

Impacting the Enterprise:

Creating, Countering, And Managing Change

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Agenda

- **Tactics for creating an Adaptive Culture**
- **Dimensions of Organizational Change**
- **The Agenda of Deliberate Change**
- *Excursus: Tactics in Change Mgt.*
- **Dealing with Other Types of Change**
- **Ten Areas to Watch**

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*Tactics for Creating
an Adaptive Culture*

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Tactics for creating an Adaptive Culture

1. Focus Recognition/Reward systems on this
2. Mutual trends presentations
3. News Clipping (and Q's)
4. Your team's customer-type suggestions
5. Circulate Competitor Info
6. "How do we trim a minute/dollar/etc off..."
7. Document "Lessons learned"
8. Train the BizUnits to bring 'stories' to you
9. "What requests have we turned down (IT, firm)?"
10. "Can you think of a way we could use this?"

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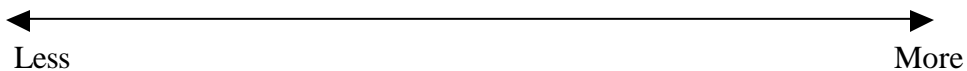
Tactics for creating an Adaptive Culture

- *Focus Recognition/Reward systems on this*
- Award Plaques to: Biz-Unit, Biz-emp, IT-emp
- Lunch n' Learns: "How did you do that?"
- Anonymous "new ideas" forum
- E-recognition: Intranet, email
- Can YOU make an award at the National Sales Award Banquet?
- "Good thinking!" phone calls (and get your boss to call too!)
- Eyes and Ears: BizUnit Execs, support, nominations

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1. Rank your business units/departments on their posture toward innovation:



2. If you had given awards for this past 6-12 months, who would have gotten them:

Business Unit _____ BizUnit exec _____
BizUnit Employee _____ IT employee _____

3. Identify the communication channels you have for "tooting someone's horn", both e-channels and otherwise: _____
4. List three individuals who should be considered for the "Good Idea" phone call: _____
5. If you cannot answer #2, how can you begin to monitor and track that?

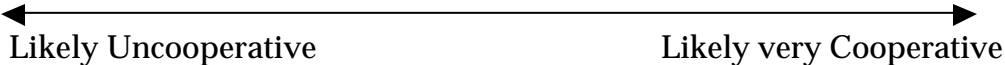
Tactics for creating an Adaptive Culture

- *Mutual Trends presentations*
 - Quarterly/Bi-annually
 - You present Trends in Technology
 - Include Trends in their Transactions/Usage
 - Include *some* Futures
 - They present Trends in their Sector (e.g., Sales, Distribution)
 - Key: Biggest changes from last period, and Why?
 - Key: What could be done about the 'bad' ones?
 - Can they get their vendors to do this too?

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1. To what extent do you have visibility into their trends today?
(Especially customer buying trends, pricing trends, and industry competitive trends)
2. Rank your BizUnits in terms of their openness and ability to do this:



Likely Uncooperative Likely very Cooperative
3. Who on your team would you assign to create the initial Trends presentation? _____
4. What trends would you likely place in YOUR presentation:

5. To what extent do you track/trend their transactions/usage already? (e.g., avg. sales per invoice, cost per PO, xacts per labor \$)
6. How well could you anticipate their "why's"?

Tactics for creating an Adaptive Culture

- *News Clipping (and Q's)*
- Have the support teams read THEIR magazines
- Periodically, send/walk this over with questions:
 - “How might this impact our/your sales?”
 - “Is this something we need to consider ourselves?”
 - “Why would they find this attractive to do?”
 - “What problems might they encounter w/this?”

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1. Which business unit execs could you do this with, beginning immediately? _____
2. To what extent would your support teams already KNOW what magazines their customers read? _____
3. If you are not organized by business unit boundaries, who would you tap to carry this responsibility (for the various groups)?

4. Can you think of any past articles in the IT trade press that might furnish you with an initial ‘practice run’ of this tactic? Who would you approach with that/those articles?

Tactics for creating an Adaptive Culture

- *Your team's customer-type suggestions*

- Brain-storming session: "how do customers think?"
- The last time you bought/used our product...
- Send them out for "product trials"...
- Do you make sales calls? Executive visits? Supply Chain vendor events?
- Try an employee "shadow" day
- Don't forget to use the BizUnits for Lunch n Learns

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1. Identify the key individuals you would want at this brain-storming session. Remember to select a wide-cross section, if possible:

2. When were your last three on-site customer visits? _____

3. When were your last two non-IT related vendor visits? _____

4. Which three business units would be most agreeable to allowing a 'shadow day' for some of you team?:

5. Who would you call to set you up with a couple of fact-finding customer visits? _____

6. Select the first 3 BizUnits you would ask to present at a Lunch n Learn: _____

Tactics for creating an Adaptive Culture

- *Circulate Competitor Info*

- Similar to News Clipping, but:
 - Wider in sources (e.g., Web research, vendors)
 - More formal in distribution (e.g., Exec Memo)
- Pose questions “to think about” or discuss
- Sometimes: add “what we are researching...”
- Could be an Executive forum on the Intranet
- Solicit items from BizUnit allies

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1. Name your top three competitors, or the top competitor for each of three business units:

2. Who on your team could you assign to do the Web research for these? _____ and what frequency would make the most sense for your situation? _____

3. Think about the last “disturbing” article you read about a competitor. What “to think about” questions could you create around that?

(1) _____

(2) _____

4. Which of your most trusted IT vendors could you ask to find out information on your competitors?

5. Which BizUnit allies might you tap for news items like these:

Tactics for creating an Adaptive Culture

- *“How do we trim a minute/dollar/etc off...”*
- The Incremental Improvement (II) approach
- Often yields much larger process improvements!
- Support teams for the BizUnits (or Joint teams!)
- Change the Variable each time:
 - Time/task, number of tasks, costs, rework, overhead
- Flip to positive: *“How do we raise Cust.Sat.?”*

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1. Identify three initial processes or products to attack with this approach:

2. Identify which BizUnits might be agreeable to participating in a Joint II session: _____

3. Which vendors (IT or non-IT) might be of use in this exercise?

4. If your teams are not organized by “group supported”, then identify the key individual you would tap for leading the first three exercises you selected in #1 above:

Tactics for creating an Adaptive Culture

- *Document “Lessons learned”*
- *Goal: reward “innovation risk”*
- *Means: document a ‘courageous failure’ and spin it into a ‘contributing success’*
- *Distribution: Lunch n Learns, Intranet, Recogs*
- *Could be fed into a Knowledge Mgt. system*
- *Could be an “courage award”, if given to a BizUnit emp (but be careful!)*

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1. To what extent does your firm encourage ‘failed attempts’?
2. To what extent does your IT group encourage ‘failed attempts’?
3. Describe two lessons YOU learned recently, and develop a format for a ‘display’ document for those. (Keeping in mind that you will need a template of some type to display these correctly)
4. Identify which communications channels would be most appropriate for IT-employee recognition, and which ones for non-IT workers:

5. Can you think of any experience of your team (recent) that you might use for your initial try at this?

Tactics for creating an Adaptive Culture

- *Train the BizUnits to bring 'stories' to you*
- *Goal: reward non-IT personnel for recognizing innovation (outside the firm) and sensing its importance*
- *Use a recognition method to encourage this (e.g., "thank you" page, all-group email)*
- *Solicit via email, targeted mailing (ask BU exec for top candidates), and/or called meetings*
- *Post some kind of research response to these, exemplifying open-mindedness but also critical thinking*
- *Asking about specifics may help prime the pump*

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1. Who would you contact in Sales to let you address the sales troops about bringing back 'stories' about competitor innovation (with customers)?
2. Who would you contact in Supply Chain Mgt to let you address the procurement troops about bringing back 'stories' about competitor innovation (with vendors)?
3. Are there industries that are not your competitors directly, but have close similarities to yours (from which stories would be relevant)?
4. Think of 3 specific topics you could ask the team to bring back stories about (the subject matter might help suggest incidents):

Tactics for creating an Adaptive Culture

- “What requests have we turned down?”
- *Goal:* Find areas of customer requests that might be causing lost sales (requires autopsy, though)
- Look in IT: coding changes requested & justf.
- Look in Sales:
 - Sales Managers, when an active account is lost
 - Sales Managers, when a “hot prospect” is lost
- Ask Sales: “what 3 new features would...”

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1. Who in Sales could you ask to share with you and your team, periodically, the results of ‘lost sale’ autopsies? _____
2. Who in your group would you want to include in those sessions?

3. If you have a team that supports Sales, who would be best suited to designing a survey for “what 3 new features would increase sales?”?
4. Who among the front-line sales team could you expect to participate in a Sales/IT brainstorming offsite:

5. Flip it: Who in Supply Chain Mgt could be expected to tell you what new vendor offerings/features cannot be utilized because of systems limitations: _____

Tactics for creating an Adaptive Culture

- *“Can you think of a way we could use this?”*
- Technology-focused or Information-focused
- Present a Briefing to a mixed group of workers (selected by BizUnit managers into an ‘idea group’)
- Create Collaborative forum for discussion
- Rotate members in and out, and accept nominations
- Always include new hires (for a spot membership)
- Ask for “Next Topic”

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1. Make a first-pass list of who needs to be in the starter group:

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. Or, select which BizUnit execs to ask for nominations from:

3. Who in HR would you talk to to get a list of “promising” new hires?

4. Select the first 4 starter topics (hopefully from competitors):

_____	_____
_____	_____

5. Who on your staff could set up and manage the collaborative discussion? _____

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Fill out the prioritization worksheet below, using 1 as Low and 5 as High:

Tactic	Ease (1-5)	Value (1-5)	Product
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Select 3-4 of these to begin immediately, and designate the person you will designate to be responsible for each:

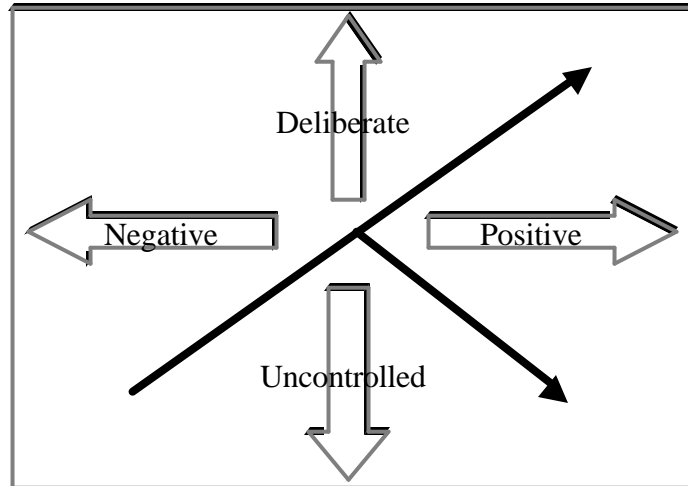
1. _____
2. _____
3. _____
4. _____

The Dimensions of Change:
Desirability and Intention

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The Dimensions of Change



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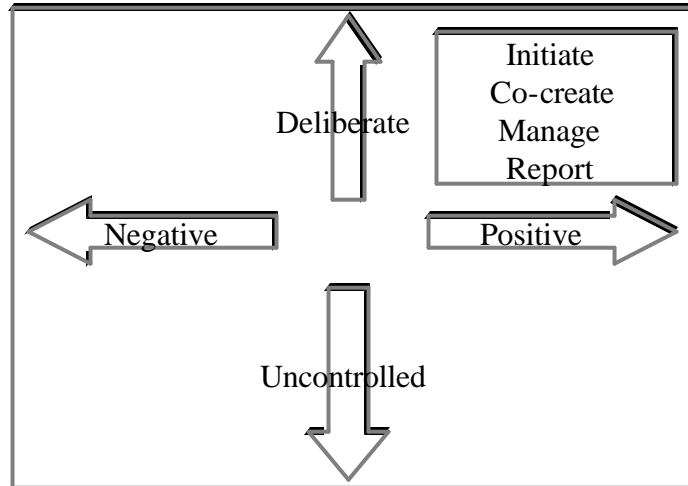
Give an example for each quadrant, from current or previous work situations (they do not have to be yours personally)

The Agenda of Change:
Deliberate & Positive Change

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The Agenda of Deliberate Change



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Actions

▪ **Initiate:** the Call to Action

Initiate Co-create Manage Report

- “What are we going to do...”
- “How much longer can we...”
- “How should we address...”
- “Can you call Bob and get us a meeting?”
- Start a process and nudge it forward
- Easier if the culture is open to your initiative...

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1. Think about two of the most recent changes in your company. By whom and how was the Call to Action done?

Situation

By Whom

How

2. List three situations in your firm that need some kind of change:

3. Who would you (or someone) approach about these situations, and how would you provoke a Call to Action?

Who

How

_____	_____
_____	_____
_____	_____

Actions

- **Co-Create:** the Vision, Plan, and Project

Initiate Co-create Manage Report

- Tech-assisted Business process modification or creation
- Could be process-only
- Leveraging labor, info, or relationships
- Up through the Launch...

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1. Who are your 3 closest allies that are ALSO good at creation?

2. Who on your team are the most creative/effective participants in joint brainstorming sessions?

3. List recent examples in which IT was used to leverage:

a. Labor further: _____

b. Corporate Info assets for biz utility: _____

c. Relationships for business advantage: _____

Actions

▪ **Manage:** Report

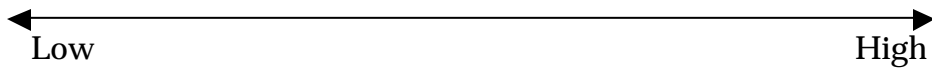
Initiate
Co-create
Manage
Report

- Parading the success of the change!
- Growing an organization *open to change*
- Creating examples of risk, mistakes, value
- An audit trail of success...

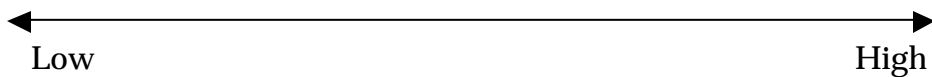
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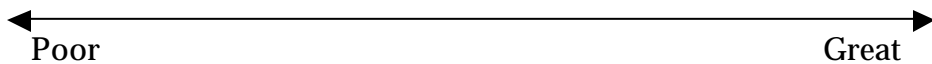
1. Rank your IT group's "self-marketing" EFFECTIVENESS:



2. Rank your IT group's "self-marketing" ability/potential/skills?



3. Rank your IT group's Public Image:



4. List your two biggest PR successes and failures in recent times:

PR Success

PR Failure

5. To what extent could your team give an 'elevator speech'? _____

Actions

- **Manage:** Project Mgt. and Change Mgt.

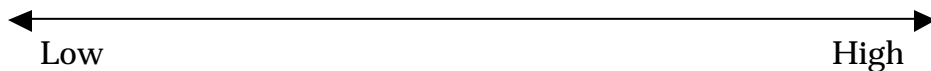
Initiate
Co-create
Manage
Report

- Project Management is the easier part!
- Change Management is more difficult the higher the possible rewards

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1. Rank your personal knowledge of Change Management theory and techniques:



2. Give an example of a project in your firm (IT or non-IT) that was a failure or failed to achieve the planned success, due to lack of effective Change Management.

Excursus: Tactics in Change Management

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“Half of my job is
creating change;
the other half is
managing it.”



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Change Management

- What is the Problem here?
- Understanding Resistance
- What is the Change Management Task?
- Various Approaches
- Specific Interventions

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What is the Problem here?

- Barriers to Change: Hard
 - Legal Obstacles
 - Resource Problems
 - IT Problems
- Barriers to Change: Soft (People)
 - Internal Individual Resistance
 - Internal Group Resistance
 - External Resistance

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1. Give examples of hard barriers you have seen in some of your firm's (current or prior) attempts to change:

- a. Legal: _____
- b. Resource: _____
- c. IT Problems: _____

2. Give examples of SOFT barriers:

- a. Individual Resistance: _____
- b. Group Resistance: _____
- c. External Resistance: _____

3. Of the 3 most recent project that were not as successful as planned, what were the TYPES of barriers most responsible for the result?

Project	Type of Barrier
_____	_____
_____	_____
_____	_____

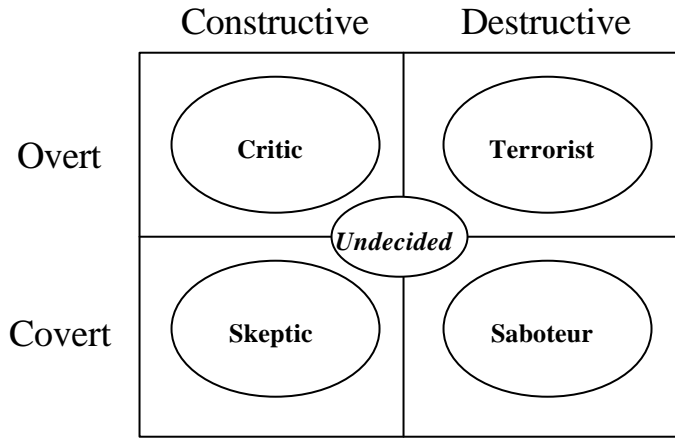
What is the Problem here(2) ?

- Resistance Dimensions
 - *Communication*
 - Overt
 - Covert
 - *Behavior*
 - Constructive
 - Destructive

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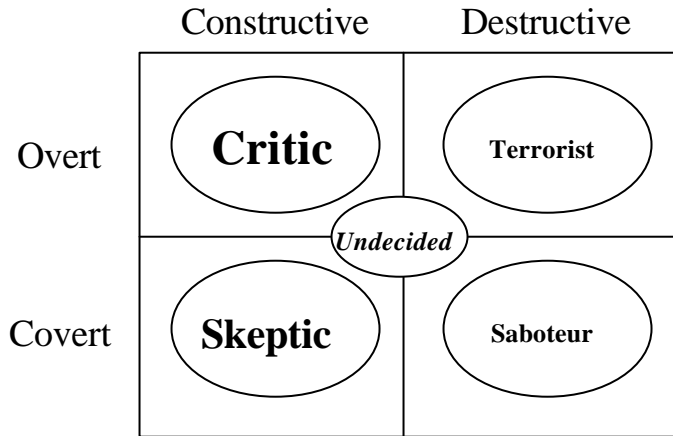
Individual Resistance Roles



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Individual Resistance Roles



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1. List three people who have played the role of Critic on recent IT projects:

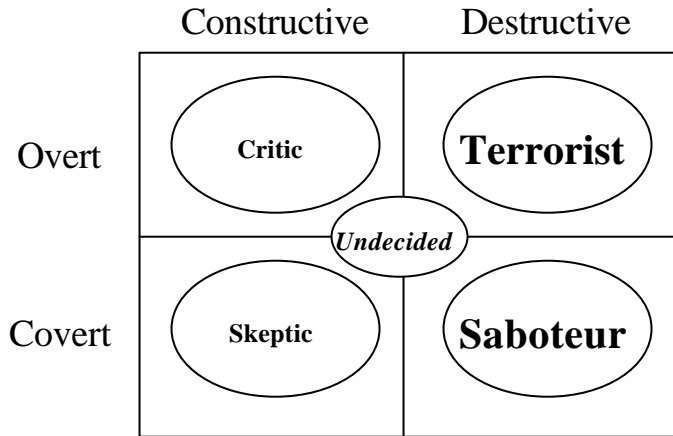
2. What project(s) are you currently (or were you recently) Critic on?

3. List three people who have played the role of Skeptic on recent IT projects:

3. What project(s) are you currently (or were you recently) Skeptic on?

4. Can you think of an example in which a Critic or a Skeptic made an important constructive contribution? _____

Individual Resistance Roles



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1. List three people who have played the role of Terrorist on recent IT projects:

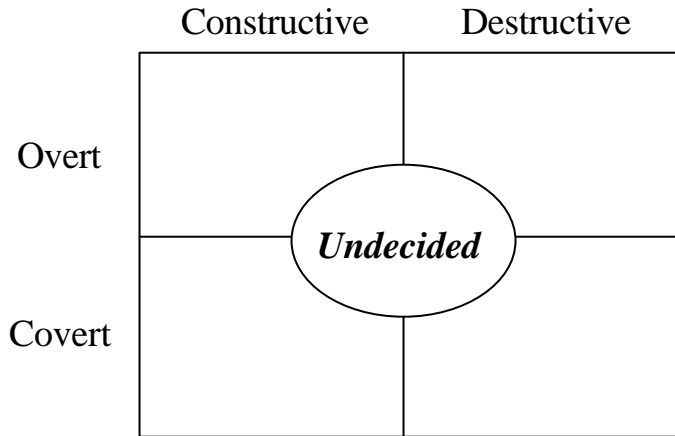
2. What project(s) are you currently (or were you recently) Terrorist on?

3. List three people who have played the role of Saboteur on recent IT projects:

3. What project(s) are you currently (or were you recently) Saboteur on?

4. Can you think of an example in which a Terrorist or Saboteur was successful in killing or maiming a project? _____

Individual Resistance Roles



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Think of your last major project pitch to an executive team. Try to categorize the attendees into the five categories:

1. Critics: _____
2. Skeptics: _____
3. Terrorists: _____
4. Saboteurs: _____
5. Undecided (at first): _____

Understanding Resistance (1)

- Don't play Lay Psychologist here!
- Reasons for *Constructive* Resistance:
 - Project Management Approach
 - Personalities of the People Impacted by the Project
 - Former Experiences(!)

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Give examples where a person gave constructive resistance for these reasons:

Project management approach: _____

Personalities: _____

Former Experiences: _____

Understanding Resistance (2)

- Don't play Lay Psychologist here either!
- Reasons for *Destructive* Resistance
 - Project Objectives
 - No Change Momentum
 - Destructive Personality
 - Group Pressure
 - Loss of Power
 - Loss of Power-related Status

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Give examples where a person gave destructive resistance for these reasons:

Project Objectives: _____

No Change Momentum: _____

Destructive Personality: _____

Group Pressure: _____

Loss of Power: _____

Loss of Power-related Status: _____

What is the Change Management Task?

- How to motivate consistent commitment to some specific organizational change
 - Formal organizational structure
 - Process changes (includes tech and systems)
 - Status (and shadow org) changes
 - Personality changes
 - Values shift or adoption
 - A change in Strategy, Tactics, or Image
- Prevent Barriers instead of Fight Them

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Identify recent projects/initiatives as being in one or more of these categories:

Formal organizational structure: _____

Process changes (includes tech and systems): _____

Status (and shadow org) changes: _____

Personality changes: _____

Values shift or adoption: _____

A change in Strategy, Tactics, or Image: _____

The Structure of Change Mgt

- Creating Readiness/Openness to Change
- Overcoming Resistance to Change
- Building and Sustaining Momentum for Change
 - Interest
 - Enthusiasm
 - Energy
 - Morale (for the inevitable bumps)

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1. Can you think of people/situations in which:

There was no Interest? _____

There was Interest, but no Enthusiasm? _____

There was Enthusiasm, but no Energy? _____

There was Energy, but not Morale? _____

2. Can you think of two examples where Morale made a difference in getting over “a bump”?

a. _____

b. _____

Various Approaches to Change

1. Individual Psychology
2. Social Psychology (e.g., groups)
3. Cultural Change (e.g., assumptions, protocols)
4. Innovation Diffusion
5. Global Change (e.g., crisis events)
6. Eclectic

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Representative works:

1. Reengineering Yourself (Aaroz/Sutton, 1994)
The Tactics of Change(Fisch/Weakland/Segal, 1982)
Masterful Coaching (Hargrove, 1995)
2. Driving Fear Out of the Workplace(Ryan/Oestreich, 1991)
Changing the Essence(Beckhard/Pritchard, 1992)
3. Working the Shadow Side(Egan, 1994)
Organizational Culture and Leadership(Schein, 1992)
4. Mastering the Dynamics of Innovation (Utterback, 1994)
Diffusion of Innovation (Rogers, 1983)
5. The Fifth Discipline (Learning Organization)(Senge, 1990)
Breakpoints (Strebel, 1992)
Sculpting the Learning Organization (Watkins/Marsick, 1993)
6. Managing at the Speed of Change (Conner, 1995)
Beyond the Wall of Resistance (Maurer, 1996)
Reward Systems for the Changing Workplace (Wilson, 1994)
Changing Behavior in Organizations (Judson, 1991)

Specific Interventions

- **One:** Individual Psychology: *Mobilizing Stress*
- *Goal:* to help the individual to identify and channel stress into energy.
- Requires pre-training the individual
- Rational-Emotive Therapy (identify, smile, message, solution search, awareness, visualization, return)

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1. What current stress-management programs exist in your firm?

2. Who would you approach about either starting one or about adding this element into an existing program?

3. Name the three (3) individuals on YOUR team (or team+customers) that have a major problem with stress in change situations?

Specific Interventions

- **Two:** Individual Psychology: *Personal Coaching*

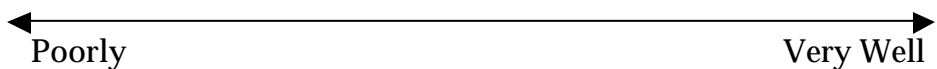
- *Goal:* to help the individual grow and develop, unleashing enthusiasm and energy
- Requires personal attention and feedback
- Vision-building and Value-shaping coach
- Challenge and Support → Transformation
- Align group and personal goals
- *End-Goal:* Transform them into coaches, too

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1. Who are YOU currently coaching? (If no one, name the top 2-3 candidates you would likely consider):

2. How well do you know how to do this?



3. Who on your team ALREADY coaches?

4. Who on your team could easily be developed into coaches?

Specific Interventions

- **Three:** Social Psychology: *The Resistance Formula (Beckhard)*
- *Goal:* to help the individual focus on the need for the new situation, and develop vision for the proposed future

▪ **Formula:**

$$\frac{\text{Dissatisfaction} \times \text{Desire} \times \text{Practicality}}{\text{Cost of Change}}$$

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1. Give an example of someone with Dissatisfaction, but no Desire (from a current or previous change situation):

2. Give an example of someone with Dissatisfaction and Desire, but no Confidence in the Practicality (from a current or previous change situation):

3. Think of a change that YOU consider high advantage for your company. Name the 5-6 people that you would target for a critique/brainstorming session:

Specific Interventions

- **Four:** Social Psychology: *Minimize Fear*
- *Goal:* to reduce fear by building a high-trust working environment/situation
- Fear is one of the more dangerous elements
- Characteristic: Not talked about
- Countered only by Trust

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1. Name a relationship in your present or past in which the openness of the other party disappeared. What factors do you think brought that about?

2. Think about the last time someone told you “don’t worry” and you remained unconvinced. What factors led you to stay “unconvinced”?

Sources of Fear

- Actual negative experience in this change project (or in past)
- Stories from others about their Threats and Losses
- Assumptions and Interpretations (private) of the behavior of Mgt. and of others
- Negative stereotypes of Supervisors/Mgt.
- Unclear situations and outcomes (e.g., rumors)

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1. Think of the last (or current!) change situation in which YOU experienced Fear. What elements contributed to your feelings of fear?

2. On a current change project: What elements of the above might be at play? Give 2 examples of possible persons affected?

Person

Element

Building Trust

- Build Relationships without Fear
- Acknowledge the Presence of Fear
- Pay Attention to Interpersonal Conduct
- Give as much clear Information as Possible

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1. Name your three most trusted relationship in your firm (in which YOU trust someone else). What elements are present that contribute to your sense of trust?

2. Think about 2 or 3 of the people who trust YOU. What elements of your behavior (or events of your agency in the past) encourage them to trust you?

Specific Interventions

- **Five:** Cultural Change: *Shadow-side Mgt.*
- *Goal:* to harness and guide the forces in the Hidden Organization
- Try to anticipate and prevent as many of these as possible...

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Shadow-side Characteristics

- Important activities and arrangements that remain undiscussed or unidentified in decision-making settings
- These fall outside the range of normal managerial interventions (since they are not explicit)
- Affect productivity and quality substantially
- Unwritten rules, often overriding the formal ones

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Name a couple of shadow-side alliances in your organization and how they have helped or hindered some initiative of yours (or of one of YOUR alliance partners).

Alliance	Impact on Project
_____	_____

_____	_____

Focus on Prevention

1. What are the blind-spots and hidden obstacles?
2. How will the difficult people react?
3. What silent arrangements and alignments will threaten to throw us off?
4. How disruptive will this be to the existing social and political structure?
5. What power-plays are likely to emerge?

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Previous Project

Current or Proposed Project

1		
2		
3		
4		
5		

Shadow-side Management

- Identify issues (esp. scarce resource movement)
- Prioritize and Select
- Choose a Decision-making Forum (formal or informal)
- Initiate Discussion Tactfully, but Assertively
- Use Shared Problem solving Approaches

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Select one “smaller” shadow-side problem you currently have. Who would you select to be on the Decision-making team?

Specific Interventions

- **Six: Innovation: *The Change Agent***
- *Goal:* to diffuse innovation while attending to the interests of the change initiator and of the “client”
- Represents both groups in communication flows
- Can be Insider or Outsider (but remember: Trust)

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1. Think of cases in your past where a Change Agent was brought in for this. What were the effective actions/behaviors, and what were the ineffective/counter-productive ones?

Effective Actions/Behaviors

Ineffective Ones

2. Were there individuals from WITHIN the firm with these characteristics? If so, why do you think they were not chosen for this role?

Seven Roles for Change Agent

- Develops the Need for Change (awareness)
- Establishes an Information-Exchange Relationship (rapport, trust, empathy)
- Diagnoses Client's Problems
- Creates *Intent* to Change in the Client
- Translates Intent into Action (esp. opinion leaders)
- Stabilizes Adoption and Prevents Discontinuances
- Create a lasting state of Self-Renewal/Reliance

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1. List three non-IT people you might consider bringing in as a change agent for an IT initiative. What strengths do they have that make them your top choices?

Person	Strengths
_____	_____
_____	_____
_____	_____

2. Can you give an example of a project that failed because of failure to "stabilize adoption"? _____

3. Can you give an example of a project that failed because the change agent was "everything" and self-reliance was not developed?

Specific Interventions

- **Seven: Global Change: *A Learning Organization***
- *Goal:* to facilitate collaborative learning in support of organizational change
- Assumes a basic movement in this direction already
- Focus on removing barriers to learning

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Removing Barriers to Learning

- *“Undo” Truncated Learning*
 - Use of skills and feedback
- *“Undo” Learned Helplessness*
 - Training, reward systems, redesign of work
- *“Undo” Tunnel Vision*
 - Cross-training, focused MBO’s, root-cause skills

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1. Can you think of a situation in which you trained TOO EARLY?
What should you have done?

2. What business unit/group might be your first choice for a “three biggest barriers to higher output and more job satisfaction” joint project? _____
Why? _____

3. What business unit/group might be your first choice for a Tag-along day?

Why? _____

Specific Interventions

- **Eight:** Eclectic: *Harnessing Resistance*
- *Goal:* to utilize resistance in ensuring and expediting project success
- Uses small group dynamics to build consensus and commitment to change

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1. Think of an example from your past in which the initial resistance was “converted” and because a powerful positive force:

2. What influences operated on the resistance that convinced them to change their position?

Method

- Have the proponents and resisters discuss pro's and con's
- Build strong "belonging" in on-going groups
- Information must be open and full (for trust)
- Give specific info to the group on what it wants (not just averages)
- Create strong group desire for the change

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Use a current (or recent) project: Who would you have included in an initial group like this:

Proponents

Resisters

Benefits

- Can increase speed and success rate on implementation of a new idea
- Increases the likelihood that all parties achieve at least some of their goals
- Showing respect will create a better culture for future change
- Can provide important insights for initiators

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Can you think of a time when a resistor pointed out a major (correctable) flaw which COULD have resulted in the project being considered a failure?

Specific Interventions

- **Nine:** Eclectic: *Levers for Change*
- *Goal:* to utilize all relevant adjustable factors, in reducing resistance and encouraging excitement
- Avoid De-personalization—Know your value proposition for the various constituencies

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Levers for Change

1. Compulsion (use of authority)
2. Persuasion
3. Sense of Safety (dealing with fear)
4. Understanding (esp. of the need and means)
5. Time (by phase)
6. Participation and Involvement (ownership)
7. Criticism (reduce implicit criticism of them)
8. Flexibility (ability to influence outcome)
9. Negotiation and Agreement (careful here)

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Think of situations in which these Levers were used effectively and where they were used improperly:

	Effectively	Improperly
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

Specific Interventions

- **Ten:** Eclectic: *Align Reward Systems*
- *Goal:* to ensure actual behavior is in synch with desired behavior
- Reward systems are many and varied
- All of them are flawed, but some are vastly superior to others
- *Intrinsic* motivation is preferred, but reward systems **MUST** be supportive

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1. Give an example of a situation in which the existing reward/recognition systems were counter-productive for an attempted change project? How did they retard progress? How was this incompatibility resolved?

2. How clear would you say the reward system is in the non-IT groups in YOUR firm? Do they promote learning, inter-organizational movement, risk-taking? Why or why not?

Specific Interventions

- Performance Management is *critically* dependent on useful feedback (SMART):
- *Specific*: Easy to understand the tie-in between actions and results
- *Meaningful*: Needs to impact the business!
- *Achievable*: Not too easy, not out-of-reach (Stretch goals)
- *Reliable*: Pay system must run predictably and run well!
- *Timely*: Frequency of feedback must be high

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What types of unproductive behavior is likely to occur when performance objectives and/or feedback do NOT conform to the SMART model:

Unclear connection between action and results:

Desired behaviors do NOT positively impact the firm:

Targets are too easy:

Targets are too difficult:

Pay systems don't make variable payments on time, accurately, or sometimes even at all:

Feedback and coaching is too little or too late:

Specific Interventions

- An Approach to Pay-based Rewards
- *Base Pay*: What skills are needed for the business strategy, today and tomorrow?
- *Variable Pay*: How well are we working together, and how well is this working for customers?
- The Key to Performance Management:
Fast, Reliable, Relevant, “Intimate” Feedback

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1. How are skill requirements forecasting done in your firm now? Is there any feed from Strategic Planning to Staffing?

2. Do you have any team-oriented bonus/reward systems in place? How well are they working to promote change? In what ways do they help or hinder adoption of new ideas and change projects?

3. How often is concrete performance feedback (e.g. SMART), affecting variable compensation, given to IT-mgt, IT-workers, non-IT workers?

IT-mgt: _____

IT-workers: _____

non-IT workers: _____

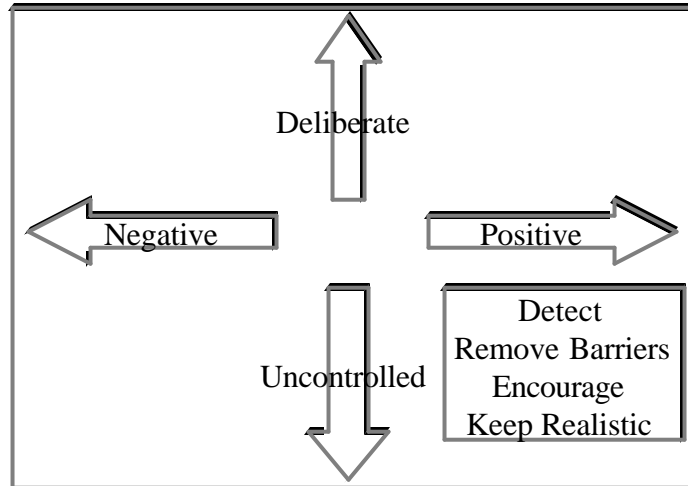
The Agenda of Change:
Other Types of Change

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There is generally **more** organizational change which is **not** deliberate than that which **is**.

The Agenda of Change



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This quadrant deals with desirable change, that you are NOT in control of. It typically would involve unintentional shifts (due to environmental or community factors), but more likely changes introduced and driven by other non-IT executives.

The Agenda of Change

- ***Detect:***

Detect Remove Barriers Encourage Keep Realistic
--

- Rewards given
- Hiring decisions
- Radical break with Business-as-Usual
- Lack of “correction” of a renegade operation
- Shadow-side loss of power

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1. Can you think of a recent management hire that seemed ‘odd’ to you? What might you infer about management desire for positive change from that hiring decision?
2. Have there been any recent reorganizations or new operating entities that were created in your firm? What types of positive value changes might have created those organizational-changes?
3. Can you think of a POSITIVE “renegade” operation that was NOT ‘rebuked’ or censured? Why do you think it escaped this?
4. Can you think of any changes in the shadow-side organization, that might reflect POSITIVE cultural change?

The Agenda of Change

- ***Remove Barriers:***
- **Exception Management:**
 - Policy & Procedure
 - “Mild” architectural concessions
 - Justification methods & requirements
- **Ad hoc communication processes**

Detect
Remove Barriers
Encourage
Keep Realistic

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1. Exception management: who do you make these concessions for TODAY? And why? How did that situation come about?

2. Communication: who do you have special communication channels with TODAY? Who has ‘unequal’ access to you?

The Agenda of Change

▪ ***Encourage:***

Detect
Remove Barriers
Encourage
Keep Realistic

- Special SWAT-team support
- Give IT “awards” (depends on visibility issue)
- “What can I do to support you...”
- The “suggestion box” tactic
- A CIO editorial on your Intranet

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1. Identify two key players in your enterprise that you would consider encouraging in some specific initiatives. Indicate WHY you feel the change or initiative is worthwhile:

Who/Initiative

Why worthwhile

2. Name two people that you COULD give IT innovation ‘awards’ to. What might be an appropriate venue or method to present those?

Who

What for

How

The Agenda of Change

- ***Keep Realistic:***

Detect
Remove Barriers
Encourage
Keep Realistic

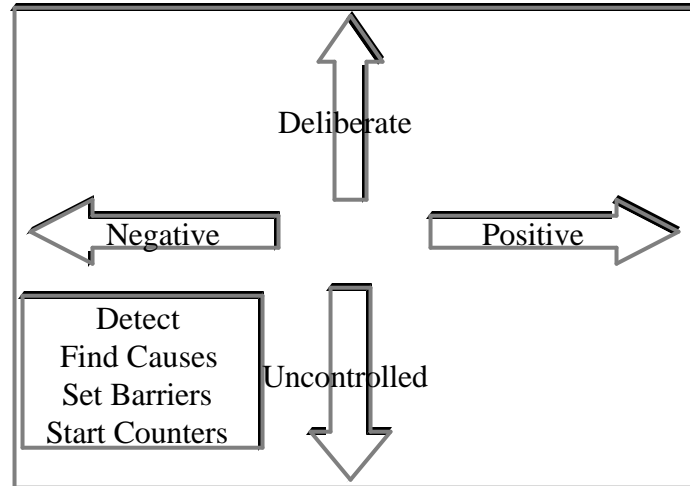
- Offer “lay-of-land” coaching
- Use a discussion group to get some “reality” voices

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1. On the two individuals you mentioned on the previous slide as those you would like to encourage in a specific initiative, what ‘reality check’ issues might you think they need to be coached on?

The Agenda of Change



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This quadrant deals with change not from IT, but which is considered negative and counterproductive to the organization's health. It is not a senior-mgt initiative, but may have key individuals driving or allowing the change to proceed.

The Agenda of Change

▪ **Detect:**

Detect
Find Causes
Set Barriers
Start Counters

- Rebukes given (even quietly)
- Hiring/re-orgs decisions
- Drops in productivity and/or morale
- Lack of “correction” of a renegade operation
- Shadow-side changes
- Changes in communication patterns

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1. Can you think of a recent management hire that seemed ‘odd’ to you? What might you infer about management desire for change from that hiring decision?
2. Have there been any recent reorganizations or new operating entities that were created in your firm? What types of negative value changes might have created those organizational-changes?
3. Can you think of a renegade operation that was NOT ‘rebuked’ or censured (but SHOULD HAVE)? Why do you think it escaped this?
4. Can you think of any changes in the shadow-side organization, that might reflect NEGATIVE cultural change?

The Agenda of Change

▪ *Find Causes:*

Detect
Find Causes
Set Barriers
Start Counters

- “Who could I ask about X?”
- “Do you know how this issue came up?”
- New Hires: “What do you think needs changing?”
- Ask HR about employee morale shifts
- Ask about any new performance target changes
- Call those who stop calling...

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1. Who do you consider to be the individuals most in tune with the ‘under currents’ and ‘rumor mill’ of your enterprise? Do you have access to these individuals?

2. What new hires (in the last 6 months) might you have this conversation with?

3. Who in HR would be a good resource for you to develop, in staying in touch with changes in employee morale—by business unit.

The Agenda of Change

▪ ***Set Barriers:***

Detect
Find Causes
Set Barriers
Start Counters

- Infrastructure support
 - Ease, speed, schedules, justification
- Communications slow-down (e.g., ‘revamp’)
- Appeal to shadow-side for ‘advice’
- Ask for a task-force on such an important issue
- Get it into the light—people, issues, time
- Ask to “help”...

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1. Can you think of a time when someone used these tactics on YOU? Which specific tactics were involved? How did it impact your progress or success?

2. For any initiative (whether you need to slow it down or NOT), which shadow-side forces could you appeal to for ‘advice’?

3. Think of the last three Task forces created within your enterprise. What is the likelihood they were created for this purpose?

The Agenda of Change

▪ ***Start Counters:***

Detect
Find Causes
Set Barriers
Start Counters

- Alternate communications tactics!
- Special support for rival initiatives
- Take the high ground—start a ‘rival’
- Start a rival, then try to “acquire” the other
- Use employee testimonies and slogans
- Try to dilute the resource base

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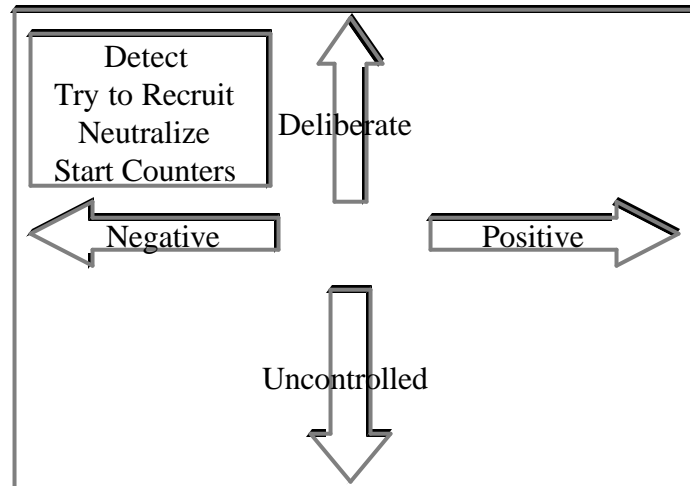
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1. What are your various media channels to reaching the employees, and how do they compare?

2. Can you think of an example in your firm of how someone used a ‘create a rival’ tactic to either usurp resources/visibility and/or acquire the other one?

3. Are there any rival initiatives NOW in your organization (or in the recent past) that you should provide special/exception support to? How might you do (or have done) this?

The Agenda of Change



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The final quadrant has to do with deliberate, individual-driven change, that you consider to be negative for the enterprise.

The Agenda of Change

- ***Detect:***

Detect
Try to Recruit
Neutralize
Start Counters

- Hiring/re-org changes
- Public Announcements/Press Releases
- Budget reviews/funding requests
- Changes in *their* IT Budget
- Feedback from IT support teams

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1. Think back over the last several press releases of your firm. Can you find hints of 'new agendas' in any of them? How might that impact IT?
2. Think of the most recent initiative that went through, but that you consider(ed) negative for the enterprise. WHERE/HOW might you have detected it earlier?
3. Who in your IT organization could you assign the task of monitoring CHANGES in support calls from the business units?

The Agenda of Change

▪ ***Try to Recruit:***

Detect
Try to Recruit
Neutralize
Start Counters

- Simple Bonding and adding Value
- “What can I do to support you...”
- Early “Lay of the Land” lunches
- Get them to help you solve a similar problem with someone else
- Put them to work in an Impact Assessment

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1. Think of your top three organizational allies. How did you ‘recruit’ them to your perspectives?

Who

How

_____	_____
_____	_____
_____	_____

2. Can you think of 3-5 people, of various levels, who need ‘recruiting’? Why? (Remember to use codes for these!)

Who

Why

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

The Agenda of Change

- ***Neutralize:***

Detect Try to Recruit Neutralize Start Counters
--

- **First Choice: Excision**

- “But one thing bothers me...”

- **Second Choice: Isolation/Containment**

- “Boss, it made sense *there*, but...”

- **Third Choice: Slow it down (for review)**

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Think of the last successful initiative that had some negative impact on either the enterprise or on IT. How might these 3 tactics have been used in that case (hypothetically)?

1. Excision:

2. Isolation/Containment:

3. Slow it Down:

The Agenda of Change

- ***Start Counters:***

Detect
Try to Recruit
Neutralize
Start Counters

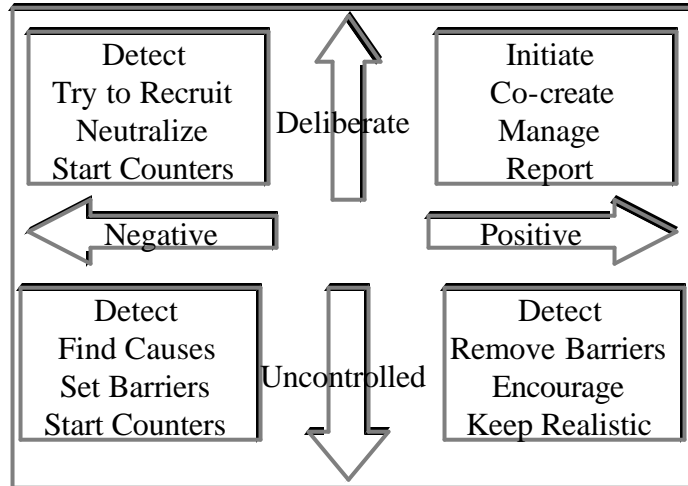
- Communications warfare
- Special support for other initiatives, *without* the offending element
- Start a substrate rival, then try to “influence” the other
- Use employee and exec testimonies

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1. What do you consider YOUR best “selling” job within recent experience?
2. What elements of “selling” did you use?
3. What positive incentives did you use, and what negative incentives did you use, in securing cooperation and buy-in to your program?
4. What additional elements might you be able to use today, in your NEXT project that required ‘selling’ to the organization?

The Agenda of Change



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The Arenas of Change:
Ten Areas to Watch Closely

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There is generally **more** organizational change which is **not** deliberate than that which **is**.

Ten Areas to Watch

1. Customer Interaction/Habits
2. Marketing Strategy
3. Industry Structure
4. Business Strategy
5. Cost and Pricing Structures
6. Organizational Boundaries
7. Corporate Culture
8. “Political”
9. Intra-Organizational
10. Oblique Technologies

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“It is not the big who eat the small, but the fast who eat the slow”

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Impacting the Enterprise:

Creating, Countering, And Managing Change

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