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The Practical Side of Systems Thinking

Guest was John Shibley

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The Practical Side of Systems Thinking

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Joe Dager: *Welcome everyone. This is Joe Dager, the host of the Business901 podcast. With me today is John Shibley. John has been working in organizational development consulting for 30 years in business and the nonprofit arts and the cultural sector. His work combines systems thinking, organizational learning, total quality, strategic planning, and innovation. He says it's kind of a junk drawer of approaches, which we'll have to find out what exactly he means by that. He's worked with a prestigious list of organizations and was one of the founders of the Society for Organizational Learning. John says for the past 30 years he has been helping organizations and their leaders become more the way they say they want to be - and when they don't know, helping them figure that out.*

That definition is one of the best and in all due respect, simplest statements that I have seen for a consultant. 'When they don't know' and 'helping them figure that out.' I mean that really is what we're all about, isn't it?

John Shibley: I started to describe my work that way when my kids when they were little, they would come home and say, daddy what do you do? I can't tell them I'm a plumber but at the same time, they're not going to understand words like organizational development or cultural transformation or any of that stuff. I really thought about it, and I think that's the niche of it, is to help organizations become more the way they say they

want to be. Not the way I want them to be, but the way they say they want to be. Sometimes organizations are unclear about that. So when they are, you help them get clear.

Joe: *Are you filling in a gap, a needed gap that they may not have?*

John: Yes, I guess so. Am I filling in a gap? I think that's true. I mean, in some organizations, they have that capacity internally. Now I spent my first two gigs out of grad school were actually as an internal consultant and as the manager of training and development first at Brown University and then at LLB. I did that work as somebody inside an organization and I think I just sort of naturally carried that approach when I left and went independent.

Joe: *Tell me about your consulting practice.*

John: The junk drawer of approaches kind of applies to the things I do. Right now, I'm working on an analysis I did for an organization that wants to take on strategic planning, but they wanted some help, thinking of what they actually get out of that. I'm also working with a senior team at a large music center, a cultural center in a big city. I'm working with the senior team to look at their team dynamics and also help them come up with some metrics, some institutional metrics. I'm coaching a woman who founded a dance company, who is trying to figure out how she transitions out of the role she's in now and enter a role that's more fitting for where she is with her life because she's 65. I'm working with an arts council that has been working in a small city for the last two years, doing an assessment of their approach and trying to help them figure out better ways to do it. Oh, and I was just asked by a foundation to run a conference in November, where they're bringing together 26 of their grantees who they have given money to do their market research and audience

research.

The pieces that they all have in common I think are they're all about strategy. They're all about getting people to think big, big picture stuff. They all involve a learning cycle of getting people to become very aware of the actions they're taking, the consequences of those actions, whether or not they're getting the kind of results they wanted from those actions, and then use what they learned to design the next iteration of their actions. In a spin around about innovation, I've been working with artists, and a lot of that work was in a program I developed with a colleague of mine to create an innovation lab for performing arts organizations where we would help them bring things to the public that they've been wanting to bring to the public but haven't figured out how to do. I kind of at this point have the whole idea about doing research, doing prototyping, thinking about running small experiments, and thinking about the need to invent new ways of thinking, as well as do new projects or new programs or new products. Those 3 pieces – strategy, learning, innovation are the tricks that run through all of the 3 kinds of projects that I take on.

Joe: *Before we get started here, you seem to be heavily influenced by music and the arts. Do you play an instrument?*

Mark: Yes! Actually, I'm a guitar player. I've been playing since I was 14. Sort of like my clients, I do all kinds of stuff. I've played in rock n' roll bands. I've played as a solo performer. I've played in Jazz and different sort of places. I've played bass in a Blues band. Right now, I'm working with a guy whom I've played with for 40 years as a duo.

I was working in business and someone who was running a program for orchestras called MIT's school of management, the systems people and said, who could you advise us to work with to teach a bunch of orchestra people about systems thinking, and I was the one

of the names they got. I went and did this work and along the way, with these orchestra people, I happened to mention that I was a musician and it just changed the chemistry completely. I went from being this business guy who didn't understand what they did, to being a fellow musician. I'm nowhere near as skilled as these orchestra musicians, but still a guy who knew how many flats there are in D flat. That was actually the start of my work with arts organizations, was my ability to be welcomed by this orchestra. If you're a musician, it's always a big part of who you are and what you do. I am. I have been for a really long time; just longer than I've been doing just about anything, I've been picking up that guitar.

Joe: *That leads me to that next question. If anyone's listened to this podcast, because I have had musicians on to talk about this, Deming was a composer. Drucker I think has a connection with music, his father or something. And Frank Lloyd Wright's father was a composer too I believe. Is there a connection there? Is there something to all that?*

John: I don't know. It's a really good question. I can't talk generally. I know for me, what I noticed... Well, Charlie Parker, somebody asked him how did you end up with Jazz, and he said, well you master the instrument, you master the music, and then you forget all that stuff, and you play. For me, when I'm working with a group, that's what I do when I'm playing on stage. I just scale work. I practice the songs. I have exercises that I do to try to keep myself fresh musically. When I'm playing with somebody, I'm not thinking about, oh, what kind of skill goes over this set of changes. I'm just reacting in the moment; out of a set of skills set I've developed.

I think that consulting practice in real time is like that. I practice what I'm going to say. I think about the design of the day. If there was an activity or an exercise I'm going to ask people to do, I'll figure out what comes first, and I'll even work out, physically, where am I

going to be in the room and what sort of things do I need. But in the moment, I don't think about that stuff. I forget that stuff, and I play. I think you have to be because, in the kind of work that I do, I'm working with groups, in the groove, as they're trying to get real stuff done. It's not about a workshop. It's not about, here's my curriculum and I'm going to teach you how to do these things. It's a working meeting. I have to be able to respond in the moment when something happens that may not be what I predicted, but it still exactly the right thing needed which is a very musical Jazz kind of idea.

Joe: *It's sort of like a jam session, right?*

John: Yes, something like a jam session. Well, except what tempers it is being quite clear about what outcome you're trying to get to. So it's not free Jazz, which is an interesting way to play. I can't really play that. It's much more like playing a set where we said; we're going to play a set, and we're going to entertain these people and at the end of it, we want them to really be excited and happy and we'd love it if they would ask us for an encore. Then you shape the whole thing that you do in order to get to that.

I think working with a team is the same way. We say okay, at the end of this, we want to know this and this and this, and we'd like to feel this about our outcomes. As long as we're clear about those things, you can react with what shows up in the moment, aligned with your overall purpose. If you don't do that, then you're just like a hound dog in a field of rabbits. You're just chasing the thing in front of you that looks interesting.

Joe: *I think you are describing how I try to come across when I describe Lean Standard Work. Everybody has the wrong connotations to standard work. They think it's this checklist. You got to do this, and you got to do this. I look at it as that you create these boundaries around a person and give them the freedom within the boundaries. And*

people's standard work is like an overlapping Venn diagram where their standard work is in the center of what they do. They understand that, and they understand where to go to get help, what they need to do when the situation calls to go outside your boundaries because standards are what creates the wow in the customer experience. That's kind of what you're saying in the music sense is that there still has to be some outcomes. There still has to be some deliverables, but in the middle of all that, you're getting there.

John: Right and some of the way you get there, you can predict ahead of time. The other thing you can predict is that in that process, some things are going to show up. If you're doing something originally and this is one of the lessons from innovation is if you're exploring territory you've never been in before, you will be foolish to think you can predict what you'll find. All that you can predict is you're going to stumble over stuff that may be useful to you and important that you couldn't know what's going to be there before you start. If you had any brains at all, you want to be able to respond to that. You have to be flexible.

Joe: *I like that. I'm smiling when you say that because from a marketing perspective, people will ask, "Could you give me a forecast or could you give me a budget and I'll do that" and it's like uh... If you're not going to know exactly how you're doing it, it's pretty difficult, right?*

John: Absolutely. I mean the version of that I see and rebel against in the not for profit world is around strategic planning is organizations will put a request for a proposal to do a strategic planning process with our organization and they'll say we want you to have these kind of meetings, we want you to talk to these sorts of people, we'd like your analysis on this, and we'd like you to come up with a report that covers this and this and this.

Consultants will compete to get the contract by pretending that they know what's going on inside the organization based on requests for proposal. And then you get the contract, and you spend an hour talking to people, and you realize, oh my God, the types of things you're asking for are actually not at all what is going to be of use to you because you've self-diagnosed. It's like telling the doctor; this is what's wrong with me. I've just seen so many strategic planning processes where people spend the first quarter of it reconfiguring the plan about what they're going to do, which seems like a waste to me.

It's one of the reasons why I've started to do these planning to plan assessments where for in a very short amount of money, for a very relatively small amount of money, I'll go into the organization, talk to a bunch of people and I'll say it seems like these are the 3 issues you really need to focus on, or you've got this huge building project and so all of your strategic activities for the next couple of years, whatever it is, it's got to somehow be tied to that building project. You've got to leverage that building project to meet your other strategic needs. Now that's the kind of stuff that they don't see inside an organization, and it's the kind of stuff you can't see from outside.

Joe: *Where I saw your work was in the systems thinking and the organizational learning side. How did you get involved in that?*

John: One of the things I did at L.L. Bean was I brought in a world class speaker once a year and the year that the Fifth Discipline was published, I went and talked to Peter Senge and said, "Peter would you come up to L.L. Bean for a day to talk to people," and he did. I just found his work really interesting. I began to develop a relationship with the Center for Organization Learning at MIT, which later became the Society for Organizational Learning. I just decided I was going to figure out how to do this systems thinking stuff. For a year and a half, I walked around with a notebook, drawing these diagrams, going through his

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book and at the back, there's an Appendix that gives different examples of some system marks types, so I would draw each of those and I would number my versions so that I could see how my thinking developed. I sort of ran a self-study program. That's really how it began. I mean I've always been interested in learning. My graduate degree is in Education, and I worked with a guy named Chris Argyris, who really was the organizational learning pioneer. It was always part of how I saw things. So for me, like for a lot of people, the Fifth Discipline gave folks a vocabulary to use, to describe those things. So that's really how it started.

Joe: *Well your paper, A Practice Theory for Organizational Learning still intrigues me to this day because it's what I might call a 6-page description of a 4-step process and iteration of going from current to future state. Versus maybe the 600-page Senge version. Can you reconstruct the reason for that paper?*

John: Sure. I can remember the exact moment that the line of reasoning that led to that paper started which is I was working with a client through the Center for Organizational Learning and I was flying home, I came clean with myself that I really didn't know what I was doing. I mean I was good tactically. I could see the next thing to do in the meeting, but I didn't have an overall model to guide what I was doing long term. I figured I'd better build one. I started with a sketch pad and just drawing things, and that's what it came about - the notion that you can look at things unfolding in the world either at a level of events, or patterns, or systemic structures, or mental models, or vision as sort of one aspect of it.

The other aspect of it was this idea that in a learning cycle, you observe what's going on in the world, you make an assessment of it, you build theory about it, you develop an idea of what you like to create and the kind of systems that have to be in place for that to be

sustained and then you implement, then you do the stuff. Once you implement, you wait a little bit, and then you go back to the observation. It's a cycle. I realized when I looked at those things that I had verbs on one dimension and nouns along the other. I could observe events and patterns, but I really couldn't observe systemic structures. Those are things I had to assess. You can't see a vision. What you end up seeing are things that are examples of that vision in play.

I realized that when I've looked at groups I was working with, they actually do these 4 kinds of work of observing what's in the world, assessing it and trying to make sense of it, developing an idea about the world they want to create or the results they want, and then implementing and doing stuff. Each of those kinds of work feels really different. They use different kinds of tools, and they talk to each other differently, realizing that those things can occur in a rough sequence. Helping groups to move through that sequence became sort of central to the way I approached that organizational learning work and it persists. I mean I was looking at the date; this article is 10 years old, and it's still really integral to the way I think about what I do. That's a way of basically explaining my practice to myself, and then I would show it to clients, and they would say, wow that's really interesting, or that's really useful, or that's really helpful. That's when I started to think it may have value for somebody other than me.

Joe: *I think it does so well. When we think about systems thinking and all those as you mentioned, drawing all those loops and going through a process, these, these loops never really maybe became mainstream would be the way I would say it.*

John: You know, it's an interesting question, Joe. I don't think I have an answer to it. Constant loop diagrams are sort of the keys because when somebody who knows how to do them does them or explains one, it seems really simple. It seems simple and elegant.

When people actually sit down to try to do them themselves, they're remarkably tricky. It's not easy. The visual grammar, getting the visual grammar straight is part of what's challenging. The other thing I think that's challenging is that doing that kind of work and I think doing systems work, in general, requires that you have a different relationship with your own thinking.

When you draw a constant loop diagram, basically what you're doing is you're making your assumptions about the way the system works. You're making it visible for other people to see and you're actually forcing yourself to refine your own thinking. You do that because you're curious about how accurate your thinking is. That's the real reason why you do it. That's the learning reason why you do it. You actually are making your thinking vulnerable to other people's inquiry. That idea is a very radical notion. Most of the time, we make our thinking visible to other people because we want to convince them how right we are. You can't use system dynamics that way and remain true to the spirit of it.

I think one of the reasons they didn't take is that people looked at the technique and thought, oh, that's what this is about. And in fact, that's not what it's about. The technique is useful, but it's useful mostly because of what the technique forces us to do about our own thinking. Frankly, it was never largely sold that way to the public. I think systems are thinking ended up being positioned as being like a lot of other things that have moved out of academia and into management practice, like total quality, like statistical process control, like Lean, but when you actually scratch the surface on it, it's not like those things. The return on investment for people just wasn't attractive enough.

They couldn't see how they would get results that mattered to them. There were large amounts of investment they had to make in order to actually create those loops and do that same thing. Now, I should say, I think there are some places where it has taken. I

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think most of the places I see it taken are people like me who have integrated it into their consulting practice.

Joe: *I think you make a great point there because the loops are the way we think, and then we look at it, and we get it, we think we do, and then when we start trying to draw it out. You talked about that at the beginning when you went and did it, you carried it around for a year and half of drawing sketches and basically doing spaced repetition to learn it?*

Mark: Right, it's not easy. An interesting lesson, a year and a half ago because I do a program called Systems Thinking Leadership Lab. What I did was I brought together seven teams of organizations in Cleveland. I said, come with an issue that you want to deal with and make sure that the team assembles enough organizational authority so you can actually do something. Taught them how to draw the loops and we spent two days' sort of getting the grammar straight, and then I came back and worked with them for a half a day a month for four months.

One of the things I noticed was as soon as people start to implement this stuff, they get stuck and most of the time, that's when the consultant is off doing something else. I wanted to give them an opportunity to bring their failures, and bring their challenges, and bring their dilemmas into groups so we could all learn from them and try to use the group's intelligence to deal with them. At the end, what I think people got was not... I don't think those people ever drew loops again.

That systems of delays in them and that may make things happen later than they thought they would or that what you're seeing is the consequence of an action that you chose six months ago that seems to make it worse before they get better, or things might get better before they get worse, that the problem I'm seeing now is actually a consequence of a

solution I may have implemented a year ago. When I'm looking at the situation, the problem may be that there's an element of it I'm not considering, that I'm missing something. All of those are sort of habits of mind that I think people develop by drawing the loops.

The technical piece about the loops falls away from those people because most people just don't have that kind of interest or that approach, but the way their thinking changed. That persists. I think it would be interesting to get a do-over and talk about systems thinking not with a focus on the loops and the techniques, but a focus on those shifts of mind. What does it mean to actually look at the world through that different set of lenses?

Joe: *I think that's what your paper did such a nice job of is the shift in the way from the loops and turned it well, what you called the learning action matrix. That was the gold that I took from that paper. I could go on and talk to you about this. I think this always interests me, but what do you have on the horizon?*

John: Well, I'm playing with my friends at a bar in July. That's the music thing. I'm continuing to really think a lot about this learning community that this foundation has asked me to be a part of creating, so I'm doing some research about that. I'm doing more assignments where I'm trying to do the pre-work around strategy that I talk about, the sort of planning to plan work. That's it. I'm by myself. I'm a single person. John Shibley Consulting world headquarters is the back bedroom of the cottage I share with my wife in Maine. I have 3 or 4 projects, or 5 project a year usually. That's the stuff. I think one of the things that your interview has... you're asking me to do this with you is I think it would be interesting to more deliberately revisit a lot of the issues that I'm articulating in this paper. Because I write the paper, and I keep those ideas in mind, but I don't revisit it often. I'm not an academic. I'm not an author. I think one of the challenges I'm going to

be giving myself is to revisit this. You know it's been 10 years, what do I know now that I didn't know when I wrote this?

Joe: *I think that would be a great thing to do John because I loved the paper and there will be a link in my blog site for people to download it and read it. If they're listening to this, they'll know that.*

I have one other question for you because you really intrigued me in this discussion. In today's world, you work half in the profit sector and half in the nonprofit sector. Some of my best marketing, my best things that I use in my work are from the nonprofit segment. The outcome mapping, the cognitive behavior type things and I can go on, is that half... or I shouldn't say half but a quarter of my books are from that non-profit sector. It's amazing what I learned from non-profit marketing, non-profit handbook. What do you think these sectors can learn from one other?

John: That's a good question. Well, I can tell you what the art sector learns from the business sector because my clients tell me what I bring from the business sector that's of use to them. Some of that is the drive to have clarity; to have clear outcomes, to have clear measures. I mean some places in the art world has it, but it's not as ubiquitous. Some of it too is because, in the arts world, it's harder to keep score. There's a financial bottom line certainly, but there's also a mission bottom line that is trickier to know if you're meeting it. Are we bringing the best art forward to people, which is also part of what we have to do along with surviving financially.

I think the business world has just figured out some tactical stuff that the not for profit arts world has and I was talking with a dance company, and they were thinking about collaborating with some other organizations, and they were getting all in a fuzz about how

we work out the details of the partnership. I said you know, talk to somebody on your board who is in the business world. Business people do this all the time. You just get a really clear contract. Who's going to pay for what, who owns it when it's over, how are you going to split the proceeds. This is not complicated, and it was like a light bulb went off with that.

I wish the business world would get that the arts world has is two things. First of all, I think a lot of people in the business world think that the not for profit arts world is easy and that people aren't working very hard and my experience is they are working their tails off and some of that is because most of the people I meet in the arts world are driven by a mission and so they're doing all sorts of things, anything they can do to further the mission of this organization. The second piece is something I think they could learn from artists which is how to deal with the messy but creative space they have to be in, in order to be original.

I watched a theatre director rehearsing a play once and she spent about 45 minutes with an actress, working with that actress around what amounted to 15 seconds with the business, where the actress crossed from backstage, put her hand on a desk and turned to look over her shoulder and they tried all kinds of ways of doing it. The director had the actress do it this way, do it that way, I don't like that, move over here, no I don't like that, think about starting with your other foot... They just practiced it over and over again. I don't think businesses, in general, make space for that kind of practice. The place they do is actually product development, where you have rapid prototyping. But if we're thinking about other things, it doesn't happen in the same way, and I've learned a lot by the way that artists are able to sit in that space, and they have a rigorous approach to using it, but they allow themselves to try it a hundred ways before they settle on the way they're actually going to do it.

Joe: *I think that's great advice. I always go back and explain to people, could your employees have the same passion for your business that a volunteer does for a non-profit and maybe it's that you need to treat them more like a volunteer.*

John: Well you know, if they're any good, they are kind of volunteering because if they're good, they can go somewhere else.

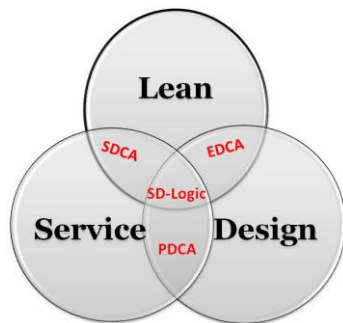
Joe: *What is the best way for someone to contact you and learn more about John Shibley?*

John: They should just email me at john.shibley@gmail.com.

Joe: *That sounds like a pretty simple way, doesn't it?*

John: Yeah, I like to keep it simple Joe.

Joe: *This podcast would be available on the Business901 iTunes store and the Business901 Website. Thanks again everyone for listening.*



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Joe Dager is President of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

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