The Future Search Conference: A Development Tool For Organizational Learning

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THE FUTURE SEARCH CONFERENCE:  
A DEVELOPMENT TOOL  
FOR ORGANIZATIONAL LEARNING

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ABSTRACT

The future search conference methodology was examined for its utilization of organizational learning tools. Organizational learning tools are tools designed to aid an organization toward becoming a learning organization. Analysis reveals that future search conference design includes organizational learning tools of dialogue, scenario planning, the “Merlin Exercise” and knowledge management and mapping. To some extent, the future search conference design also uses practice fields and action learning.

I. INTRODUCTION

Since the advent of the phrase “organizational learning” more than 25 years ago (Argyris & Schon, 1978), organizational learning has continued to evolve and develop and companies have continued to realize important competitive advantages from organizational learning and organizational learning tools (Fulmer, Gibbs, & Keys, 1998; Greve, 1998; Lee, 1999).

As organizations struggle to develop and maintain competitive advantages, it becomes increasingly important to look for organizational development methodologies that also build organizational learning capacity. As Hendry (1996) contended, processes for organizational learning need to be a more central part of planned organizational development efforts. The development of employee skills in organizational learning must be in conjunction with other development efforts.

Organization development researchers and practitioners have argued that survival in our rapidly changing environment requires development processes

The purpose of this paper is to examine whether future search conferences utilize organizational learning tools that could facilitate the development of organizational capacity for organizational learning. The next section defines organizational learning and identifies some tools of organizational learning. We then describe future search conferences and compare organizational learning tools to future search conference design elements. We conclude with a discussion on developing organizational learning capacity through the use of future search conferences.

II. ORGANIZATIONAL LEARNING

Senge, Roberts, Ross, Smith & Kleiner (1994) wrote that organizational learning is “the continuous testing of experience, and the transformation of that experience into knowledge -- accessible to the whole organization…” (p. 49). Miller (1996) further defines organizational learning as “the acquisition of new knowledge by actors who are able and willing to apply that knowledge in making decisions or influencing others in the organization” (p. 485).

The original tools of organizational learning, such as employee suggestion systems, statistical process control, and reengineering, have been expanded upon with a second generation of learning tools. Fulmer, Gibbs, & Keys (1998) identified six second generation learning tools critical to an organization’s capacity to develop as a learning organization. These tools are dialogue, scenario planning, the “Merlin Exercise”, action learning, practice fields, and knowledge management and mapping (Fulmer, Gibbs, & Keys, 1998). The following sections describe each of these tools in greater detail.

Dialogue is a process of interaction whereby participants, through open inquiry and discussion, work to identify the thought processes that form their beliefs and opinions (Bohm, 1989). Dialogue is what allows organization members to learn from one another. It enables a group to reach a higher level of consciousness and creativity through the creation of shared meanings and common thinking processes (Fulmer, Gibbs, & Keys, 1998).
Scenario planning is structured role playing. Small groups are created to envision what a future scenario would be like and then they act it out in some manner (Fulmer, Gibbs, & Keys, 1998). Organizations are essentially “making memories of the future” based on “what if” scenarios. Similar to scenario planning is the “Merlin Exercise.”

The “Merlin Exercise” is a combination of free-form simulation and scenario planning. The concept is based on T. H. White’s story of how Merlin meets the future King Arthur and knows to set a table and prepare a meal for his guest (Fulmer, Gibbs, & Keys, 1998). In the “Merlin Exercise” participants project themselves into the future and imagine that their organization is a national leader in its market. Participants then discuss and describe what the future would look like and how they would achieve that vision. Then working backwards from the future to the present, they identify key milestones that must be accomplished for the future vision to be achieved.

Action learning is a process of creating small groups for specific problem solving tasks. In the process of solving the problem, these small groups acquire new knowledge, concepts, skills and/or tools. As people participate in additional action learning teams, the knowledge is spread throughout an organization.

Practice fields is a technology driven “what-if” simulation. Practice fields often incorporate the use of a decision support system to simulate different decisions and look at future outcomes. The outcomes are then studied and the “what-if” simulation is modified according to the new learning that has been gained. Practice fields are similar to moot court for attorneys or rehearsals for entertainers. Practice fields generate “big picture” learning by encouraging cross functional decision-making without the high risk incurred in real organizations. They develop an understanding of systems theory and associated interdependencies, and promote futuristic planning (Fulmer, Gibbs, & Keys, 1998). The proponents of this tool argue that with little risk of failure, participants try more creative approaches.

Knowledge management and mapping is the collection, indexing and storage of learned knowledge in an organization. It is “a process for identifying what knowledge is needed within an organization, what gaps exist, and what skills are required to solve a problem” (Fulmer et al., 1998, p.495). Information is gathered through the development of learning histories gleaned from reflective interviews from people with different perspectives on a project (Roth & Kleiner, 1998). This information is used to create organizational
stories and themes which are presented to organization members along with questions and commentaries on the stories. This document is then disseminated to organization members at company workshops (Fulmer et al., 1998).

These six second-generation learning tools help provide a foundation for organizational learning (Fulmer et al., 1998). The next section describes the history, benefits, and phases of a future search conference and provides a background for examining future search conferences as an important methodology for developing organizational learning skills.

III. FUTURE SEARCH CONFERENCES

Future search conferences evolved from the work of Eric Trist and Fred Emery (1960) at the Bristol/Siddeley aircraft engine company in Great Britain. Fred and his wife, Merrelyn, then expanded upon the methodologies used in this first search and conducted numerous search conferences during the last forty years throughout their home country of Australia, and in Africa, Great Britain, Canada, India and Scandinavia.

Future searches have been very successful in helping organizations and communities identify and accomplish innovative whole system improvements (Weisbord, 1992). “The outcomes can be quite startling. They range from grassroots community action to stimulate new business and jobs, to revitalizing a major company’s total quality program, to setting future policy for a national banking system, to making policy for whole nations” (Weisbord, 1992, p. 9). Weisbord (1992) documented future search outcomes including strategic planning, visioning, joint appreciation for and joint influence among stakeholders, and increased initiative to implement strategic plans.

A review of the Future Search website (www.futuresearch.net) provides additional documentation on numerous future search applications in businesses, communities, and congregations across a variety of sectors including education, government, healthcare, environment, and human services. The documents linked through this website describe many benefits from future searches including enhanced ownership and involvement from stakeholders, greater intra-organizational communication and understanding, and renewed commitment to strategic initiatives.

Organization development literature also includes many examples of future search techniques applied in a wide variety of organizational settings (Bailey & Dupre, 1992; Polanyi, 2001; Reddy, Sickler, & Lohmueller, 1996).
Reported changes include improvements in organizational communication and collaboration, the development of a shared vision for the future, and increased commitment to strategic plans. Some of the organizations that have successfully used Future Search Conferences include the U.S. Department of Health and Human Services, Brigham Young University’s Business School, Presbyterian/St. Lukes Medical Center, Pakistan’s Conservation Agency, and Columbia’s National Electrical Agency (Weisbord, 1992).

Future search conferences have also been successfully applied to academic settings to teach both content and process. O’Connor (2001) wrote of his experience using future search methodology in academic settings to heighten student awareness of global realities and the changes individuals and organizations must make to survive in our current environment.

Future searches are generally conducted over a three-day period consisting of five separate phases:

- **Phase 1** focuses on the past. All participants contribute historical information about themselves, the system, and the world. This process creates a shared, global context for the future search.
- **Phase 2** focuses on the present. The goals of this phase are to identify current trends affecting the system and to clarify what is happening now.
- **Phase 3** focuses on the development of a timeline which identifies key events that have affected the system being searched.
- **Phase 4** focuses on the future. Participants imagine and then dramatize futuristic scenarios. Common features of the envisioned futures are then highlighted and validated by the participants.
- **Phase 5** involves the formulation of strategies and action plans for accomplishing the newly formed, commonly held, future vision.

We next examine if and how second-generation learning tools may be embedded in future search conference design.

**IV. COMPARING ORGANIZATIONAL LEARNING TOOLS TO FUTURE SEARCH CONFERENCE DESIGN**

Each aspect of the future search conference was explored to see how or if it incorporates second general learning tools. Table 1 presents a summary comparison of learning organization concepts, second-generation learning tools, and future search conference design elements. The subsequent
discussion presents an analysis of how second generation tools are incorporated in a future search conference.

Table 1: Comparison of Second-Generation Learning Tools to Future Search and Organizational Learning Concepts

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<tbody>
<tr>
<td><strong>Divergent thinking</strong> - everyone gets the opportunity to explain his/her reasoning and to challenge the reasoning of others</td>
<td><strong>Dialogue</strong> – collective thinking and inquiry</td>
<td>Small and large group dialogue / group decision making (Phases 1, 2, 3, 4, 5)</td>
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<td><strong>Mental models</strong> – development of “what-if” scenarios</td>
<td><strong>Scenario planning</strong> – alternative stories for the future</td>
<td>Team-based role playing and creative thinking; skits (Phase 4)</td>
</tr>
<tr>
<td><strong>Creating scenarios</strong> – story telling with a future setting</td>
<td>The <strong>“Merlin Exercise”</strong> – freeform simulation and scenario planning</td>
<td>Team-based role playing and creative thinking; futuristic scenarios (Phase 4)</td>
</tr>
<tr>
<td><strong>Team-based decision making</strong> – consensus among personally responsible members of a team</td>
<td><strong>Action learning</strong> – attacking “real problems”</td>
<td>Group decision making. (typically not on current problems but future desired outcomes) (Phases 3 and 5)</td>
</tr>
<tr>
<td><strong>Simulation</strong> technology to further organizational learning</td>
<td><strong>Practice fields</strong> – experimentation without high risk</td>
<td>“What if” scenarios are developed. However, technology is not typically used (Phase 4)</td>
</tr>
<tr>
<td><strong>Decision support systems</strong> to document learning and organizational plans for implementation</td>
<td><strong>Knowledge management and mapping</strong> – distilling output into usable formats</td>
<td>Mind mapping and flip charts document process and outcomes; implementation plans. (Phases 1, 2, 3, 4, 5)</td>
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1. DIALOGUE

Future search conferences were designed to bring a whole system together to dialogue. From the work of Solomon Asch (1952), Fred Emery extrapolated four conditions for effective dialogue and then developed the search conference agenda in such a manner as to create those conditions. A future search conference involves whole systems discussing and analyzing experiences, giving and receiving feedback, and generating shared meaning from these dialogues. Unlike many change efforts, there are no lectures or formal skills training as part of the conference. No analysts report on market trends or provide financial projections. The essential element of a future search design focuses on the opportunity to hear and learn about another’s reality (Weisbord, 1992).

The conference is organized to extend over a three-day period to allow for individual and group processing of information. This amount of time is critical in order for participants to reflect on another’s perspective, to listen and ask questions, and to develop shared understandings.

A significant portion of the three-day conference is spent in small and large group dialogue (as opposed to brainstorming or action planning). Specific tools to assist the dialogue include individuals writing their thoughts on paper so that even those who are shy or quiet spoken will have their ideas noted. These individual thoughts are then posted on flip chart paper so as to become a permanent part of the conference record. Egalitarian methods are used to summarize the data so that the most outspoken or the most senior person at the table has no disproportionate influence on the outcome. Instead, each participant has an equal number of votes.

Dialogue plays a critical and foundational role in future searches and presents an important training opportunity for building learning capacity in organizations.

2. SCENARIO PLANNING AND THE MERLIN EXERCISE

Scenario planning and the “Merlin Exercise” are very similar to key aspects of a future search conference. During phase four of a future search conference, participants are asked to develop and then role play their envisioned futures. They are typically asked to stage their scenario as if it were twenty years in the future. Teams of participants create and then act out scenarios of what their system or organization will be like twenty years in the future. These futuristic scenarios integrate the reflections and discussions of
the past and present that have occurred during the conference. The debrief for this exercise identifies the common themes between each team’s scenarios thereby helping to define a desired shared future. This exercise sets the stage for examining what steps the organization must take to achieve this envisioned future.

3. ACTION LEARNING

The second generation learning tool, action learning, focuses on attacking real problems. This focus on problem solving is in direct opposition to the theoretical foundations of a future search conference. The future search conference design focuses on finding common ground and envisioning a preferred future not in resolving immediate “real” problems. Therefore, action learning is not identified as an element utilized in future search conferences. However, the final phase of a search conference does ask the participants to develop future action plans to accomplish the futuristic scenarios developed during the conference.

4. PRACTICE FIELDS

While future search conferences do not specifically incorporate “what-if” simulations, a future search is designed to develop futuristic scenarios and promote futuristic planning. The conference methodology specifically encourages organization members to be creative and develop a “big-picture” perspective through the involvement of stakeholders from all participant groups including customers, shareholders, suppliers, bankers, employees, and, in some cases, even competitors.

The key difference between practice fields and future search conferences are that practice fields focus on decision-making using technological support. Future search focuses on developing future plans -- not problem solving and decision making. Electronic simulations are generally not incorporated into the conference process.

5. KNOWLEDGE MANAGEMENT AND MAPPING

Future search incorporates knowledge management and mapping through a highly interactive whole system process. Instead of private interviews later distilled into stories as proscribed in the organization learning tools, the future search conference design seeks out stories and organizational
information from individuals who share them with the whole system during the conference in a variety of ways.

First, future searches often include an evening exercise where participants are asked to share memorable events or stories about the organization. In some cases, participants are asked to bring an item to the conference that holds meaning for them about the company. For example, someone might bring a broom and discuss a time they felt a project they were working on was “swept under the carpet.”

Second, during phases 1 and 3 of a future search, participants reflect on the past by noting on large flip charts historical organizational events or moments. This process helps organization members understand and acknowledge information about their shared experiences and shared past.

Third, during the focus on the present, future search conferences conduct a mind mapping exercise. Conference participants gather around a large flip chart to map all the external trends that have an impact on the conference topic. The mind map is created as a large group so that everybody hears what trends or issues matter to others. Ideas and thoughts from one participant generally trigger others’ thoughts. The result is a validation of every participant’s reality and a map that reflects the complexity of a system. After the map is completed, every participant receives seven colored voting dots that they can use to “vote” on the trends they consider most important. They may place all seven dots on the same trend or “vote” on seven different trends. The result is a collective reality of important trends affecting the organization.

6. SUMMARY

Future search conference design clearly supports the organizational learning tools of dialogue, scenario planning, the “Merlin Exercise”, and knowledge management and mapping. Practice fields and action learning are included to some extent in the conference design. The next section explores how future search conferences may be used to develop critical learning skills in organization members.

V. DEVELOPING ORGANIZATIONAL LEARNING CAPACITY THROUGH FUTURE SEARCH CONFERENCES

The results of our analysis shows that future search conferences can be a critical developmental tool for building organizational learning capacity. Key
elements of future search conference design teach organization members valuable organizational learning skills.

Dialogue is both an organizational learning tool and a fundamental element of a future search conference. The future search conference is a series of dialogue exercises which teach participants important skills such as listening to and hearing others, identifying common ground, and ensuring that all stakeholders have a voice in key decisions. These dialogue processes, as taught by the future search conference experience, can be used by whole organizations or by small teams. Once taught during a future search, these dialogue processes could be easily incorporated into an organization’s arsenal of organizational learning tools.

Scenario planning and the Merlin exercise arguably develop critical creative thinking skills in organization members. These exercises, as incorporated in a future search, help organization members break down the barriers of current thinking and current realities to move closer to possibilities and potentials. The ability to generate creative approaches and solutions and futuristic scenarios is a much valued organizational learning skill and a key second generation organizational learning tool.

Action learning, as the name implies, requires action from those participating to solve a current organizational problem. While future search conference activities do not focus specifically on problem solving, the outcome from a future search conference is typically an agreed upon action plan. Documented results from future searches indicate that active participation leading to action is a key element of the design. Consequently, action learning could be planned as a follow-up exercise to a future search conference.

Similar to scenario planning, practice fields provide organization members with a method of thinking about possibilities, role-playing “what if” situations, and participating in cross-functional decision-making. The process used in a future search, albeit focused on the future, could be redirected to focus on developing creative solutions to current situations and thereby provide additional critical organizational learning developmental tools.

Knowledge mapping, through the use of the future search mind map, provides a very visual and participative technique for identifying knowledge and knowledge gaps. The future search approach involving stakeholders from across the company to collectively develop a visual map of a situation or
process where everyone can “touch the data” would arguably be another critical tool in the organizational learning arsenal.

While the future search conference mind mapping process does not focus specifically on organizational knowledge, the technique could be modified to develop an organizational history or to document organizational knowledge needed and existing gaps. This process teaches a tool that could easily be reoriented to focus on capturing organizational knowledge of a particular process.

Organizational development literature supports that future search conferences have been instruments of significant change (Weisbord, 1992). Our analysis has further demonstrated that future search methodologies develop organizational learning skills and create conducive conditions for learning.

VI. CONCLUSION
Learning tools can be central to an organization’s development. We argue that a learning culture may be created from the careful selection of organization development tools. Since people are often seen as the principle source of competitive advantage, organizations need to examine how and if they train employees in organizational learning skills. Organizations should evaluate their developmental efforts for a focus on developing the tools of organizational learning. Future search conferences appear to be an organization development methodology with great potential for improving a company’s capacity for organizational learning. Future research will need to explore whether the techniques, once taught during a future search can be applied to other situations and what impact this may have on a company’s organizational learning capabilities.

REFERENCES


