

Managing culture change

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Key learning points

- Change is a political process and needs to be managed.
- The key roles and people in the change team.
- Managing sponsors as part of the change team.
- The need for rapport between the external change agent and the internal trainer.
- Identifying vital issues for resolution in the change process.

Your role and culture change

Culture is too important to be left to chance or to outsiders; yet, in many instances, the internal trainer or facilitator is left out of the process. This article highlights the importance of you, the internal facilitator or trainer, working closely with an external consultant to facilitate change.

First, focus on the process of change

One of the critical success factors in successful projects is managing

the process of change. This means working outside technical or task considerations. You need to understand that change is about managing emotions, egos and motivations, that are sometimes the invisible forces shaping the political arena or climate in your organisation. Change is a political, as well as a behavioural, process and requires those in the change team to work together quickly and effectively to resolve key problems – and to think outside most change-management practice.

There are always winners and losers in any change. Some people will be left with more power, influence and resources, and others with less. As the internal expert, you should be working closely with the external change agent in identifying leverage points for change. You know that change-management practice is not a logical, sequential process that can be implemented step by step. The process is often erratic, subject to the whims and politics of particular power groups. Egos

often get in the way of initiatives. You must ensure that the change is bedded down and working before the next 'quick fix' or 'fad' hits the business.

Take charge – or someone else will

Change will not happen by accident. In times of greatest uncertainty, we need control. Effective change is about your taking charge and managing the change team. The change team is composed of the external consultant, yourself and the sponsor. Failure to get this team working smoothly is the biggest factor when change does not work, or when it is less than effective. As the internal guru, you have to maximise the power and expertise of the external change agent. At the same time, you have to ensure that the sponsor is doing their job.

First, here are a few words on sponsors. All too often, they are senior managers who are not always 'hands on' in relation to their project. You need to approach them with solutions, not problems.

Five-step consulting process

It is a good idea to work through the key stages of the *Five-step consulting process*² (see Figure 2). As internal facilitator, you will be leading this process. By anticipating the problems that are likely to arise, you can deal with anything unexpected. The issues in this process have been harvested over the years from participants attending internal consulting workshops, and occur in most organisations. Most of them can be resolved by people working closely together as change partners.

Rapport in the change team

An analysis of best practice in change management indicates that the application of soft skills in working with key players in the process of transition helps to alleviate potential resistance to change. Think through projects in which you have been involved, for examples of when the team acted in a seamless manner, so that you could be almost certain that the project would be more successful than ones in which it was hard work to encourage the change team to 'sing from the same page'. Time devoted to forging a psychological contract between all team members ensures that the team is applying the same values – and is measuring improvement

References

- 1 Edgar Schein, *Organizational Culture and Leadership*, Pfeiffer Wiley, 2004.
- 2 Philip Atkinson and Ian Millar, *Shaping Customer Focus*, Transformations UK Ltd, 1999.

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Case study: Confusion in the contracting process

A colleague was working as consultant to a large insurance business, driving through a major culture-change initiative that was concentrating upon customer focus, internal and external to the business. This consultant worked closely with the internal consultant. Their relationship was amicable, but my colleague was concerned that the internal consultant had not negotiated a solid agreement with the client – the company's HR director. This client, given the job by the CEO, was not really committed to seeing through all the necessary changes in his own functional area. He believed (wrongly) that the HR function had no emerging problems, and that the issue of customer focus was everybody else's problem, not his. My colleague knew that the HR director was not committed to the process, lacked self-criticism and wanted only to be seen to be doing the right thing. Neither had the HR director allowed any of his people to attend training because 'Training is their stock in trade and attending is a waste of their time'. The major point was that there was a non-verbalised and tacit agreement between the internal consultant and the client: that under no circumstances would there be debate about HR being involved in any training or development related to the intervention. The internal consultant, in turn, knew that it was a problem, and the HR director knew that the internal consultant was aware of the problem – but the issue was never raised in discussion. My colleague (the external change agent) had to approach the issue differently, and managed to achieve a shift in the HR director's attitude.

This example illustrates the problems that arise due to failure to raise the issues about what we need to agree 'psychologically'.

with the same mindset. The real secret of success is for you, the internal change specialist, to take the lead, build a strong team, and forge a psychological commitment to how you will work together as you progress.

“ Culture is too important to be left to chance or to outsiders ”



Answer this simple question: 'Is it critical that the sponsor opens doors and fully supports the programme?' If the answer is 'Yes', but the sponsor is currently doing little, then the role of the trainer is to focus all their attention on developing the relationship. This may mean selling the benefits to them. It will certainly entail the investment of more time. That may be difficult, but it is crucial for the process. And if it continues to be difficult, you will have to devote even more energy and time to it.

So, the reality is that change is difficult, calling for energy to be directed at gaining rapport and working relationships with the rest of the change team. Inject more enthusiasm into this process and the change will work. Remember, a focused sponsor is a great asset. Frequently, sponsors have many different projects calling on their time. Your role is to ensure that they devote resources to your team and, at the same time, take on the role of the gatekeeper who will grant you access to the key people who can support you.

You may even have to educate the sponsor in their role. Ultimately, your task is to create a psychological contract for the change team (see Figure 1). To help you achieve the goal, you may also have to apply

some leverage to make effective any power that the consultant has to persuade the sponsor to refocus their thoughts – this recalls the earlier statement that change is a political process. It is about exerting influence, winning support from others – sometimes senior to yourself – and managing the activities of an outsider. That outsider's choice of profession probably makes them fairly independent, maybe even difficult to manage. You play a critical part in the change team.

The **psychological contract** is an agreement that binds all parties in the change team to agreed ways of working together. It usually involves the following:

- Objectives – general, specific, and evolving as the project progresses.
- Review periods – frequency, key milestones and associated activities.
- Metrics – precisely how will progress be assessed?
- Time expected to be devoted to the project from beginning to end.
- Percentage of time expected to be devoted per week to the project – for example, is the project full time or part time, and for what percentage of the

Leadership – shapes the culture

Two factors are critical in shaping the corporate culture.¹ These are:

- what leaders pay most attention to
- how leaders respond to critical incidents.

People are 'boss watchers'. They pay attention to where and how business leaders focus in their quest to change the culture. They also pay attention to how you lead projects. Your actions and omissions send various signals to all those affected by them.

How does your role as internal trainer and facilitator fit in with this process? You have a leadership role: to ensure that sponsors become leaders, rather than mere clients overseeing a project. Leadership is the single most important issue in determining whether organisations will survive and prosper, or fail to survive. In the absence of strong leadership, the internal trainer usually takes charge.

Sponsors occasionally make the assumption that their role is passive

week is the consultant expected to work on the project?

- Confidentiality agreements.
- Deliverables agreed by both parties.
- Use of external resources, such as change agents outside the organisation.
- Agreement on how the internal consultant and external change agent will work together.
- Training and development time for the internal consultant.
- Resources available.
- Budget constraints.
- Access to client.
- Standards of behaviour.
- Defined expectations.
- Means of resolving conflicts.

rather than active, with regard to what is expected of them. That is why it is important for you to think through the key issues in the change process, and assess the roles and responsibilities of the change team.

- What specific activities should be driven by the sponsor and the external change agent?
- Where can the sponsor have most influence and help to sustain the work you are performing?
- What issues need the clout of the sponsor to ensure closure or compliance, or even support?

Assessment of potential risks prior to working with the team is vital.

Use external consultants to best effect

You have to ensure that you get the best possible support from the external consultant. This may well include using them in circumstances in which – or with people with whom – you have little influence; even though their message and yours are identical, their expertise and status may give them more credibility than you with some people in some situations.

Sometimes the external consultant will set out an unpopular view point and will be able to assert themselves to best effect, so that they protect you from any fallout. Sometimes you may make a career-limiting decision by dealing 'full on' – telling sponsors things that they would prefer not to hear. The situation may call for others to act as the conduit for giving bad news simply because, if you take that on, it may put your credibility in the change team at risk. We are realists; sponsors can be rational, fair people – but they may not always be that. You have to manage the risk.

Issues for resolution

1 Entry and contracting

- From what perspective are you looking at the problem?
- What are the major root causes that impact on the problem?
- Test for history. Are events recurrent?
- Have others worked on the problem before?
- What are the symptoms of the problem?
- Who are the decision-makers?
- With whom would you be working, and what history do they have?
- What resources are available, and for how long?
- What are the desired outcomes?
- Are you problem or solution centred?
- Who is the client?

2 Data collection and diagnosis

- What data are you to collect, quantitatively and qualitatively?
- Are data available or not?
- What is the time-frame?
- Will you ensure confidentiality?
- How will you communicate your presence?
- What presentations do you have to give to ensure rapport?

- What rapport-generating activities will you initiate?
- Work on balance with people who work, as well as with those who manage the process.
- Who is the client or sponsor?

3 Analysis

- What do the data tell you?
- How will you ensure you look at the problem from different perspectives?
- Run focus groups and one-on-ones; test for understanding – very few do!
- Avoid becoming the expert – ask key questions and listen.
- Design the material to isolate the problem.
- What has gone before, and who were the key drivers?

4 Implementation

- Who will implement – how will it be measured?
- Does the solution fit the client – is the client on the right part of the learning curve?
- Is the culture ready for the solution?
- Does the culture have the capability to sustain the solution?
- Who will be the change champion in line management?

- Are they senior enough, and sufficiently well respected?
- Does the change champion have the skills to deliver the solution without diluting the message or damaging the credibility of the message?
- Is the solution politically acceptable, administratively convenient and financially sound, and does it project technical competence?
- Make sure you communicate fully to all parties.

5 Review and feedback

- Measure only that which can be managed.
- Establish soft and hard measures.
- Develop an implementation plan with roles and responsibilities.
- Establish a team spirit with those with whom you are measuring and assessing progress.
- Always tell the truth and hide nothing.
- Be sensitive to how the truth is revealed.
- Believe in the power of questions, and stop telling.
- Keep emotion out of judgement.
- Remember who the client is.

Fig. 1: The psychological contract ©Learning Strategies Ltd.

Fig. 2: The five-step consulting process © Philip Atkinson and Ian Millar, *Shaping Customer Focus*, Transformations UK Ltd, 1999