the We Will Lead Africa book series, a non-fiction anthology of everyday African leadership stories.. Yabome continues to research, write and speak on leadership & organization development issues, posttraumatic growth & on honouring diversity and social equality in our locally global world. Yabome is community-engaged on various Boards, including the Organization Development Network, Canadian-based NGO, The People's Foundation for Sierra Leone & The Mayor's Advisory Board for Black History Month in Vancouver.

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