

Copyright © by WM Symposia. All Rights Reserved. Reprinted with permission.

ABSTRACT

Implementing an organization change is challenging, because many changes touch unexpected organizational units and processes, requiring unplanned inter-group communications and collaboration. Organization change communications can be designed to engage people, and to coordinate their actions for a successful change completion.

Leadership communication focuses on presenting the idea for an organization change as a purposeful and worthwhile process that will deliver benefits to the organization and its customers and stakeholders. A series of discussions with personnel to clarify the change objectives, success metrics, and timelines serve to engage them in productive participation in the change process. Management communication ensures that the actions taken will be effective to accomplish the intended results and benefits of the change. The depth, detail, and orientation of the information delivered in these three types of communication is different, but the intention, in all cases, is to have people work together to successfully complete the goal(s) of the change.

An example of these communications is included in this paper, focusing on the communications of a change leader. Change leadership communications are usually delivered by high-level people but can be delivered by individuals at any level. They speak a vision for a possibility, i.e., a new future, in a way that engages people in its value and desirability.

The shift from change leadership communications to change management communications is best made as a collection of dialogues with groups of people who will be leading, managing, supporting and/or participating in various aspects of the change. These dialogues take several forms, including Q&A sessions, dialogues to clarify what “success” will look like, and discussions that develop management tools and practices for the change. These “engagement” discussions create a bridge from leadership vision to management implementation.

Change managers often head up departments, teams, or smaller groups. Their communications are designed to have group members participate in refining the change goals into team goals, measures, and assignments; collaboration with key players; and tracking and updating elements of the change process as it progresses toward completion. This work is often more daunting than the leadership phase, due to forces of increasing detail, complexity, and disorganization over time, such as unexpected interruptions, changes in resources, and new requirements for coordination.

INTRODUCTION

Much of organizational work is fairly routine, even where creativity, technology, or courtesy are required. Furthermore, in organizations with policies, processes, and procedures that are clear, obvious, and well used, leadership and management may be blended and flexible: people know their jobs and do them properly. But organization change is special: whether the change is large or small, structural or functional, simple or complex, it requires communication that is highly intentional and consistent, with regular doses of follow-up. In organization change, leadership communications are especially useful, engagement dialogues and discussions are crucial to activate participants, and management communications are especially important to implement the intended results.

LEADERSHIP: FROM VISION TO ACTION

Organization change begins with a vision and intention for a new future – one that is different from the future we are currently moving toward [1]. Ideally, the change will end with a full realization of that future. To this end, change leadership communications focus on *what* will change, and *when* and *why*. They also identify the people to be involved in – and affected by – the change and express the anticipated value and benefits of accomplishing the change successfully.

Leadership communication that introduces a change for the first time or provides leadership for a change process that is being revised or updated, does not require details of specific tasks or results. Think of President Kennedy saying, “I believe that this nation should commit itself to achieving the goal, before this decade is out, of landing a man on the moon and returning him safely to the earth.” No details about propulsion, training, or space suits are necessary.

Leadership communication creates a vision for a possibility, engaging people in recognizing that new options are available for their organization and its vital relationships with others in its external environment. When leadership communications are delivered after the change process is underway, they remind people that success is possible, and refresh an understanding of the benefits of making the vision a reality. Leadership communication also sets people up to participate in discussions that address their questions or concerns about the change process and offer their ideas for improving the process.

Mobilizing people toward engagement in changing an organization’s structure, strategy, and/or operations, is sometimes referred to as “inspiration”, “influence”, or “motivation”. But if it is well designed, leadership communications create a strong foundation for organization change by gaining a positive reception from participants. This is done by clarifying the basic facts of the change, then encouraging dialogues and discussions to answer questions and develop ideas about what a successful change process could look like and how to support its success.

Basic Change Communication: Facts, Participants, and Vision

Introducing an organization change to the organization’s personnel begins with giving people an understanding of the change itself, and the vision for the new future. Developing this leadership communication usually requires both imagination and big-picture thinking, often with the support of other well-informed people, whether peers, higher-ups, or external specialists. The communications, whether to launch or to revise an organization change, introduces the facts of the change; the different people who will be involved; and the greater vision and purpose for the change [2].

1. **Facts about the change:** To give people reassurance and honest and complete information is important here, as the first reactions to hearing about an organization change often include apprehension. Those facts address three questions:
 - a) What will be changing? The answer includes a summary overview of the entire change and any major sub-changes affecting organizational units and/or processes. Nothing long or complicated, just a few statements about each will do for the initial introduction. The answer to “What will change?” gets ever more detailed in subsequent leadership, engagement, and management communications.
 - b) When will it happen? Providing an estimated timeline for completion and for various stages along the way can be updated in subsequent communications as the change process goes forward.
 - c) Why are we doing this? Solid and straightforward answers support good alignment among personnel and groups for participating in the change process. This includes logical and easily understandable statements addressing such (often unspoken) questions as:

What calls for this change now? What will be possible after we make this change that is not possible now?

2. **Players for the change.** Answering the “who” questions – the people involved in this change and what role(s) they will play – enables participants to create their first-draft image of the scope and complexity of the change. Good questions to address are:
 - a) What individuals and groups will be responsible for overseeing and coordinating the change process?
 - b) Who will be the main participants in implementing this change, and who will be the primary resource providers and the primary beneficiaries?
 - c) Who – inside and outside of this organization – will be affected directly, and who indirectly? And in what ways will they be affected?
3. **Vision and purpose:** Speaking a vision is sharing a possible new future. This final portion of the change leadership communication is reserved for last, because participants will now be able to hear it without wondering about the reasons for the change and their role in accomplishing it. This communication has three elements, each addressing approaches to the new future:
 - a) Where, exactly, are we going with this change? The answers can describe what the new future is expected to be like: what will look different, or what will function in a new way. If possible, it is also useful to say when might these new things first be visible, and when will they be complete. Sketching out the post-change future in this way makes it more real for people and begins to engage their thinking about it.
 - b) Why should we go there? Outlining the value of making the change includes speaking about the benefits of the change to the organization as a whole, to its component parts, and to key players in the external environment.
 - c) What are the next steps? This final element of the leadership communication moves people toward a next phase of interaction: dialogues and discussions on future-building rather than announcements and descriptions. The answer to “What’s next?” will, of course, be customized to the organization, the change, and the situation. But a workable starting point is to create some version of this: “We will work together to define success, identify challenges, and develop the best pathway and processes that will take us to a successful completion of this change.”

This same format for the three types of “basic change communications” – facts, players, and next actions – can be re-used and modified at many points during a change: in the middle, at the end, and when there are notable successes or failures. Change leadership communications over time are the opportunity to add new specifics about the change that arise as the process unfolds. They serve to help people align behind the change and update the playing field on which it is taking place. Change leadership communications can ignite (or re-ignite) an interest – and a willingness – to participate positively over coming weeks, months, or even years.

ENGAGEMENT SESSIONS: THE FOUNDATION FOR ACTION

When the change leadership communication(s) have been delivered to personnel who will be involved in the organization change, a new phase of change communication begins. Q&A sessions come first, to interact with people’s perceptions on the proposed change and to hear their feedback. These are followed by “Success” dialogue/discussion session to capture ideas on what the change will look like and how to have it be successful [3]. The third kind of interaction, Management Development Discussions, begins to shape the tools and practices necessary for change management.

These discussions are usually done in smaller groups – perhaps teams, departments or cross-functional pairings of groups – rather than entire divisions. It is helpful to include a record-keeper, i.e., a person (and/or a recording machine) to capture what participants ask, what answers are developed, and what concerns are most prevalent. This information to clarify goals, tasks, and key players will be valuable to the change leaders, planners, and managers, to update information, issues, and ideas as the discussions progress. This helps to avoid reinventing solutions and to alter future leadership communications as well as improving the change process itself.

Question and Answer Sessions

Engagement sessions for organization change are designed to ignite interest and engage people in investing in the creation of some new projects or processes, and perhaps on dismantling some old ones. Even though questions may have been asked and answered in the early leadership communications, these small-group opportunities allow for a deeper dive into the facts of the change with even more specific and topical discussion.

The Q&A Sessions assist people in clarifying their understanding of the basic change communications – the change facts, participants, and purpose – and resolving any concerns they have about them. Q&A Sessions also serve to refresh those basics elements of the change process for people, and to invite their feedback – problems, solutions, and ideas – on each topic. Engaging participants in the change by encouraging their participation in Q&A sessions pays off in the quality of their investment in the change.

Success Discussions

Success discussions encourage people to provide input and ideas on ways to observe or measure the success of the change, as well as possible challenges that may occur. These discussions will include most of the organizational change participants, and perhaps some other external players as well. The purpose is to lay the groundwork for developing appropriate change-management “structures”, i.e., tools and practices, for accomplishing this specific change. A set of questions to stimulate this discussion has been compiled from a variety of change managers, and is given here:

1. What will a successful change look like?
 - For this change, how will we know when we are succeeding?
 - What are the milestones or timelines that will let us see our progress?
 - What accomplishments are we most likely to observe along the way?
 - How will we know when we need to stop and re-think our plan or our strategy?
2. What kind of challenges could we anticipate?
 - With this change, what are the biggest problems we could encounter?
 - What are the most likely barriers to our success?
 - At what points might we have to solve problems we have never encountered before?
3. If an organization change process is a recurring cycle of 4 parts – “Create-Start-Collaborate-Stop” – then, what can we say about each of those parts of the cycle?
 - Create:
 - What tools or technologies do we need to create to have this change succeed?
 - How will we know when we need to innovate, or create a new approach to our goal?
 - Start:
 - When do we start doing each of the various steps in our change process?
 - How will we handle starting a new step or direction with our collaborators?
 - Collaborate:

- Which parts of our organization will be changing the most – and what collaboration will they need to support their success?
- What changes do we foresee in our own internal interactions? Or with our Users or Customers? With our Resource Suppliers, or Regulators? How will we handle those changes?
- Stop:
 - What things we are doing now will we stop doing at some point in this change?
 - What is required to stop some activity or deliverable when others are involved?

These big-picture questions provide opportunities for dialogues and discussions among people at all levels in the changing organization. Every group at every level has a unique perspective on the functions, groups, and processes in an organizational change – and their input is valuable to integrating the whole.

Talking about performance and accomplishment in this way engages people in *creating* the journey from vision to action, rather than simply following the lead of others. The main idea is to support them in contributing their best, all the way to the end.

Management Development Discussions

Finally, the shift from big-picture discussions of change to preparing for change implementation creates an interface with the requirements for change management. Successful change management relies on structures, tools, and practices that frame “performance” in terms of goals, results and outcomes, as well as productive relationships among players, schedules, and interactions [5].

Inspiration and motivation become less important here, giving way to the eventual need for clear assignments of responsibility and clear agreements for taking actions and producing results (which, admittedly, have their own value as motivators). There are four areas of new knowledge, first introduced and developed in the leadership communications and discussions, that can now be explored and given more detail. One simple way to summarize this is shown in Table 1.

<u>Outlined in leadership communications plus Q&A and Success discussions:</u>	<u>To clarify for change management:</u>
Change what, and when →	Goals and milestones
The new future →	Success metrics
Key participants →	Productive relationships
Change process as collaboration →	Change process specifics

TABLE 1. The Leadership-Management Interface: From Generalities to Specifics

If the ideas, concerns, and suggestions from prior meetings – the Q&A Sessions and Success Sessions – have been recorded and edited, there will be a substantive summary of what change participants have contributed to the leadership communication of the change’s “basic facts”. At this point, there are discussion questions that can be used to support the development of change specifics even further and assist people in moving from general ideas to creating a framework for change management. To develop the management tools and practices, it is important to collect the feedback on the most appropriate of these questions:

1. **Goals and milestones.** The facts of the change – what will change and when it should or will happen – have already been talked about. Now that people know what the big-picture changes

are, they can look at the many other, smaller changes that will be required to accomplish the larger change goals. Questions that support this development include:

- a) How can we state the overall goal of this change so people will understand the value?
 - b) What other changes do we see will be needed to accomplish the overall change goals – and how could we state the goals for each of these sub-changes?
 - c) How long might each of these changes take? And in what sequence should they happen?
 - d) What are some useful milestones and timelines to observe our progress along the way?
2. **Success metrics.** So far, people understand what the new future is expected to look like. They have also talked about the hoped-for value and benefits to key players and have considered some of the challenges they may encounter in this change process. People can draw on that to develop ideas about how to measure success, answering questions such as:
- a) How will we measure the success of this change?
 - b) How can we measure the value and benefits?
 - c) What are the most important accomplishments of this change?
 - d) How will we know when we've finished the change successfully?
3. **Productive relationships.** Participants in the change have been identified in terms of internal teams, departments, and offices, as well as external customers, resource providers, and stakeholders. But the new relationships among these participants need to be defined, beyond simply talking about “collaboration”, to support effective interactions. Useful questions for these discussions are:
- a) How will the relationships among these key participants be different in the new future than the way they are now?
 - b) Will each group send and receive the same or different things, to and from each other?
 - c) Who needs to work together to accomplish each of these changes in relationships?
 - d) What will make those changes easier for everyone involved?
4. **Change process specifics.** The change process itself may have been outlined only in general terms such as “coordination” and “innovation”. More specifics are needed to support change implementation. Some questions that can be brought to these discussions include:
- a) What do we see as the stages or steps of this change process?
 - b) When – on what schedule – will it be best to start and stop different sub-changes?
 - c) Who will work together, and when, and how? What are the key relationships that will make this change most efficient and effective?
 - d) How can we measure the success of our change process overall, from here to the finish?

It is not unusual for people to want to move the leadership communication even further into developing the specifics of the change. This sometimes takes on a life of its own, with independently created or manager-assigned small-group dialogues that elect to “brainstorm” on *how* to make the vision a reality, *who* should be involved, and *where* the resources can be obtained. The conversations that shift to a more detailed and practical view of smaller sub-changes may continue to dive even deeper, such as outlining various programs or projects to accomplish their goals, and/or defining policies or practices that support more productive relationships in the future.

ONE EXECUTIVE'S CHANGE COMMUNICATION AND SET-UP FOR MANAGEMENT

Larry, the CEO of a property management company, faced a challenging organization change. He explained how he communicated his vision to each of the five sub-groups of the company. “I was straightforward about it”, he told me. Here's what he said.

“Hi, everybody. I’ve got some shocking news for you, so please stay with me. Our Board has agreed that we will outsource our company’s property maintenance function. That means we will put our property maintenance work out for bid to a new Property Maintenance Vendor. It also means we will transition one-fourth of our workforce out of this company – to be hired by a new property maintenance company. We will support these people in getting new positions, or in retiring if they chose that option. Instead of giving our personnel a lot of details on strategy, revenue, and expenses, I have painted a simple picture of what we are going to do.”

What Larry did at the five separate “Change Introduction” meetings he conducted was to show each subset of his employees a diagram of the five departments in his company. Each was represented by a colored box, as shown in Fig 1. The Maintenance department was drawn as an interconnected part of this first diagram, linked to all four other departments by its agreements to send and receive certain products, services, and communications.

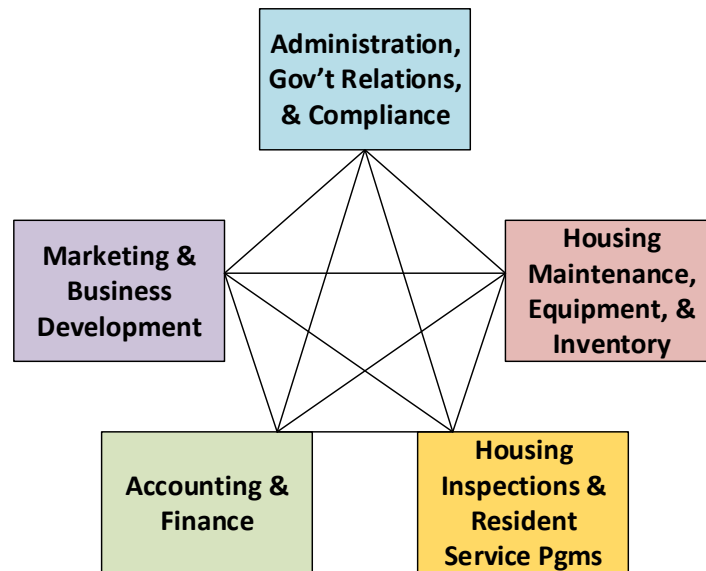


Fig 1. Larry’s Property Management Company

In his second diagram, Larry showed the same pattern, but added one other box to represent the new Property Maintenance Vendor.

Larry said to his audiences, “I took the corporate-coloring out of our Maintenance box, to indicate that they were moving over to Vendor-land. Aside from the un-coloring, Larry also moved the Maintenance department over next to that new Vendor box and changed the lines between Maintenance and the other four corporate boxes into dotted lines, as shown in Fig. 2.

“There are two main things that are going to change”, he told them, “and a thousand little ones. First, the people in the Maintenance department will be working in another company – in a different place, with new managers and co-workers. Second, the connections between the new Vendor’s Maintenance people and everyone who stays here will still exist, but they will be different. And it will be our job, working together, to determine what those connections need to look like.”

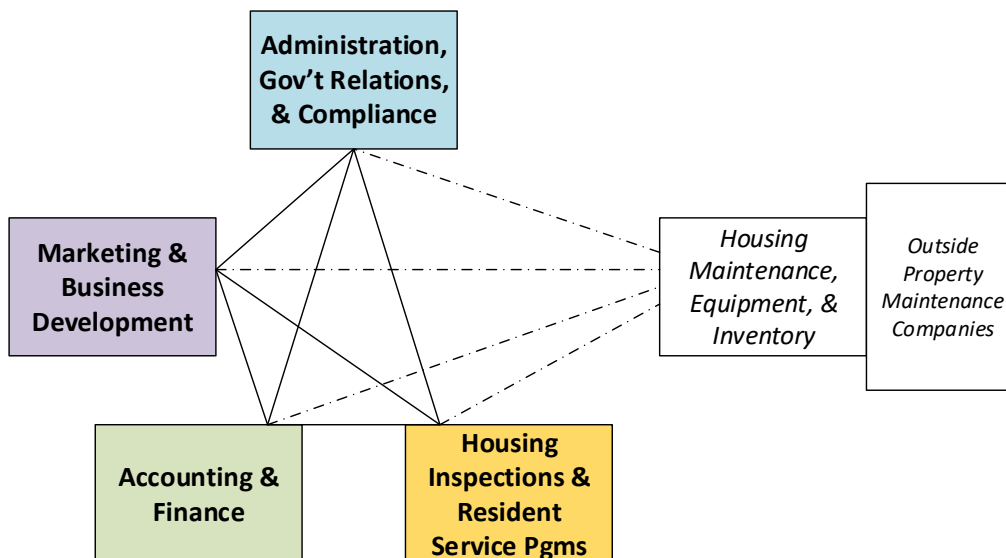


Fig. 2. Outsourcing the Maintenance Department

Larry paused to let this (very big) news sink in, then said, “I have some other things I want you to know, and then we’ll take questions.” He went on to say that:

- “The purpose of this change is to make the company’s focus tighter and more responsive to increasingly complex regulations around property management in the different communities we serve. Remember, they each have different budgets and expectations. We want to do a better and more economical job for our customers, and to stay competitive in our community.”
- “Maintenance is a special kind of expertise. Those of you in Maintenance need more – and better – support than we can give you now. We will help you get jobs, hopefully in the new Vendor’s company or someplace else that is larger than we are and can give you even newer equipment and better pay raises than we can afford.”
- “Those of you who are not in Maintenance deserve better support in working effectively with Maintenance people and their specialized work and scheduling demands. With this change we will be able to give more attention to that.”
- “The way this is going to unfold will take 8 months, starting now with a 3-month planning and preparation process. Then the bidding process starts in November and the final turnover will happen in April. Each of you in Maintenance will be able to choose whether you want to make the change to a new employer, take retirement, or accept a severance package. You will work with our Administration’s HR people to tailor the solution that is your best fit. We want to do our best for you, as you have always done for us.”
- “Our biggest challenge will be re-establishing relationships with our property residents and the many local, state, and federal regulatory groups we work with. That’s why we are going to work together with our Service and Compliance departments to clarify how we can spell out new ways to coordinate, both internally and externally. Service is why we’re here. Compliance is how we stay here”.

Larry took questions – mostly about the timing of the change and whether people in other departments were also going to lose or change jobs. Some people were shocked and upset, while in each of the five meetings, two or three people expressed a desire to start working on the plans for transition to the new arrangement. Two of the four non-Maintenance department managers scheduled time to meet with the

Maintenance manager and his supervisors to begin transition planning. The other two Department managers agreed to meet with one another first, then bring a draft plan to both Maintenance and the Administration's HR managers, regarding the financial and legal issues around the transition. Before each meeting ended, Larry called for people to sign up for discussion groups to deal with more questions, concerns, and ideas about the change.

For the launch of a potentially devastating change, Larry's communications started with the "basic facts" of the change, then began the shift from leadership to management very well. He gave an overview of what would change, reasons for making the change, and the timeline for the whole process. Larry also spoke about the value and purposes of the change, although it was a worrisome one for some people in the firm. Importantly, he assured people of personal and customized assistance in their own transition.

Then he set them up for what was next: further conversations about the change that was coming. In some of these subsequent meetings, he had "Change Team Leaders" facilitate discussions about success, goals, and key relationships between groups. People began looking at ways to accomplish the organization change in concert with others, and to bring order to the 8-month change process. The leadership emphasis on vision and action moved naturally toward a management-stage emphasis on responsibilities, results, and timelines.

Discussions Shift from Leadership to Engagement – Toward Change Management

Larry's leadership communication wasn't fancy, but it gave everyone the basic information and a chance to ask questions about it. Their responses were captured and used to customize the next discussion sessions: Q&A, Success, and Management Development. He did not go into detail about the key external players who would be associated with the changes, although his mention of regulators, community requirements, and residents reminded everyone of their external environment.

The discussions soon produced the necessary ideas for management tools and practices. The Change Team Leaders shifted attention toward localized management for various change projects and activities, operating in coordination within and between the company's five departments and key external players.

MANAGEMENT: FROM ACTION TO ACCOMPLISHMENT

The work of management is to revise (or create, as needed) and operate the performance structures, practices, and communications that support people in focusing on the goals, results, and outcomes that will turn a vision into a reality. This process is usually much more daunting than the leadership phase, due to forces of increasing real-world complexity over time, such as unexpected interruptions, changes in resources, and new coordination requirements [5].

A successful organization change that has a clear vision for the future, a statement of value and purpose, and specified key players, needs only to coordinate people in acting purposefully for its accomplishment. The information gained from the "Engagement Session" discussions can be further developed, in partnership with others who will be working on various aspects of the change, to create two change management tools and one key practice that support team alignment and progress. The first tool is one or more Scoreboards; the second is at least one "Player's Map"; and the key practice is to schedule regular status review and update meetings for change progress toward the goal(s).

Tool #1: Use Scoreboards to Support Accomplishment

A scoreboard is a visual aid that helps keep the change "game" alive and accessible, not in people's "hearts and minds", but in the daily world of their conversations, report headers, meeting agendas, and even email subject-lines. Of course, a scoreboard must be updated regularly, or people will stop paying

attention. Scoreboards come in different arrangements and levels of complexity, but they should always let people know where things stand.

Scoreboards are best designed by whichever group(s) of people will be responsible for completing a change, or a well-defined portion of a change. They can customize it to their objectives: one scoreboard can be associated with a single objective, include multiple levels of sub-goals, or focus on different things such as productive relationships with other change players.

In the example of Larry’s property management firm, people came up with some good ideas in their meetings to start organizing the work to be done. Jake, a Maintenance supervisor, summed it up, saying, “We used that second diagram Larry gave us (Fig. 2), and talked about what the future would look like for us in Vendor-land. We saw the first job would be to find the right company to take over our maintenance function. We figured getting the request for bids out is a job for Administration, but we want a say in it too, so we connected with Administration and set up a few meetings.”

“After that,” Jake continued, “there were still five boxes on that diagram, and each one needed to look at what they need to do to make this change happen – and who they’ll connect with to get it done. All five groups also need to look at the future – what they’ll need from each other, and from the new Vendor, after Maintenance is outsourced and operating someplace else. We decided that each of those boxes needs their own scoreboard(s), and each Department should bring their scoreboard to every meeting we have together.”

Jake propped up his Maintenance department’s first-draft scoreboard on the table and enjoyed the fact that everyone in the meeting laughed at his statement of the goal on Line One (see Table 2). “It’s better we have fun with this than be upset about it,” he said. He admitted that there were lots of blanks in this first draft and that it needed much more discussion. But he was off on the right foot, even though he would need to add other columns or make additional scoreboards later.

<i>MAINTENANCE GOAL: GET TO VENDOR-LAND!</i>				
Company Departments	Tasks	Goal	Owner(s)	Timeline(s)
Admin / Human Resources	Transition help for staff	All Maint. staff OK	Sharon	Start now!
Administration & Compliance	Maintenance input on request for bids	New Vendor contract	Jake	Start now!
Marketing & Business	?	Alex	Alex	?
Accounting & Finance	New report format and data requirements	Reports updated	Alex	After new company is selected
Inspections & Resident Services	Prepare weekly reports on what residents want	Resident need documents	Jake	Start resident meetings next month
New Maintenance Company (Vendor)	?	Smooth & easy transition	CEO / Admin	April

TABLE 2. The Maintenance Department’s Task-Goal Scoreboard

The idea of using a “task-goal scoreboard” like this one showed early benefits by providing a visual reminder of what needs to be done, who will do it, and by when. It was updated at every meeting – adding more information, clearer statements of goals and timelines, and changes of owners as

appropriate. People at each meeting had an opportunity to contribute ideas, ask questions, and observe how activity in the change network would affect their work and interactions. At each meeting, participants took notes to update what they needed to do, or delegate, before the next meeting.

Another Department manager, who had a task-goal scoreboard like Jake’s, described the way he used it this way: “I put our team’s overall goal statement at the top of the board. Then the whole team met three times in the first two weeks – for 2 or 3 hours each time – just to get clearer about the tasks, the sequence they should be in, when each one should be finished, and which of us should do them. Sometimes people got annoyed, but mostly it was interesting to figure out a whole new pathway to getting something done the way we wanted it. When we settled into weekly meetings, they were short and sweet. We used them to track our progress and see where we needed to add something we hadn’t thought about before, and we erased completed items. That is, after we took a picture, of course, so we could report our results at the bi-weekly Company Meetings.”

Two other scoreboard formats have been successfully used by other change managers – one for a change team, and the other for relationships between a team and others inside and outside the organization.

Team Assignments Scoreboard. Another way of organizing management data for a group or team is by the name of each team member. One manager said, “We make all our team members’ project accountabilities and timelines visible to everyone. That way, everybody knows what everybody else is working on. It has helped collaboration, with people pitching in and sharing expertise. Our meetings review the status of each project to see if there are any changes in timelines and resources and decide how we’ll assign new tasks and projects.”

It is also useful to assign responsibility for managing key relationships with other groups to one or more individuals on a change team. Who will engage the key Executives in identifying the actions and results necessary for financial backing? Who will create and facilitate a research group to evaluate options for implementation? Who will work with key legislators to gain support and shepherd a bill through committees for eventual adoption?

The Team Assignments scoreboard makes individuals and their responsibilities visible and easy to update at each meeting. It supports individual accountability while also ensuring that team members can see – and weigh in on – what needs to be done overall and support one another in assigned tasks and projects. The template shown in Table 3 can be customized to create a scoreboard that includes all team members.

People	Project-Task & Partnership Responsibility	Results Due	Due Date
<u>Team Members:</u> 1. 2. ... etc.	_____ _____ _____	_____ _____ _____	_____ _____ _____
<u>Other Players:</u> 1. 2. ... etc.	_____ _____ _____	_____ _____ _____	_____ _____ _____

TABLE 3. Team Assignments Scoreboard for Change Tasks and Relationships (*Template*)

Inter-Group Scoreboard. Jake’s Maintenance Department put inter-group information on a simple scoreboard posted in his team’s conference room. It got more detailed over time, but his first draft is

shown in Table 4. Jake said, “There were certain parts of this change that we were especially interested in knowing about – and maybe even weighing in on. We felt we needed to know what they were doing and who to talk to about each one. We wanted to give input on some things, so we took on those key relationships to check in with them every week.”

Too often, the people who initiate an organization change fail to integrate the change into all ongoing operations of the organization. The use of a scoreboard, with information about what others are doing, can serve as a reminder to communicate with other change participants (or those impacted by the change), elsewhere in the hierarchy. Coupled with a Player’s Map (see samples in Fig’s. 1 and 2), scoreboards remind the change team that they are operating in a task-relevant environment and need to maintain integrity with the larger organizational change process. By keeping the big-picture view on tap, the team can re-align with the full network of change operatives as needed.

Goals & Milestones	Key Relationships	Due Dates
Bids released - Staff decisions on stay or retire - Vendor selected - Equipment decisions made - New Vendor chosen - Turnover meetings - Turnover complete -	- Admin, Finance, Business - HR - Inspect’s, Resident Svc, etc. - Inspect’s, Resident Svc, etc. - Admin, Resident Svcs - Vendor + All Dept’s - Vendor	<i>Check in with these people every Monday, get updates every Friday by 3:00 PM, and schedule meetings as needed.</i>

TABLE 4. Jake’s Change Management Scoreboard

The bottom line on scoreboards is that all managers and team leaders can use them, but change management takes people into new territory. A scoreboard helps to make the change’s progress visible, supporting discussion about it at regular meetings. Scoreboards show, at a minimum, the team members and other key players involved, their respective agreements for results, and the due dates or timelines for delivery. It is also useful to identify the goal or objective to which each task or project responsibility is linked. Being able to identify goals associated with each task supports more recognition and understanding of the work that is really required by all sides in the ever-changing network of commitments.

Tool #2: Use a Player’s Map to See Your Change Environment

Larry’s “paint a picture” gambit was more than a clever way to show people what was going to happen. It became a vital tool in seeing which players were in good communication with others, and where the communication-connections between certain groups needed more support or guidance to be effective. He kept it on the wall in the main conference room, and soon saw replicas hanging on walls in other discussion rooms. Several discussion groups brought their observations about some groups that were not participating fully, or new groups that needed to be added into the diagram.

“Now I see organization change as a game,” Larry said when his company’s change was complete. “There is a beginning, a middle, and an end. There are scores, and time-clocks, and interactions among all the players that are hard to see all at once. You need a way to watch and keep track of what is happening, especially if it is critical to success. This change worked, but I think one factor was that we embraced the whole playing field right from the start.”

The value of a Player's Map is that it makes the connections between groups visible. Usually, attention in an organization change goes to the individuals and groups involved. But the action happens on the lines: requests are made, agreements are established, and results are delivered – or, too often, they don't happen and nobody notices, causing failures on timeline and budget targets. A Player's Map ensures that the “outside world” beyond any change team will be recognized and included in planning and change operations.

The Management Practice: Regular “Change Huddles” for Integrity and Accountability

Built into the use of visual displays such as Scoreboards and Player's Maps – whether they are displayed physically or online – is the assumption that regularly scheduled meetings are vital to moving change forward. Team meetings can use those displays to ensure that people look at the overall status and the players involved, communicate the status of their assignments, and report on their observations about the goings-on inside and outside of the change team. Four things are important for effective huddles: reliable scheduling, a standard agenda, agreements for attendance, and updating the Change Team's Scoreboards and Players' Maps.

1. **A reliable meeting schedule** establishes new patterns of work habits and communication for all players. Ad hoc meetings are disruptive to schedules, and do not encourage people to be prepared to report their results to the team. Many managers save them for emergencies only.
2. **Use a standard agenda** for all change team meetings. What's the agenda? Start by using one or more of the Scoreboards and/or Player's Maps described above. Customize them to the best fit for organization changes and team responsibilities. Whether the scoreboards are on paper, on a handout or a flip-chart, or in a spreadsheet projected onto a whiteboard, the visual structure will organize the conversation and focus attention. Scoreboard-agendas make meetings more efficient, guiding meeting conversations through the same things every week. People learn what they need to be prepared to report, and what tasks or responsibilities they may be expected to take on. Meeting times often shorten.

“I just go through each line,” one manager said, “and have the team member accountable say something about where things stand and what they need. Sometimes there is a problem we can solve in discussion, other times a project manager collects people's ideas to take back and work things out with his team.”

3. **Take meeting attendance.** Too often, meetings are a poor use of people's time: either necessary people are missing, or unnecessary ones are attending. Be clear about who must attend, who will be consulted prior to the meeting, and who will be notified of meeting results. And set the expectation that the right people will attend all meetings whenever possible.
4. **Use the meeting to update all displays.** The Player's Map changes over time, and elements in the scoreboards, including assignments, players, and due dates, will need to be added, changed, or deleted. The visibility and accuracy of maps and scoreboards are the team's primary responsibility and support members' conversations for accomplishment. When someone listed on the scoreboard cannot be present, they can update the status of their tasks and projects before the meeting, so everyone will know what has been done, and can update the rest as needed.

CONCLUSIONS

The three-stage journey of organization change – from vision to engagement to accomplishment – entails a necessary change of focus: from the big-picture view, to a closeup engagement with change

participants, ending with the operating structures of management. Without leadership, the basic facts of the change may be muddy and misunderstood, and a more visionary context of value and purpose can be missing. Without engagement discussions, the ideas of people at the top may be ill-informed about the working reality of details in operational corners far from their view. Without management, the necessary – and daily – coordination of people, assignments, and resources could be neglected or impaired.

Engaging people effectively in organization change is a matter of creating the bridge between the big-picture view and the nuts and bolts of management: task accomplishment, coordinating communications, and tracking results. Too often this bridge is missing, setting up managers for failure. Discussions to clarify the change in detail, creating ideas for goals and milestones, success metrics, and necessary relationships among key players, are powerful magnets for helping people invest in change. These discussions, reaching between leadership and management, will sketch out and develop the change process itself.

Leadership speaks the future to be accomplished, not just once but frequently, keeping the process energized and accurately presented throughout the change. Well-designed and thorough discussions, grounded in operational reality, give the change plans and structures their appropriate shape and rhythm. Management communications for organization change – including visual displays of scoreboards and player maps – activate the network of key players to produce, collaborate, and benefit from the change. Leadership, engagement, and management communications are complementary, each supporting the other and collectively defining, organizing, and implementing the vision for a new future.

One final tip: Celebrate the completion of the change, even when it didn't end perfectly. Completion goes a long way to honor the participants and have them be willing to consider changing other things in the future.

REFERENCES

- [1] Kotter, J. P., *Leading Change*, 1996. Harvard Business School Press, Boston, MA.
- [2] Burke, Warner. W., *Organization Change: Theory and Practice*, 2017. Sage, Thousand Oaks, CA.
- [3] Isaacs, W., *Dialogue and the Art of Thinking Together*, 1999. Currency, New York.
- [4] Sull, D. N., & Spinosa, C., *Promise-Based Management: The Essence of Execution*, 2007. *Harvard Business Review*, 85(4): 78-86.
- [5] Eccles, R. G., Nohria, N., & Berley, J. D., *Beyond the Hype: Rediscovering the Essence of Management*, 1992. Harvard Business School Press, Boston, MA.