

LEADING CHANGE AND TRANSFORMATION

CASE HISTORY



The client company

- A marketing and selling company of 110 people, highly technical and intelligent.
- Part of a global science-based organisation of 17,000 people.
- The company had produced strategies and 5 year business plans in the past without proper buy-in or full implementation. The Managing Director also wanted to change the culture and improve leadership skills throughout the organisation.

Underlying principles

I put together an integrated programme based on the following principles:

- Essential for the Top Team to start working well together and demonstrate a high degree of trust within the Top Team.
- The commitment to culture change that starts at the personal level; then team; then organisation. The client saw the advantages of this 'inside out' approach to change as they had previously used the top down cascade approach which had not worked.
- Once the Top Team was working well together I expanded the numbers and created a Champions Group by adding a cross section of staff (the Group had 18 members). I wanted to fully involve the internal HR consultant and this person was a member of the Champions Group.

The role of each Champion was to:

- contribute towards the programme
- communicate with their own team
- model the desired change

The Programme

The programme was phased in line with our Renaissance Change Cycle model.

1. Assess
2. Recognise
3. Implement
4. Accelerate/Sustain

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Phase 1: Assess

Commencing in February I spent 3 days studying background information on the company, including earlier strategies and client surveys; walked through the company's internal procedures; and met two customers.

I spent a further 2 days conducting one to one diagnostic interviews with some of the potential Champions and sent the questionnaire to 5 others out in the field.

A report was prepared for the Top Team.

I then spent 2 days with the 5 members of the Top Team:

- Encouraging them to dialogue with each other i.e. saying what they really felt and wanted.
- They used flip charts to draw their own personal current reality and their future vision, which they then described to each other.
- We created the Top Team's outline vision for the company in 5 years, primarily so that they could experience the value of our six-step change process and identify any major differences of opinion.
- We agreed the selection and role of the Champions and how the corporate change programme would be communicated to all staff.

I facilitated a one day workshop with the Champions Group (Top Team plus 13 others, totalling 18) in order to:

- Create the team
- Agree their role:
 - Contributor
 - Communicator
 - Change agent
- Capture their concerns and expectations.
- Feedback my findings on current corporate reality.
- Finalise the dates of future meetings and workshops.
- Finalise communications to other staff.

We developed a 360° personal profiling service around the 5 areas of effectiveness we would be covering during the programme.

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Phase 2: Recognise

We developed and presented a 2 day Personal Effectiveness Recognition Workshop Programme for the 18 Champions.

We developed and facilitated a 2 day Visioning Workshop for the Champions Group based on the following six-step change process:

1. Current reality
2. Future vision (in 5 years)
3. Barriers to achieving 2
4. Sustainers (beliefs and values)
5. Consequences of
 - (a) not changing
 - (b) achieving future vision
6. Commitments

The workshop was highly experiential as we wanted to engage their hearts as well as their minds and also appeal to the different learning styles/intelligences you get in any group. We used mind mapping for current reality. They built a physical model to depict the various aspects of the company's future vision. They built a wall on which they recorded the barriers and sustainers. We used theatre and board breaking for consequences and they openly shared their level of commitment to the vision.

During the workshop a major paradigm shift occurred regarding the identity of the customer.

In the following weeks I worked with small sub-groups of Champions on:

- Mission
- Values and behaviours
- Tidying up the future vision
- Critical success factors.

I also helped them prepare an annual 2 day Company Forum attended by 45 of the 110 employees. We used this Forum to spread the message out from the original 18 to an additional 45 people. We gave the 45 a progress report, emphasising the need for change and asked for their input, particularly on how to implement the strategy. Each Champion, other than the Top Team members, gave a presentation or facilitated discussion groups during this meeting. All participants completed a questionnaire which helped us assess their level of understanding, concerns and commitment.

As an associate of The Benchmarking Centre I arranged visits to 2 companies outside their industry sector but which also used distributors or channel partners. The Champions who came on these visits presented their findings at the next full meeting of the Champions Group.

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2 day meetings of the Champions Group were held in early June, end July and early September.

At the June meeting we:

- Agreed the Company's mission and vision
- Continued defining the critical success factors
- Started work on business objectives and milestones
- Agreed the company's values and behaviours
- Decided what/how to communicate

At the July meeting we:

- Finalised the critical success factors
- Set up sub-groups:
 - (i) on culture change and skills audit
 - (ii) to plan the October Business Conference
 - (iii) IT strategy
- Agreed responsibilities for preparing the business implementation plans
- Decided what/how to communicate

At the September meeting we:

- Finalised the business implementation plans
- Finalised our thoughts on the October Conference
- Agreed how to implement the culture change programme and skills audit
- Brainstormed which areas of the business could be simplified

Phase 3: Implementation

In October all 110 staff attended the 2 day Business Conference, which was devoted entirely to launching the new strategy and implementation plans. I had helped shape the programme, rehearse the speakers and brief the group leaders. The Champions presented the sessions and led the discussion groups. Day 1 was primarily on the vision and strategy and getting sign off to this. Day 2 was devoted to implementation.

Phase 4: Sustain/Accelerate

In the months following the October Conference the company has concentrated on implementation at personal, team and organisational levels, and starting to align the structures and procedures to sustain/accelerate the strategy. For example the teams are to be reorganised (staff were told in October that this would happen).

All directors, managers and staff have attended our 3 day Personal Leadership Programme.

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Year 2

One of the challenges in Year 2 will be to sustain Year 1's learning and achievements. In Year 1 we also raised awareness in e.g.

- strategic thinking/planning
- knowing oneself and valuing differences in others

and we plan personal development in these and other areas for appropriate staff.

The top 12-15 people will commence a Leadership by TLC programme.

A 3 day skills programme will be designed and delivered by TLC for team leaders. This will provide participants with basic leadership skills such as planning, delegating, making decisions, solving problems, listening, appraising and understanding financial information.

At team level, staff will examine the characteristics of high performance teams and tailor these characteristics to fit their business and structure. We will design and deliver any team learning/development events e.g. on building trust and increasing co-operation within and between teams and with other businesses.

At organisational level selected staff will be encouraged to identify world class organisations and to share their findings with the rest of the staff.

I also anticipate the company agreeing a performance management system to align the company's strategy and goals to team and individual performance.

Year 3

I anticipate the company introducing organisational learning (knowledge management). This will be a model for the rest of the business.

A 2 day Effective Coaching Skills workshop will be held for the top 12-15 people and mentoring from TLC will be available on a say 3-4 monthly basis.

The company will introduce an Innovation programme.

Richard Fox