

YOUR  
**PLAYBOOK**

FOR THE BUSINESS OF  
BUILDING A BETTER WORLD

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FOWLER CENTER FOR  
BUSINESS AS AN AGENT  
OF WORLD BENEFIT



DAVID L. COOPERRIDER CENTER FOR  
Appreciative Inquiry  
CHAMPLAIN COLLEGE | STILLER SCHOOL OF BUSINESS

**USING LARGE GROUP  
METHODS AND  
THE APPRECIATIVE  
INQUIRY SUMMIT TO  
ENGAGE ALL OF YOUR  
STAKEHOLDERS AS  
YOU SEEK TO LEAD  
YOUR INDUSTRY IN  
TODAY'S MISSION  
ECONOMY**

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## PART I

# Introduction

*Your Playbook for The Business of Building a Better World*

## **It's no longer a distant future that's coming. It's here.**

This is the era when the business of building a better world is good business. There is no reversing the fundamental finding that providing market-driven solutions to the world's greatest social, ecological, and human challenges is a winning strategy (see Hoek; 2021; Kramer; 2021.)

Peter Drucker, the father of management theory spoke with me several decades ago, shortly before he passed away. He saw it coming and the logic was clear. He was 93 years old at the time and just as he so often did during his great career, he would spot trends turning into trajectories, just before the tectonic plates would shift.

He said:

*"I wrote about it many years ago... that every single societal and global challenge of our day is a business opportunity, in disguise, just waiting for the opportunity-focused entrepreneur, purpose-driven innovation, and of course, effective management, defined by results."*

Today is the decisive moment that we make the business of building a better world the growth story of our time. Just consider a few of these trajectories (see Cooperrider and Selian, 2022):

- Sustainable brands are outperforming non-sustainable brands both in revenue as well as growth as consumers increasingly vote with their dollars.
- Shareholders have driven environmental, social, and good governance (ESG) analysis into the heart

“ **What we are witnessing is a shift that is all-embracing, rapid, irreversible, extending to the far corners of the planet and involving practically every aspect of business life. What we are witnessing is a world increasingly divided by companies that are seen as part of the problem and those that are leading the solution revolution in this, the era of massive mobilization. What we are witnessing is the birth of a comprehensive new enterprise logic, one that can not only create thicker value and truer wealth but can also be a platform for building the 21st century company, that will be loved by its customers, envied by its peers, and admired by all those who care about the next decisive decades of our planet.** ”

**–Paul Polman**

*Former CEO of Unilever*

*Honorary Chair of the International Chamber of Commerce*

*Vice Chair of the United Nations Global Compact*

”

investment decisions, where ESG-linked funds have witnessed, in exponential terms, a 10X rise since 2015.

- Green investments are on track to reach \$50 trillion by 2025.
- 100s of companies such as Apple, Unilever, Natura, Microsoft, Tata, the Gap, Novo Nordisc, Tesla, and IKEA are not only leading the 100% renewable energy revolution but are finding that embracing the world's 17 sustainable development goals (SDG's) can come with a huge prize. For example, take a company like the retailer Gap, Inc. who has aligned their efforts on SDG 5: "Gender Equality." Research by the McKinsey Global Institute projects that the market impact of products and services that focus on gender equality will add up to \$28 trillion, or 26% of annual global GDP by 2025.
- CEOs such as Paul Polman, former CEO of Unilever and now Chair of the International Chamber of Commerce have shown that better profits will increasingly come not from creating the world's problems, but from solving them. In their new book (Polman and Winston, 2021, p. xi) which demonstrates the positive pathways of companies such

as IKEA, Natura, Microsoft, and others, Paul Polman is clear: "A net positive approach not only prepares you to be competitive today, but more important, positions you well to be among the winning companies and industries of the future. Being a leader is a privileged position and there is nothing more gratifying than leveraging it to serve others and creating a better world for all."

Moreover, it's not just what is done but the how. Managing business as a force for good is like a superpower. Recent research shows that raising the ambition, going beyond sustainability as less bad, and embracing the journey to become a Net Positive company, is rapidly becoming the most reliable way to bring the human side of enterprise to life. Human beings are hardwired for meaning. Almost everybody wants a better life not just for themselves but for their children and a healthy Nature.

Have you ever been part of a large group strategic planning session in your own organization or at a company such as Whole Foods, Interface, IKEA, or Apple—where they bring 100's and sometimes thousands of employees from every level, specialists from every function, including external stakeholders such as customers and

stakeholder community leaders—to co-create over 2.5 to 3 intensive days the company's sustainable and shared value strategy while embracing the ambition to become a net positive force for good in the world? Have you ever experienced the energy? The sense of meaning, purpose, and value? The inspired innovation and the "design studio" format? The bold action follow-through? The bubbling up of intrinsic motivation and the thrill of being an integral part of a high-performance stakeholder community?

Hundreds of empirical studies are showing it, that is, they are answering the question why good things happen to good people (Post and Neimark, 2007) while those persons are working toward the greater good "out there." And for organizations with lots of people mobilizing around larger purposes, we now know this is consistently amplified. Scientifically verified findings have reached one overarching conclusion for organizational leaders and it's been summarized like this: the most potent force on the planet for bringing an organization alive and bringing it to its most flourishing or vital best is to invite the whole system to together build a better world in ways that create new sources of shared value while propelling the success of the business (see Cameron, 2021; Cooper-

rider 2017; Cooperrider and Fry 2012.)

The paradox? By focusing on and helping worlds "out there" to flourish, the research shows that there is a "mirroring flourishing" dynamic where those same organizations and the people in them experience a kind of reverse or reciprocal flourishing not just "out there" but simultaneously on the "in here." When Bob Stiller the CEO of Green Mountain Coffee Roaster's did his first major whole-system-in-the-room strategy summit — Preparing for an Era of Phenomenal Growth and Phenomenal World Benefit — little did he know that years later he would describe that experience as one of the most profound and productive "high-point moments of my career." Yet Bob Stiller, of course, is scarcely alone. Flourishing enterprise, increasingly, is what every leader wants and here is how it is being defined:

*"Flourishing Enterprise is about people inspired every day and bringing their whole selves into the enterprise; it's about innovation arising from everywhere; and it's about realizing remarkable net positive value with stakeholders, including customers, communities, societies, and ultimately, with a healthy and thriving Nature."*



## A Playbook and a World-Renowned Methodology

This playbook takes all the studies, stories, and success principles in *The Business of Building a Better World* (see above figure one) and places in your hands a powerful methodology to propel your organization's journey, wherever along the positive pathway you are. The playbook's goal: it's to help you magnify, multiply, and mobilize your collective capacities, and your naturally accessible universe of strengths, to deliver on the promise of business for good. Think of the figure above as a set of business leverage points and cornerstones. Think of this playbook as your process to sculpt your own.

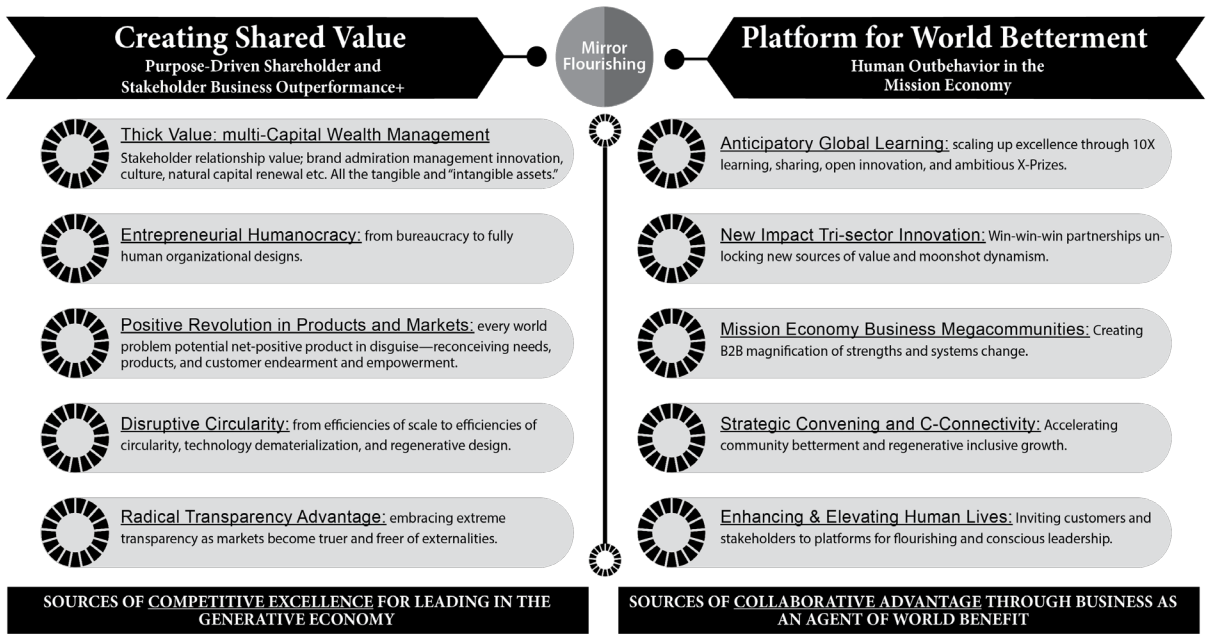
### **This playbook is for organizations, communities, and leaders who:**

1. Want to be part of the solution revolution and believe that we have an incredible opportunity to reimagine and create entirely new and net positive industries, products, services, and supply chains while in parallel helping to transition existing systems to a generative and regenerative economy in the service of life, now and across the generations.
2. Want to experience a new change equation, one that reverses and erases the common and continuing 70-80% failure rate of major change initiatives while showing how people will thrive and unite in bold change, and that resistance to change is largely a myth. People don't resist change; they resist being changed.
3. Want to learn about the remarkable power of the rapidly growing field of large group methods — something that's not top down or bottom up and represents a third kind of leadership — the kind that can turn any significant change opportunity into something that's intrinsically motivating instead of externally depleting, strengths-focused instead of deficit focused, and innovation-inspired instead of defensive or divisive.
4. Want their planning methods to strengthen the best in their culture and to leave behind a more flourishing enterprise. Just like Olympic champions and teams have dedicated practice fields, these large group planning "fields" are de-



signed to mold and model a flourishing way of working. They, make us better for the future. Large group methods, when well-designed are places of natural flourishing: they are about people inspired every day and bringing their whole selves into the enterprise; they are about innovation arising from everywhere; and they are about realizing remarkable regenerative and net positive value with stakeholders, including customers, communities, societies, and ultimately, with a healthy and thriving Nature.

## The Betterment of Business + The Business of Betterment



**Figure 1.1** — The Business of Building a Better World “Opportunity Areas” for Realizing New Sources of Both Competitive Excellence and Collaborative Advantage While Creating Shared Value and Becoming a Platform for World Change (see Cooperrider and Selian, 2022)

## Welcome to the Collaborative Age

Organizations, cities, economic regions, states and provinces, whole industries, nations, and even UN World Summits are searching for methods that bring people and institutions together across specializations, sectors, and silos in positive ways to discover common ground dreams and designs for action. Planning methods of the past are slow, cumbersome, and falling short in our complex, high velocity, multi-stakeholder environments. But fortunately, exciting management innovations are making breakthroughs and these new 21st century approaches are coming of age — especially those that embrace whole systems engagement from a strengths-based and design-thinking perspective. The very concept of strategy is itself undergoing transformation. Gone is the static blueprint model. Our complex world is calling for dynamic processes, high engagement methods across boundaries that forge commitment and common ground along the way; multi-stakeholder methods that move beyond both top down and bottom up. Today the coupling of strategy-and-change must be designed in from the start because the real test of strategy is not

just execution in parts and fragments. Leaders everywhere know that in dynamic, volatile, complex systems the question is not simply about change per se: the real question every leader is asking now is about “change at the scale of the whole” — how do we move forward faster and better, together? Clearly, it's not enough to have isolated pockets of excellence and execution. When game-changing innovation, scalable solutions, and industry leadership are at stake, the combination of whole systems unity, agility, speed, and responsive execution is often the decisive differentiator.

Today an entire field has emerged, and it is transforming how we strategically convene and bring out the best in collective planning. It's called “large group methods” and it's been indispensable to so many industry-leading stars, especially in the business for good movement. Some of the stories are now legendary, for example when Whole Foods brought the whole-system-into-the room to create its “Declaration of Interdependence” or when IKEA, Interface, Green Mountain Coffee Roasters, the UN Global Compact, Apple, the Business of Terra Carta

& Co., and Clarke Industries mobilized their own stakeholder summits around strategic work mobilizing such programs as “Project Greater Purpose” or “Carbon Takeback” or “Coming Together to Create an Economic Engine to Empower a Green Business on a Blue Lake” or “Helping Children to Be Students of Sustainability.”

And while it's beyond the purpose of this playbook to catalogue the rich re-

sources and vast vistas of this large-group domain we do want to help get you started with one the field's stand-out approaches. In a key report of the United Nations Global Compact this one, the Appreciative Inquiry Summit, was described as “the best large group method in the world today.”

## **The Appreciative Inquiry Summit Method**

An Appreciative Inquiry Summit is a large group strategic planning, designing or implementation meeting that brings a whole system of 300 to 2,000 or more internal and external stakeholders together in a concentrated way to work on a task of strategic and interdependent value. Moreover, it is a roll-up-the-sleeves 2.5 to 3-day co-design collaboration that leverages what's known as “the concentration effect of strengths” where all relevant and affected stakeholders are engaged as co-designers to share leadership, create and alignment of strengths, and take ownership for making the future of some big-league opportunity successful. When Green

Mountain Coffee Roasters did their first 500-person AI Summit it was prophetic. Their task or big-league opportunity, as mentioned earlier, was called “Preparing for an Era of Phenomenal Growth and Phenomenal World Impact.” At the time — when they inaugurated what became more than a decade of annual AI Summits and rapid design studios — GMCR was relatively small, about \$150 million in annual sales. Moreover, at the time it all started, there were whispers of bankruptcy and the concept of “sustainability” was largely seen as philanthropy or foundation work, not as a lens for creating lowering risks and costs, elevating radical prod-

uct innovation, eradicating poverty through profitability, creating sustainable inclusive growth in communities, inspiring product design, building a high-purpose culture, and turning such things as the world's global goals into business strategy. Within a couple of years of its launch-pad summit, the company was named the most ethical corporation in the world and had embedded sustainable value thinking into everything. It's most ethical corporation in the world award was a repeat affair too. The company received unprecedented annual back-to-back honours while they almost single handily helped create the US Fair Trade movement and more. And within the decade, GMCR's market value simply soared, to some \$24 billion dollars. It was one of the business growth stories of the decade.

How did they do it? It was the combination of powerful strategy analysis (expertise) + the kind of whole system co-creation (emergence) that makes process and content unite. The result: a super-coherent set of strategies and core principles to live by, flawless execution and successful improvisation, the growth of an iconic brand, and a human-centric culture powered by purpose. Rod Ely, a senior executive in IT, later reflected and commented on it before he retired. He said "during

these 500-person summits, with employees at every level, and with coffee growers from countries all of the world, and with B2B customers and our consumers, our stakeholder community leaders, and with other leading edge companies in the room with us, our courage and cooperative capacity to innovate truly soared above specializations and silos...And these summits were not about talking heads or pre-negotiated strategies, but about co-creation and lifting every voice. In fact, our CEO Bob Stiller would quietly and powerfully take it all in and then at the end share back everything he heard, summarizing points of priority excitement and agreement. And then, after three unbelievable days of work, the standing ovations for our CEO and each other would happen. Our external stakeholders said never in their careers have they ever been invited into the inner circle of strategy of a company like ours. Now looking back at those years of turning Green Mountain Coffee Roasters into a better business + better world platform, I see it clearly... those years were my Camelot."

...

As we have shared the Appreciative Inquiry Summit is a science-backed and game-changing large group strategic planning, designing or implementation meeting that brings a whole system of 300 to 2,000 or more internal and external stakeholders into the room in a concentrated way to work on a task of strategic, and especially whole system, value. The strategic convening appears bold at first, and yet it is based on a simple notion: when it comes to system-wide innovation and integration, there is nothing that builds trust and brings out the best in human systems—faster, more consistently and more effectively—than the power of 'the whole'. Imagine it, for example, at a trucking company: you are at a roundtable with truck drivers, the head of finance, dock workers, leaders in the stakeholder community, supply chain partners, external experts and innovators from other countries, union leaders, the CEO, and of course, precious customers. For everyone involved, right from the very first roundtable exploration, there is the remarkable experience of "wholeness." And for many reasons we are still trying to understand this wholeness and the power of it. What we do know is that the experience of wholeness does something to us. It calls us to our best. One CEO—he was

so nervous before his first 500-person summit—afterward remarked: "What was all the fuss about? We have such good people in in this organization." So powerful was this first summit that this company's head of strategy and organization development ended up leading more than sixty such 500- person summits over the next two years to completely transform her 30,000-person company. Cindy Stull explains how each of these convenings were task-oriented summits, to rally around high priorities, rapidly. One summit she talks about, for example, was totally dedicated to the challenge taking seventy-five million dollars of cost out of operations and doing so without any layoffs or drop-off in customer quality. It succeeded. Millions were re-purposed into operational innovations that doubled the speed of company's throughput. Two years later the company's market-value grew by over 400% while employee engagement scores soared (Ludema, et. al, 2008.) In part this was due to the value of network effects, the well-known principle that something becomes more valuable, often exponentially, as the number and quality of relational ties (whether through face to face or technology enabled networks) and as usage increases.

Flowing from the tradition of strengths-based management and theories of complex adaptive systems the "AI Summit" says that in a multi-stakeholder world it is not about (isolated) strengths per se, but about configurations, combinations of strengths, and interfaces. We live in a world where change is the new normal but as noted earlier the question is not just how we change for the better. As mentioned, the real question has shifted: it's how do we change at the scale of the whole? "How do we move together as a whole 67,000-person telecommunications company; or a whole 1.5-million-person business; or a nation-wide dairy industry; or a whole 5 million person economic and ecological region; or as a whole country united around some epic purpose and grand strategic opportunity? Enterprise-wide mobilization must become dynamic, design-inspired, silo-breaking. It needs to elevate the best, not the worst, and it needs to build collective willpower and way-power while linking together expertise and emergence, two things that are seemingly impossible to fuse. For leaders who prize speed with quality, innovation with unity, and trust with accountability they should take note of something leadership thinker Meg Wheatley has observed

over and over: "There is no power for change greater than a community discovering what it cares about."

Appreciative Inquiry was introduced into the business world in 1987 by David Cooperrider and Suresh Srivastava and soon thereafter University of Michigan's Bob Quinn said in his book *Change the World: How Ordinary People Can Achieve Extraordinary Results* "Appreciative Inquiry is revolutionizing the field of organization development and change." One of the principles of AI is that a person, or an organization or system, will excel only by amplifying strengths, never by fixing weaknesses — and so AI provides the tools and methods for elevating system-wide strengths, for creating new combinations and concentration effects of strengths, and ultimately spreading and deploying those strengths in the service of a more sustainable and net positive future. It's based on a strengths-inspired principle proposed by the great Peter Drucker, the father of management thought, when he said that the task of leadership is ageless in its essence:

"The task of leadership" said Drucker, "is to create an alignment of strengths in ways that make a system's weaknesses, irrelevant."



That's what the word appreciation means. It means valuing those things of value. It also means to increase in value. And that's how innovation happens, through the elevation, magnification and cross-multiplication of strengths and solutions and discovering together what works, what's better, and what's possible. Today AI's approach to strengths-inspired, instead of problematizing change, is supplanting many of the traditional change management models in business and society. Appreciative inquiry is being practiced everywhere: the corporate world, the world of public service, of economics, of education, of faith, of philanthropy — it is affecting them all.

How do you prepare for it? It is very simple—think of the pre-summit phase, the summit, and the post summit. Once a trusted and capable convener or convening alliance is assembled, a design team goes through a one or two-day design session where everything big picture for the summit is designed including (1) the internal and external Stakeholder Mix; (2) the articulation of the summit Task; (3) plans for building pre-summit Momentum and designing any Insight Research needed to support it; and then (4) agenda framework and most important, (5) the home grown and

totally customized AI Summit Participant Workbook. From the moment of the 1st -design meeting, the typical whole-system-in-the room summit usually takes place in 3-6 months. But it can be fast tracked.

In the summer of 2021 Harley-Davidson, the iconic brand in Milwaukee Wisconsin and B-Team leader, wanted to give back to its stakeholder community and help build a Near West Side for sustainable inclusive growth, health and happiness and wellbeing for all, and economic vibrancy, safety, and greening. They co-convened with the Near West Side Partners, residents, small and large businesses, the faith stakeholder community, universities and K-12 leaders, public officials, youth leaders, sustainability experts, and international figures. The summit took place rather quickly, just 8-weeks from its seed moment, in July of 2021. This one, like many today, was held over 2.5 days on the Zoom platform. One of the moderators of the summit, when asked later, why was this so easy — the actual summit itself — shared an answer we often hear. She remarked:

“It's all in the pre-summit planning... once the AI Summit participant workbook is created using the AI “4-D” cycle of Discovery, Dream, Design, and



Destiny, the whole thing elegantly and easily flows on its own...the most important thing for us was having an example or model summit workbook." Then she continued: "of course, we changed the questions, customized our own Task focus and summit goals, created our own magical stakeholder mix, and tailored our time frames and

action objectives. But once we had the workbook completed — with all the roundtable instructions and design-studio "opportunity areas for innovation" — all we had to do, from a moderator perspective, was to keep time!"

## **What You Have in Your Hands Is a Model Playbook**

What you have in your hands is a generic playbook that:

- Can easily be customized by your core convening group, steering committee or design team and summit moderators.
  - Serves to help you activate, in the most powerful way we know, the concepts, principles, and innovation opportunities in our newest book *The Business of Building a Better World: The Leadership Reset that is Changing Everything* (see Cooperrider and Selian, 2022.)
  - Includes a generic 2.5-3-day AI Summit agenda flow and set of worksheets with instructions for roundtable discussions again, easily adapted.
- Provides a high-level set of moderator rules of thumb in the end-notes. And for those wanting deeper theory, cases, variations, and detailed facilitator tips we offer a select library on the AI Summit. You will find it in the references. While there are today over 700 books that talk about Appreciative Inquiry, we've kept the references concise and placed a priority on those books that outline the more detailed "how to" for example, how to situate the tables to maximize roundtable dialogues and plenary report-outs. We wanted to keep this playbook fairly concise and not overwhelm leaders and facilitators with details they may or may not need.

- Will save you at least ten days of starting from scratch. It's easy. For example, you and your team will be able cut and paste your own company name; your own summit title and task; your own summit discovery questions; your own dream phase prompts; your own design-studio opportunity areas for rapid prototyping; and you can easily customize the deployment or action-planning worksheets.

As a model or generic playbook, I've taken lessons from hundreds of AI Summits that I or our many colleagues have run. For example, with Apple, the company learned how to leverage their world-class design-studio capacities –remember Steve Jobs obsession for “insanely great products” — and then transfer that same kind obsession into the operations arena of supplier-responsibility, focusing on human and ecological initiatives across vast supply chains, touching many millions of lives. With Interface we've learned how the AI Summit can help create a totally unified company in what CEO Ray Anderson called “Climbing Mount Sustainability” and how each of whole system-in-the-room convenings, when applied over the years, invites radical progressions, with each summit producing unstoppable waves, as witnessed in Inter-

faces “Next Ascent” AI Summit. With Whole Foods, we learned how the Appreciative Inquiry approach can become part of everyday meetings, not just large group events, but embedded as integral part of the strengths-based DNA of the working culture. Roberta Lang, VP, and former Whole Foods chief legal counsel, shared with us how almost every meeting soon applied the method of appreciative inquiry for after-action reviews: “what was best?” “What's the new possible?” “How might we make it so?” At Walmart we learned, perhaps not surprisingly, how the AI Summit can scale for larger systems innovation, for example, how Walmart strategically leveraged the AI Summit methods to convene the entire value chains of whole industries around sustainability—the dairy Industry, magazine industry, seafood, electronics, apparel, and more—and now how these are now leading to even more ambitious projects, such as project Gigaton with 2,300 suppliers in partnership. Project Gigaton is remarkable illustration: its aim is to avoid one billion metric tons (a gigaton) of greenhouse gases from the global value chain by 2030 through pathways such as their 100% renewable energy investments, zero waste initiatives, net positive product designs, sustainable packaging breakthroughs, and more.

## Introducing the Terra Carta Corporation

In our generic playbook we were inspired by a manifesto recently released by former Apple chief designer Jony Ive who teamed up with The Prince of Wales to launch an initiative that will encourage designers, entrepreneurs, and bold businesses to put Nature, People, and Planet at the heart of global value creation—one that will harness the precious, irreplaceable power of Nature combined with the transformative innovation and resources of the private sector.

Their Terra Carta declaration calls every one of its corporate signatories to help make a sustainable and regenerative future the growth story of our time. It takes a “future of industry” and “future of economy approach” and it leverages the creative disciplines of global innovation centers, moonshot and design thinking disruptors, scientists, software engineers and technology pioneers, young people, artists, designers, and business revolutionaries to expand the view of what is possible and what it will take to get there. They also want to accelerate global learning and the diffusion of innovation across industries and countries, seeking out and showcasing

emerging solutions and “living laboratories” to demonstrate and scale up sustainable market opportunity and making the idea good growth a reality. Inspired by this, our fictitious Terra Carta Corporation shares this conviction — that we have an incredible opportunity to reimagine and create entirely new flourishing industries, products, services, and supply chains that put Nature, People, & Planet at the heart of economic betterment and inclusive sustainable growth.

Moreover, we believe that the Appreciative Inquiry Summit is exactly the kind of design-inspired approach that other visionary designers like Bruce Mau see as aligned to this work. He calls it “fact-based optimism” in action which is not at all about turning a blind eye to anything, but design starts with the belief that the future can always be made better, and that there are underleveraged strengths and inspirational resources everywhere, across nations and cultures, across history and future images, within our organizations and each one of us, and across nature’s 3.8 billion of years’ worth of life’s lessons. Indeed, we live in a universe of strengths, lessons into what

works are today instantly transmitted everywhere, and somewhere in the world it is already tomorrow.

Appreciative Inquiry is the cooperative co-elevationary search for the best in people, their organizations, and the world around them. It involves the discovery of what gives “life” to a living system or organization when it is most effective, alive, and constructively capable in economic, ecological, and human terms. AI involves the art and practice of asking questions that strengthen a system’s capacity to apprehend, anticipate, and heighten positive potential. In a 2.5-day summit format, it means a little more than a half-day deep dive into each of the “D’s” of the AI “4-D” cycle: Discovery; Dream; Design; and Destiny. What makes the AI Summit — and this example workbook — different is that it says that design is too important to leave to just professional designers. Indeed, we are all designers. And when design thinking is paired with large group methods, strengths-inspired approaches, and high purpose, innovation hope grows, and community expands.

So welcome to the Terra-Carta Corporation’s “Better Business, Better World Summit.” We hope it’s a tool you can use. Their summit workbook starts with a model kind of welcome letter

from TCC’s Executive Chair and CEO; it describes the key success factors large group design summit’s; it situates the summit’s purpose-inspired task or design intention; it demonstrates the power of appreciative inquiry’s discovery questions; it speaks to the logic of the stakeholder mix; it provides worksheets for giving instructions to roundtables; it shows the power propelling waves from Discovery, to Dream and Design, and then to Destiny or Deployment. And once again it ends with references to other detailed books — whole volumes — where you can go for further resource.

## PART II

# Our Better Business, Better World Summit

*The Terra Carta Corporation*

## A Time for Action

Welcome by Our CEO

*Eileen Hunt, Executive Chair and CEO, Terra Carta & Co.*

*Welcome to the Terra-Carta Corporation's Better Business, Better World Summit and thank you for being here. It is an exciting time to be an employee, partner, and stakeholder with TCC. Our business is strong, and our previous Shared Value Strategy showed us how to unleash new waves of innovation and growth which involved creating economic value in a way that also creates value for society by addressing its needs and challenges. Launched a decade ago, we found not all profit is created equal, and that profits driven by higher purposes and aligned with our core competencies, inspire innovation while attracting valuable new relationships and purpose-driven performance. Yet at the foundation of the Shared Value strategy is one word that our people and stakeholders are saying is the hidden gem. That one big idea — and it's time to embed it, better understand and leverage it consistently — is the word Net-Positive. Its about enabling betterment, not about just focusing on less harm. We believe the next stages of business, beyond "zero" is where our values call out and our history of success has prepared us for.*

*For example, one of our manufacturing sites set out to reduce energy, create near zero waste, and the like, and succeeded. But then a few of our own revolutionaries raised seemingly heretical questions: "How might create a facility with 100% solar renewable energy, while lowering costs to the point where we might produce more clean energy than we need and thereby provide the surplus to our stakeholder community's youth-entrepreneurship training centers so those centers, in turn, can reach out to more people." Think about that. What if that innovation were to spread throughout our more than 300 facilities in hundreds of communities? But more than that one innovation, what if Net Positive thinking permeated our culture, our operations, our product designs, the enrichment of our customers lives, our goals for being a fully human organization, all our supplier relationships, our commitment to the creation of true markets and transparency, our better world partnerships and industry coalitions, our circular economy quest, and more.*

*We gave you all ahead of time a book written by one of my closest friends, Paul Polman. Paul was the former CEO of Unilever who teamed up with Andrew Winston to write what's being called "the best business book of the decade." The book is called Net Positive: How Courageous Companies Thrive by Giving More Than They Take. I hope this book inspires you as much as it has challenged and inspired me. But what's more important than the book is your vision, ambition, and passion and your ability to raise the exciting questions: "What if...our business was one that improves well-being for everyone it impacts and at all scales — every product, every operation, every region, and country, and for every stakeholder, including employees, suppliers, communities, customers, and even future generations and the planet itself?"*

*Imagine something for a moment. Imagine a Terra Carta organization of 60,000 Net Positive innovators, a place that is energized top to bottom to do good and do well, and where 60,000 people are fully engaged and actively taking responsibility to use the lens of Net Positive to make us a flourishing enterprise on the inside and a platform for world betterment on the outside. Obviously, this is a north star, not a short-term plan. No company can claim to be Net Positive. This is not a critique. We believe it's an opportunity to lead. We believe it's the call of our time.*

*As you look around the room you will see some 800 Terra Carta stakeholders and people from every level of the company and from all around the world. You will see interns as well as future recruits — younger people who have a stake in Terra Carta being a destination workplace. You will see friends of Terra Carta — suppliers, world class companies, valued customers, communities where we work, environmentalists and sustainability scientists, business for good thought leaders, and more.*

*Why did we bring this large group together? There are two reasons. First, the task of this summit is complex and it's strategically important to the business. People from different levels and parts of the world have different perspectives, experiences, and ideas and we need the best thinking from every quarter of the company and beyond. Secondly, we need ambassadors for action, across the company and around the world. We know that what we are working on here is too important to the future than to just have a nice conversation. We need you to not only take positive action after our work here but also play our message everywhere.*

*Thank you in advance for your best thinking and full engagement. I am pleased that the leaders of the sustainable innovation council have proposed this step — and thank everyone on the council for the many hours of preparation, analysis, and focus you have given to this work. This summit will be a success, in my view, when we emerge from here with a focused set of initiatives for building the Net Positive corporation. Building the "Better Business, Better World" is a privilege — it's also the mandate of this meeting.*

*Sincerely,*

*Eileen Hunt*

*Executive Chair and CEO, Terra Carta & Co.*



# The TCC Multi-stakeholder Summit Objectives

Our Better Business, Better World Summit is about our vision of the future, not someone else's vision, but our collective vision. A shared vision is not an idea or a specific goal, but rather a force in people's hearts. At its simplest level, a shared vision is the answer to the question "What do we want to create — together?" Vision animates, inspires, and it transforms purpose into action. Indeed, if you can dream and design it, not just alone but together, you can do it. Our summit's task is clear. We are coming together to design a compelling vision and to set it into motion: Our Better Business, Better World Summit: Coming Together to Imagine the Radical Innovation Opportunities of Net Positive Enterprise & the Business of Building a Better World.

## Our Objectives

- 1. DISCOVER:** to illuminate "the positive core" of TCC's "better business, better world" strengths - all of the past, present, and future assets, qualities, and strategic strengths — and to do a continuity analysis: "What are those things we should keep, honor and leverage — even as we change, grow, and reinvent ourselves in a world of frantically accelerating change?"
- 2. DREAM:** to imaginatively create ideal scenarios of the future of TCC as a Net Positive force for betterment and shared value creation, as we seek to help build a world of "full spectrum flourishing" that is, a world where our business can excel, all people can thrive, and nature can restore, renew, and replenish? What kinds of leaps has our history prepared us for, and what kind of future is wanting to be born in relation to the call of our time?
- 3. DESIGN:** to ideate and design rapid prototypes — a set of real initiatives and strategic priorities — that will help propel our common visions into reality. As we create ideal and desired scenarios of the future, we will discover "opportunity areas" that can be turned into action. Some of these will be initiatives and designs already existing that we want to honor, embolden, and accelerate. Some will involve a radical innovation agenda and blue ocean thinking



— and cause us to question our moonshot capacities. Some will be small but carry a big impact. Others will be bolder, braver, bigger, and longer-term creating future-fitness. What we are building and want is a portfolio effect. Like waves combining, we want to build the momentum for the kind of flourishing enterprise and better world that our hearts and minds know is possible.

4. **DEPLOY** and set in motion a focused portfolio of self-organizing initiatives (with assigned metrics) to actively network us within the enterprise and across silos and specializations and to strategically partner “outside of the building” with industry partnerships, supply chains, customer communities, and worldwide moonshots such as global climate action and realizing the economic and social inclusion goals of the world's SDG's.

## What is an Appreciative Inquiry (“AI”) Summit?

The **WHOLE SYSTEM** participates — people and groups that care about and have a stake in the future of this initiative. AI wants to connect the omnipresence of strengths — the universe of strengths in the system — and this requires a configuration of the whole.

**TASK-FOCUSED**, an AI summit is not simply an educational event or a conference. We are here to build a vision and plan of action that creates a new Terra Carta & Co. — one propelling Better Business, Better World strategies, priorities, and initiatives.

Future scenarios are put into **HISTORICAL** and **GLOBAL** perspective. That means thinking globally together before acting locally. This enhances shared understanding and greater commitment to act. It also increases the range of potential actions.

People **SELF-MANAGE** their work and use Design **INQUIRY** — not deficit-based method as main tool. That means more discovery and joint designing than speechmaking and pre-determined outcomes.

**COMMON GROUND**, rather than “conflict management,” is the frame of reference. That means honoring our differences and then discovering areas for action where we have common-ground images for the future we want to help create.

**APPRECIATIVE INQUIRY (AI)** — "to appreciate" means to value and is the AI process taken to understand those things worth valuing. To inquire means to study, to ask questions, to search. AI is, therefore, a collaborative search to identify and understand the system's strengths and greatest opportunities, and people's aspirations.

**COMMITMENT TO ACTION** ensures that, because the "whole system" is involved, it is easier to make more rapid designs (prototypes) and deliver on promises to act in ways that everyone can support and help make happen. As co-designers, we brainstorm and build things that we want to help create in partnership with others and as a whole.



**Figure 1:** Our Better Business, Better World Summit: Agenda Flow in a Glance

**Discovery Phase:**  
**Your Question Guide for Our Opening Conversation in Pairs**

**Exercise:** Person **A** will interview person **B**. Then person **B** will interview person **A**

““ **Don't ask what the world needs. Ask what makes you come alive and go do it. Because what the world needs is people who have come alive.** ””

**–Howard Thurman**

*Author, philosopher, theologian, educator and Civil Rights leader*

*It's reported that the poet and doctor William Carlos Williams carried a notepad around with him that said:*

““ **Things I noticed today that I've missed until today.** ””

**Q1: A Story about You as a Leader: Collaborative Planning and Designing**

*Increasingly any kind of achievement requires the crossing of boundaries, often bringing together improbable partners and stakeholders across perspectives for a free exchange of knowledge, skills, experience, and intelligence to make a difference. Indeed, Meg Wheatley defined leadership in terms of leaving the world in a better place than we found it: "a leader" she said, "is anyone who wants to make a*

*difference at this time."*

*By this definition, all of us in this room are leaders. We have all been part of collaborations that utilized everyone's strengths. And we have all had ups-and-downs, high points and low.*

*We'd like you to reflect on one of your most memorable leadership "high point moments" — a time that stands out when you felt most engaged, passionate, and effective — a time when you worked with others to build a better solution, new vision and plan, or collaborative achievement.*

A. **Describe the story and what happened.** Where? When? Feelings? Insights? What made this experience a high point for you? Root causes of success?

B. Now, **when you look at this story and others like it**, what does it say about you and your special talents or strengths? What are your three most dependable signature strengths? And how might you bring these into our work over the next two days?

**Q2. Charles Darwin said, "It's not the strongest of the species that survive nor the most intelligent, but the ones most responsive to change."**

*Likewise, we know that Terra Carta & Co. must embrace change, evolve, and transform. In fact, every business has to change just to keep up in this constantly changing world. Cities that are successful know how to preserve and leverage what they do best, and at the same time, they know how to change, get better, innovate, and act boldly.*

*Before we move to exploring your visions of a better future, we want to ask you the continuity question. If you could keep just 3 of our greatest strengths, assets, or best qualities as a stakeholder community and as an economy – where everything else can change – what, in your view, are the 3 greatest core strengths, assets, or special qualities of Terra Carta & Co. that you would want us to keep, even as we move into a new and changing future? And do you have at least one example - a project, organization, network, program or initiative - for each core strength?*

**A. To answer, please finish the following sentence:** "The things I really want Terra Carta & Co. and our stakeholder community to keep and strategically build on and celebrate, no matter how much we change include \_\_\_\_\_."

1.

2.

3.

**B. Emerging Strengths and Signs of Promising Progress:** Now as you look at Terra Carta & Co., there are new strengths emerging signs of fresh progress and new projects, organizational developments, and external partnerships or initiatives. If you could spotlight one or two of the fresh and newly emerging strengths — even small signs of emerging potential and promising possibility — what would they be?

### **Q3. Your Images of Terra Carta & Co.'s Better Future – Your Visions and Hopes**

*Imagine, that tonight, after our session, you fall into a sound sleep. It's a good sleep. It lasts for ten years. When you awaken it is 2032, 10 years from now. During those ten years, many Net Positive "better business, better world" innovations and positive changes happened at TCC and its partnerships with society. It's exciting to see. During those ten years so many advanced happened that it's like a miracle, and TCC has become the kind of industry leading star that you would most be proud to be a part of or a partner with.*

*So, step into 2032. You get to see the vitality and life of the human side of our corporation—the people, the leadership qualities, our conscious culture, our relationships, and the advances in our purpose and principles. You get to see our super circular operations—and climate action commitments, ahead of the curve progress, and new science base targets and ambitions. You get to see the company's growth and business successes—for example its blue ocean strategies and new net positive products and better services. You get to see our innovation systems and external partnerships in local communities and global "business for good" coalitions focusing on system-wide transformations for advancing people and prosperity; planet; and regenerative industries and economies and our world's mission-oriented moonshots, for example by 2050, achieving the 1.5-degree targets of the Paris Agreement and the end of poverty goals of the 17 SDG's. And most importantly, you get to see how TCC has become an exciting and compelling 21st century company that is loved by its customers, envied by its peers, and admired by all those whole care about the next decisive decades of our planet.*

*So, you step into this future and love what you see emerging. Now describe it. What do you see happening, what do you see that's new, that's changed, and that's even better?*



A. **Please make notes on what you see in this 2032 vision.** What is happening in your vision that's new, that has changed, and that's better? And how do you know it?

B. **Now, please complete this sentence, "I will be most proud of our better and greater Terra Carta & Co. in 2032 when \_\_\_\_\_."**

## **Q4. Moving to Action**

*The anthropologist Margaret Mead famously said, "Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has."*

*The outcomes of this Our Better Business, Better World Summit and the ripples or waves that it will create begin with our own personal intentions and our fresh connections. As we launch this event, we each can envision right now certain actions and possibilities that could make a difference. Let's allow ourselves to think small and to think big at the same time. And let's assume that we've been given the power to build the business we most want.*

A. **What is one of the smallest or quickest things we could do** that would come out of our work together over the next three days that might have a significant impact on our objectives of Net Positive enterprise and being a prosperous and flourishing enterprise for the business building a better world?

B. **What is a bigger, braver and bolder, longer-term action?** If you could imagine just one bolder thing that could come out of our work here — perhaps it is an initiative or something we as an enterprise and as a stakeholder community may not have even considered yet? What's one bigger, braver, or bolder possibility that could come out of our summit together?

## **Thanking your interview partner.**

Take a moment at the end of your interview with your partner and simply **thank them in your own way** for the gift of a great conversation or who they are. Perhaps there was an insight that inspired you, or a strength they bring to all of us.

What do you feel grateful for from your conversation with your partner?

## Discovery Phase: Roundtable Exploration

**Activity:** Discovering – in groups of eight – what draws us to this work, and the hopes, assets, and aspirations we each have for Our Better Business, Better World Summit.

### **Assign Self-Managing Roles for the discussion (see box on next page)**

- 1. Introduce your interview partner to your table team. Share a couple of highlights from your interview, something from your partner's stories and visions that stood out most for you, and things that interested, inspired or impressed you most about your conversation (allow one minute to introduce your partner).*
- 2. Next, as a group go deeper into one of the interview questions assigned to your table. Everyone shares their stories and observations. As a group, listen for patterns and themes as well as exemplars (what we might call "positive deviations" from the norm).*
  - Tables 1 - 28 focus on question 1*
  - Tables 29 - 56 focus on question 2*
  - Tables 57 - 84 focus on question 3*
  - Tables 85 - 100 and up focus on question 4*
- 3. Each table's Recorder – takes notes on the designated worksheet (see next pages) and prepares a flip chart summary of the responses.*
- 4. Each table's Reporter – prepares to give a three-minute report-out. Be sure to include one or two of the most powerful actual stories/examples that came from your group.*

## Self-Management and Group Leadership Roles

Each small group manages its own discussion, data, time, and reports. Leadership roles can be rotated. Divide the work as you wish. Here are useful roles for managing this work:

- Discussion Leader: Ensures that each person who wants to speak is heard within the time available. Keeps group on track to finish on time.
- Time Keeper: Keeps group aware of time. Monitors report-outs and signals time remaining to the person talking.
- Recorder: Writes group's output on flipcharts, using the speaker's words. Asks people to restate long ideas briefly. Keeps notes in the RECORDER Workbook at each table.
- Reporter or Reporters: Delivers a report to the large group in the time allotted.

### Q1. Share "high point" moments of leading change (Tables 1- 28)

#### Sharing High Point Leadership Moments

*List core elements of stories from each member of group.*

**Root Causes of Success**

What success ingredients do you notice in these stories? Implications for us here? Principles for our long-term success?

**What draws you or calls you and your group to this summit? What are your biggest hopes?** What does this say about the people in your group or in this room?

**Reporters:** Come back with your themes and insights and **choose one** of your group's best "high point" stories of "collaborative leadership" and "making a difference" to share in the report-out to the large group. Also share: what calls people to the work of this summit? What does this say about the people in your group or in this room?

**Q2: The Continuity Question, Assets, and Strengths (Tables 29- 56)**

**What are the assets and strengths we want to leverage and honor as resources?**

Core capacities and signature strengths (including examples):

Most recent or emerging assets and strengths (including examples):



**The Continuity Question: What are the three most important qualities, strengths, or areas of best practice that we want to keep, even as we change in a changing world?**

1.

2.

3.

Now, create a picture, a drawing, or a metaphor of TCC's signature strengths.

**Q3: Visions and Images of the Future (Tables 57-84)**

**Images of the future we see and want in 2032**

Once everyone shares their visions, list notes and common themes below.

[Empty space for notes and common themes]

**As a group, create the front page of the June 2032 edition of a major publication — for example, *The Economist*, *Harvard Business Review*, or *Wall Street Journal* — with a cover story dedicated to your organization’s areas of progress, betterment, and its industry leading innovations.**

What is the headline?

Key elements in the story:

**Q4: Moving to Action After Our Summit (Tables 85-100)**

**What are three of the smallest things that could come out of this summit and have significant impact?** List things that will help turn our vision into action — things that may be small but carry a big impact.

[Empty response area for writing answers]

**What are three bolder things that we might want to consider, things we may not have talked about?** List things that are bolder and braver and may be seen in the future as “game changers.”

## Dream Phase: Our Images of the Future

*What Kind of Future Do We Want to Create by 2032?*

**Purpose:** To imagine the future you want to work toward – one where we've unleashed our Net Positive innovation and business success and have become a platform for a world of full spectrum flourishing, one where **economies can excel, all people can thrive, and Nature can flourish now and across the generations.**

### **Activity:**

1. *Assign Self-Managing Roles for the discussion (see box on page 45)*
2. **Put yourself 10 years into the future.** *Describe your own vision of an even greater Terra Carta & Co. a little more than a decade from today. Step into that future. Imagine 2032. Imagine you and we as stakeholders have the power to create the business of our dreams. See into the best future you see in 2032. What does it look like? What's happening that's changed, that's new, and that is better? What's the future that is wanting to happen. What is the outside world calling for from us – our customers and stakeholders and Nature – and what has our history prepared us for? If you would like, you might look at the social and global opportunity areas of our time (see the 17 Global Goals and the opportunity areas for business innovation on page.*

**Everyone in the group shares their visions based on questions like these:**

- A. *I will be most proud of TCC, our society, our partnerships, and our contributions to a flourishing world in 2032 when...*
- B. *What are some of the most exciting and valuable elements of your vision? Consider elements like these:*
  - *Where and how is sustainability and Net Positive business creating benefit for the world and value for the company – for example, re-designed ways of valuing and using resources, turning waste to profit in circular economy ways; using technologies to create intelligence and networks for open innovation; radically improving energy productivity and clean energy; engaging and attracting people with higher purpose; combining lean and green; creating new strategic partnerships for industry and society betterments;*

*simplifying operations; lowering costs; generating leading-edge new services and Net Positive products for customers; creating humanocracy and high engagement planning methods; opening new markets; strengthening brand identity; mobilizing supply chains around better business better world collaboration; participation with policy makers and regulators in societal priorities around climate action, anti-racism, creating equality of opportunity and net zero emissions; regeneration of biodiversity and healing toxicities, building real community involvement for transition to smarter grids with significant energy efficiency achievements, etc.*

- *What do people across the nation and around the world say about Terra Carta & Co.? What is our reputation in our industry in 2032 — our leadership and future fitness?*
- *Can you speak to the quality of collaborations you see in the future with regulators, policy makers, researchers, and others for the advancement of Net Positive policy and sustainable society?*
- *Why are talented people and partners attracted to join with Terra Carta & Co. in this cause to protect our environment and create a better world for future generations?*
- *What are we doing to emulate, improve and share knowledge openly and new lessons widely? How have we harnessed open innovation?*
- *What kinds of strategic partnerships are happening? Are there any improbable new ones that help us scale up solutions and our own organizational intelligence?*
- *What results do you see by 2032? Where are our better world impacts most profound?*

*Again, everyone is given the opportunity to their images and dreams for the future. Share what makes this vision exciting to you? How does your vision help us unlock hidden opportunities to create shared and better value for our society, our world, and business? And out of everything that you envision, if you could choose **just a few** of the most important opportunities or strategic priorities — for all of us to rally around — what might you say is most important?*



2. *Its time now to discover common ground visions that bring us together. **Capture the most relevant, innovative, and strategic elements of your group's visions for the future.** Spend enough time to develop a concrete, collective vision of what your group wants to see — and you may want to narrow it down for emphasis and focus on what matters most. This is an exercise in creative visualization that builds on all earlier discussions. Remember the quote from Goethe, "Dream no small dreams for they have no power to move the hearts of men."*
3. **Finally, choose a creative way to present your vision in our next plenary session. You will have four to five minutes.** *So, focus on what is most important to your group. Use as many members of your group as possible in the presentation. Hopefully everyone.*

*Examples: Your presentation of the Better Business, Better World future might be a TV news documentary; a reality TV or game show; scenes depicting a "day in the life..." or a "before and after skit"; a rap or music; a "60-minutes" type feature story; a prolific Twitter storm; or it can be a more formal panel presentation.*

*Our only hope is that **everyone in your group plays a part in the creative presentation** and that you help us see it and feel what that future holds in terms of potential and high visions and values.*

4. *Each group's Recorder — uses your table flipcharts or google docs to capture the core elements of your group's vision of 2032, a written summary in addition to what will be portrayed in the group's presentation.*

“ I have a dream that one day... ”

**–Dr. Martin Luther King Jr.**  
*minister and civil rights activist*

“ The future belongs to those who believe in the beauty of their dreams. ”

**–Eleanor Roosevelt**  
*former First Lady of the United States*

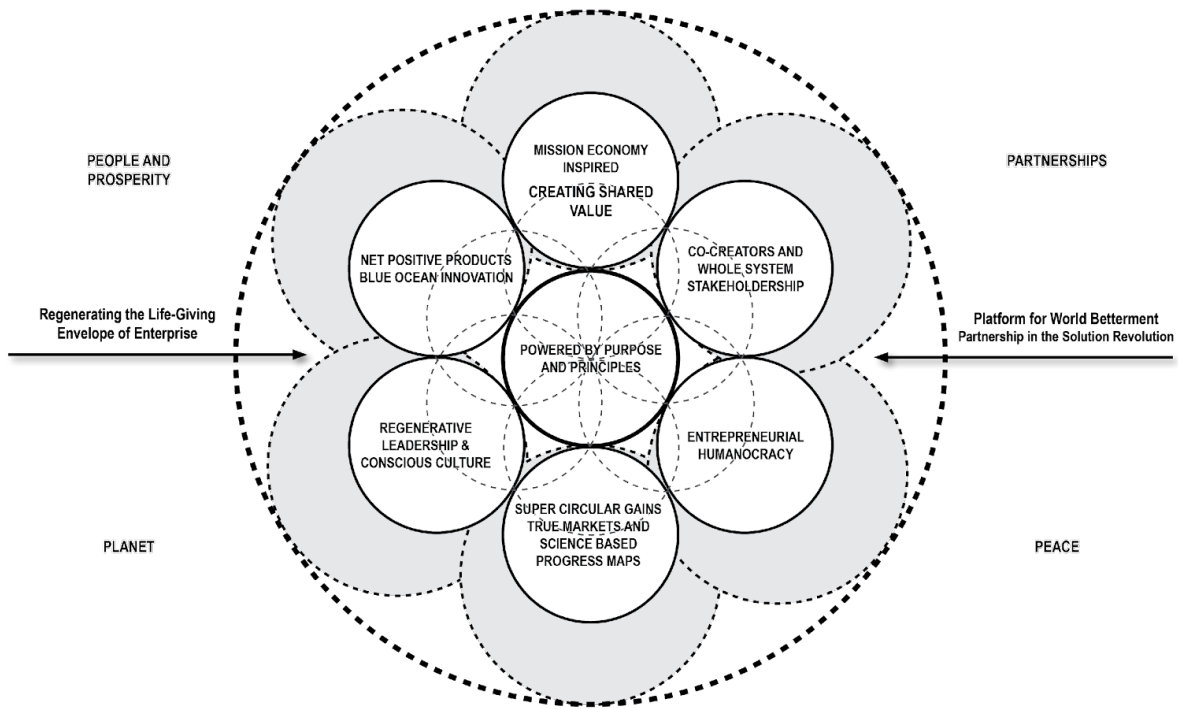
“ Imagination is more important than knowledge. ”

**–Albert Einstein**  
*theoretical physicist*

## Self-Management and Group Leadership Roles

Each small group manages its own discussion, data, time, and reports. Leadership roles can be rotated. Divide the work as you wish. Here are useful roles for managing this work:

- Discussion Leader: Ensures that each person who wants to speak is heard within the time available. Keeps group on track to finish on time.
- Time Keeper: Keeps group aware of time. Monitors report-outs and signals time remaining to the person talking.
- Recorder: Writes group's output on flipcharts, using the speaker's words. Asks people to restate long ideas briefly. Keeps notes in the RECORDER Workbook at each table.
- Reporter or Reporters: Delivers a report to the large group in the time allotted.




# SUSTAINABLE DEVELOPMENT GOALS

<b>1</b> NO POVERTY 	<b>2</b> ZERO HUNGER 	<b>3</b> GOOD HEALTH AND WELL-BEING 	<b>4</b> QUALITY EDUCATION 	<b>5</b> GENDER EQUALITY 	<b>6</b> CLEAN WATER AND SANITATION 
<b>7</b> AFFORDABLE AND CLEAN ENERGY 	<b>8</b> DECENT WORK AND ECONOMIC GROWTH 	<b>9</b> INDUSTRY, INNOVATION AND INFRASTRUCTURE 	<b>10</b> REDUCED INEQUALITIES 	<b>11</b> SUSTAINABLE CITIES AND COMMUNITIES 	<b>12</b> RESPONSIBLE CONSUMPTION AND PRODUCTION 
<b>13</b> CLIMATE ACTION 	<b>14</b> LIFE BELOW WATER 	<b>15</b> LIFE ON LAND 	<b>16</b> PEACE, JUSTICE AND STRONG INSTITUTIONS 	<b>17</b> PARTNERSHIPS FOR THE GOALS 	 <b>SUSTAINABLE DEVELOPMENT GOALS</b>

# Things I Like in the Images of the Future

*Notes from each of the presentations*

<b>(The What?)</b> <i>Elements of the visions I find most important or exciting</i>	<b>(The How?)</b> <i>Opportunities and possibilities for action</i>

## Discovery Phase: Our Common Ground Future

*And the Emerging Opportunity Areas to Propel and Mobilize the Future We Want*

**Purpose:** *To lift up — from our own and collective visions of 2032 — some of the higher leverage points or “opportunity areas” to activate and propel us to Our Better Business, Better World Summit. What do we see emerging as the promising and strategic leverage points for Terra Carta’s Net Positive innovation in Better Business, Better World?*

**Activity:** *You have listened to and seen scenarios of our visions of the future. While many of the images of 2032 are about the end results, we want — great economic growth, equity, numbers of jobs created, etc. — now we need to build propositions or opportunity areas to focus on how to there? What are the greatest leverage points to galvanize or activate Our Better Business, Better World Summit in relation to our visions? It’s like building a hypothesis:*

**“If** we focus on and commit to \_\_\_\_\_ **then** we will realize our visions and best future.”

1. **As a group, reflect on the visions we just saw and heard.** *Ask yourselves: If our group could choose only three promising or strategic leverage points — what we call “**opportunity areas**” to activate, propel, and mobilize the kind of future we want to create — which three are the most exciting, relevant, and important opportunity areas? Listen to everyone’s sense of some of the big picture opportunity areas.*
2. **As a group, select only three and complete the sentences on the following page.** *Our three highest ranking **opportunity areas** for moving Terra Carta & Co. to its best and most desired future. These opportunity areas can be big or small, but either way they hold promise for impact. They can be areas that are new or they can be opportunity areas that are already in motion but need to be scaled up, re-affirmed, renewed, or replenished.*

**“If** we focus on and commit to \_\_\_\_\_ **then** we will realize our best future.” — See worksheet for this on the next playbook page.

2. **Each group's Recorder** — writes your top 3 “If...then” propositions on the colored sheet provided at your table and deposits this sheet in the receptacles or **boxes** placed in the front of the hall. If you want to elaborate on your high priority opportunity areas feel free to write on the back of the sheets or attach another sheet.

**In closing**, please know that this is the last activity or roundtable dialogue you will have with this group. Tomorrow you will have a chance to work with others. Please take a few minutes for each person to share what they valued most about this group. What do you feel most grateful for? Maybe it's some of the group's ideas or visions. Maybe you noticed individuals or approaches that helped the group. Maybe there is something or someone you wish to thank. Or maybe you want to share your hopes for tomorrow. Share briefly so everyone has the chance to share and say goodbye — in whatever way you wish — to your group.

# Emerging Opportunity Areas to Propel and Mobilize the Future We Want

If we focus on and commit to...

---

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...then we will realize our next leap, our Net Positive Better Business, Better World vision.

If we focus on and commit to...

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...then we will realize our next leap, our Net Positive Better Business, Better World vision.

If we focus on and commit to...

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...then we will realize our next leap, our Net Positive Better Business, Better World vision.

**Note: these will be collected by the steering team tonight — from all 100 tables — and will form the foundation for tomorrow’s design studios.**

## Design Phase

*See the Design Studio "Opportunity Areas" Stationed Around the Summit Conference Center. Go to the Opportunity Area that Most Calls Out to You and Meet Your New Co-Designers.*

### Self-Management & Group Leadership Roles

*Each design group manages its own discussion, data, time, and reports. Leadership roles can be rotated. Divide the work as you wish. Here are useful roles for managing this work:*

- **Brainstorm Radical** — *Assures that the group is challenged to contribute bold, wild ideas.*
- **Time Keeper** — *Keeps group aware of time left.*
- **Brainstorm Facilitator** — *Facilitates the brainstorming session by upholding the brainstorming rules and raises questions to keep the brainstorming moving. Challenges the group to go for quantity. Try to get as many ideas and "post its" as possible on the board.*

## Step 1: Brainstorm

Brainstorm as many ideas as possible related to your group's Opportunity Area. Think of ideas or initiatives that can move Our Better Business, Better World Summit in the direction of our future visions and collective dreams.

The core designers' question is: **HOW MIGHT WE?**

### Brainstorming rules:

- Defer judgment — don't dismiss any ideas
- Encourage wild ideas — be radical
- Build on the ideas of others — no "buts" only "ands"
- Stay focused on the topic
- Hold one conversation at a time
- Be visual
- Go for quantity



## **Step 2: Theme & Vote**

1. Do a quick read of the promising ideas or combination of ideas from the brainstorming session. Think about ideas that can be designed into something that is tangible; a value creation initiative. It might be a whole business initiative with all the sectors behind it, or maybe a small pilot that can grow, or it might be a new way to scale up and galvanize things already happening.
2. For the sake of building at least one prototype, narrow and prioritize the brainstormed list. Group similar ideas together into common themes. Have each group member take five dots and place them on items they most want to work on (you could put all five dots on one item or could vote for five different items).

## **Step 3: Document**

Your team will only have time to prototype the most important initiative that you select. In order to retain the other ideas from your group, select a Recorder to document all of your ideas on a separate sheet — or take photos of your board. The Recorder should include clear notes to fully explain the ideas in the documentation.

## Design Phase Part Two: Rapid Prototyping

### Assign Self-Managing Roles for this discussion

**Purpose:** *To focus in and take the most promising areas from the brainstorming session and build and design a prototype or model to help us realize our visions for the future. The goal is to begin prototyping an initiative that has strategic value for accelerating economic growth, equity, and opportunity for all.*

### Step 1: Prototyping

Build the prototype and make it visual. For example:

- A drawing or model
- A storyboard...like a movie script of scene one, scene two, etc.
- A three-dimensional model that you can touch or see
- A role-play showing the UX or user interface
- A mashup — “ours is a combination of Pinterest and an X-Prize”
- A business proposal — or a Shark Tank Pitch

If the prototype has several distinct elements, you might want to form subgroups to work on different pieces of the initiative or scale up.

### Step 2: Presentation

Be prepared to do a three-minute presentation of your prototype and the basic idea behind it to a larger group. After your prototype sharing, we'll ask you to name the design elements or big ideas you included. Be ready to make the ecological economic and human opportunity case for the initiative you are prototyping.

## Deployment and Delivery Phase: Moving to Action

### Assign Self-Managing Roles for this discussion

**Purpose:** *To refine the prototype and build an action plan to find the quickest, cheapest, and lowest-risk ways to put the prototype into practice.*

### Steps:

1. Name your prototype with a great name — because great names matter to follow-up.
2. Identify your key, high-level objectives and then the specific objective of this initiative. Describe both clearly, including the end result goals, and what it is intended to accomplish in relation to our summit Task.
3. Determine whose input, collaboration, or partnership - people or organizations or other networks in this summit and beyond and in and across the business — would be most valuable at this stage of development. Collaboration and trust are key words here at this Summit. Can your group leverage the win-win-win thinking of tri-sectoral collaboration? Who/what are possible partners or positive combination effects?
4. Assess in an initial and big picture way the financial better business logic and better world logic in your value proposition.
5. Identify the possible challenges you will face and, more importantly, how you will transcend or re-frame each obstacle or overcome each challenge.
6. Name the group members here who will continue with this initiative and their contact information. Select your one or two “launch leaders,” who will have the following responsibilities for the next several months (October - December):
  - Convening with potential collaborative organizational and stakeholder partners.
  - Maintaining communication with your group members and the Summit planners.

- Ensuring measurable progress towards your high-level objective by January/February
  - Leading your group in the development of an update presentation for a follow-up event, of our whole summit group, in March.
7. How you will measure or track success and positive progress moments?
- Define your immediate action plan? (See instructions on page 26).
  - Early steps (first three weeks) including the very first step - this might just be a date for a group meeting or your next phone conference;
  - Moderate term steps (next three months);
  - Longer-term steps (up to three years)
8. Move back up to the higher North Star. Create your "Aspiration Statement."
9. Each group's Reporter should: Prepare for a final, two-minute presentation on the big stage in our closing session:
- Share your aspiration statement.
  - Share what is most exciting, important and valuable about this opportunity.
  - Share **your very first step** after this Summit: "our group's very next step is \_\_\_\_\_"

# Action Plan

Plan of Action for _____ (name the initiative)			
What will be done? (Stages & Steps)	Who's responsible? (Name group & point person)	Completion date	Help needed from specific others

## Crafting Your Longer Term “Aspiration Statement”

**Purpose:** Following your action planning, now it's time to elevate your highest overall aspiration

**Activity:** Please assign a discussion leader, timekeeper, recorder, and a reporter.

1. *Take time now to look at your opportunity area from a big picture perspective, five to 10 years out. What are your highest aspirations for this opportunity area? What is its ultimate value?*
2. *As a group craft an aspiration statement for your initiative in the online form. An ASPIRATION STATEMENT serves as a north star with these kinds of characteristics:*
  - *It is something you want and desire.*
  - *It is stated in the present tense — as if it has happened already.*
  - *It is a stretch — it takes us beyond the status quo. It is a provocative proposition. A good aspiration statement often leaves people saying, “I am not sure we can do it...it is bigger, braver, and bolder!”*
  - *It uses energizing words and provides tangible images: we can see and sense it.*
  - *It will help unify long-term focus and sense of direction.*

## **An Example:**

### **Aspiration Statement related to an opportunity area**

*"Clean, Renewable Energy" (From Cleveland's Green City on a Blue Lake Summit)*

Cleveland is one of the first communities and cities in America powered by 100% clean renewable energy and is a first mover not only in offshore wind energy, not in oceans, but in our freshwater great lakes. With first mover and pioneering engineering expertise, Cleveland has turned green energy into an economic opportunity to create jobs and create healthy air and ecosystems. It has harnessed first mover advantages to create centers of excellence that bring others into our region for training, consultation, benchmarking, and certification programs. As an iconic symbol of Cleveland's rising, the Lake Erie offshore wind energy is seen from above by 1,000s of visitors as they fly into Cleveland Hopkins airport. In addition, the proximity of it to the Rock n Roll Hall of fame also inspires visitors. All of this provides an opportunity to educate young and old, to significantly accelerate achievement our carbon action plans, and is critical for reaching our 2050 net zero commitments. All of this is a visible and beautiful source of community pride and serves to attract young people to our city. Our offshore energy system — as impressive as it is — provides a "living-proof" example of the quality of life and human and ecological health we want for all, including being our gift to the many generations to come, people not even born yet that will hear and re-tell the genesis story of how all of this happened with our inclusive "all stakeholders" cooperation, co-creation, and collective action.

**Note: In our closing of this phase** each of the 20 prototyping groups will send one person to the stage and put their groups aspiration statement on the big screen. All 20 prototype aspiration statements **will be read out loud**, one after the other, so we can see our whole body of work as a whole and a real sense of the "portfolio effect" we are creating.

## Deployment: Champions for Success, Innovation, and Inspiration

*With a person near you, we invite you to reflect and discuss the following:*

### A. Name the 3 most important things that happened for you at this Summit.

1. A key area of learning and insight and one high point moment in for me in our summit was...?
2. My feelings about this community and the way we worked together...?
3. One of the most important outcomes in my view was ...?

### B. What messages of innovation or inspiration will you communicate to others outside of this summit to ensure the success of Our Better Business, Better World Summit, and the priorities you hold?

### C. What are your personal pledges or commitments?

**Note:** We invite you to share anything you like from above — your feelings, insights, commitments, etc., in [The Great Leadership Reset Social Lounge](#).

“ Collaboration, creativity, and respect build life-long connections that matter and make a difference, propelling us to work together across all boundaries. ”

–Diane Luna  
*musician*



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For Testimonials and What CEOs and Leaders are Saying About Appreciative Inquiry, email [dlc6@case.edu](mailto:dlc6@case.edu).

# The Authors

**David Cooperrider, Ph.D.** is a Distinguished University Professor at Case Western Reserve University and holds two chaired professorships: Char and Chuck Fowler Professor for Business as an Agent of World Benefit, and the Covia--David L. Cooperrider Professorship in Appreciative Inquiry, at the Weatherhead School of Management. David is Founder and Faculty Director of the Fowler Center for Business as an Agent of World Benefit and also the Honorary Chairman of Champlain College's David L. Cooperrider Center for Appreciative Inquiry at the Robert P. Stiller School of Business. David received the Organization Development Network's "Lifetime Achievement Award" for his pioneering theory on Appreciative Inquiry. David has published 26 books and authored over 120 articles and book chapters, including a five-volume research series *Advances in Appreciative Inquiry*, and his most recent 2022 book, *The Business of Building a Better World: The Leadership Revolution That is Changing Everything*. David serves as advisor to CEOs in business and societal leadership roles, including projects with five Presidents and/or Nobel Laureates such as William Jefferson Clinton, His Holiness the Dalai Lama, Kofi Annan, and others. Marty Seligman, the father of positive psychology wrote: "David Cooperrider is a giant: a giant of discovery, a giant of dissemination, and a giant of generosity." Likewise, Jane Dutton, University of Michigan thought-leader and former President of the Academy of Management said: "David Cooperrider is changing the world with his ideas and who he is as a person. There are few who combine such insight, inspiration, and energy."

**Lindsey Godwin, Ph.D.** is a professor, practitioner, and possibilitizer who has a passion for creating transformational learning spaces for individuals and organizations. She holds a Master of Science in Conflict Analysis and Resolution from the Jimmy & Rosalynn Carter School for Peace and Conflict Resolution George Mason University, and a Ph.D. in Organizational Behavior from the Weatherhead School of Management at Case Western Reserve University. She currently holds the Robert P. Stiller Endowed Chair of Management in the Stiller School of Business at Champlain College (Vermont, USA), where she also serves as the Academic Director of the David L. Cooperrider Center for Appreciative Inquiry (AI), and the lead faculty for Champlain's MS in Leadership and MS in Organization Development & Human Relations programs. An active thought-leader in the field of OD and Change, her work has been published in a variety of outlets, including the *Journal of Business Ethics*, *The Journal of Applied Behavioral Science*, the *Oxford Handbook of Positive Organizational Scholarship*, *Practicing Organization Development* (4th Edition), the *Research Handbook of Responsible Management*, the 4th volume of *Advances in Appreciative Inquiry*, the *Journal of Human Performance*, and *Psychology Today*. She also serves on the editorial team for the *AI Practitioner Journal*. An acclaimed scholar-practitioner, she earned the Edward Lyman Phelps Professorship, Champlain College's highest recognition for a faculty member. A sought-after international speaker, consultant, and facilitator, Lindsey has worked with individuals and organizations across the globe— including the United Nations, Imagine Nepal, Ben & Jerry's, IPEN, World Vision, Dealer Tire, the City of Tampa, and many others— having taught & facilitated over 10,000 people.

# The Centers



DAVID L. COOPERRIDER CENTER FOR  
**Appreciative Inquiry**  
CHAMPLAIN COLLEGE | STILLER SCHOOL OF BUSINESS

**The David L. Cooperrider Center for Appreciative Inquiry at Champlain College** is the global hub for connecting people to learn about, apply, and amplify Appreciative Inquiry.

The Center was made possible through a generous gift from the Stiller Family Foundation in recognition of the impact of the Appreciative Inquiry (AI) philosophy on the success of the company Robert P. Stiller built, Green Mountain Coffee Roasters, now Keurig Green Mountain.

The Center's mission is to be the global hub for connecting people to learn, apply, and amplify Appreciative Inquiry. It seeks to enable and expand strengths-based organizational growth by providing coursework and certification in Appreciative Inquiry and by connecting people and organizations with each other and with research and practice.



FWLER CENTER FOR  
BUSINESS AS AN AGENT  
OF WORLD BENEFIT

**The Fowler Center for Business as an Agent of World Benefit** is a research, education, and applied center of excellence located in the Frank Gehry designed Weatherhead School of Management at Case Western Reserve University. As the top research university in Ohio, seventeen Nobel laureates have been affiliated with Case Western Reserve.

Today the Fowler Center's mission is to advance new knowledge for transforming the world's most complex problems into business opportunities for industry-leading innovation and world-shaping benefit. We carry out the mission through executive education, applied sustainability and strategy work, and discovery oriented scholarship focusing on innovation.

