Challenges and concerns of successfully implementing change.

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Introduction

These are the notes from the joint BCS Business Change Group and Change Management Institute UK event held on 23rd April 2015 at Southampton Street in London. It was attended by a mixture of project professionals interested in extending their knowledge of change management and change management professionals interested in agile concepts and how this impacts change management.

Change in the agile lifecycle

We began the event by identifying the role that change management has to play in the lifecycle of a project, with particular emphasis on agile projects. As shown in this lifecycle diagram, the importance of managing change effectively has grown significantly as many organisations move from a waterfall to an agile approach for managing projects.
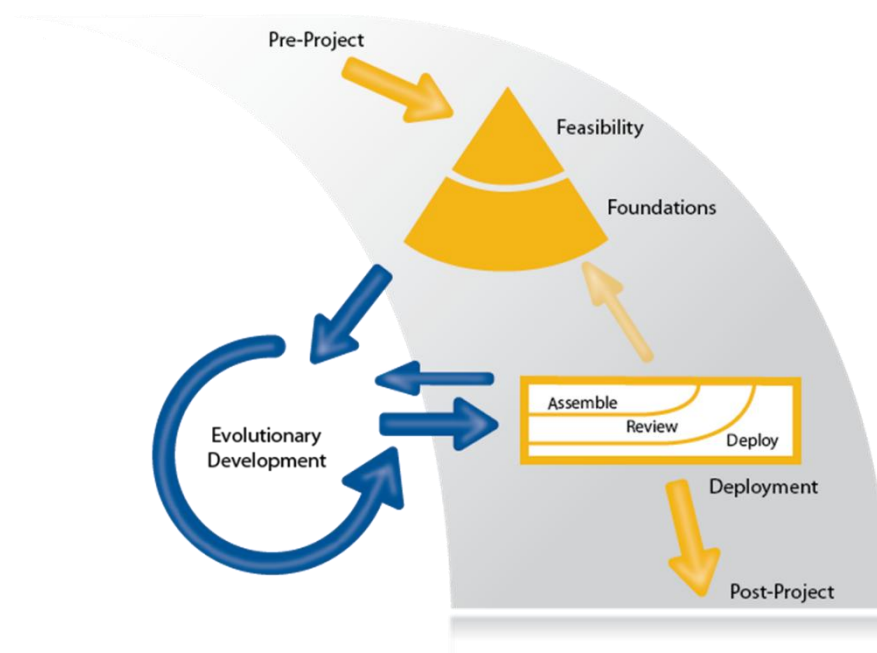
This diagrams from the Agile Project Management Handbook v2, shown courtesy of the DSDM Consortium, the copyright holder.

In waterfall projects, it is traditional for 'go-live' of project deliverables to take place at the end of the project lifecycle. This means that implementation or deployment is a one-off activity and as it is at the end of the project, if there are delays or problems with the implementation of the project deliverables, then this has no effect on further development within the project. For these reasons, the implementation of the changes brought about by the project and the project itself can be seen as independent events, controlled by different resources (project team versus business units affected). However, there has been a growing recognition over the last few years that unless these events are both successfully completed, then benefits

from the project cannot be realised. After all, unless what the project creates is successfully deployed to become the new 'business as usual' then the expected cost savings and/or efficiency gains and/or revenue increases described in the projects business case cannot be realised.

I think greater emphasis on benefits management and benefits realisation has been a significant driver towards increased interest in how to implement changes driven by projects.

In agile projects, the need for effective change management is even greater. Implementation or deployment takes place throughout the project lifecycle. There is a virtuous circle between development of project deliverables and feedback from their live use. In an agile project the solution evolves according to the greater understanding that users have about their needs as they see each of the project deliverables deployed into their environment, seeing things working in practice and understanding what is missing and what else is needed from the project. Failure to implement the results of each development cycle prevents the feedback needed to help decide what needs to be developed next. So in agile projects, we cannot allow change to be implemented whenever it is convenient for the users. The implementation activities have to be scheduled and managed as carefully as the development activities.

Psychological impact of change

In this presentation, I am not going to spend time on identifying, planning and resourcing the implementation or deployment activities. We know that implementation involves training people in how the deliverables should be used, helping them to amend their processes to reflect the use of the project deliverables and helping people to practice these new ways of working to build their competence so that they truly become the new business as usual.

None of this will happen if we cannot support users through the psychological impact of change, ensuring that they are able to overcome the negative emotions that change invariably triggers and enable them to reach a point of acceptance of the new project deliverables and a willingness to experiment with them to create meaningful, useful new ways of working.
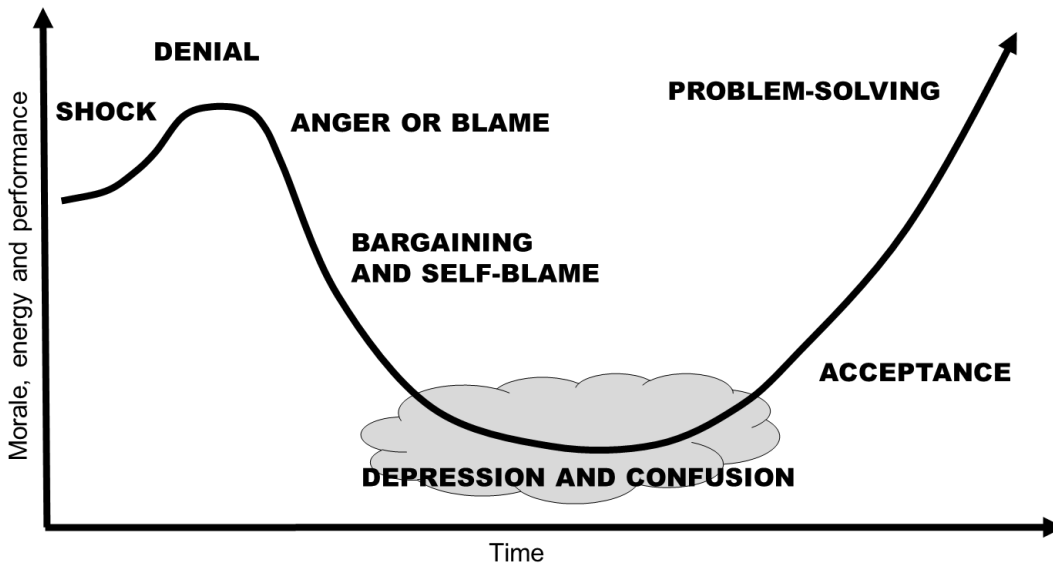
Kübler-Ross (1969), reprinted from Effective Change Managers Handbook 2014, Kogan Page

Not everyone will experience the significant dip in morale shown in this diagram, however, even the most enthusiastic of individuals will be affected by the change. This is because anything new means we have to learn a new way of working whilst abandoning all of our old habits. This involves a temporary loss of skill or competence whilst requiring us to put a lot of effort into practising new ways of working, making mistakes as we practice and perhaps attracting negative feedback from our senior managers in response to those mistakes. This doesn't sound much fun, even for the most dedicated of employees.

Creating intrinsic motivation

I think the secret of helping people through this psychological journey is to tap into their intrinsic motivation. We know from thinkers including Hertzberg and more recently Dan Pink that extrinsic motivation works for some manual tasks but when the work is based on knowledge, intellect, innovation and judgement then we need to encourage people through their own passion and enthusiasm. A pay rise, a bonus, better working conditions merely keep people working for the organisation, they don't motivate them to put more effort into their work.

Intrinsic motivation is a powerful force because it generates enthusiasm which leads to motivation which leads to participation and a willingness to volunteer, to get involved and to take on the extra responsibilities and activities needed to make change happen. It is connected to the ideas of 'flow' which is when an individual becomes so involved in what they are doing that they can effectively 'lose themselves' in the task, no longer noticing time passing or distractions from others. It is when flow has been achieved that they are at their most creative and innovative.

This is why I think intrinsic motivation is so important to successful change efforts. Without it, we cannot generate the new thinking, the new perspectives needed to create genuinely new ways of working. Too much change relies on adapting existing ways of working around new project deliverables, instead of creating new ways of working (and new levels of efficiency, speed, customer service etc) only possible because of the new project deliverables.

Intrinsic motivation is comprised of three elements:
1. Meaning
2. Autonomy
3. Talents

Meaning or purpose

Individuals need to feel that what they are involved in, and what they are applying their effort to is worthwhile. Therefore, if we want to motivate individuals to become involved in implementing project deliverables and creating new ways of working they have to understand the benefits and how the new ways of working connect to the priorities of their team, their department and ultimately their organisation. Depending on what is important to the individual, we might need to explain the required changes in terms of how they align to the strategic objectives of the organisation (for those who like to see the bigger picture), or how the changes will fix more immediate problems in the current ways of working. Some individuals are motivated by their relationships with others so will be keen to hear how the changes can benefit customers or relationships with suppliers or regulators. Others will be interested in how the changes help them to develop more relevant and up to date skills. Whatever the perspective, change begins when individuals realise that the changes are meaningful and worthwhile.

Autonomy

This is about having the power to organise your own work and to take some control over your working environment. We do not work creatively or enthusiastically when we are being overly controlled. Of course, when we work for an organisation we have to cooperate with the known standards and policies. However, if we are subject to 'micro-management' then we comply with instructions but we stop bringing our own thoughts and ideas to our work. We are simply operating as machines which are only as good as the instructions they are given. To generate motivation to do more, we must provide an environment of choice and self-determination. If we need new ways of working to be created, we can

provide autonomy by setting out the requirements but standing back and inviting suggestions about how this might best be achieved.

Talents

Individuals perform at their best when they are playing to their strengths. When an individual is naturally good at something they receive positive feedback about their performance, they make less mistakes which enables them to enjoy their work and this leads them to want to do more of this work and less of the work for which they are not as naturally talented. This makes tapping into talent and natural skills a virtuous circle. The more talent you have for a task, the more willing you are to do it, the more often you do it so the better you become at it. In terms of creating intrinsic motivation, autonomy and talent are closely connected. If we want to generate enthusiasm and motivation for making change happen we need to offer a range of activities that individuals can choose to participate in (autonomy) where these activities involve a broad range of talents that appeal to the different skills of individuals (talents).

Appealing to different preferences

To create a range of opportunities for becoming involved in change that appeal to the talents of different individuals, we need to recognise the different personality preferences and motivations of different individuals.
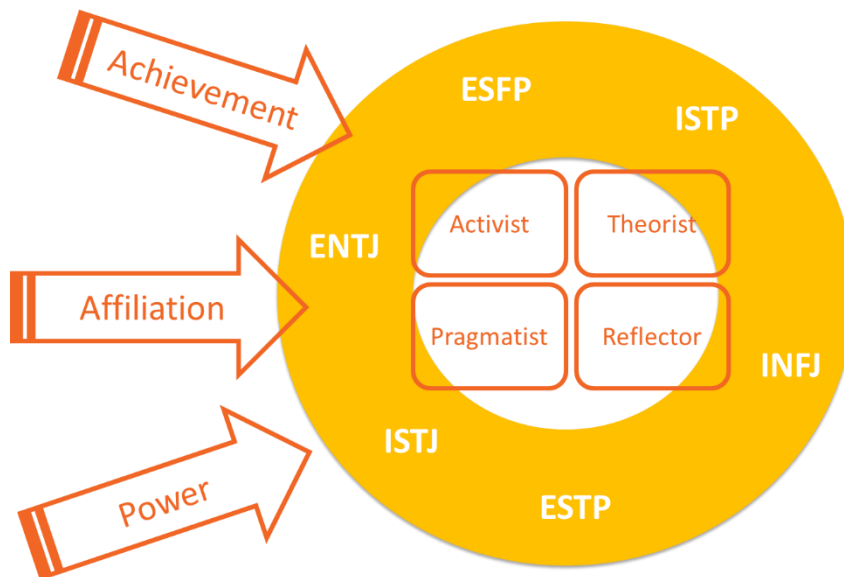
In this diagram I have overlaid a number of different theories and models about preferences:
In this inner circle I have represented the views of David Kolb and Honey and Mumford who identified how individuals have 4 different preferences for how they receive information and learn about new things

In the outer circle I have captured some of the 16 preferences in the in MBTI model of personality types which identify that different people have different preferences for how they engage with others, how they make decisions and how they take in information.

The arrows on the left are drawn from the David McClelland Model of Motivation which describes three motivational forces that drive individuals to behave in certain ways.

The most important message from these different approaches is that not everyone is the same as you. Therefore, when you create a change management plan, you will naturally include activities that appeal to your own talents, priorities and experiences. However, if you are to maximise the involvement of others you have to create opportunities that appeal to individuals who have different preferences to you. These models demonstrate that if we do not recognise how others prefer to work and accommodate this, then we are limiting participation in our changes to those who are like us.

Whilst these are all useful models, I have found in my consulting work that my clients are not worried about models, they just want practical help to get people involved in the implementation and deployment of changes. For this reason I have taken the essence of these models combined with many years of experience
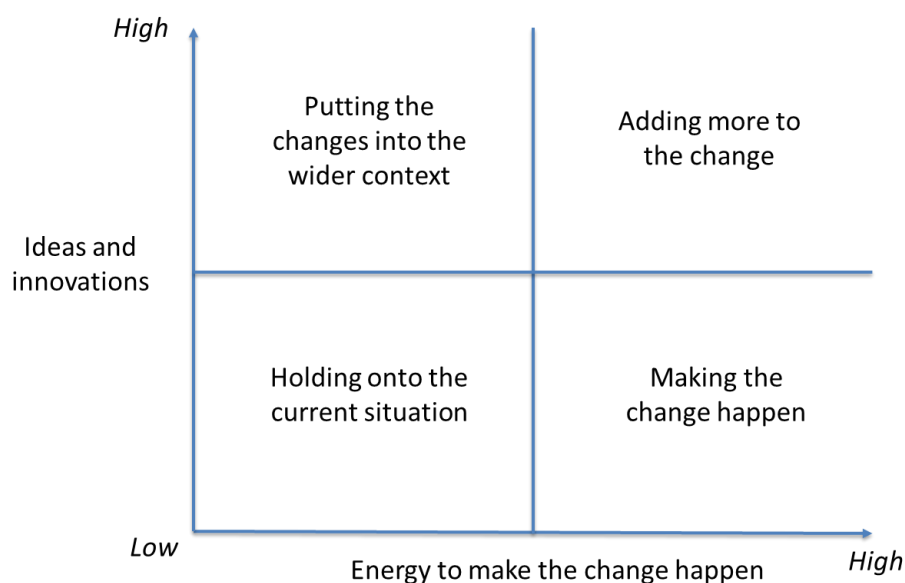
and identified four categories of personality for which I need to create options for getting involved in change.

The four categories are:

1.   **Holding onto the current situation** – individuals with this preference are great at keeping the scope of the project and the consequent changes manageable. Their desire not to change means they will review what is being proposed with some scepticism and will try to stop the project team 'overdoing things'. People with this preference are very good at encouraging us to provide proof that things will work so they are supportive of pilots and prototypes instead of 'big bang' roll-outs. To get the best from these resources,

they will need some flexibility in how to use the project deliverables and the autonomy to retain some of the existing ways of working.

2. **Putting the change into a wider context** – looking for connections with other initiatives, seeing how the change connects to the longer term aims. People with these preferences challenge the project team because their need to 'join the dots' and align the project to the wider strategic direction of the organisation means they ask a lot of questions about inter-dependencies with other initiatives. They can also be very interested in the relative priority of the project work, needing to know where the project sits in relation to other initiatives, trying to gauge what they should treat as 'top priority'.

3. **Making the change happen** – people with this preference are 'doers'. They are motivated by how much work they have got done and how many tasks they have ticked off their to do list each day. When they get involved in implementing change, they look for a detailed task list of things that need to be done to move from old ways of working to new ways – e.g. redesigning processes, going on training courses, agreeing new performance metrics. They are unlikely to contribute many additions or want to change the list in any way. Their priority is to undertake the work and make the change a reality. This sounds great in theory, but in practice their limitation is that they will not contribute much information about possible risks or problems. They don't think about the wider implications or question the priority of the work so make sure that what you ask them to do has been properly thought through.

4. **Adding more to the change –** opportunity for design and creation of additional changes. People with this preference take their initial understanding of the changes required as a starting point. They want to contribute and as they are unafraid of change and see it as a positive thing to do, they want to go further and add more to the scope. Point them in the direction of other parts of the organisation that might be impacted by your project and they will make a great contribution by finding others who need to change and additional functions and processes that need to be amended.

Results of the workshop

As part of this presentation at the BCS – Chartered Institute of IT, I then facilitated a workshop with the 50 attendees, who were each asked to consider change management activities that would appeal to one of the personality preferences. At the start of this part of the workshop we discussed the importance of being an authentic leader and for that reason, I was going to apply the concept of intrinsic motivation to this work. I outlined the importance of enabling the attendees to apply what they had learnt (to give them meaning and purpose) and that they could choose which personality preference they worked on (to give them autonomy) and that they could decide how to approach their work (to apply their talents). This introduced one of the challenges of creating intrinsic motivation, which is the risks associated with giving individuals autonomy over their work. Without control, how could I be certain that all four personality preferences would be covered? The short answer is that I cannot, so as a back-up plan I need to prepare my own answers for each of the preferences so that when the participants feedback at the end of the workshop, there will be a chance to share ideas about each of the four categories. This might sound like hard work, but in my opinion it is worth it because of the level of engagement, energy and motivation generated by the intrinsic motivation approach.

In this case, it turned out that only one team wanted to talk about those that add more to the change, a couple of teams chose those like to put the change into the wider context and all the other groups chose the preference for holding onto the current situation. So the ideas for those who prefer just to get on and make the change happen had to come from me.

These are the results of the workshop:

1.   **Holding onto the current situation**

- Their biggest contribution is in identifying what needs to be kept, and to keep the scope of the change under control so that it is not automatically assumed that everything needs to change.

- They will be interested in ensuring that things don't get out of control so reassure them with an explanation of phased delivery and the milestones that will be used to track progress and achievements.

- Although they may appear to be against the change, do not automatically assume this, and give them a role to play in the change. For example, their interest in maintaining the current situation is often supported by their own knowledge of organisational history including how the current status quo was reached and the previous attempts to change it and the lessons learned associated with those previous efforts so they can be responsible for sharing this information. They can also be given a role in quality assurance of the change, as they are going to be monitoring it closely anyway to make sure it does not destroy everything they believe works already. Another good idea for getting them involved is to give them a role in testing as this will help them to prove to themselves that things are really working well before they are implemented.

- This group will want to know 'what's in it for me?' so they will push to understand the business case at a personal level before viewing the change with any interest. They will also want to assess the credibility of those involved in the change. If they perceive themselves as experts in the current ways of working, they will want to know that those who propose to make changes have the credibility to back up their demands.

- This group are interested in holding onto the current situation so often understand it very well. They can help to identify where the current strengths are and where things don't work so well. This gives them a great insight into the benefits and the risks of changing.

- This group can be reassured by visits to those who have already made similar changes so that they can see the new ways of working in action and can assess for themselves the real impact of making these changes, which might not be as significant in practice as they appear on paper.

- Finally in this workshop there was a general view that this group might take time to come on board, so they should be communicated with as early as possible so that they have the necessary time to absorb the need to change.

2.   **Putting the change into a wider context**

- There was a lot of discussion about this group being 'deep thinkers' and the contrast between them and those that want to get on and make the change happen.

- As part of their desire to think and analyse the change, they will often push for more information about the change, which can reduce the risk that poorly planned changes will take place.
- It was felt that this desire to see the 'workings out' behind the change can make a substantial contribution to improving the quality of the business case – benefits, costs and risks.
- Their need to 'join the dots' and put the change into the wider context will help to identify the 'burning platform' and all the reasons why the organisation cannot maintain its current ways of working. They can also help to identify how the change, aligned with other initiatives, contributes more than the sum of its parts as it drives the organisation forward to meet its strategic objectives.
- As this group are thinkers there was a recognition that they need to be given time to analyse information and come to their conclusions so they must be given information ahead of meetings and not be pushed to make 'on the spot' judgements. There was a lot of appreciation for how this group are often willing to look through a great deal of background information and wordy documents that many others involved in the change are less keen on and how this helps to avoid mistakes by finding problems in the small print!
- This group can also make a substantial contribution to controlling the scope of the changes by ensuring that duplication with other initiatives doesn't take place, because of their willingness to find the linkages and dependencies with other projects in the organisation.
- Also, this group can challenge the status quo by thinking through the implications and identifying where the change might not have gone far enough and where additional work should be included.

3. **Making the change happen**
- The workshop participants didn't tackle this group at all. Interestingly, the reasons given were that so many of them were natural change agents themselves they wanted to spend time considering personality types that were different.
- One of the things that we did identify that is important to this group is minimising delays. As they are a group that want to get on and make the change a reality, and are driven by the need to make progress, delays are particularly frustrating. Therefore, resources, materials and information need to be ready in advance of their work. We also talked about the need to ensure that information was available on-demand e.g. training materials or Frequently Asked Questions that can easily be downloaded as and when they are needed.
- This group is also good at leading 'show and tell' workshops where they can present their achievements to others to generate feedback. This group needs the reassurance from others that they have made progress and that their efforts have been recognised but it is also helpful because it enables others to critique their work, even if these other groups do not want to do the work themselves.

4. **Adding more to the change**
- With this group there was a general feeling that they can act as visionaries for the change, providing meaning for the change by putting it into an even wider context of how it contributes to the future.

- We felt that this group can be useful sponsors of change because of their natural enthusiasm for change, inspiring others with their belief that 'change is good'.
- However, they can also be a source of 'change fatigue' as their constant jumping from one idea to another can place others under pressure to deliver all of their ideas.
- We felt this group were good at 'the art of the possible', overriding possible objections to come up with truly innovative ideas that can lead to real innovation in how business is done.
- However, with this group there are always concerns that they can have so many great ideas that they derail the original scope of the change, and progress is halted whilst others attempt to incorporate their ideas into what they are doing.
- We debated ideas about how to reign this group in whilst at the same time not dampening their enthusiasm for change. It was agreed that encouraging them to think about the costs of their ideas in terms of implementation costs and the costs of disruption to business as usual could be very useful.
- We also felt this group were natural starters but not natural finishers so could be very good at piloting ideas but might get bored by the requirements of a full roll-out. Their ability to pilot can generate early wins and concrete evidence of success which can be used to motivate others who are less sure of the need for change.

Conclusion

The most important conclusion of this session came from one of the participants, who explained that she now felt a lot more positive about involving everyone in change as she could see how each personality type had a role to play and a contribution to make in change. For this reason she felt more able to cope with those who are resisting her changes at work, a view that was echoed by many in the audience.

Melanie Franklin has a track record of excellence in project, programme and portfolio planning and delivery. In recent years she has focused on helping organisations move from waterfall to agile project management approaches in response to the increasing need to deliver projects on a shorter timescale.

Creating agile environments has grown in importance in recent years, and many executives are driving this adoption as they become aware of the benefits of agile thinking in responding to fast moving changes in the international business environment.

She is a respected author of 8 text books about project and change management. Her most recent book, 'Agile Change Management' proposed an approach to managing change initiatives that apply the principles of agile project management. This ensures that the exact deliverables from a change initiative can evolve in response to customer, regulator and market demand, project deadlines are still respected.

Melanie believes in authentic leadership, therefore, as well as using her training skills to develop the skills and knowledge of attendees on her courses, she also ensures she attends training to build her own skill set. Melanie is an accredited trainer in AgilePM and is a Certified Scrum Master and LeanKanban Practitioner. She is also an accredited trainer in Change Management, an examiner for the APMG Change Management Foundation and Practitioner qualifications and the Co-Chair of the Change Management Institute UK.

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