

Difference Matrix

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October 15, 1999

The basic idea:

The Difference Matrix is a frame that helps you think about the emerging patterns of a group's behavior and your behavior within the group. You can use it to plan an activity, observe an interaction, or intervene to increase a group's capacity for adaptation. Use it to understand and encourage emerging systemic change in organizations.

Potential contexts for use:

Supporting change--

- ◆ New, emerging cultures
- ◆ Changes in patterns of interaction
- ◆ New system definition and formation

Planning--

- ◆ Conversations about difficult issues
- ◆ Meetings
- ◆ Training sessions

Observing--

- ◆ Small group dynamics
- ◆ Difficult relationships in groups
- ◆ Patterns of interaction during meetings

Intervening--

- ◆ Group interactions
- ◆ Problem solving sessions
- ◆ Personality conflicts

Description:

The Difference Matrix brings together two factors that shape the emerging patterns of group behavior-- difference and interaction.

Principle:
Paradox & Tension

Primer:
Diversity in CAS

Aide:
*Difference
Questioning*

Difference is the source of creative change and learning. In the same way that a difference in height releases the power of gravity when a river flows to the sea, differences in a group provide the potential for movement and change. When there is no difference among the members of a group, everyone may be quite comfortable, but there is no motivation to get the group moving. When differences are too great, the group may be unable to come together for conversation or action.

Principle:
*Feedback
Cooperation*

Interaction in a group provides the opportunity for change. In the same way that a wire carries electrical current from one pole of a battery to another, interaction turns difference into power to accomplish real work. If there is little or no interaction, then the group gets stuck in their different perspectives, and no system-wide emergent patterns are possible. If there is too much interaction, the group may shift its focus from

one point to another without spending enough time or energy to resolve any specific issue.

The Difference Matrix is a tool that helps you focus on differences that make a difference and to establish interaction patterns that are most adaptive for a particular time or issue. You can use this tool to plan, observe, and intervene in group dynamics to influence the emerging patterns of conversation and behavior. You can also use it to build new systems and support groups through system-wide change. Figure 1 shows the parts of the Difference Matrix, and each quadrant is described below.
[Insert Figure 1 about here.]

Aides:
Generative
Relationships

Quadrant 1--High Difference/High Interaction. When groups are involved in creative problem solving, they are practicing Quadrant 1 dynamics. This quadrant is the most active and potentially productive one of the Matrix. This is where important differences come together to interact and produce creative solutions. Self-organization occurs here when differences generate new options that go beyond original assumptions. Like all of the other quadrants, Quadrant 1 has its limitations. It requires hard work, openness to change, and focus of attention. Some people are uncomfortable in such an environment, and everyone feels stressed and exhausted if they spend too much time here. In a healthy balance, Quadrant 1 provides creative opportunities for the group.

Principle:
Co-evolution

Quadrant 2--Low Difference/High Interaction. When a group celebrates shared success, they are practicing Quadrant 2 dynamics. In this quadrant, everyone agrees, and they talk about what they hold in common. This quadrant provides powerful energy. It allows a group to bond and to build energy reserves for future challenges. The drawbacks for Quadrant 2 appear when it becomes the only dynamic of a group. Lack of constructive difference means that nothing new comes to life. The group can seem to be traveling in circles, saying the same things again and again and not making a real difference in their environments. Frequently factions form, where a few people who agree on a certain issue or concern will talk with each other about it but not take action to resolve the issue. This is an example of destructive Quadrant 2 action. In a healthy balance, Quadrant 2 provides fun and a sense of shared mission.

Aide:
Reflection
Principle:
Bifurcation

Quadrant 3--High Difference/Low Interaction. When a group has agreed to disagree, they are practicing Quadrant 3 dynamics. Great differences remain unresolved as long as the group is in Quadrant 3. This situation can be quite helpful when private reflection is called for, when individuals feel unsafe talking about a specific issue, or when particular differences are not relevant to the work at hand. For example, an agreement not to discuss politics or religion during work hours might be a very effective use of Quadrant 3. The risks of this quadrant are tremendous, however. When important differences are great and remain unresolved, they tend to fester. Anger, frustration, and misunderstanding can grow until the system explodes. In a healthy balance, Quadrant 3 provides open space for individual reflection and rest.

Principle:
Fractals

Quadrant 4--Low Difference/Low Communication. When a group shares assumptions that need not be spoken, the group is living in Quadrant 4. Education, profession, culture can all provide underlying assumptions that are never voiced. When a group holds these things in common, they will feel safe and secure. They experience a sense of belonging. Frequently people will return to such a comfortable situation to recover from the trials of Quadrant 1 activities. By itself, however, Quadrant 4 leads to inaction and a vague sense of boredom. It is extremely difficult to change anything that exists in this quadrant because there are no differences or interactions to encourage transformation. In a healthy balance, Quadrant 4 provides a place for rest and recuperation in the midst of a changing environment.

Reflection:

Before using this aide:

- ◆ What are the differences that make a difference? Emergent patterns can form around any difference. Sometimes the differences that form the patterns are not important ones. This happens when a difference in jargon builds barriers that interrupt good problem solving. Before using the Matrix, decide which differences are the most important to the work of the group and focus your analysis on them.
- ◆ Which quadrant is most comfortable for me and for others in the group? Some people have styles that work better in one or another quadrant. Consider for yourself what your preferences are and be sure that your analysis reflects the needs of the group rather than just your personal preference.

While using this aide:

- ◆ Which quadrant best describes the current situation?
- ◆ Is the membership of the group representative? Is it balanced? Is it the right mix for the conversation?
- ◆ Where should we be to move forward in our work together?
- ◆ How can we move into that more productive place? (Figure 2 shows actions you can take to move from one part of the Difference Matrix to another.)

[Insert Figure 2 somewhere about here.]

After using this aide:

- ◆ How did our differences and interactions change during the experience? What can we learn from that progression?
- ◆ How many differences affected our interactions?
- ◆ How many kinds of interaction did we engage in, and how did each affect the behavior of the group?

Examples:

- ◆ One service unit had extensive contact with customers. Over a three-year period, the cultural, racial, and economic diversity of the client population changed significantly. Service providers were confused about how to work most effectively with these unfamiliar groups, so they made some mistakes. When they were chastised for their "racist" behavior, they became even more hesitant to interact with their new clientele, moving farther and farther into Quadrant 3. Among themselves, they would talk about their experiences and frustrations (Quadrant 2), but they refused to talk with their supervisors to ask for help (Quadrant 1) or to work directly with customers to discover their needs (Quadrant 1). The situation finally exploded when a customer commented, "You always make me feel like I'm a number not a person." The Difference Matrix helped the service providers think and talk about what differences made a difference to them, their organization, and their customers. They used those insights to plan steps to build their understanding and skills for working with people who were different from themselves.
- ◆ A cross-functional, self-managed team was stuck. They had a clear mission and sufficient management support to meet it. What they didn't have were effective working relationships. When they spent time together, even if the intention was to build bridges, they came away even more angry and frustrated with each other. They used the Difference Matrix to analyze their issues and interactions. They built a series of experiments to spend one whole meeting in each of the quadrants and to reflect on their experiences. They began with Quadrant 4, which seemed an easy and safe place to start. During that meeting, they talked only about their previously unspoken agreements. By the fourth meeting, when they committed to stay in

Quadrant 1, the group had accomplished a great deal of work, including resolving their interpersonal issues.

*Tales:
Merging, De-
merging, and
Emerging At the
Deaconess Billings
Clinic*

- ◆ The Edgeware tale, *Merging, Demerging, and Emerging at the Deaconess Billings Clinic*, outlines the complex emergence of a new operating culture from two quite different ones. The business differences of legalities, organizational structures, and financial issues were successfully negotiated early in the process. These were relatively easy issues to face in Quadrant 1, because they were clearly articulated, and both of the merger partners saw the need to move into high communication mode to build a new organization.

Other differences, those of identity, culture, and decision-making, proved more problematic. The Difference Matrix helps explain why. The hospital and the clinic had worked separately in Quadrant 4 with regard to these issues. Internally there was wide-spread agreement and common sets of assumptions, so neither had needed to make their common grounds explicit. As the merger progressed, however, these unarticulated principles that were held by each generated tremendous turbulence between the two. Clinic staff followed a consensual decision-making process in which physicians were involved in most major issues. The Hospital functioned in a more corporate model, with the CEO and a few senior administrators making most of the decisions. When the new three-person Office of the President made decisions, both sides experienced frustration as their fundamental assumptions were challenged. Because these differences were not expressed, they moved the organization into Quadrant 3, where frustration mounted and distrust grew rampant. Even when leadership tried to expand conversation to surface issues, problems persisted. Over time, they realized that basic definitions of terms (joint governance, for example) meant different things to different groups. As they tried to move into Quadrant 1, language differences from Quadrant 3 made problem resolution even more difficult.

As the organization developed common mission, vision, and values statements, they began to move some of their most central issues from Quadrant 3 (between the Clinic and Hospital) and Quadrant 4 (within the Clinic and the Hospital) into the low difference, high interaction of Quadrant 2. This effort established a foundation of self-similarity that provided some degree of stability, but fundamental, unspoken differences continued to disrupt the evolution of the new organization. Common budgeting, shared management, and process consolidation contributed to establish Quadrant 2 dynamics. Rather than easing tensions, however, these actions tended to focus more energy on the differences between the historical cultures of the merger partners.

The stage was set for a bifurcation as the Quadrant 2 agreements amplified the Quadrant 3 differences. Physicians began to discuss the possibility of "de-merging." Hospital representatives and Board members sought ways to deal with "unruly" physicians. The Quadrant 3 dynamics grew until a group of physician leaders requested a facilitator to mediate.

The mediation was a classical example of Quadrant 1 behavior. An external facilitator was able to establish a "safe enough" environment by using the Quadrant 2 foundation that had already been established. The conversation instigated the high interaction that was a necessary condition for the self-organization of a new culture that could belong to the whole. During two weekend sessions, the facilitated group aired the differences that were most painful. The energy generated by these conversations allowed the group to establish a new definition of their emerging identity: the physician-led, professionally managed, community governed health care system. Ultimately a team-based management structure evolved in

which medical and administrative staff were responsible to cooperate to solve specific operating challenges. "Where administrators and physicians had complained about each others' inability to understand what they did, DBC now had a structure where physician leaders and administrators were expected to collaborate to solve problems and resolve misunderstandings." This new structure institutionalized Quadrant 1 behavior of high interaction regarding real and perceived differences.

With the cultural differences essentially resolved, DBC now faces a variety of new challenges. Rather than focusing on the differences within the organization, they can turn their attention to difference that make a difference, including financial performance, community relationships, further cultural changes, quality of goods and services, and improving outcomes. Each of these complex issues involves a variety of differences. Some of them, like commitment to quality, will help provide stability because they lie in Quadrant 2. Some, yet to be identified, are lurking in Quadrant 3. All will need to be surfaced and discussed to set the context for on-going emergence. The sustained attention to differences that make a difference and appropriate levels of interaction will continue to lead DBC forward in its complex adaptive processes.

Tales:
Unleashing People Potential: When trouble makers become superstars

- ◆ The Edgeware tale, *Unleashing People Potential: When trouble makers become superstars*, demonstrates another example of the application of the Difference Matrix. The tale describes the experience of Jane, a hard worker and good common sense thinker who was always willing and able to encourage change. Over time, her passion for Quadrant 1 threatened her bosses, annoyed her colleagues, and exhausted her patience. Others were not willing to focus on high difference issues, so Jane gave up and took her wonderful ideas into Quadrant 3.

When Mary Anne entered the picture as a leader of patient care, she recognized Jane's dilemma. Immediately, Jane and Mary Anne moved together into Quadrant 2. Each recognized the energy and insight of the other. They made a great team as they reinforced the energy and ideas of each other.

Together, they were able to move patient care processes out of stodgy, siloed patterns of Quadrant 3 organization. By building a centralized admitting process, they established the context for Quadrant 1 behavior. Employees were cross-trained, procedures were consolidated, schedules were adjusted, and the organization was moved in many ways into high difference high interaction dynamics.

Mary Anne's relational principles of leadership to encourage organizational change reflect her intuitive understanding of the dynamics of the Difference Matrix. She supports mutuality, which removes the power difference and generates the authentic feedback loops that are necessary in Quadrant 1. She focuses on acknowledgement, which allows her to value the differences that each and every individual bring to the work. She provides encouragement by expressing the commonly held values and hopes of Quadrant 2. She established the paradoxical presence that embodies the experience of Quadrant 1 interaction.

Tales:
A Complex Way of Connecting with Communities: Creating hope through connections and action

- ◆ Brenda Zimmerman and Curt Lindberg tell the story of Rusch and Zastocki as they cross the boundary between institution and community. They describe the community plan as, ". . . a Mecca in some sense where people come together, they grow, they act, and they learn together--where natural spin-offs will occur that allow more and more people to connect." This is classical Quadrant 1 behavior that involves both health professionals and community members. How do they establish such a context? They move the system into Quadrant 2, by articulating

the self-similarities between healthcare workers and the community. Then they remove the barriers that hold people and issues in Quadrant 3. They encourage a variety of approaches that open the dialogue between community and the hospital, including training, volunteering, and participation in a variety of community projects. With these two strategies, healthy relationship between the hospital and the community , "just happens--they do it on their own." This emergent self-organization does just happen on its own, but it also depends on leadership that is able to establish the two conditions for self-organization--difference and interaction.

Facilitator's Tips:

- ◆ Use the Matrix to solve specific problems. As you analyze a problem, decide which quadrant of the Matrix it currently represents. (For example, a troubled customer relationship can usually be represented by Quadrant 3, when the patient and the professional have stopped talking, and their perceptions get farther and farther apart.) Next, determine which quadrant would provide a healthy dynamic for the system, then build tactics to shift toward the new levels of difference and interaction.
- ◆ The Matrix also helps resolve interpersonal conflicts. Two persons who are having trouble communicating can use the Matrix as a neutral tool to describe their own and each others' reactions to stressful situations. It can help the pair develop reasonable strategies for improving their working relationship.
- ◆ The Matrix works, whether or not it is explicitly shared with a group. As a facilitator, you can gauge the dynamics of a group according to the Matrix and respond to shift the interactive patterns. You can also use the Matrix to plan a meeting or training session. Use your knowledge of the group to anticipate a starting point for their work, then plan activities that will increase their focus on similarities or differences to move them to the right or the left of the Matrix. Use activities that increase or decrease whole-group participation to move them up or down in the Matrix.
- ◆ You may want to preface the Difference Matrix with a discussion of differences that make a difference. You can have the group brainstorm all differences that affect their work. Mark with a plus sign (+) the ones that are most important to the constructive work of the group. Mark with negative sign (-) those that interfere. Mark with zero (0) the differences that really are not relevant. For example, you might find that differences in education are positive contributions to work, while different geographical locations interfere, and gender differences are irrelevant. This will help the group think analytically about differences that make a difference before they begin working on the Matrix.
- ◆ Use personal examples or examples from the recent history of the group to illustrate the dynamics of each quadrant.
- ◆ After defining each of the quadrants, ask the group to reflect how the Matrix relates to them and their group. Consider the following questions:
 - ◆ Which quadrant is most comfortable for you and why?
 - ◆ How does it feel to work in each of the other quadrants? How do you act when you feel that way?
 - ◆ Where do you think your team members are most comfortable working?

Aide:
Wicked Questions

- ◆ What issues does this group put into each of the quadrants?
 - ◆ What policies or procedures do we have that encourage each quadrant's dynamic?
 - ◆ What unwritten rules do we share about interactions and differences?
 - ◆ Do we tend to repeat common patterns of movement from one quadrant to another? If so, what might these patterns mean?
- ◆ Take some time to discuss the Matrix as a group, then give participants time to think about it for themselves. Frequently the tool helps people find a way to articulate concerns or discomforts that have been held in private. Everyone may need some time to become accustomed to bringing their own dynamics into Quadrant 1.
 - ◆ The Matrix may look like an either/or proposition. It is not. Of course differentiation and interaction are both continuous quantities. You may have a situation that stays close to the center of the Matrix, when neither factor is extreme, or you may have situations where one or another is close to the edge. You can use the Matrix as a map of interactions by thinking about it as a continuum.
 - ◆ Groups can quickly become proficient enough to use the Difference Matrix as a self-monitoring tool. Post a copy of the Matrix in a meeting room to encourage participants to be mindful of their own dynamics.
 - ◆ As a facilitator, you do not determine the dynamics of the group, you merely have opportunities to influence them. Even a tool like the Difference Matrix will not allow you to predict or control how a group emerges. If you intervene to try to shift the energy of a group, and they continue on their original path, think about what difference or interaction processes are holding them in place. Use your powers of observation to learn about where they are and what they are doing. Do not always expect to move them where you want them to go.

Difference Matrix

Figure 1

		High Difference	Low Difference	
High Interaction	1	Learning Growth Self-organization Stress Conflict Exhaustion	2	Celebration Reinforcement Energy Low productivity Wasted energy Factions
Low Interaction	3	Reflection Safety Clearing the decks Isolation Misunderstanding Frustration	4	Comfort Belonging Rest and recovery Boredom Stagnation Death

Moving in the Matrix

Figure 2

