Diary of a Change Consultant
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Aged 46 & 1 month
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Dear Diary

I have been approached to support an organisation-wide change programme for a UK based education provider. The organisation has a three business units, each providing different services to different sectors of the global education market. Wanting to grow its overseas and UK business, the organisation is now looking for greater efficiencies. This programme will be responsible for redesigning how the organisation works in its head office and corporate services functions and includes the relocation from multiple buildings to one purpose built building in two and a half years time.

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Entry 0 – first meeting

Just getting ready to meet my main contact who is the Business Change Manager, along with the Executive Director and the Programme Manager. The BCM has just called in sick! Too late now so I am off to introduce myself to the others and find out more about the programme.

One of the first rules about change programmes is that everyone initially sees their scope differently and this morning was no exception. The Programme Manager had a very clear idea about what he had to deliver but although he recognised the need for change management he wasn't really sure what that involved. The Executive Director took a very different view of the scope of the work required, outlining the political challenges the programme. He was very candid about the conversations the Board of Directors haven't had yet which sounds like an admission of failure but which I found very comforting. In my initial meetings with the Business Change Manager I had already identified that the scope was not as clearly defined or as clearly understood as people thought it was and that this was going to be our first issue. Hearing this recognised by the sponsor tells me that we can be honest with each other.

The sponsor and I chatted through a few high level scenarios with different scopes. This led us to an agreement about my role: I could help with the planning and the implementation but it would be the responsibility of the Executive Director to do all of the political sponsorship and work closely with the board to get their support. I really enjoyed the 'no holds barred' style of our conversation and have concluded this is a team I really want to work with so *fingers crossed* they like me too!

Learning Points

- Be flexible and listen – the initial request for help may be very different from what you end up doing for the client

Entry 1 – writing the proposal

I wrote the proposal for how I would help the client today. It's always difficult because every change programme is different so trying to predict what expertise will be most useful changes as we move ahead with the change. In the end I decided to describe the likely journey of change, based on my experience of running a number of 2-3 year transformational change programmes. Whatever the outcome, they share a similar structure:

1. Discovery
2. Design
3. Adoption

Discovery - the programme creates an environment that encourages individuals to experiment with ideas for new ways of working. People are invited to events where they are provided with well researched scenarios outlining how things might be in the future. This work is the starting point for their own interpretation of what is needed and how it might work i.e. helping staff to see the possibilities and their consequent advantages and disadvantages.

Design - the emphasis moves to defining exactly how the ideas from Discovery can be developed. This can include changes to processes, information sharing and collaboration with different colleagues, changes to products and services, changes in relationships with customers and suppliers. This work must be carried out by those directly impacted by the change, but the programme must have oversight of all that is taking place and must provide a governance framework that minimises duplication of effort, clarifies who has authority for implementing which changes and ensures that changes to working practices are fed back into the building project.

Adoption - the programme has to ensure that ideas are being implemented and that benefits are being realised. This involves oversight of multiple projects and work streams across each of the three business units and if greater collaboration is included in the scope then there will be cross functional initiatives as well.

Learning Points

- Use previous experiences to explain the journey the new client will be going on.

Entry 2 – clarifying the proposal

Today I had to help the client get sign off for my role by describing how unique I am! It feels a bit like showing off to describe my skills and experience as 'unique' but without this the client will be forced to go to tender for the assurance role which is a risk for both of us: me because I could lose out to someone else: the client because it will delay the start by at least another month.

I began the justification with an explanation of what is involved in supporting a transformational change programme and what my role should be. This is driven by my knowledge of who will be reading the document which is the Procurement Team and not my end client. It is the Procurement Team who decides if other suppliers should be asked to provide these services so help them out by bring very clear about what is involved. This was my description of the role:

"Essentially my role can be described as 'wise counsel', 'critical friend' or more formally as an assurance function. My work does not replace those of the existing team but seeks to give them a sounding board as they develop their approach along with ideas and examples drawn from my many years of experience in re-shaping how organisations design and govern their end to end processes as well as numerous building moves and development of new offices and businesses around the world."

This was my description of what skills are involved:

"Transformational change requires a broad skill set which combines:

1. *Project portfolio management*
2. *Programme management*
3. *Project management*
4. *Change management"*

Learning Points

- Don't be afraid of pushing your skills to the client : if they are the correct skills you will be doing the client a favour
- If writing for benefit of procurement process, be very clear about what you will offer

Entry 3 – Getting appointed

Just heard my appointment has been confirmed so now the hard work begins! Emotional roller-coaster of joy (winning) then stress (delivering).

I have spent the last couple of weeks gathering inspirational examples of how organisations are creating working environments that inspire people to be creative, to innovate and to work collaboratively with their colleagues and stakeholders. Whilst I would love to pursue these ideas I know from experience that the start of my assignment is the best time to take a step back. This might sound confusing but no programme begins with a blank piece of paper so I want to see everything that has been discussed, created and possibly dismissed do far. This is because I don't want to make enemies from the start so I want to understand who has been involved to date, however fleetingly. I don't want to duplicate previous effort or waste time going over old ground and I want to show respect for the work that has been done to date by at least showing that I know it has been done even if I cannot find a place for it in the programme from now on.

Getting all this information together will also show me how well organised the programme is at the moment and how well the information management is working. Usually the answer is <u>badly</u> so the first job is to agree an approach to information creation, storage and retrieval that enables remote workers like me the same access to information as those who are physically on-site.

Learning Points

- Don't get into the work immediately – step back and assess activities done by others first.

Entry 4 – Starting work

Started work on the programme today. First job is to make sure all parties have a clear and a shared understanding of the scope so that we don't miss things out but we don't over engineer because we think the programme is bigger than it needs to be.

I have reviewed lots of templates including a programme brief, a project initiation document, a blueprint and a transition plan but none of them feel quite right. I want to keep things simple and I don't want to confuse the scope of the programme with the justification for it, so I do to want to include any elements of the business case just yet.

Many of my new colleagues have not been involved with a programme of this scale before so I believe we need to keep things simple and that includes breaking everything into small, self contained and easy to understand steps.

Instead of a detailed programme brief, I have decided to kick things off with a simple Scope Statement that has only 3 headings:

1. Objectives

A quick explanation of which of the organisations strategic objectives will be met by this programme.

2. Scope

Which elements of the business are to be included. To make sure everything that should be included is included I use this checklist:

Who

- Businesses
- Specific business units or departments
- Corporate functions or shared services
- Roles or management levels

What - inputs

- Different types of suppliers, partnerships and outsourcing relationships
- Suppliers based in different locations
- Different types of contract for supply

What - outputs

- Products
- Services
- Different types of customer
- Customers based in different locations

Learning Points

- Prepare simple 3-step Scope Statement to align all the team members- it saves missing things out AND over-engineering project

How

- Processes
- Regulations and laws
- Systems
- Information

3. Exclusions

Which elements of the business are to be excluded - I think this is so important because it helps clarify exactly what the programme will address and where it will not impact the business. This gives those authorising the programme a chance to review the coverage of the programme and include any areas that might be missing.

Entry 5 – Plans vs Planning

Consistent theme of managing large-scale change initiatives is that they are never linear! Things don't progress in the order that you would like them to, however much you plan and organise the work. At this point I can't help but remember the quote "*if you want to make God laugh, tell him your plans*" but perhaps it is better to quote Eisenhower instead "*in preparing for battle I have always found that plans are useless but planning is everything*".

These thoughts are prompted by a demand from the Sponsor to go over in depth who the change agents are going to be, and how they are going to contribute to the programme. The programme is at such an early stage that no discussions have been held with senior managers whose staff are going to be affected by the change. No decisions have been reached about what makes a good change champion and crucially whether they are to be allocated to the change initiative or whether they are going to be invited to volunteer – more of this in later entries.

Anyway, I decide to treat this issue for what it is – almost nothing to do with communication and change champions and nearly everything to do with the sponsor having a bit of a confidence wobble. Effectively the sponsor wants to know that things are happening, and that there is output from the many meetings that are now starting to take place.

I help the Change Manager put together a presentation that explains the approach to communication:

Communications Activities - Phase 1

1. Generate the scope - activities including announcements, presentations and workshops
2. Conduct a full stakeholder analysis
3. Explain the change management approach to those nominating change agents so they know what they are letting themselves in for
4. Identify the first wave of change agents
5. Get plugged into the network of other projects that the change agents will be involved in
6. Provide regular, structured information packs for use by change agents in their communications
7. Provide an induction event for change agents

Learning Points

- React positively to information requests from senior stakeholders – be grateful they are showing an interest.

We make sure that this information is presented alongside other achievements so that the sponsor can see the wider picture of everything that has been accomplished in getting this change off the ground, which provides the comfort that I believe is being sought.

Learning Points

- Don’t be shy in sharing information but make sure you put it in context of achievements.

Entry 6 – integrating with an established team

Feeling under pressure as I have joined an existing team who have been defining the change for over a year. Although I tell myself it is always uncomfortable to feel one step behind everyone else.

So my focus is to work out what I need to know and get hold of the information as quickly as possible.

My checklist includes:

- LinkedIn profiles for every stakeholder mentioned in a meeting even though I don't know how important they are.
- Reading the websites of all existing and potential supplier organisations who will be a part of this change - I am finding their case study pages really helpful in quickly identifying what they do

Asking lots of questions in every meeting particularly about what decisions, events and activities have taken place so far to create my own timeline of all the things I have missed so I can see the wider context of what I am doing.

Learning Points

- Use Linked-in to research individuals in your new team
- Look at websites of client and suppliers to understand scope of change required.

Entry 7 – MoSCoW is sanity

Ok so I am definitely feeling under pressure now, so many tasks are coming my way that I am finding it difficult to see the wood from the trees. However, experience tells me that if I get too caught up in the details of the work and forget the overall outcome that we are trying to achieve then I will not be delivering the quality of work needed.

So before I go mad, I am going to apply the MoSCoW technique to create a HIT list – a list of High Impact Tasks (the Must Haves) and then categorise the rest of my work as Should Do and Could Do (if time allows).

To help me find the Must Haves:

- Is this task time sensitive – if it isn't done now then will the window of opportunity for getting it done have passed?
- Is this task an enabler for something else and failure to do it will stop me getting on with other things?
- Is this task externally facing, and failure to do it would create a bad impression with stakeholders?
- Is this task directly connected to the objectives and outcomes of the project or is it administrative and could be scheduled at a later date?

Learning Points

- MoSCoW helps to keep track of the important deliverables

Entry 8 – Communication Planning

I am really feeling the pressure today and even though its Friday the thirteenth I am not blaming this celebrated date. The pressure is because I feel disorganised which means I feel out of control, which for a control freak like me is always bad news! Ironic isn't it - a control freak who tries to guide transformational change initiatives which by their nature tend to be emergent rather than controlled!

Anyway, the pressure is a result of our current success - we have communicated so much about our change initiative we cannot remember who knows what?

We all know communication is at the heart of any successful change initiative and there are lots of techniques to help us analyse our stakeholders and map out our communication activities. However, once momentum builds up, and there are opportunities to address meetings, hold webinars, give presentations, craft emails and newsletters we need techniques for tracking our progress.

'Selling' the change is what we should be doing as change practitioners but being out on the road so much, I miss the chance to catch up with my team and track our achievements.

As soon as I get back to my desk, these are the things that I want to achieve:

- Create a spreadsheet listing all those I have met and engaged with
- Review our stakeholder map and see who we haven't yet contacted and who was missing that we might need to address one on one
- List who attended which events and identify which events were most popular
- Capture the questions people asked me and what I answered
- Turn these questions into Frequently Asked Questions and post them on our intranet
- Let the team know just how much we have already achieved and celebrate - order in pizza for lunch!

I know once I have complete these tasks I will feel so much calmer!

Learning Points

- Measure the communication activities to help demonstrate progress

Entry 9 – Creating a Change Network

Change cannot be imposed from a central team. We need a network of local change leaders:

- Detailed understanding of current business practices
- Incentivised to improve their accuracy, efficiency or level of service via performance management
- Have the confidence of their colleagues in their ability
- Have the time and willingness to commit to the change

So today we ran a workshop to define what we are looking for in terms of attitude, behaviour and ability. We have created a specification for the type of people we are looking for - let's hope we can find enough of them!

1. Attitude - thinking and feeling:

- We are looking for individuals with a positive attitude to life, who view problems as a puzzle to be solved and not an insurmountable disaster
- We need them to have a belief in the value and benefits of the change
- These individuals should not be quick to criticise or judge the contribution of others but encourage their input and welcome different perspectives
- Each new idea should be examined for its ability to add to and enhance the quality of the change and not be seen as additional work or pressure

2. Behaviour - actions:

- proactively looking for links between elements of change to create integrated, seamless change, - always looking ahead for risks and potential hurdles that can slow down or stop the changes taking place
- identifying opportunities to transfer ownership of the changes to those most impacted by them

3. Knowledge, experience and skills:

- Knowledge of the current ways of working to he able to accurately size the gap from this to the new ways of working
- Appreciation of the current political power, where it is is held and how it is likely to be affected by the change
- Experience of how to measure change readiness
- Track record of making change a reality

Learning Points

- Know the environment into which you are delivering change…then work on finding people that reflect your new world

Entry 10 – Creating a compelling vision of the future

Today I am working with the Department Manager of a large department that will be heavily affected by changes.

At an executive level, changes to the structure of his department have been decided. These include a 15% head count reduction, coupled with much greater emphasis on automation of low value tasks to enable highly qualified staff to spend more time servicing customers.

These changes to the structure of the department were identified when the corporate vision for change was agreed. The Department Manager and I are using the corporate vision for the change programme as a starting point to create a department specific vision.

Why are we creating a department specific vision for change?
By creating a department specific vision we are addressing a critical success factor identified in research from the Change Management Learning Centre:
"An overarching vision and strategic direction once communicated needs to be translated into a local context".

Creating this department specific vision also addresses comments made by Cameron and Green in the Practitioner Handbook for the APMG Change Management Foundation and Practitioner course:
"Employees need to hear about change from two people - the most senior person involved in the change and also their line manager. The senior manager is best suited to communicating business messages around the change whereas an employees line manager is best suite to communicating more personal messages".

How we did it
For every sentence in the corporate vision for change, I helped the Department Manager translate the wording opinion department specific goals, metrics and objectives.

For example, the corporate vision says:

"*we will integrate our ways of working together to provide consistent and easily accessible information to our customers, suppliers and regulators*".

We translated that into a department specific context by referencing the stakeholders they engage with and the information they provide, so in the case of this department

"*we prioritise the provision of timely information about the schedule and the results of product testing to the product*

Learning Point

- Translate the corporate vision for both the department and also the individual *development teams at our suppliers, giving them the opportunity to meet with us face to face on a regular basis*".

We continued through each of the other statements to complete the full set of 'translated' statements that made sense to us.

Next steps
The extra level of detail in the department specific vision can be used to help managers identify the changes they need to make within their teams. We took the statement about the provision of information and broke it down into individual tasks. For example, identifying the need to create a schedule for regular face to face meetings, agree who would attend and decide on an outline agenda and format for the sessions.

Conclusion
It is easier to see how the scope and objectives of:

- these individual changes align to the department vision,
- the department vision aligns to the corporate vision.

This helps to maintain the integrity of the changes as they spread from the board into the organisation as a whole.

Learning Point

- Translate the corporate vision for both the department and also the individual

Entry 11 – Bringing the outside in

We are at the point in this change where we are questioning our direction, wondering if all the effort is going to be worth it - the change equivalent of a mid-life crisis which happens on every change I have been a part of. My solution when we hit this 'belief' barrier is to bring other examples to the table. These can illustrate continuing change in the environment that demonstrates we cannot stand still or examples from competitors, customers and suppliers of innovations that strengthen the validity of our innovation.

Appreciative Enquiry
Getting enthusiasm for this 'appreciative enquiry' technique is achieved by asking simple questions that identify the risk of insular thinking:

- When did we last compare ourselves to others?
- Have we asked the customers directly what we think or are we solely relying on the voice of the sales and business development functions?
- Have we sat down with small, medium and large suppliers and asked them for their views of how our changes will affect them?
- When was the last time any of us went on a site visit to a customer or a supplier to see things working in practice?
- Have we sense checked the 'cutting edge nature of our change against the most popular trends in IT, management and customer relationship management by attending an exhibition and talking to the exhibitors.

Unknown output
I can't tell you what any of these actions will produce for your change but I know the power of bringing the outside in creates energy from knowing others are going through the change process too. It also generates a competitive edge, to ensure our changes are implemented better or generate more benefits than those we have observed.

A simple example of this is in my family's holiday rental business on the Isle of Wight. To give the best experience to holiday makers our properties are regularly refurbished and amenities upgraded. However, earlier this year a neighbour started renting their property. Just by looking at their website and talking to them about their experiences we gained a fresher perspective. Comparing new entrants to our established business generated energy and fresh ideas.

Schedule conversations
To keep momentum during your change, include a programme of visits, conversations with other providers and market comparisons in your stakeholder engagement plans.

Learning Point

- Appreciative Enquiry helps rebuild enthusiasm for change and don’t be afraid of the answers

12 - Change ≠ Change

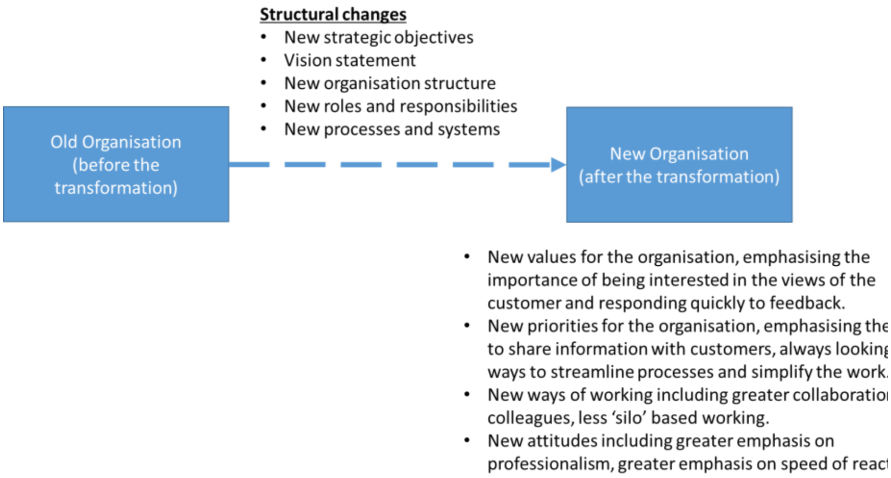
The change has hit a bit of a block recently. A lot of the structural changes have now been made, but they are not being adopted as the new norm. The indicators that things are getting a bit stuck include the amount of time people spend referring to how things used to be, and the slowness of their work because they are still referring to checklists and guidelines to help remember how they should do their work now that the new processes have been launched.

Effective change is a mixture of structural and behavioural changes. When an organisation undertakes a structural change, emphasis is given to the new organisation structure and new processes and systems

However, to realise the benefits from these changes requires a shift in attitudes and behaviours by all those affected.

If we want the ‘right’ behavioural changes we have to explain how to think about the work, what is important and what should be prioritised. Designing new processes or new reporting lines only tells people what to do, it doesn't help them understand that the organisation they used to work for no longer exists.

Old vs New
I draw this diagram for every change I am involved in, showing that the structural changes are accompanied by new expectations for intangible elements of culture which we can label values, beliefs and attitudes.



Assumptions restated
The drivers for our change were customer led, as we were not meeting their expectations for responsiveness and willingness to help. So we needed to change how we engaged with our customers. We have made lots of changes to the processes and the

Learning Point

- Don’t be afraid about re-stating assumptions & expectations systems in the Customer Services and Operations teams. However, to understand how people are expected to behave, we need to hear from the executives that commissioned the change. We need them to explain the assumptions that they have made about how the organisation has to operate to be successful in the new world.

Implicit vs explicit

In our case, there is an implicit assumption that we need to be more responsive to customers and have greater efficiencies to be able to compete with new competitors. There is a need for higher standards of performance and greater professionalism. Executives expect the organisation to be more streamlined and to collaborate more easily internally and with its partners.

As change practitioners we have to help managers put into words what these implicit changes are, so that their teams realise that they are working for a new version of their organisation. What was once acceptable behaviour may no longer be the case.

Speeding up adoption

To speed up the adoption of change we are now hosting a series of workshops where senior managers describe their expectations of the future and participants are encouraged to describe their understanding of what they have heard. We discuss new attitudes to customers and colleagues and what work to prioritise. This generates real understanding about what is really important to achieve

Learning Point

- Don’t be afraid about re-stating assumptions & expectations

"I had a brilliant day last week reviewing the change programme with the Transformation Director. We made so much progress that I wanted to share some of our successes and how we achieved them."

Get a big wall

1. We started with a very clear picture of where we are now by creating a wall chart of all of the individual projects within the programme and how they are grouped into work streams. The work streams were identified from the vision, which has come directly from the CEO. Each work stream has projects covering changes to processes, systems, roles, skills and the organisation structure of the divisions of the organisation.

Using the wall chart, we discussed each project, checking the scope of each one to make sure it isn't too wide or overly ambitious. We also challenged each other to make sure we had not missed any projects. We also looked for opportunities for combining initiatives and debated if the names of the initiatives really summarised the scope of the work. This last point might appear to be a minor consideration but experience tells me that what you call things has a big impact on how people judge their relevance.

Mapping roles & responsibilities with capabilities

2. We used the same wall chart to review the relationships between the project managers and their sponsors. There are currently 24 initiatives underway so with 44 staff to discuss we kept returning to these issues throughout the day. In some cases we had to accept that for political reasons we were stuck with certain individuals (we are nothing if not pragmatic in this transformation!). In others we have been able to transfer some scope from less able managers and expand the roles of those managers and sponsors who have shown a real talent for transformation work.

Let's check on the transformation team

3. We carried out a review of the transformation team, looking at their abilities, the challenges they have experienced and how they are coping. This gave us a chance to reorganise some of the roles and identify the coaching and support we want to offer to each of the team. When the team was formed we recognised that as we had not worked with these staff before, some of our matches of person to role might not be right. It's far better to make changes now that the team have been in place for a few months, as decisions about who does what is now based on experience and not guess work.

Learning Point

- Find a large enough space where you can lay out your whole organisation
- Put "Out of Office" on your email, phone and calender

Importantly, we always let the team know that we needed them to be flexible when we hired them, as transformation programmes by their very nature are about emergent change which requires a willingness to navigate through ambiguity and uncertainty. If any of the team could not accept this request for flexibility we knew they shouldn't be in the transformation team!

Allowing time to think

Aside from the prep work I did ahead of meeting the client, the two of us spent a whole day uninterrupted to run this exercise. Scheduling this into diaries is not easy and avoiding emails and phone calls during the day is even harder but by 10am we were definitely in the zone.