"If we expect certainty, we cannot help our clients navigate uncertainty. If we expect to return to normal, we play a waiting game with reality. Reality always wins. How to adjust, redesign, adapt, drop, pivot, surf, dance with the changing rhythms of life are skills we can model."

Learning to Transfer OD Online

Adaptations of a Technology Late Adopter

By Heather Berthoud

Abstract

For OD to contribute to organizations that work online in response to the COVID-19 pandemic, OD practitioners require preparation and agility. After reviewing three examples of transition to online OD, common client conditions and OD adaptations were identified, including facilitation in virtual space, that addressed upheaval to clients and students, uneven participant capacity, and the blurred separation between professional and personal life. I conclude with a discussion of practitioner preparation and stance necessary for any new environment, including the virtual. The work of practitioner development is to align ourselves with the fact of uncertainty, to develop our presence, here-and-now awareness, and ability to conceptualize and be flexible with project designs. By attending to the human dimension of change, we maintain OD's relevance.

Keywords: COVID-19, online OD, virtual OD, practitioner development, presence

OD need never worry about its relevance. Issues of organizational life including leadership, strategy, organizational structure and culture, learning, equity, effective interaction, self-management, role clarity, social and political awareness, forecasting, and much more are especially important in the world disrupted by the COVID-19 pandemic. This article focuses on how OD prepares for and contributes to online work. After reviewing three work examples made virtual in response to the pandemic, I identify common issues, consulting modifications, and the implications for practitioner readiness. I conclude by anticipating OD practitioners' needs in a virtual world.

Cases

The presenting situation including the consulting charge and system capacity for virtual work; consulting adaptations; and progress made is described for each case.

Case 1:
Transition to Virtual

An organization with offices around the world was preparing for structure and culture change that required a shift from a US organization with satellite offices to a truly global organization. The change had to account for diversity, equity, and inclusion (DEI[1]) within the organization as a whole and within specific country contexts. It also had to reimagine leadership roles and practices.

The work began in February 2020, after in-person conversations with US-based sponsors and champions. Work-groups were meeting in person when all work shifted online due to the COVID-19 pandemic. With work projects and travel

1. Note on terminology—as understanding of the topic of belonging across social identities evolves so does language. In this article, I use the client's language.

postponed, the client believed they had time for the OD project. They chartered separate workgroups to develop analysis and recommendations for organization design, DEI, and leadership—with expected cross-group implications and coordination. Each workgroup, except the leadership team, was a diagonal slice of the organization.

This client navigated multiple time zones and virtual meetings easily. All workgroups included people from at least two continents. The COVID-19 pandemic made *everyone* virtual, not just those outside the US or the location with most participants. The change serendipitously aligned with consultation goals—to move towards a global organization with power distributed across geography. Still, people were stressed by the COVID-19 pandemic upheaval.

Adaptations

I worked with the client to shift meeting protocols to include extended check-in, with a focus on how people were managing COVID-19 pandemic-related changes. Such explicit interest in colleagues was new. Like so many organizations, despite genuine care for and about each other, this organization was used to getting right to business, and separated the personal from the professional. When people work from their bedrooms and get interrupted by toddlers, such separation is impossible.

Members of the organization were uneven in their awareness of DEI dynamics and how as individuals they helped create them. The leadership team—six white people plus two people of color who were unofficial participants—while explicitly open, was unaware of its biases and behaviors and, therefore, capable of causing real harm. A planned two-day in-person session to heighten leadership awareness of their behaviors and practices was changed to two half-day sessions one week apart.

Predictably, the white members wanted instruction from their Black consultant on how to "get it right." Instead, they needed to see, and say to each other, how they contribute to their own dynamics.

I used preparatory reading for conceptual grounding, giving the expert role to authors of published texts on DEI. I had them use online whiteboard polling to identify their culture's characteristics. The video-conferencing platform feature of hiding non-video participants allowed people on screen to discuss issues while others observed with special attention to an assigned culture aspect. After several rounds, everyone had discussed and observed. More importantly, they had begun practices that do not burden the people of color among them.

Stress diminishes creativity. Despite their anxiety for quick results, I worked at the pace their overwhelm could handle and repurposed opportunities as needed. For example, the original workplan included formal staff surveys but events overtook intentions. George Floyd's murder stoked simmering DEI concerns and warranted an all-staff gathering. Workgroup members were assigned to breakout groups. They collected staff's perceived needs and *implicit* vision for DEI and working globally. Workgroup members then used what they gleaned as the basis for deeper inquiry.

Results

The project was predictably unpredictable. Personnel overlap on workgroups spurred cross-communication. In their action-orientation, the groups expected to immediately generate recommendations and quickly escape their current circumstances. Their eagerness for results distracted their attention from their participation in, and manifestation of, the challenges they sought to address. They assumed updates required "concrete products" like recommendations. Otherwise, they were silent, which led their colleagues to imagine the worst.

Each workgroup suspected they were not as fully authorized as their charters declared. They expected someone to relieve them of their responsibility or override them. Therefore, they were reluctant to invest creative energy. Or they assumed they had dictatorial powers—the obverse of the same concerns. They retreated into

habits of dependence, counter-dependence, and siloed approaches to complex, system issues.

The workgroups responded with disbelief and frustration to the leadership's vision for the organization. The leadership group was taken aback by the response. At the same time, the OD and DEI groups identified dynamics of (unintentional) bias related especially, but not exclusively, to race. The leadership's muted reaction to the murder of George Floyd contrasted with their response to other issues and underscored the working groups' concerns.

In preparation for the first all-workgroup virtual meeting, the OD and DEI groups met jointly to confront their relationship to their assignment, the leadership group, and their own process. They began to engage questions such as: What would allow them to believe their charters? How did they want to engage? What stance did they believe would embody the new relationships they wanted? When did they fall back on the familiar, if unsatisfactory, habit? Meanwhile, the leadership group was moving from individual member responsibility for line functions to collective responsibility for the enterprise. They were informed by, though did not privilege, their functions. They were approaching shared leadership with each other, though not yet sharing leadership with staff.

As might be expected, the first all-workgroup meeting was stilted, though guardedness loosened as the session progressed. There was some truth telling and engagement with different perspectives. I refer to this period as "cracking the egg." Finally, there was a break in the old dynamic.

Following similar sessions, their momentum and attitudes shifted. Each workgroup began to see itself as contributing to the status quo they wanted to change. They took responsibility for work and process and investigated both in relationship to their goals. Once they acknowledged the importance of their process, they became more productive. Each group took initiative, communicated, and coordinated with the others, and created timelines for task and process checks.

Case 2:
Wholesale Redesign

In the second case, a year after they received the proposal, the client secured funds to create a strategic plan for Justice, Equity, Diversity, and Inclusion (JEDI) when, due to the COVID-19 pandemic, they moved work online. I had no in-person interaction before the project started. This regional organization was used to in-person meetings though also familiar with virtual work. They decided to create a JEDI plan regardless of COVID-19 pandemic obstacles. I was to facilitate the development of a plan that integrated JEDI with their operations including practices that impacted recruitment and retention of people of color, especially; programmatic work; and resource development.

Adaptations

I reconceived workshops from in-person multi-day sessions to dispersed half-days. Self-facilitated task groups implemented the work. I guided main contacts who coordinated the work internally. Although I was available to task groups as an occasional coach, problem solver, and task clarifier, I was not as regular a presence as originally proposed.

Instead of a three-day session, I conducted the launch as three half-day sessions over five days to allow soak time and respite from online learning. Facilitators used time between sessions for check-in and redesign. I similarly refashioned workshops held later in the process.

I recruited a colleague as a thought partner and technical assistant. He helped keep goals for each session tightly focused. Given the consultant's tendency to overdesign, and not prune, we committed to modesty in design. With clear purpose, we quietly trimmed the session when needed without sacrificing intention or raising feelings of loss.

To facilitate engagement, we used online whiteboard, polls, and small groups for discussion of pre-assigned readings, self-assessment, skill practice, and idea generation. Each half-day session focused tightly on one or two topics—data feedback, possible approaches to JEDI, how to give and receive feedback, a preliminary vision, and the overall plan development process.

Work online required closer contact with the client to monitor project developments. Regular updates, follow-up from and preparation for work sessions became even more rigorous. Real-time adjustments required explicit and repeated rationale. While not substantially different than in-person work, the virtual context heightened our attention to subtle shifts.

Results

The goals of the first session included data feedback, orienting to JEDI concepts and practices, beginning meaningful conversations, surfacing their aspirations and assumptions, and providing an overview of the planning process. Given the often-fraught terrain of JEDI work, I wanted space for individuals to claim themselves without fear or favor, and to make the group visible to itself. Then they could see how closely they approximated their intentions. After the first three-part series, they saw themselves individually and as a group, identified options to move forward, had some tools for difficult conversations, and had the desired tension between commitment and dissatisfaction. They grappled with their diverse assumptions, values, and intentions about JEDI and began to align.

Of course, the hope and energy generated in the first series dissipated as they rejoined their habits. The task forces got confused about deliverables, members had other work priorities, or they were stymied by their discomfort with too much, or too little, change. They remained under-skilled for the meaningful conversations they wanted and needed to have. These typical dynamics of change efforts now were mediated online.

Through periodic online facilitated sessions, interspersed with task group assignments, they developed a workable plan. They engaged in challenging conversations and built deeper understanding of each other and their commitment to the work. Most importantly, they had the means and energy to continue.

Case 3:
Academic Residential Course

As part of a Masters in OD program, I co-taught a residential course on Use of Self. The remote setting fosters intimacy with self and group along with learning about the whole person in the context of group, organization, community and other levels of system—all essential for aspiring and developing OD practitioners. Sample learning objectives include:

» Recognize and differentiate between multiple levels of human systems.
» Increase awareness of one's intentional and unintentional impact on others.
» Recognize the role of social identities in creating context, perceptions of self and others, and perceived action choices.

Because the course occurs in the first third of the program, we usually shepherd the cohort through early group stages from *forming* to *storming* (Tuckman & Jensen, 1977); create opportunities for self-differentiation in the seemingly paradoxical pursuit of community; review content and process and differentiate the two; and foster learning in and about the group. We use emergent design, especially after introductory sessions. While we reliably cover some topics, we shuffle, augment, or substitute them as student needs arise.

Elements of a residential program that we were hard-pressed to design into the virtual space included walks with random students between sessions, sidebar conversations over meals, reading full-body language, and noticing seating patterns as the days progressed. Importantly, we also lost our daily walks to build our connection, debrief the students' learning, and plan next sessions.

By the time the course was to run, I knew I had a two-hour virtual meeting limit and that participants had similar constraints. With clients, I had redesigned multi-day retreats to several half-day sessions spaced by at least two days. Now, my colleague and I were going to run a seven-day program from 8:45–4:30 each day, bookended by half-days.

Neither of us were proficient teaching online. Moreover, the topic, Use of Self,

required that faculty "show up" fully on a platform we had not mastered. Like others, we wondered how to convey warmth and attention to participants while also tracking notes; how to establish a meaningful connection across a hierarchy in the virtual context; and how to convey and teach process online.

Adaptations

In preparation, we created modules in PowerPoint—a tool we judged too impersonal for the residential setting. Yet, in the virtual space, it facilitated shared focus and consistent access to content and process instructions. We taught the course several times, so we thought we "just" needed transfer our notes. Much more was needed as we prepared for a course intended to provide deep personal development based on in-person, here-and-now interactions.

First, there was the challenge of group formation and configuration. The course features learning support groups [LSG] of four-six self-selected students who use the LSG to extend individual and group learning beyond formal class time. Students create their groups and explore task and process at the individual and group levels. We designed an online whiteboard process to approximate in-person movement, pairings, and small group conversations. The adaptation maintained participants' agency to create their groups. We also included a student observer, as we do in person, whose role and learning are to share observable phenomena that help group members see group dynamics.

Another challenge was how to teach seeing and working at different levels of system. We used the virtual whiteboard to generate and comment on visual group patterns, and to distinguish pattern from uniformity. We also used the platform feature of hiding non-video participants to explore the dynamics of different subgroups as distinct flavors of the larger system. Instead of in-person selection from a picture set, we asked people to identify objects in their homes that characterized the group as a whole and themselves as part of the group.

We reminded ourselves we might not use all the prepared modules and might need others in the moment. We planned to hold our daily debriefings and finalize next-day designs by phone, not on walks. We structured and timed out the exercises well in advance, thereby limiting our preferred in-the-moment experiments. We chose to rely on the platform's random group assignment instead of noticing how students divided themselves—a sacrifice of here-and-now observation to the technology.

Another challenge was the heightened attention needed to be present for long days—to learn to look at the camera to convey attention, not the picture in the square down the screen, to take notes via computer instead of pen and paper to minimize head down and the impression of not paying attention, or to take notes after the session. Such tight attention also required frequent breaks that included movement with music, yoga, or individual walks.

Through these adaptations, we built needed trust to teach individuals and the group; supported students and instructors with somatic processing; and were mindful of individual and group dynamics. For example, we recognized the group needed more relationship-building than we had planned. We improvised a longer and more personal introduction that facilitated subsequent engagement and learning. We made ourselves available for informal interaction at some lunch times. While not the meal sharing we typically enjoyed, it gave us an opportunity to engage with students (and they with us) beyond the official course content.

Results

We wondered whether the learning that typically occurs during LSG formation would transfer to the virtual platform. We need not have fretted. All the typical topics of group formation, including being chosen, initiating or following, being in control, wanting to be liked, fearing rejection, and more, emerged as if on cue. As did arguing with the instructors for creating an exercise that risked unpleasant experience, and the temporary confusion about, misinterpretation of, and disregard for instructions that accompany counter-dependence and flight from the uncomfortable.

As with clients, different personal circumstances and presentation styles tracked social identity. Individuals negotiated learning needs across differences of race, gender identity, class, age, and sexual orientation. The desire to be inclusive contrasted with feelings of exclusion, confusion, and more. As usual, we supported them in confronting their experiences and dynamics.

Final papers demonstrated learning. Students interpreted their experiences through theory, identified implications for their professional roles and developed action plans for continued development, as in previous classes. We believed by the end of this course, the group and each individual moved along the journey of awareness and self-responsibility for continued growth and development. A student should not say at the end, *I'm exactly where I was at the beginning, and I'm OK with that.* That standard held true for this group too from our observations and assessment of the dynamics and learnings reflected to us by the students.

Commonalities

In this section, I review common issues and OD modifications that supported each project. I also discuss the advantages and disadvantages of virtual space and adjustments that can benefit practitioners.

Common Among Cases
Each organization had to establish secure connections at private homes. Most staff had to determine how to work from home—where to create dedicated space, if possible; how to work with and around the equally disrupted lives of others at home; how to manage fear of the virus with expectations of productivity, and how to relate to racial reckoning. None of the groups had practice engaging with process intensive consultation and I had limited to no in-person preparatory contact with anyone in the organization. We all built trust with each other online.

In all cases, upheaval needed to be accommodated. Homelife circumstances meant uneven physical, technical, and psychological capacity to participate, e.g., single person versus parent to multiple small

children versus manager of infirm family members. Such facts are usually masked in shared workspaces. Normative expectations that economic and family arrangements uniformly support the presumed primacy of work were contradicted by unequal resources necessary for work.

Remote work erased the (assumed) separation between professional and personal life and the arbitrary boundary between social, political, and economic domains. Differences in individual situations tracked social identities such as race, gender identity, age, and class, and became impossible to ignore, sometimes to the surprise of dominant group members and sometimes to the frustration and shame of subordinated group members (Hardiman & Jackson, 2007). JEDI issues were highlighted and needed to be acknowledged and accommodated, if not redressed.

All, except perhaps the master's students, were new to online learning, as I was new to online teaching. My willingness to admit my learning in the virtual space permitted everyone to be learners in working online and, more importantly, in the subject of the OD project. Our complementary newness did not hamper, and likely enhanced, the work.

Of course, group dynamics were present, observable, and workable in the virtual setting, including who speaks first, longest, loudest, last; who asks genuine questions; who couches statements as questions and vice versa; who resists making a proposal; the underlying topic present but unnamed; the explicit and implicit power dynamics in the group; who wants which rules, enforces them, colludes with them, resists them openly or covertly; the pairings or patterns in sequence of speakers in connection to what content or process; the dynamics of race, gender identity, class, sexual orientation present and how the group navigates them, with what underlying assumptions. Yet, instantaneous connection in virtual space reinforced participant eagerness for results without accounting for *time and method*. Given the stress of disruption, teaching and facilitating process management became even more important than usual.

Common Adaptations

To adapt to online work, I distilled themes from colleagues and literature such as, spend time in openings i.e. check in, introductions, orientation to each other, task, and technology; be modest and *clear* about expected outcomes; create frequent breaks; provide explicit posted and verbal instructions for group activities; vary presentation methods; beware of technology challenges including time for participants to adjust to technology or even have access to it (Rewa & Hunter, 2020; Tippin, et al., 2018). I implemented the principles yet remained basic with the technology itself.

I tested online whiteboards, synchronous polling platforms, and explored the features of online meeting platforms. Participants forgave my learning curve when I was honest and invited them to learn with me. The technology was not the point but a means to the project's purpose.

As always, I needed to build relationships with participants through attention to openings and OD practices such as self-disclosure, follow-up questions, and expressions of care. Sharing my music selections during breaks or stretching with participants became a way to join their experience with the unfamiliar.

Virtual work benefitted especially from attention to overall purpose, clear intention for consultant and participant tasks, focused agendas, and curbed crosstalk due to limited attention reserves. Ongoing process observation helped consultant and client align behavior with purpose. For example, we distinguished needs from habits, such as, no space between virtual meetings, all meetings on camera, and assumptions that people were *more* accessible because they were not traveling regardless of other life demands. Usually, we moved one-to-one interactions that contained no document editing to the telephone. We adjusted meeting duration, frequency, spacing, and participation based on need and capacity. While well-structured meetings were vital, people also craved the informal time and activities they once enjoyed. They innovated coffee hours, birthday parties, dance breaks, and the like on the virtual meeting platform.

In sum, adaptations included slowing down, attending to the emergent, heightened attention to the relational, clear purpose, role clarity, facilitating meaningful participation, and individual and collective care. As in, OD.

About Working Virtually

Importantly, as before, technology was a handmaiden to the OD interventions. It afforded opportunities otherwise less available and it had limitations.

Advantages of Virtual Work
» Virtual whiteboards allow participants to post, easily move, and deepen inquiry into more fully developed ideas.
» Documentation is easy with whiteboards converted to pdf and sent as a pictorial and/or editable record of meetings, and meetings recorded for later viewing.
» Online polling, within platforms or standalone, displays instant results as word clouds and ranked preferences. Processes advance without contention over ranks and themes.
» Designated time and task in virtual breakout rooms help focus participants. There is no herding people back into full group although participants need some psychic transition time.
» Fishbowl processes and subgroup observations are easy to set up.
» JEDI issues are more visible and, therefore, workable.
» With everyone online, more people have access to power, knowledge, shared learning, and participation.
» The attempt to integrate work and home surfaces assumptions about the place of work in life.

Disadvantages of Virtual Work
» Planning takes longer, especially when one is learning multiple modalities.
» A partner for technical aspects permits the consultant to focus on group work, and increases time and cost for client and/or consultant.
» Group development takes longer. There are more distractions and psychic distance to overcome, especially if relationships begin and exist entirely online.

» Zoom fatigue drains people's limited attention time. Creative and frequent energy breaks including dance, walks, and stretching, help (Jiang, 2020; Sander & Bauman, 2020).

» Technology features can be distracting, confusing, intimidating, and/or unreliable. They can also seduce the facilitator to love technology at the expense of learning.

» Support for virtual breakouts is less organic than in-person.

» The move to online erases the illusion of abundant resources. Access to technology, time, attention, and space is uneven, and requires accommodation to real differences in access.

» Shame about the technology differences thwarts people's psychic availability (Bentley, 2012).

» Participants immobilized at computers have limited somatic processing options, and the consultant can only witness what is captured in the computer frame (Lee, 2020).

» Increased speed of technology may lead to expectations for increased speed of change.

Virtual is not the *same* as or *equivalent* to in-person meeting. It is better than nothing, supports some processes better than in-person, and hampers others. There is no touch, nor is there the immersion that helps limit distractions. Still, it can serve.

Implications for Practitioners

Given these and other likely adaptations to working virtually, OD practitioners need skills appropriate to the venue. Rather than become overwhelmed with virtual meeting methods, adequacy with a few programs can keep client and consultant focused. Although technological awareness and proficiency is helpful, it does not differentiate OD practitioners.

Rather than propose new skills, I maintain that the work of practitioner development is essentially the same. As in face-to-face engagements, we have the responsibility to develop our presence, here-and-now awareness, ability to conceptualize and be flexible with system change and project designs. How we do that work for ourselves, our clients, and our students enables us to make a meaningful difference.

Practitioner presence conveys the confidence and care clients need to trust us with themselves as individuals and with their organizations (Nevis, 2005; Rainey-Tolbert & Hanafin, 2006). During in-person engagements, we use ourselves to share perspective, interest, and ability (Berthoud & Bennett, 2020). In the virtual world, we convey the same in myriad ways—timeliness, preparedness, facial expression, voice tone, appearance, and what we attend to. Yes, we learn to look at the camera rather than, or in addition to, the faces on the screen. Perhaps we learn to exaggerate or quiet facial expression, voice tone, and body language, and minimize our distractions. Still, cultivating presence is the practitioner's work for any venue, including virtual. By fortifying our presence-building practices, we enhance our presence and model both practice and presence for clients.

Here-and-now awareness is also an essential skill for practitioners in the virtual world (Stevenson, 2018). Because practitioners support system change, we need to understand the systems we are working in, and their nested location in supra-systems. Therefore, we need to comprehend larger forces, including social and historical dynamics, that impact organizations and their participants. This is not new.

A current challenge is overload with multiple crises and their consequences. Practitioners base here-and-now awareness in reality. Saying *this is hard* can be a balm that opens the client to adjustment. Likewise, saying *this is unknown* allows for trial and error just as reference to current events softens the often false boundary between work and the rest of life.

Cues abound—camera on or off, regular or irregular participation within session and across sessions, difficulty moving work forward, facial expression, relative silence or verbosity, the content of contributions, the degree and frequency of distractions and the intensity of focus. Once explicit, the meaning of the cues can be explored. Regular stock-taking with clients builds and validates their awareness and enhances their ability to engage in reality-based decision-making. As always, the practitioner's *self*-awareness is essential. In each of the cases presented, my frustration, confusion, delight, etc. helped guide my actions. I used my self-awareness as a prod to discover the client's state and needs.

The skill of process design transfers directly to the virtual space. Practitioners always adjust for time and capacity. We need clarity of purpose and flexibility with means. Information moves faster than before but has not changed human processing needs. Recognizing the human impact of technological change may be more important than ever. Designing our processes to allow participants to grapple with change, see their own dynamics, and create humane systems for themselves remains essential.

More than anything, **how we respond to uncertainty** and upheaval forecasts how we engage with clients. George Floyd's murder and other supposedly "external" events are no longer cordoned off. The pandemic itself impacted the form and location of work. Events impinge upon the psyche and homelife in ways that cannot be "left at the door"—if ever they could. Rather, we can attend to them as life as it is, including their impact on people and work.

As the ancients knew, change is the only constant. We are living that truth more plainly than ever. If we expect certainty, we cannot help our clients navigate uncertainty. If we expect to return to normal, we play a waiting game with reality. Reality always wins. How to adjust, redesign, adapt, drop, pivot, surf, dance with the changing rhythms of life are skills we can model. Critically, our presence and here-and-now awareness help clients ground themselves in the now and therefore make decisions about the next with the knowledge the emerging now may be more different still (Snowden & Boone, 2007; Johnston, et al., 2014). We convey our confidence in them and they (learn to) surf, too.

Conclusion

The cases noted here are some of many experiences in the virtual world, including learning circles, individual and group coaching, class series, and retreats, plus more festive gatherings like dance parties and birthday celebrations. It is what many of us do now.

There are many more functions in the online world than the few I have named. Yet, that abundance presents a challenge. It is easy to become overwhelmed, especially for later adopters of technology. I have found it useful to learn a few programs that support my offerings and share them with clients (who are usually thankful) and/or build in time to learn the client's preferred platforms. At this moment, as in previous upheavals, e.g., email, globalization, and cheap flights, the challenge is less the change than how we relate to it. How we manage our own adjustment is more important than what we insist on for or from clients.

Our readiness to engage with system change and paradigm shifts allows us to support clients whose struggle with technology may reflect their difficulty with deeper change. In this way, our relationship to challenge and change can be a guide and mirror for ourselves and our clients as long as we are aware of and interrogate our own processes and contexts. OD practitioners can attend especially to human dynamics that can be masked by, and/or amplified in, the virtual world.

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