Organizational Consulting and the Anthropological Lens

Building Careers in Anthropology Conference

May 13, 20222

Barry Dornfeld, PhD

Daphnie Pierre, MBA

An agenda for our time together

1	2:30 – 2:35PM	Introductions
2	2:35 – 2:55PM	CFAR, Organizational Consulting and Anthropology
3	2:55 – 3:15PM	Case Study
4	3:15 – 3:30PM	Q&A

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Our Objectives

- Understand where and when anthropological skillsets may be helpful in organizational consulting
- Discuss tools and frameworks for leveraging culture in client engagements
- Understanding an organization’s capacity for change
- Applying these concepts to your organization and projects

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About CFAR

Our mission is to help leaders activate organizations to achieve their highest aspirations—productively, meaningfully, profitably, and with impact.

CFAR spun off from **The Wharton School in 1987**. We leverage our academic roots in strategy, finance and the social sciences to help clients navigate and manage complex organizational issues.

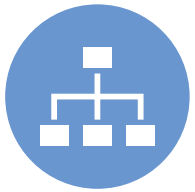
Our clients lead organizations where **mission and purpose are critical and engagement and alignment matter**—in healthcare, owner-led businesses and family enterprises, higher education, foundations, associations and other corporate and non-profit entities.

We **partner with our clients** to understand obstacles to their success and offer ideas, tools and approaches that create strategic alignment, strengthen culture, build teams, improve outcomes and enhance performance.

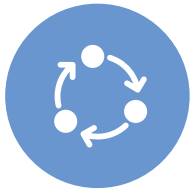
Our commitments to you:

Your world—understood.

Your choices—clarified.



Your organization—activated.



Your purpose—realized.

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Introductions

BARRY DORNFELD, PH.D.

Principal

Co-leader of CFAR's Healthcare and Higher Education Practices

Leads CFAR's Culture Practice

BA, Tufts University

Ph.D., University of Pennsylvania

Adjunct faculty member at the University of Pennsylvania and Goucher College

Faculty, Harvard Macy Medical Educators Program, CNO Academy

Co-author, *The Moment You Can't Ignore: When Big Trouble Leads to a Great Future*

DAPHNIE PIERRE, MBA

Manager

Member of CFAR's Healthcare Practice

BA, Boston University

MBA, Boston University

Member, ACHE MA Early Careerist Committee

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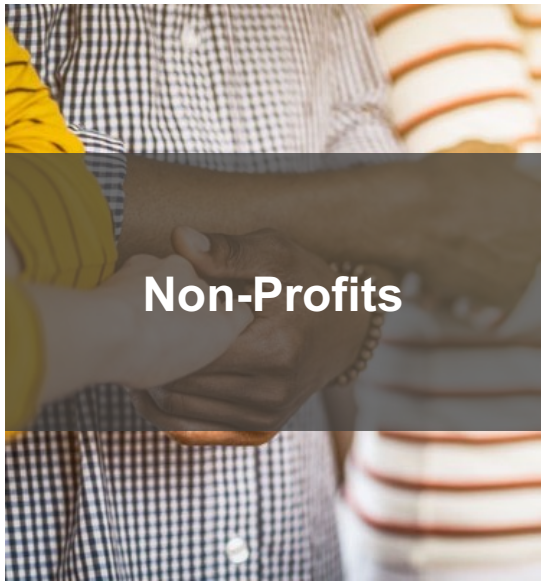
CFAR's Specialty Areas

- Operating Companies
- Family Foundations
- Family Offices

- Health Systems
- Academic Medicine
- Professional Societies and Associations
- Research Centers and Institutes
- Healthcare Foundations

- Colleges and Universities
- Research Institutes
- Professional Societies



- Associations
- Non-Profit Foundations
- Social Service Organizations

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Our work centers on…

STRATEGIC ALIGNMENT

Developing strategy where organizational engagement, ownership and alignment matter.

CULTURE ASSESSMENT AND CHANGE

Assessing culture, creating a shared vision, building a targeted roadmap to change practice and improve performance.

TEAM AND LEADERSHIP DEVELOPMENT

Coaching effective leaders, building their teams, identifying and developing successors, and adapting organizational structure to deliver on strategy and mission.

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What is organizational consulting?

Organizational consultants partner with leaders to improve performance by tackling high-stakes challenges, characterized by complicated human and organizational dynamics.

The anthropological frame can help consultants think strategically about organizational change.

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Effective joining with your client is a critical first step in an engagement

Pre-entry thinking and planning

- Joining is about chemistry and attunement
- Starts with the introductions and presentation of the team.
- First impressions cast long shadows.
- Clarify roles for client and consulting team.

Entry

- Respect the client's culture
- Honor both not knowing and knowing
- Slow down to speed up
- Create space for thinking
- Be curious and empathetic

Post-entry reflection and learning

- Reflect and learn
- Harness the diversity of the consulting team
- Use evidence and deep listening to understand the organizational challenges

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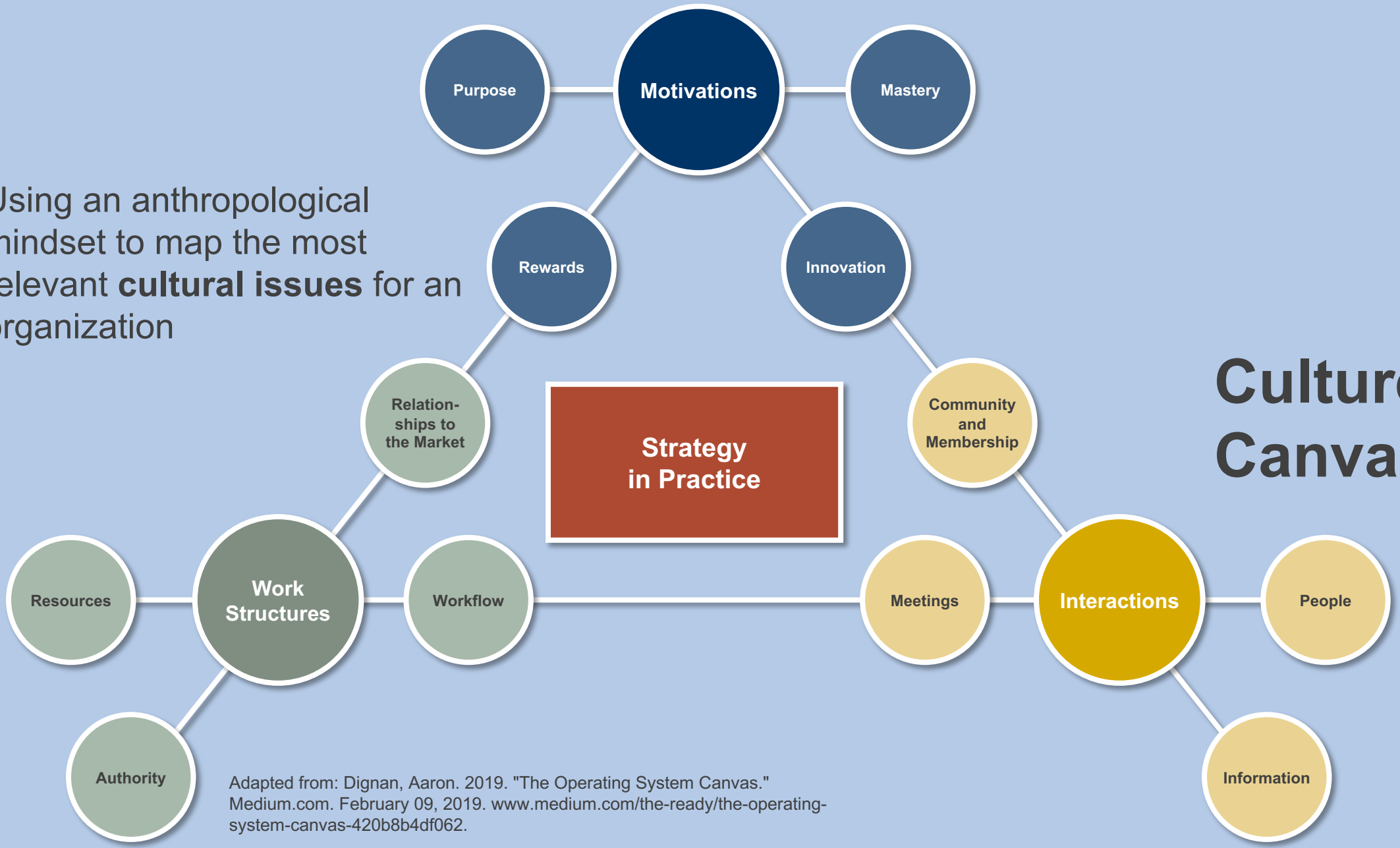
Using an anthropological mindset to map the most relevant **cultural issues** for an organization



Culture Canvas

Adapted from: Dignan, Aaron. 2019. "The Operating System Canvas." Medium.com. February 09, 2019. www.medium.com/the-ready/the-operating-system-canvas-420b8b4df062.

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The map is great, but how do you actually get there? We assess culture through the following four methods

OPEN-ENDED INTERVIEWS
with stakeholders focused on culture and collaboration

ETHNOGRAPHIC OBSERVATIONS
in client settings

SURVEYS

SHARING OF DATA WITH LEADERSHIP
to raise cultural issues to their awareness

What methods have you employed in any consulting that you've done?
How have you experienced consulting services as a consumer?

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Ethnography is a research method to understand how people see their world

Ethnography goes beyond "**being there**."

It's a way of paying attention that tries to discover the cultural assumptions, unspoken rules, and mental frames that people use to make sense of the world they're in.

> Ethnography is a research method whose goal is to understand the world **as perceived by those within that world,** to understand what activities mean to the people who do them.
> —Simon Roberts

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Understanding the client's view of the change they are trying to create

MOVING FROM…

Current state

i.e., Decision processes are slow and unclear

Limited commitment to equity, diversity and inclusion

MOVING TO…

Desired state

i.e., Decision processes are agile and explicit

A diverse, equitable and inclusive culture

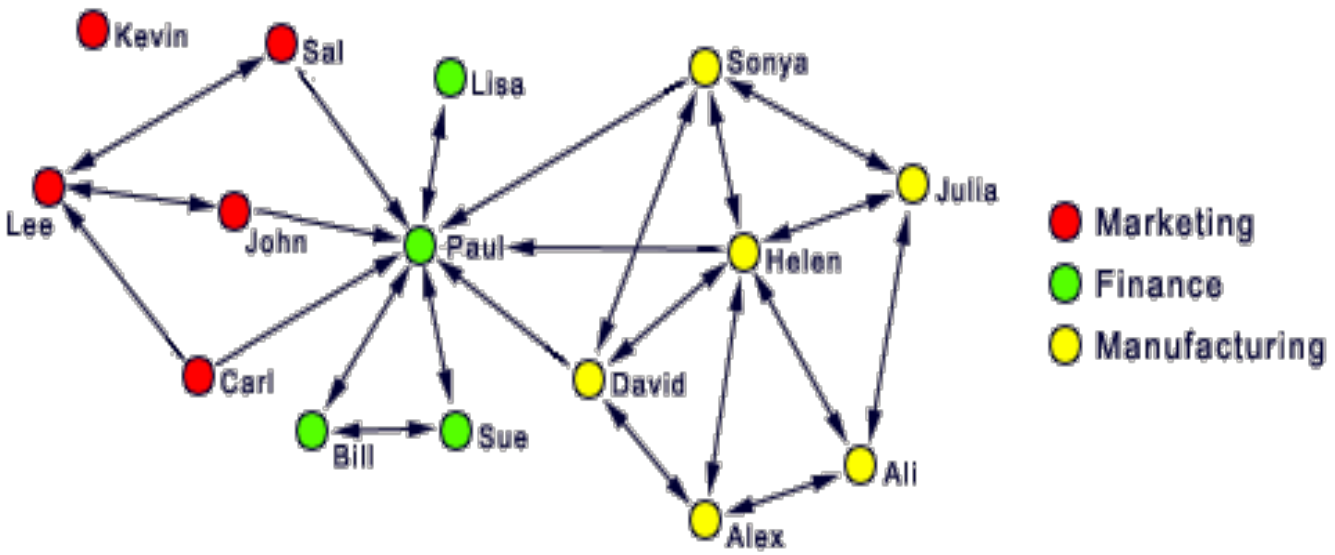
In a phrase, capture the change you want to see…

… the current state and the desired state.

Sweep people in to build a coalition for change

To build a coalition, you need…

- ☑ The passionate few to provide energy.
- ☑ Friendly skeptics to challenge your assumptions.
- ☑ People with strong and wide networks into the right parts of the organization.



Engage stakeholders systematically

	More Influence	Less Influence
For	• Build coalitions among members of this group • Link them with others	• Connect with those who are more powerful • Keep them informed
Against	• Listen carefully to sources of resistance • Find common interests • Reframe where possible (e.g., through a strategic theme)	• Convert, if possible, or ignore • Prepare to manage and respond to roadblocks

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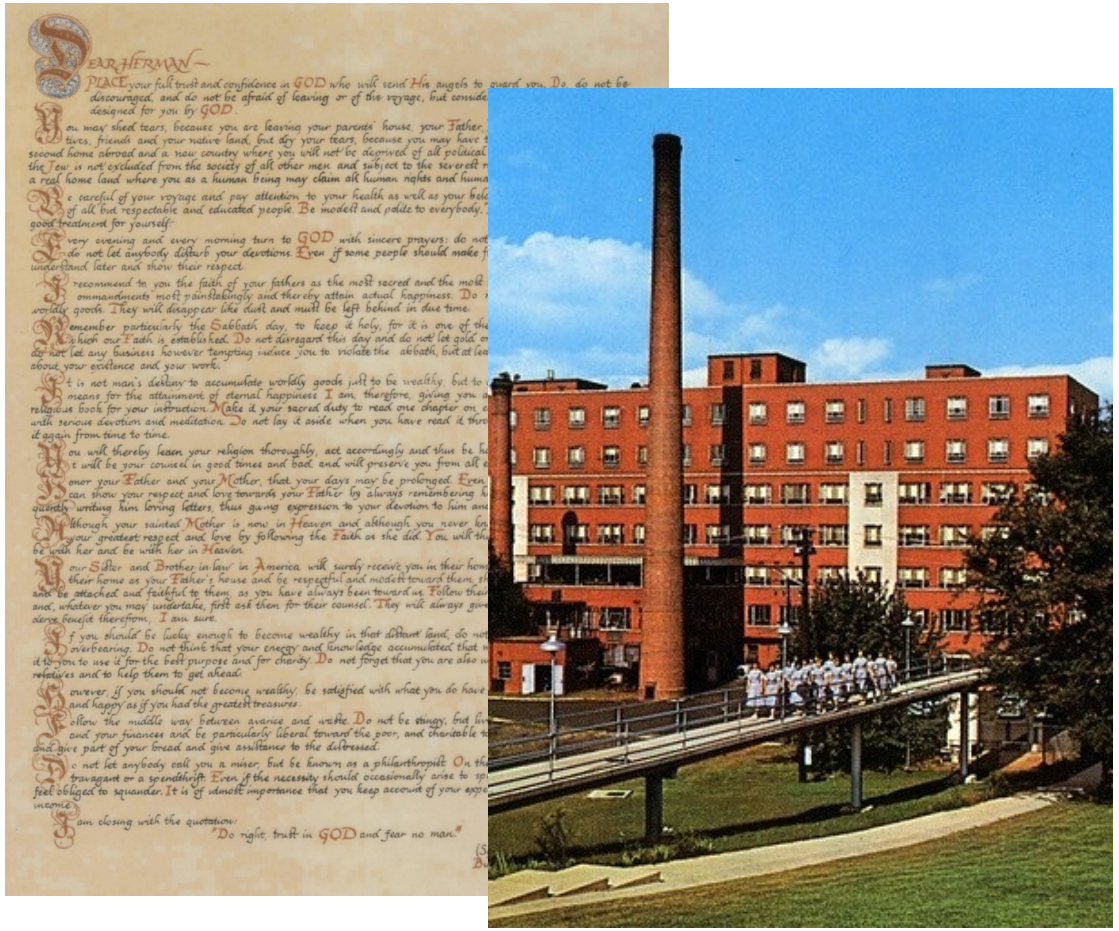
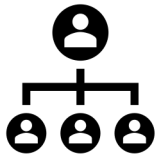
Case study: A merger of two healthcare systems

- Culture is critical for the success of any organization, and plays a particularly important role in the success of mergers. The desired strategy and impact of the future merged organization will direct its cultural focus, and enable the organization to deliver on that mission and strategy.
- The purpose of this assessment was to understand the following, *which will inform how the integration team works together:*
  - The “cultural current state of leadership”—key attributes, norms, behaviors, and dynamics and their relationship to organizational strategy and performance in each partner organization
  - Where the health systems are culturally aligned and where there are significant cultural differences or gaps that need to be addressed.
  - A clear point of view of the cultural aspirations, assets and challenges and how they can support the strategy for future success of the integrated organization.



How would you approach this work?

The larger partner (“Fort”) was more hierarchical, outcomes-driven, and fast-moving.



The smaller partner (“Helios”) was more physician-centric, consensus-driven, and focused on culture.

- In your small groups, discuss how you would approach this project.
- Pick one person to be a note taker and reporter to the full group.
- Be prepared to share your key takeaways and learnings.

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Application: how do you want to put this information to work?

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What we did: Data elements for the assessment

- To understand each organization's strategic aspirations and identify the set of leadership cultural priorities needed to achieve a successful integration, we:
  - Reviewed key documents and materials
  - Facilitated executive leadership team sessions with each partner organization
  - Tested the insights from the executive sessions through:
    - Interviews of 40 senior leaders across both organizations
    - Inviting 243 leaders to take a cultural calibration survey across both organizations

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Our executive summary: A future as one, with value in the differences today

Leaders across both partners **believe in the promise of the integration**. And when it comes to culture, your leaders want to move **in the same direction in every way we inquired about—this is rare.**

There are distinct differences in the culture of the healthcare systems today **and those differences hold potential value**.

You each aspire to learn from one another and are **eager to evolve** while holding pride in your identities today.

It will be critical to **communicate the end state and the approach** to the integration, remain curious about each other, and determine how to balance **centralizing or localizing decisions**.

We recommend building culture into the structure of the integration, sharing what is known and unknown in the future strategy and integration plans, engaging leaders in articulating the culture of the future, harvesting cultural knowledge from specific examples in each organization, and setting cultural goals at the executive leadership level for the long term.

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Discussion

Questions?

Comments?

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For more on organizational culture and change

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Thank you! Please reach out with any questions, comments, etc.

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