

CHANGEOSITY INSIGHTS | SEPTEMBER 2023

TRANSFORMATION: IN JUST ONE YEAR

By Krysta Fox & Sally Mitchell-Wolf

With Discipline, Embedding Change in
One Year is Achievable!



changeosity

Creating Better Leaders. Creating Better Organisations

TRANSFORMATION: IN JUST ONE YEAR

With Discipline, Embedding Change in One Year is Achievable!

By Krysta Fox & Sally Mitchell-Wolf

This change initiative was ambitious. Charged by the board to manage this project, Claus worried that it might prove too ambitious. The company had experienced a rough time in the past two years. Claus understood all too well that the failure of the previous change attempts sapped morale. The staff who were still with the company were doubtful, or even worse, antagonistic about a new change initiative. But in the extraordinary meeting where he'd agreed to step into the role, the executive and owners had not pulled any punches about this project being more than about staying competitive. It was about survival. Looking at the empty Gantt Chart the board had asked him to prepare, and everything else on his to-do list, Claus wondered – where do I begin?

DON'T TELL ANYONE... WE'VE BEEN DOING EXPERIMENTS

Part of leadership is experimentation.

Successful leaders have the capacity to try, fail, learn, and grow as part of actively continuing their own self-development. They are willing to take informed risks and learn through trial and error.

Not only do they draw on their own experiences in this process, but also on their team's experience.

The very best leaders also often draw on the knowledge and ideas of thought leaders, including their industry peers, through professional reading and, these days, from podcasts.

The way we do things at Changeosity has been informed by these elements:

- our own professional experiences
- experimentation
- ideas and knowledge shared by thought leaders.

Effective organisations build the capacity to learn. One aspect of learning is through a continuous process of refining processes.

In this edition we share some of what we have learned about running a change program that drives transformation. Our experience and knowledge are deepened through careful, informed, and reflective experimentation.

Each organisation and transformation are unique. Be wary of generalisations and inflexible approaches that prevent customisation.

None-the-less, drawing on our recent experiences of guiding change programs in an international law firm and MENA region governments and construction companies, we have found the change programs that work best are broken up into parts.

Further, substantial change is possible within only one year!

To make significant progress toward achieving a strategic vision requires the capacity to learn and the desire to evolve.

GOVERNANCE & SPONSORSHIP – THE FOUNDATIONS

Governance is about having the right approach to strategy, decision making, and risk and is an effective way of enabling the right decisions and actions to be taken.

Therefore, that an assumption in the article is that good governance is in place prior to commencing transformation in just one year. In depth discussion of governance can be found in previous Changeosity

Insights editions, including [July '22](#) and [August '22](#).

Any change agenda requires significant effort and investment and therefore should be aligned with the overall direction of the business.

The high-level analysis you've started on, such as a SWOT analysis, has helped identify barriers to achieving your clear strategic goals.

The vision of the organisation post-transformation has started to form. Possibly the imperative is little more than a hunch or a gut feeling, the same one that pushed you and carried your entrepreneurial ideas this far.

You've decided change is needed.

But the next steps to get the ball rolling may be unclear.

Sponsorship is critical for successful change and underpins the models and process outlined in this article.

A sponsor sits at the top level of the organisation.

This individual, or entity, is the driving force for a specific change initiative. They are invested in the achievement of the

The change programs that work best are broken up into parts, or stages.

strategic dimension the change is driving toward.



CLOSE UP: SPONSOR CANDIDATES

Candidates for the critical role of sponsor depend on the size and structure of the organisation.

Always someone within the organisation, they can be:

- *The Owner*
- *The CEO*
- *An Appointed top-level Change Leader*
- *The Chief Strategy Officer*
- *The Executive Board*

Regardless of title they must:

- *Be a Credible Leader*
- *Sit at the top level of the organisation*
- *Have decision making power*
- *Have resource allocation authority*

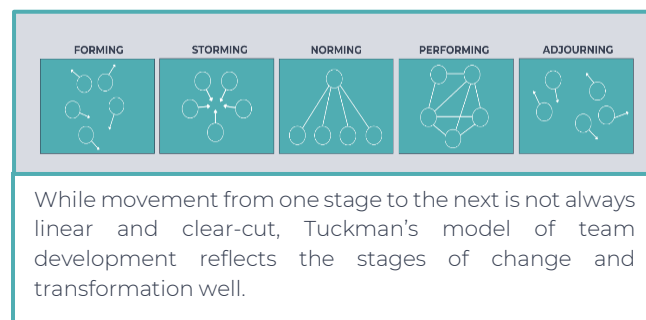
A sponsor must have clout in both decision-making power and the level of responsibility necessary to allocate resources which the project demands, as this enables them to enact their sponsorship.

Additionally, their credibility in seeing things through and achieving outcomes must be such that they imbue the project and stakeholders with confidence.

Who a sponsor is depends on the structure and maturity of the organisation. While it may be the board, our experience is that an individual, a single point of accountability is more effective.

In some instances, this sponsor is one level above the leaders who form the Change Committee.

Consequently, the sponsor is also responsible for ensuring full alignment and support exists between Committee members and their line managers.

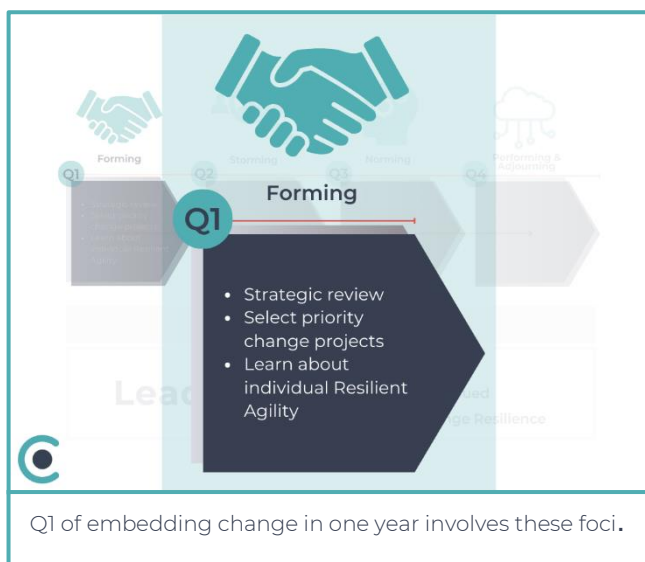


THE FIRST QUARTER - FORMING

There's good alignment between our four-quarter structure for change and Bruce Tuckman's model of team development. Additionally, while our focus here is on the practical and structural, there is a reminder in Tuckman's terminology that all change is inseparable from the people involved. from the people involved.

In our process for embedding change in one year, the foci of the first 'forming' quarter are:

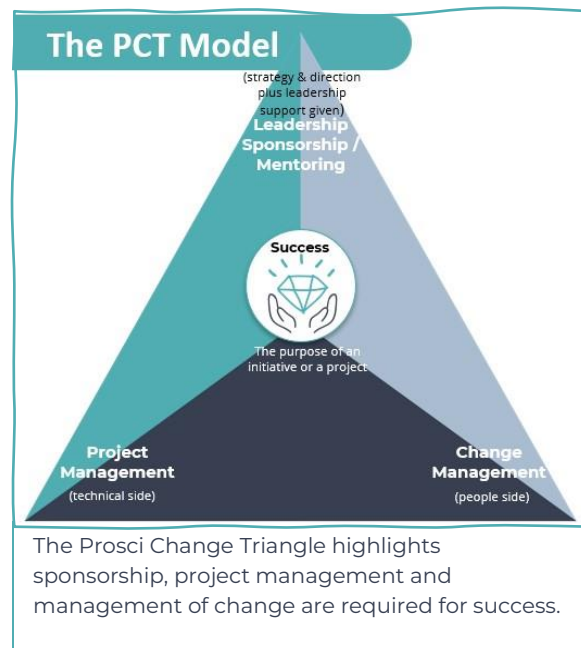
- Strategic Review
- Select priority change projects
- Learn about individual Resilient Agility



Transformation begins with establishing the Change Committee, the key people within the organisation who will drive the change. Each will take responsibility for leading a discrete initiative within the overall Transformation Project.

Their journey and learning kicks-off with the introduction of concepts around change management

including understanding the Prosci Change Triangle, or PTC Model.



At the same time, Change Committee members are introduced to the concept of resilience agility and exploring their own individual resiliency. Elements (Saville, n.d.) include:

- Dealing with change and uncertainty with positive composure.
- Staying connected by actively participating and communicating.
- Using insight to enable new ways of working, to forge new directions and deliver effective work plans

- Maintaining drive by capitalizing on opportunities

while keeping everyone focused on key objectives.



CLOSE UP: GREAT QUESTIONS TO PROPEL CHANGE

When asked with genuine interest and intention to provoke and clarify, the power of the right questions at the right time should not be underestimated. Closed questions allow a limited yes/no response. They have their place, but are limiting.

When the goal is discovery, growth, and transformation, using open questions invites detailed and broad responses. Some of the questions we have found most powerful to ask during change are:

- *What could you achieve if you got out of your own way?*
- *How will you feel when you've completed your project deliverables?*
- *How do you want to 'show up' as a leader?*
- *List the behaviours which reflect this. (e.g.: reliable, present, motivated, proactive)*
- *Describe what that looks like. (e.g.: coming to every meeting on time, being prepared, speaking up)*

The power of Leaders asking the right question, at the right time, will be the focus of a pair of forthcoming Changeosity Insights articles.

Critically, as consultants working with the organisation, in this first quarter, the organisation's strategy and its relationship to the transformation is examined and understanding is developed.

This includes exploration and working with the vision, mission and values and ensuring that proposed change initiatives align with these and the organisational strategy.

Running an exercise to check alignment is very important.

It provides the opportunity to elevate the committee's understanding of the organisational strategy and allows each member of the Change Committee, each of whom is assigned a specific initiative, to identify how their part supports and enhances the organisation's overall ability to achieve its objectives.

Without this big-picture view, two things detrimental to successful change and transformation may occur within the Change Committee.

1. failure to understand the importance and impact on the organisation of their specific initiative within the project adversely affects effort and outcome.
2. work effort focussed on initiatives which are not aligned depletes energy and resources.

The First Quarter is also about setting expectations and the ground-rules.

One of the lessons we were surprised to learn is the impact of tracking attendance. It was our assumption, working with adults, that administering attendance lists wouldn't be needed.

However, when Change committee members are aware that the project sponsor sees attendance records, problem behaviours around participation and fulfilling responsibilities are significantly reduced.

Establishing this as the norm begins in the first quarter and continues for the life of the change project.

POTENTIAL TRAPS IN QUARTER 1

Being aware of common traps in each quarter can be helpful in avoiding them and keeping the change program on track to achieve the desired transformation in the timeframe.



Rushing/Short Cuts

There is a temptation to not spend enough time on the kick-off and on mobilising the Change Committee. If this is rushed, it undermines the foundations of the project.



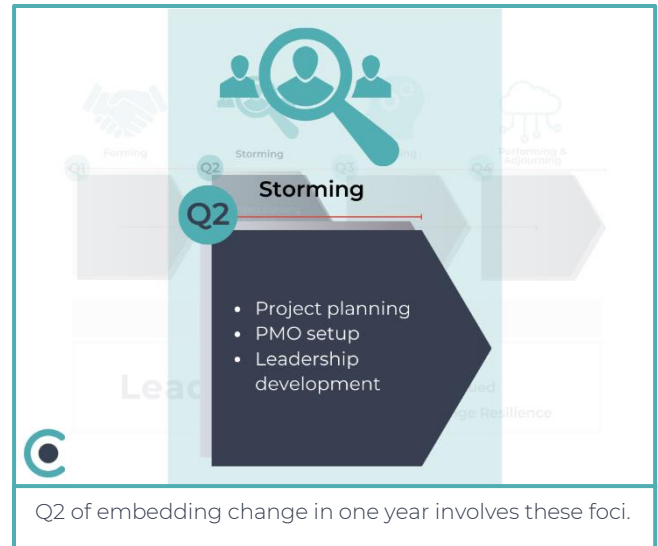
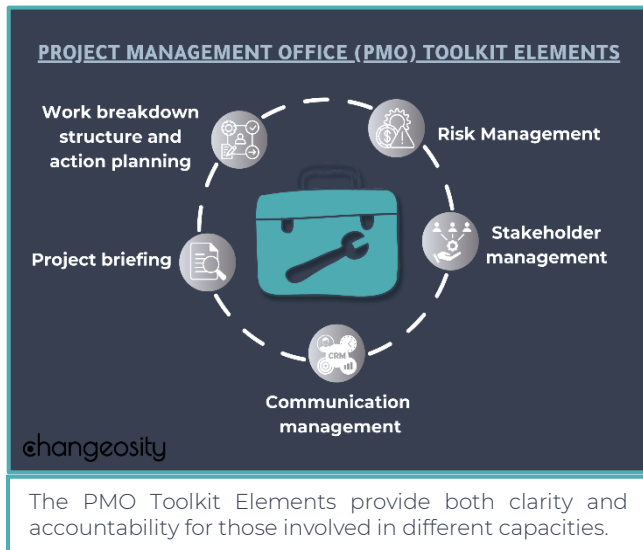
Not on The Same (Strategy) Page

Failure to ensure that all stakeholders have reached a robust shared understanding of the organisational strategy can have far reaching impacts.



Underestimating effort

Underestimating how much effort will be required to expend on the Project, particularly by Change Committee members is a common trap.



THE SECOND QUARTER - STORMING

There's a lot of thinking and planning as well as hands-on practical actions which happen in the second quarter. Broadly speaking, it all falls under:

- Project planning
- Project Management Office (PMO) setup
- Leadership development

The second 'storming' quarter is potentially the most challenging phase for people because it requires a lot of detailed digging to develop full understanding of what the project involves.

On one level, it's all about establishing the terms of reference and business case of the project.

The focus of activities in this quarter are on consolidating the foundations of the project and build strong understanding among project leaders of what they will be delivering and how it all fits together.

It is key to clearly identify the specific benefits the project will bring for the organisation and stakeholders. This vision provides motivation when times get challenging.

On a more practical level, this stage sees significant attention given to working through the details, determining what kind of actions

are going to be required to create that vision of transformation.

Each leader of an initiative within the overall project must think very carefully about:

- who else needs to be involved
- who the connecting points are
- who they will collaborate with.

For the Change Leadership Committee, time is dedicated to learning more about the 'how' of leading change. Specifically, developing competencies related to managing a project and establishing familiarity with the Project Management Office toolkit.

Our expectation for a fully planned project includes discussing it in detail with others. The requirement to demonstrate this *before* implementation not only to members of the group, but also to someone with only a basic knowledge, often surprises leaders.

However, we have found it is only when each Change Committee member has a complete grasp of things themselves, can they clearly explain the project and the initiative they are leading.

During this quarter, additional professional development for the

Committee members occurs, according to the needs of the group and individuals.

Group sessions are very effective for team support and ideas generation, however it's easier to hide.

We have learned that personalised, one-to-one follow-up has a significant positive impact for leaders, the success of initiatives and the overall transformation project.

Line managers need to give members of the Change Committee, as leaders of project initiatives, the space necessary to spend on their initiative for its full duration.

Line Managers also have a role in providing strategic context to those leaders and the entire team.

Further, success is more certain if the line manager invests time in discussing the project with the leader, offering support, feedback and guidance.

The sheer variety of activities, the accelerated professional development, the challenges and the detail demanded before moving

forward are why doing things well in this quarter is so important.

POTENTIAL TRAPS IN QUARTER 2

Not only is it necessary to help remain on track to embedding change in one year, avoiding common traps now can prevent the program from becoming one of the reported 70% of change initiatives which fail (McKinsey, n.d).

Poor Documentation

Rushed or incomplete planning is reflected in an absence of project elements from project documents. If such an oversight is found, a step back and time taken to review is essential.

Who?? What???

Failure to identify both the resources needed and who will work with you inhibits implementation. Attend to the 'how'.

Underestimating Time

Inattention to realistic estimations of how long it will take to implement an action can risk derailment of a project before it progresses. Appropriate estimations of time required is one

factor which reduces change resistance and contributes to success.

Not Communicated

A project leader's understanding remains untested and potentially fuzzy or incomplete if they've not explained not discussed the project with others. To enable others to work effectively with them, a project leader must also be able to help others comprehend the 'what', 'why' and 'goal'.

Insufficient Communication

It can be challenging to estimate how much, and what type of communication is required to bring stakeholders 'up to speed'. Careful consideration and action here can prevent later problems arising from misunderstandings.

Assuming Presentation Skills

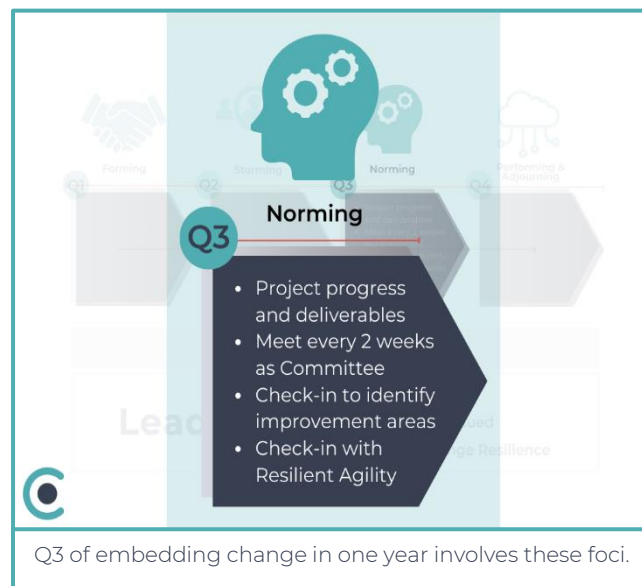
One area to not overlook in terms of capacity building is the limited experience levels most people have in presenting project plans to senior leadership and the decision-makers, often an executive committee. Failing to provide opportunities to upskill and prepare middle leaders

for success is a commonly encountered trap.

Loose Meeting Schedule

By not having a regular meeting cadence and tolerating ‘no-shows’ when there is a published schedule,

- Check-in to identify improvement areas
- Check-in with Resilient Agility



“ Putting people out of their comfort zones, in a supported way, such as by presenting to senior leaders, is often cited as the greatest aspect of personal development for change program participants. This is possibly one of the most effective on-the-job development programs I've experienced in my career.

Krysta Fox – Founder & CEO, Changeosity

undermines accountability. For the various components of a transformation to occur and synchronise, and the project to ultimately succeed, avoiding this trap is essential.

THE THIRD QUARTER - NORMING

The third quarter, in Tuckman's terms, is the ‘norming’ phase. Everything is now about delivery, with attention on:

- Project Progress & Deliverables
- Meeting every 2 weeks as Committee

The structural elements of project management take centre stage with project tracking and action plans on digital dashboards fully updated and regularly reviewed.

This stage is a juggling act to balance the structured attention to getting tasks done with the critical people-focussed need to keep leaders of project initiatives motivated, engaged and confident.

It's dynamic, exciting and a true test of agility as people put plans into action, reflect, and experiment with refinements and progress.

Our own experience has confirmed the critical importance of accountability.

Through experimentation and confirming what works in a range of contexts, Changeosity has developed tools and systems for creating accountability.

Our project structure requires each Change Committee member to give updates based on an agreed meeting cadence. These 'check-ins' follow a standard documentation template.

Some organisations may resist a structure which puts members of their team 'in the hot seat' but building discipline around project progress check-ins this is a highly effective way to catalyse and compel progress.

As consultants, this is also the stage where we see the biggest rewards.

When they are supported well, with the right tools and personal development, the individuals involved in the change projects are transformed.

There are many tools and processes that impact the mindset of a leader and create discipline and positive

initiative and project behaviours. They include:

- Digital brainstorming spaces that enable creative expression
- Highlighting individual strengths with the support of psychometric assessments
- Combining Change Committee Check-ins with individual mentoring
- Members taking turns to step into the facilitator role for ongoing PD
- Visibility and support from the project sponsor
- Peer accountability partnerships
- Providing project leaders with administrative support
- Plenty of communication between the core change leadership team
- Elements of gamification
- Recognition and rewards

A variety of well-chosen tools and activities, implemented in a timely manner to gather new insights and new ways of working can both add variety and interest when the 'going gets tough', easing the path forward.

Sponsorship, along with effort to build capability, support and mentor are key in this phase. So is attention to avoiding common traps.

POTENTIAL TRAPS IN QUARTER 3

Assuming Full Understanding

Making an assumption that project leaders both fully understand their project and its impact on the organisation.

Unrecognised Pressures

This can be a tough quarter. Failing to recognise the pressure that project leaders are under in this phase and not providing tools and support is a significant trap.

Okay to Bail

If leaders are allowed to bail-out or perhaps just not show up for meetings when the hard work begins, it can snowball, derailing or entirely stalling a transformation initiative.

Assuming Attrition = Failure

In our experience, despite support, a small number of people involved at the start will not continue. This does not mean the program is a failure. If it were easy, then everybody would lead change. Not everyone can. Sometimes it's just not the right time for an individual. Sometimes a project leader discovers they are

uncomfortable with being a change agent. In our experience, forcing the issue when everything else is in place simply doesn't work.

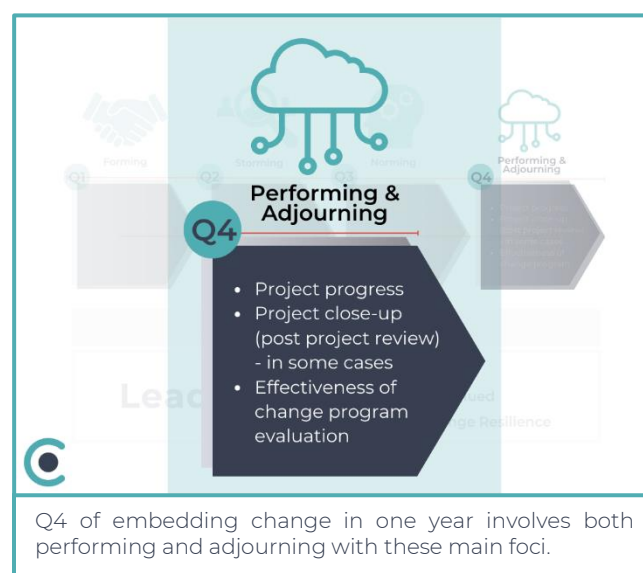
THE FOURTH QUARTER

Each initiative within the project will have a different timeline, so while some are continuing, others will be reaching their completion.

Thus, thinking back to Tuckman's model, the fourth quarter involves both 'performing' and 'adjourning'.

It is characterised by these activities:

- Project Progress
- Initiative Close-up (post initiative review) - in some cases
- Effectiveness of Change Program Evaluation



During close-out the following processes and actions are important:

- Identify that action options have all been delivered to the specified standard
- Determine if the purpose has been fulfilled by revisiting the project briefing
- Meet with stakeholders to present the final deliverables for acceptance
- Gather feedback from the leaders' connecting points
- Debrief in an open conversation about the highs and lows of the project, the leaders' learning along the way and what they will take forward on their personal leadership development journey

Acknowledging and celebrating achievements large and small is important at each stage. The recognition and rewards of the third quarter become wider celebration in the last.

POTENTIAL TRAPS IN QUARTER 4

Even though a great deal of significant work has been done, awareness of and attention to traps the final quarter remains necessary to make sure the strategic goals which drove the transformation are realised.

Set & forget

Change will stall if the time to deeply embed its elements is not allowed. Additionally, ongoing development, such as of skills for monitoring new systems to ensure sustainability, may be required.

Rushing

Time for reflection, embedding learning, and allowing people to recover from change fatigue is needed before embarking on the next change project!

DESIRABLE THROUGHOUT PROJECT **A** **FEATURES CHANGE**

Deep learning and knowledge come through experience and experimentation. Leadership, especially of change and transformation, is a site for continuous professional growth.

While we have outlined a one-year structure here, change is, in the real world of business, ongoing and continual.

The right support and professional development will enable an organisation to build internal capacity for monitoring and continued transformation, as and when needed or desired.

We have learned that high visibility and communication from the project sponsor throughout every stage is key.

Another organisational factor which we have identified as being significant for success is establishing a small core group who direct and facilitate progress. Especially when a transformation is facilitated externally, as is the case in the work Changeosity does, this core group includes the consultant, a representative from HR and a member of the executive. It must also include one or two members from the change committee.

As members of both groups, they can be a voice for the change committee as a whole and share insights which might not otherwise be heard by the core.

As part of Changeosity's overall guidance to organizations seeking to make changes which stick, we encourage top leaders to implement change programs as part of wider initiatives.

Depending on the nature and maturity of the organisation, this may include establishing a well-governed Advisory Board, and committees responsible for areas such as compliance and risk. Like members of the change committee, members of all these groups should

have the opportunity to explore and develop their leadership.

WHAT A DIFFERENCE A YEAR MAKES

Part of leadership is experimentation. Just as change happens at the individual level, innovation and transformation require individual growth.

Change in one year is ambitious. Leaders must expect that achieving significant transformation in this time period is intense and demanding for all involved.

However, one year, broken into four quarters, provides a clear and relatable timeframe. For leaders familiar with the concept of SMART goals, you will appreciate the way in which being 'Time-bound' provides a deadline to focus on and something to work towards, supporting success. (Mind Tools, n.d.).

Managed correctly, our experience shows a change in one year project can help avoid the phenomenon of change fatigue which can derail large scale transformation initiatives.

Once unlocked, the capacity to undertake transformative change builds upon itself.

In the organisations we have worked with on a one-year

transformation, the personal and professional growth, which occurs in individuals and within companies, through this one-year transformation is truly inspiring!



Claus had been right to be cautious about embarking on a change project. It took longer than expected, and it was hard! When some people who he'd thought he could rely on dropped away, it was demoralising! What Claus hadn't counted on was the joy of watching other members of his change team go beyond their previous limits and flourish. The weekly huddles had been dedicated to developing leadership skills as much as they were about driving the change initiatives. Looking back, Claus saw the

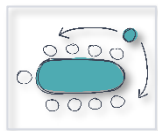
journey included a major shift toward empowerment and motivation. Not only did the company survive but the transformation approach was now embedded in the fabric of the organisation, driving continuous improvement.

WANT TO LEARN MORE?

If you have identified a change project that will accelerate your business and are ready to tap into the guidance and expertise a team of experienced consultants can provide, contact us! Changeosity is passionate about helping leaders and organisations grow and we would be excited to discuss your individual needs and explore the ways we can support you on your journey.



STRATEGY
DEVELOPMENT



GOVERNANCE



LEADERSHIP
ACADEMY



ECONOMIC ZONES
& ADVISORY

Get in touch with us to discuss your business or follow us:



References

- Last, S. (2019). 4.2 Five Models for Understanding Team Dynamics – Technical Writing Essentials. [online] Bccampus.ca. Available at: <https://pressbooks.bccampus.ca/technicalwriting/chapter/understandingteamdynamics/>
- McKinsey.com. (n.d.). Why do most transformations fail? A conversation with Harry Robinson | McKinsey. [online] Available at: <https://www.mckinsey.com/capabilities/transformation/our-insights/why-do-most-transformations-fail-a-conversation-with-harry-robinson>.
- MindTools (n.d) SMART Goals How to Make Your Goals Achievable [online] <https://www.mindtools.com/a4wo118/smart-goals>
- Prosci.com (n.d.). An Introduction to Change Management. [e-book] Prosci. Available for download at: www.prosci.com
- Prosci Inc. (n.d.). *Prosci 3-Phase Process*. [image] Available at: https://www.prosci.com/hubfs/Prosci_2021/3Phase_Process/Prosci-Methodology.png.
- Saville Assessment. (n.d.). *Building Resilient Agility* [online] Saville – a Willis Towers Watson Company, Available at: <https://www.savilleassessment.com/resilient-agility/>

The information contained within this article is of a general nature and does not constitute professional advice. Changeosity, its owners, directors, employees and affiliates are not responsible for any decisions made based on this content.