

# Horses Help Create Strategic Direction for Consumer Research Firm

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**T**his case study illustrates how Saddle Sojourns integrated Appreciative Inquiry and a unique approach to experiential learning to help a consumer research firm develop a new strategic direction.

## Background

In the spring of 2003, Saddle Sojourns designed a one-day workshop for the two principals of ABC Research. ABC Research was founded in 1991 as a one-person marketing research consulting company that has since grown to 10 employees and over \$3 million in annual billings. They provide qualitative and quantitative research for manufacturers requiring information on peoples' preferences, ranging from designs for new cars to the size and shape of kitty kibble.

## Client Objectives

While the firm was financially successful, the founder/CEO and her Executive Vice President/business partner found themselves at a crossroads. The purpose of the workshop was to take time to reflect on what had brought the firm to its current level of success, identify high leverage areas for change and begin to define a strategy to continue the growth of the business without continuing to burn out the principals.

## Project Description and Outcomes

The day was divided into two sections. The morning was spent doing arena challenges on horseback with the purpose of enhancing communication skills, increasing risk-taking, and having some fun in roles they would not typically occupy. Using each other, their equine partners, and the workshop facilitators as a source of feedback, they saw and experienced the positive value of their different approaches to problem solving and leadership – and identified areas for further development. The participants reflected on each challenge, identified what they learned, and drew parallels to situations back at work.

During lunch we reviewed the results of previously completed personality assessments and linked the experiences on horseback to findings in the feedback report. In the afternoon, we used a 4-D design beginning with a paired appreciative interview. The protocol began with the question: ABC Research is a successful organization ready to take the next step in its growth. Can you remember a story about when you experienced excitement and success during previous growth and transition? Tell me a story about that time.

By mining the stories of their success, it became obvious that the brilliance, creativity and powerful work ethic of the two principals, the very factors that had made them successful, were now limiting their growth. Completing projects in a manner that met the creative and intellectual standards of the two principals had unintended outcomes. Clients not only see the difference between their work and that of other employees, but they specifically request the principals instead of other employees to do certain parts of the projects. Equally important, hiring and retaining employees who can perform at this level was becoming increasingly difficult.

They next created a visual image of a preferred future in which their employees could produce better work than any competitor, but did not require the extraordinary talent of the principals. They put their image into words in their bold aspiration statement: *“Being recognized as a powerhouse of excellence in marketing research that delivers impressive results every time.”* They then used a “goose-egg” framework to identify all of the stakeholders and the various processes that will be affected as they move into their vision.

Nine months later, they are having some success with their plan. They now charge more Clients who insist on using only them on a project. They share the spotlight with other high level employees so that clients become comfortable with the employees’ style. They have developed templates, process, and style guidelines that help employees imitate their style as well as provide extensive training on the internal process they both use to create the deliverables. They are giving small, manageable pieces of a project to others.

## Appreciative Learnings and Insights

ABC Research held a company retreat in San Diego and shared the learnings from the Saddle Sojourns experience with the full staff. They spent one afternoon with two teams debating the value of flexibility versus consistency in their products. This exercise was very valuable in getting everyone thinking about why we are so “compulsive!” And, it also helped them feel better about relaxing the criteria in some circumstances.

The powerful combination of working experientially with horses and Appreciative Inquiry help created the new strategy for ABC Research that is enabling them to grow.