



# Stepping lightly into strategic collaboration

**In this article, Philippa Hardman and Chris Nichols, co-leaders of the Ashridge Consulting Strategy Engagement Practice, talk about how they supported the leadership of global healthcare charity The Cochrane Collaboration, to engage over two thousand people in a conversation about choices for the future of the organisation.**

Imagine you are the CEO of a global organisation of several thousand medical and healthcare specialists and you want to engage them as widely as possible in a conversation about your shared future. That is challenge enough.



But what if, at the same time, your organisation is one of the most virtual organisations on earth? You employ only a handful of staff, while everyone you need to consult is an independent associate (over 15,000 of them putting forward their skills in service of your cause) and spread across the globe.

You may not be aware of The Cochrane Collaboration, but your life could easily depend on its work. It is a leading global organisation in evidence-based healthcare. Their meta-analytical studies of medical and healthcare research inform practice and policy worldwide.

In early 2008 the leadership of The Cochrane Collaboration faced a challenge. They needed to embark on a periodic strategy review of the organisation. The collaborative nature of the charity demanded wide consultation in the process. Its membership of professional researchers and scientists also required a review based on a sound methodology with analytical rigour at its core. Yet the resources available to consult widely were extremely limited. With a tight budget and scarce professional resource available, CEO Nick Royle turned to Ashridge Consulting.

After a few initial conversations, it was evident that traditional consulting approaches would be too costly, and that The Cochrane Collaboration would need to undertake the bulk of the work in-house. The role of Ashridge Consulting would be to act as strategy coach, co-designer, supporter and critical friend to the leadership and in-house review team.

To discover how this might look in practice, it was decided that an initial two-day workshop would be held at Ashridge, to explore the remit for the review – and to allow a proposal to be made to The Cochrane Collaboration's governing and decision-making body, the Steering Group, to which the CEO reports.

## **Initial meeting and project design**

By the time of the initial meeting, Nick had secured full-time leadership for the in-house team. Jeremy Grimshaw, Director of the Canadian Cochrane Centre and Professor at Ottawa Medical School, was granted protected time to lead the project. His budget allowed him to second 75% of the time of Mary Ellen Schaafsma, Executive Director, to join the team. In April, Nick and Jeremy came to Ashridge for two days of co-design work. This was the first of just three face-to-face involvements with Ashridge consultants, who aimed to use a 'light touch' approach based on coaching and virtual working practices.

We supported and challenged Nick and Jeremy as they explored the themes that would enable them to steer the process over the coming months. The critical issues at this stage were:

- Gaining clarity on what a 'good outcome' from the review would look like, from the perspective of Nick and Jeremy as its leaders, and from the perspective of the Steering Group as their ultimate client.
- Making initial decisions on the areas of inquiry that would be essential to the review: what would be the areas of questioning.
- Making decisions on which internal and external stakeholders to involve in inquiry into each area of questioning, in recognition that it was unlikely to be possible to involve everyone in everything – at least not in direct conversation.
- Uncovering blind spots and stuck patterns in thinking that might otherwise limit the review by bringing challenge and creativity to initial assumptions.
- Framing an approach to the method of engagement and consultation.
- The Cochrane Collaboration is a vast virtual network and, as such, has regular regional and thematic meetings, while also being very familiar with conference calls and web-based working: a key decision was how best to use technology to collaborate as effectively as possible with the global constituency.
- Developing the formal project plan and budget for the Steering Group – and a working agreement to steer ongoing cooperation with Ashridge Consulting.

Jeremy Grimshaw commented: *"I found that this session provided me with different conceptual lenses and ways of thinking about The Cochrane Collaboration; and the review, informed by business and organisational science was (and continues to be) important."*

It was a full and busy two days of creative conversation, resulting in the project design. Core to the design was a series of inquiry conversations that emerged as central to the work:

Throughout this design phase, the group had in mind a central event in The Cochrane Collaboration calendar, the annual Cochrane Colloquium, which in 2008 was in Freiburg, Germany. This week-long event is a major scientific gathering, bringing together worldwide specialists in just about every field of medicine and health. The Strategy Review core team planned to hire exhibition space at the Freiburg event, to create a physical invitation

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for participants to come along and join in the strategic exploration. In addition, the event was expected to provide Nick and Jeremy with ample opportunity to join various meetings of The Cochrane Collaboration regional groupings and therapeutic specialities, again to engage the widest possible group in the strategy conversation.

Bringing the lines of inquiry to a suitable point to allow the creation of a powerful 'market stall' for Freiburg became an important goal. The design was for conversations to be pursued over the coming months through a combination of virtual work and meetings. The virtual work took the form of online surveys and email conversations, and a large number of phone interviews – all conducted by The Cochrane Collaboration team. In addition, being a scientific organisation, various entities within The Cochrane Collaboration family hold conferences, meetings and symposia around the world to discuss their areas of speciality. Nick and Jeremy used their attendance at these pre-existing events to conduct formal and informal rounds of face-to-face inquiry.

A critical decision at this point was the degree to which web technologies should be used in the process. Initial conversations had explored the possibility of creating large scale synchronous web-conferences, using internet technology platforms such as WebEx. Offering initial propositions and provocations by podcasts with accompanying Wiki-pages, were also considered – allowing widespread asynchronous collaboration. Reflecting on the culture and practice of The Cochrane Collaboration, however, it was noticed that the organisation conducts its business successfully through much simpler virtual technologies: phone, email and the sharing of e-documents. So a design decision was made to reduce the technology investment and invest instead in wider use of The Cochrane Collaboration's existing ways of virtual working.

### The summer months: airmiles and phone lines

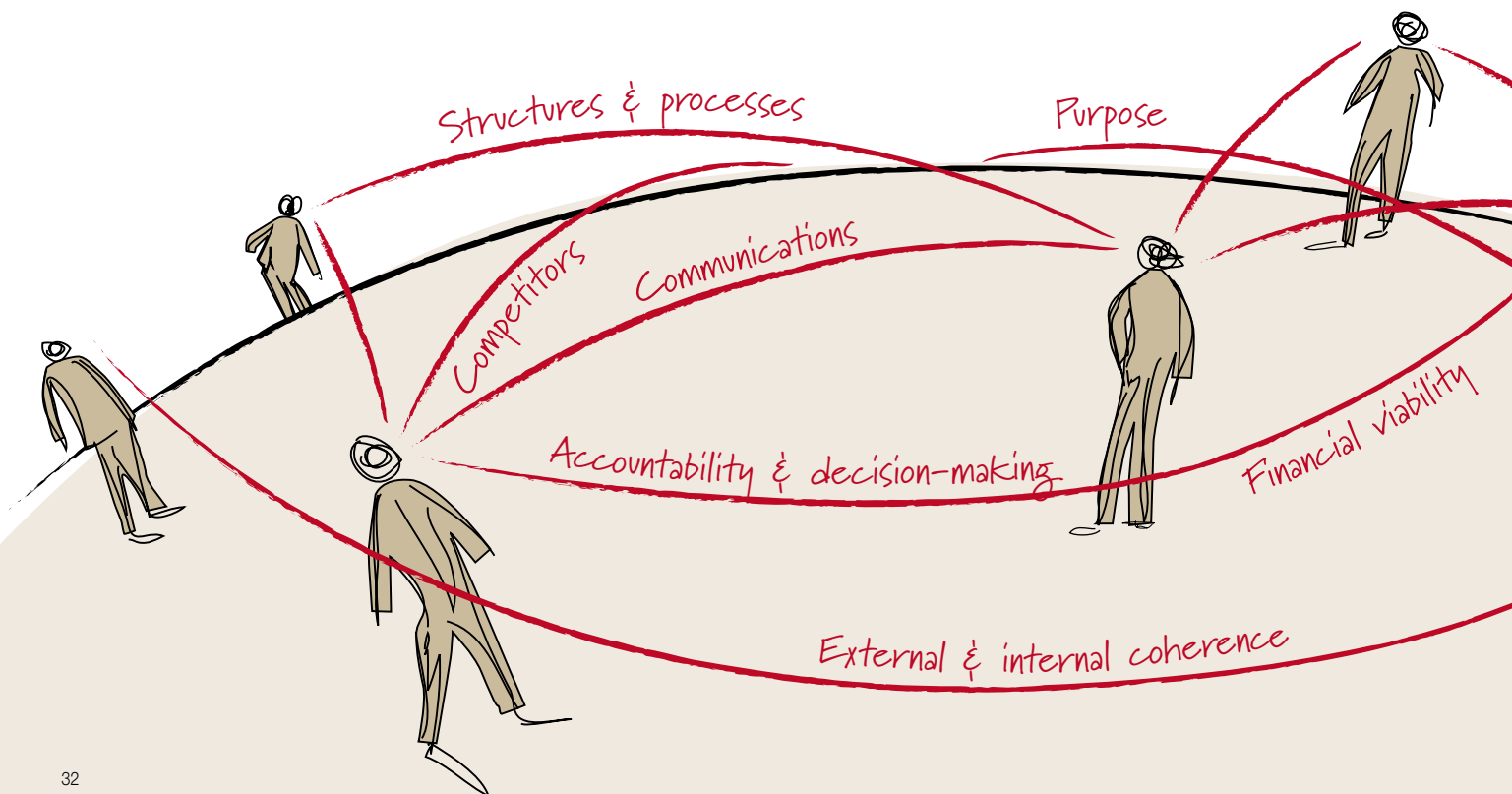
During the April to September months, Jeremy and Nick continued to criss-cross the globe, attending a wide array of The Cochrane Collaboration internal gatherings in Italy, India and the UK, amongst others.

At the same time, Mary Ellen and Jeremy took to the phones and the internet, engaging stakeholders both within The Cochrane Collaboration and externally in inquiry conversations. Gradually, working papers appeared, recording the emerging themes from the calls and meetings.

Throughout this process Ashridge Consulting provided strategy coaching support. The Cochrane Collaboration, though disciplined in research, did not have widespread experience of strategy dialogue, and so the Ashridge Consulting team helped in the development of 'inquiry protocols', steering briefs to guide the telephone and face-to-face interviews being conducted globally by the Canadian team. The underlying methodology used was the semi-structured interview, a carefully constructed sequence of main lines of inquiry, supported by guidance on supplementary questions to probe responses. The interviewer had the discretion throughout to follow the energy and interest of the interviewee, guided by the underlying structure.

Ashridge acted throughout as methodology guardian, offering challenge, for example, on the methods of interpretation and data coding so that the biases of one person did not cause data to be over-looked or miscoded. A peer review arrangement was proposed, allowing at least two pairs of eyes to be involved in the interpretation, to help richness of data to be maintained and biases noticed and handled. This process was aided over the summer by the arrival in The Cochrane Collaboration's Oxford team of Lucie Jones, who was released from other duties to assist in the data review and analysis.

### Seven threads of conversation



Ashridge's support over this period took the form of phone-based coaching, usually in set conference calls every four to six weeks, and through email comment on protocols and methodology. The co-design for the critical pre-Freiburg coaching event at Ashridge, due for early September 2008, was also done virtually.

By the end of the summer, over 2,000 people had been engaged in the strategy conversation. Hundreds had been contacted in surveys and questionnaires, and over 1,000 people had visited the Strategy Review pages on The Cochrane Collaboration website.

### Preparing for Freiburg: the September meeting

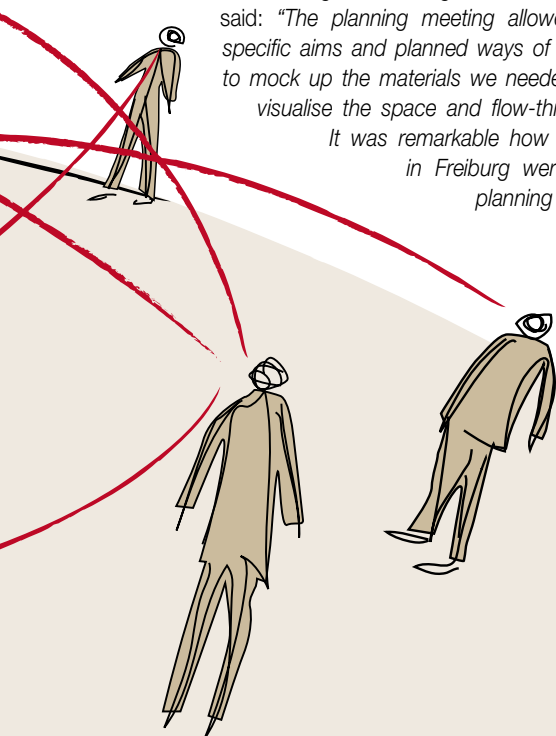
By September, attention was turning towards Freiburg, with the Colloquium looming in early October. The team met again at Ashridge for a second face-to-face facilitation and coaching session, with the dual aim of making sense of the inquiry so far and deciding how to present this data to optimise the inquiry at Freiburg. Above all, there was the challenge of designing the Strategic Review 'space' in a way that would engage people in the story so far, and draw them into joining the ongoing conversation.

The initial part of the two-day event focused on finding the emerging story in the data. The Ashridge Consulting team used a variety of group-work devices, including illustration and 'fish-bowl' conversations to draw out the differing perspectives that The Cochrane Collaboration team had gained. The group then created display boards based on the emerging stories, each board becoming a summary of what had been found in the inquiry so far, and what had been raised as further questions to be pursued.

Overnight, the meeting room was transformed into a mock-up of the Freiburg exhibition space – a six metre by three metre booth, complete with furnishings as close as possible to the dimensions offered by the exhibition company handling the Freiburg event. The aim was to allow The Cochrane Collaboration team to get a feel for working in the space, to allow them to visualise the flow of people visiting the booth and therefore to create the right invitation, in the form of exhibits, questionnaire response sheets and conversations to engage in the most effective way. Gradually, during the day, the storyboards from the inquiry to date became a series of rough exhibits, designed to inform and provoke.

Reflecting on this stage of the work Jeremy Grimshaw said: *"The planning meeting allowed us to clarify our specific aims and planned ways of working for Freiburg, to mock up the materials we needed to prepare and to visualise the space and flow-throughs of the booth.*

*It was remarkable how our real experiences in Freiburg were anticipated at the planning session."*



### Freiburg and beyond: the road goes onward...

The Colloquium at Freiburg proved to be a great success – with both the booth and the numerous presentations and discussions creating great engagement with the strategic thinking process. Reflecting on the event Mary Ellen observed: *"What became really clear at Freiburg was that this Strategic Review was not necessarily revealing new information, but bringing existing thoughts and concerns out into the open to be discussed. It was quite liberating to realise this – I think for everyone, and it injected a hopeful feeling that the future of the Collaboration will be strong."*

Jeremy noted: *"Challenged by Ashridge, we explored ways to make the activities in Freiburg engaging and fun. The Review team wore delightfully dayglo green shirts so we were always visible. We took photos of anyone coming by the booth and developed a photomosaic montage to demonstrate the face of The Cochrane Collaboration complemented by badges: 'I am a face of The Cochrane Collaboration'. Signage was in over 20 languages and we engaged colleagues from around the world to ensure that participants could talk to someone in their own language about the review. We did a session linked to the AGM of The Cochrane Collaboration that, a number of participants enthused, made it 'the best AGM ever'. Finally we got over the idea to participants that this was their review and that they had to take responsibility for ensuring that their voices were heard during the review and for taking forward actions resulting from the review. Going into Freiburg, I was extremely nervous but within 24 hours we knew that this was the right approach for our organisation (although our voices didn't recover for at least a week after the event)."*

After the event, the team met for the third time at Ashridge to make sense of the story so far and to plan for the final rounds of inquiry, to take place over the winter months.

So what has everyone learned from this process? We reflect: *"It has been a wonderful journey for us all, and it goes on. Some of the most important learning has been about the process of participative strategy and just what is possible with modest means. By stepping away from traditional assumptions about consultant-led interventions, drawing on a mix of strategy coaching techniques and virtual working, we have been able to support The Cochrane Collaboration in working at the frontier of large-scale engagement work."*

As this article goes to publication, over 3,000 people have been engaged in conversations, visited the website, called in at the Freiburg booth or have otherwise joined in the exploration of the strategic future of The Cochrane Collaboration. Very shortly, decisions from this work have to be made, and participation will not mean democracy. The Steering Group, assisted by CEO Nick, will reach decisions on the working intent for the next stage of the organisation's development. It will do so briefed on the basis of the widest possible insight that the energies and minds of the organisation can offer.

Above all, it will then be able to invite the participation of the organisation in the knowledge that this is a strategic decision that has emerged and has been informed by its community: a community that has developed its own connection to the strategy and has moved beyond traditional ideas of 'buy-in'. Here there is nothing to sell. The global community that is The Cochrane Collaboration has hand-crafted its own strategy – with just a little support from its friends. ■