

Mastering Organizational Change
By Barbara A. Davis
(A book review by R. Max Wideman, FPPI)

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Published here October 2018

Introduction

Last month we reviewed Gina Abudi's book *Implementing Positive Organizational Change*¹ that focused on positive communication throughout any serious business remodeling project. In this book, *Mastering Organizational Change Management*,² Author Barbara A. Davis takes a rather different perspective. Barbara describes how to overcome the inevitable challenges involved in organizational change management (OCM), and includes in-depth descriptions of the available range of techniques available for doing so.

As Barbara observes:³

"Many organizations, and indeed many individuals, still hold the attitude that people (employees and customers alike) should just accept that changes are a part of life and readily adopt them.

Thankfully, attitudes are changing. Perhaps we have the Millennials to thank for it. As a direct result of how this generation was raised, we see a massive shift in the way companies operate and manage employees and customer relationships. It is out of this shift that we are seeing a shift in emphasis on social currency. In other words, we are beginning to understand that people don't have to be loyal just because someone gave them a job."

Barbara continues:⁴

"Ultimately, this means that existing companies must change the way they think and act on engagement to manage those critical relationships."

And further:⁵

"The most commonplace approach to OCM in the past at many companies was virtually nonexistent. ... This means that there was no planning, or visibility into planning by people outside the executive suite, no communication until the changes were to be implemented, no input taken into consideration, and little or no follow up. It was often referred to as a *top-down* approach to change management. This isn't an approach; it's a disaster."

The Key Features of this book include:⁶

- A discussion of the barriers to successful change and how to gain a thorough understanding of the business ecosystem before planning and executing any change effort.
- A condensation of the vast number of root causes for change into a few all-encompassing reasons.
- A description of four proven frameworks for managing change, which work best given the barriers to change, the business ecosystem, the reasons for the change, and the project or program objectives and organizational goals.

- How to develop and execute a winning OCM strategy, and the key stages, activities, and techniques best suited to a variety of situations.
- How to measure organizational change, including how to develop and use a *change scorecard* for predicting an organization's ability to make a change successfully, evaluating it throughout the transformation, and after it is completed.

This book is supported by various assessment tools, that include a functional complexity matrix, and a change scorecard template. These are designed to assist practitioners in managing an organizational change project and measuring its success. These tools and templates are available to purchasers of the book by download on line.

About the author

Barbara A. Davis has a degree in conflict resolution and over 16 years of business experience including project management, community development, business ownership, change management and conflict resolution. She is also an international speaker who works with Fortune 500 companies to realign business analysis services and critical struggling projects in order to ensure successful outcomes in the face of conflict and challenging circumstances. Barbara has published numerous articles and authored three more books: *Managing Business analysis Services: A Framework for Sustainable Projects and Corporate Strategy Success*; *Going beyond the Waterfall: Managing Scope across the Project Life Cycle*; and *Mastering Software Project Requirements*.⁷

Book Structure

The contents of this book are set out with an Introduction and 12 chapters as follows:

Introduction

1. The Barriers to Change
2. The Reasons for Change
3. Interpreting the Language of Change
4. The Process of Change
5. Understanding the Business
6. Understanding the Change
7. Who Is Impacted by the Change
8. OCM Approaches
9. Organizational Change Manager Techniques
10. How to Measure Success
11. Creating a Winning Organizational Change Management Strategy
12. Adopting a Culture of Change

The book is well written in a clear and understandable in-depth style that makes for easy reading. As can be seen from the Table of Contents, each chapter focuses on a particular aspect of Change and, up to chapter 10 concludes with a list of references. The text is well supported by a number of good tables, charts and brief actual examples to help the reader understand the content, and exercise practical application.

The fact is that any organizational change is a project whether it be 5 days or 5 years, and this book offers sound advice to that end. The book has a total of 252 pages – it does not include a Glossary of Terms. The contents of this book are somewhat expanded in Part 2 of this article.

What we liked – Part 1

In her *Introduction* and up front, author Barbara Davis makes the point that:⁸

"The reality is that people want to feel as though they have some modicum of control over what happens to them and how they work. Naturally, change that is well managed is going to have a more positive impact on morale than change that is not."

And on the inevitable inertia:⁹

"By employing the right techniques in the correct order, inertia can be used to help motivate people to change when the perception of success with those changes is high."

She goes on to say:¹⁰

"This is why the underlying barriers to change as well as the process of change are so critical for practitioners to now and understand."

And notes that:¹¹

"Change management uses specific communication tools to reach broad audiences and address the issues and feelings of uncertainty that could sabotage any project."

Barbara explains that:¹²

"Four basic strategies that are often employed in change management include: normative, coercive, adaptive, and rational. The normative strategy seeks to reeducate, the coercive strategy utilizes the balance of power, the adaptive strategy proposes that people will gradually adapt to the new circumstances, and the rational strategy appeals to self-interest. However, these strategies are geared to meet various behavioral styles of employees¹³ and do not necessarily consider the other factors of change such as the process utilized or the communication activities¹⁴ leveraged."

"Remember, change management strategies are designed to mitigate the impact of change on both the individual employee and the corporate environment. ... The language and image – or the overall *look and feel* of both the announcement and the foundation of the corporate change itself, whether it is a deployment, new policies, or a merger – should already be consistent with the existing culture."¹⁵

Even though any organizational change is, or should be, a project, Barbara identifies the leader as a "Change Agent"¹⁶ and describes five types of participants with whom that change agent has to deal. These groups fall into the categories of the Nonparticipant, the Heckler, the Hijacker, the Kamikaze, and finally probably the most important group, the Active Participant. We enjoyed these descriptions and recognize the owners of all of them.¹⁷

What we liked – Part 2

The following are brief samples of the contents of the chapters that follow. In fact each topic and more are handled in some depth.

Chapter 1 - The Barriers to Change deals with both Internal and External Barriers

Chapter 2 – The Reasons for Change covers topics such as Continuous Improvement, Facilitated Growth; Scaling Back Operations; and Mergers and Acquisitions.

Chapter 3 – Interpreting the Language of Change introduces the concepts of Listen–to Understand; What People Say and Why; Speak–Being Understood, etc.

Chapter 4 – The Process of Change describes Internal Change–How Individuals Change Themselves; How People Incorporate Change into Their New Role; External Change–How Organizations Change

Individuals; Setting and Managing Expectations, etc.

Chapter 5 – Understanding the Business, this chapter is one of the largest and covers a lot of ground including Business Model; Organizational Structure; Culture; and Customer Loyalty; etc.

Chapter 6 – Understanding the Change covers Business Goals and Drivers; Change Scorecard, People; Process; Technology; Demographics; and Learning Curve.

Chapter 7 – Who is impacted by the Change provides a short chapter on Stakeholder related matters.

Chapter 8 – OCM approaches describes four change management models: ADKAR, KOTTER, IEMO and AIDA¹⁸

Chapter 9 – Organizational Change Manager Techniques is the longest chapter dealing with some 17 tools and techniques available to the change agent. These include for example: Visioning, Needs Assessment, Impact Assessment, Quick Wins, Celebrating Success, and so on.

Chapter 10 – How to Measure Success is, in our opinion, one of the best chapters in the book. It covers from "Before: Setting up for Transformation Success" to "After: Verify and Finalize Results" and everything that may come up in between such as "Reevaluating Progress and Achieving Milestones".

Chapter 11 – Creating a Winning Organizational Change Strategy includes: Business Climate; Ecosystem: Business Readiness; and Elements of a Winning Organizational Change Management Strategic Plan.

Chapter 12 – Adopting a Culture of Change covers Attributes of a Change-ready Culture; Layers of Change; Hiring Change-ready Resources; and Change Fatigue.

Downside

This is rather personal. In her *About the Author* piece¹⁹, author Barbara Davis lists no less than 10 different titles and roles she has held, so one may well ask: "What's in a name?" Well the name is important because she also claims to have interviewed and assessed hundreds of *resources* (emphasis added). The word "resources" appears again in chapter 12 under the heading Hiring change-ready *Resources*. Yes, I know that the use of the label "human Resources" is common practice, but I am glad I have not been one of the interviewees or hires because I don't like being thought of as just a "resource". Isn't that a bit demeaning? After all, whoever they are, they are all *people*, and surely adopting the right attitude towards people in OCM, isn't that absolutely essential?

Moving on, we found Chapter 8 a bit chaotic. There are four OCM changes to describe, but they are not each dealt with in the same way for comparison, nor in our view are they in logical order, see footnote #²⁰.

If you are going to embark on an important Organizational Change Management venture, it seems to us that it would be wise to read chapters 10 and 11 first, and get those recommendations in place before you start. If that is true, then perhaps these chapters would be better placed at the beginning of the book rather than at the end. That's because, as with any project, you want to start with success in mind and know what success looks like from the beginning.

As a point of interest, Chapter 10 includes a subsection titled "Leveraging the Balanced Scorecard". You have probably heard of the name but may not know what it is. Barbara Davis describes it here as:

"The balanced score card is a strategy performance management tool ... that can be used by managers to keep track of the execution of activities by the staff within their control and monitor the consequences arising from these actions."²¹

The Scorecard covers four themes or perspectives: Financial, Customer, Internal, Learning and Growth. Of course each of these have to be defined in some detail and collecting the data on a regular basis is not

as easy as you might think. That's because you have to rely on the information owners to first collect it and then to render it up in a consistent manner. It represents extra work for them, with no evident benefit.

Summary

Chapter 12, as described earlier, provides a fitting end to the book by the suggestion of a "change culture", one in which people readily accept change as a matter of routine. They accept it if it is well managed and they can trust the organization and its leadership.²² That is particularly important in these days of rapid advances in technology. What is cutting edge one day is obsolete the next.

The problem is that the private sector in particular exists in a tough competitive world, and in order to survive, future OCM moves under consideration must remain confidential. That means that the rank and file may have little idea of the whole picture. Rumors are rampant and any organizational change inevitably becomes suspect.

In the case of the public sector, where OCM is probably most needed, it is not about corporate competitiveness because there isn't any and it isn't about being prudent with money, because in practice there is an unlimited supply. It's about saving your place in the face of internal politics, avoiding taking responsibility as much as possible, and protecting your boss when he or she is attempting to climb the political ladder. All of that probably requires a somewhat different approach.

Barbara Davis concludes her book nicely with these words:

"Conducting change in waves is the critical difference between a culture of change and a culture that changes. In doing so, not every one is involved in the change at the same time. In that way, people actually get breaks from the process of change. It is important to remember that everyone needs some sense of stability and a feeling of control. It is in between the waves of transformation that they get these."

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¹ See <http://www.maxwideman.com/papers/implementing/intro.htm>

² Davis, Barbara A., *Mastering Organizational Change Management*, J. Ross Publishing, Florida, USA, 2017

³ Ibid, pp1-2.

⁴ Ibid.

⁵ Ibid.

⁶ Observations abstracted from back cover.

⁷ Abstracted from pp xiii-xiv

⁸ Ibid, p2.

⁹ Ibid, p3

¹⁰ Ibid.

¹¹ Ibid, p4

¹² Ibid.

¹³ In other words, the prevailing *culture* of the workforce generally.

¹⁴ Always assuming that the organization has an active and effective communication structure in the first place. As we have argued elsewhere, some organizations do not give effective communication a high priority.

¹⁵ Ibid, p6-7. That's assuming that the existing culture is a healthy one. If not, presumably a prior project is required to fix that problem first.

¹⁶ Ibid, p10

¹⁷ Ibid, pp11-15

¹⁸ If you don't know what these acronyms stand for (we didn't) they are respectively: 1. "Awareness, Desire, Knowledge, Ability, Reinforcement"; 2. so named after "famed change management guru- John Kotter"; 3. "Inform, Involve, Evolve, Maintain, Observe"; and 4. "Attention, Interest, Desire, Action.

¹⁹ On page xiii

²⁰ Chapter 8, pp 141-157. The order as presented in the book is ADKAR, Kotter, IEMO, and AIDA. As referenced in Table 6 p155, it is the same except that the second is described as "Kotter 8-step Model. But based on the length of Barbara's texts we think the order of the last two should be IEMO last because it is the longest description at over 8 pages compared to the others at only 2 or 3 pages.

²¹ Ibid, p199

²² Ibid, p233