



International Association of Facilitators
The Art and Mastery of Facilitation – Worlds of Change
Toronto, Ontario, Canada
April 27 – 30, 2000



World of Organizational Change

DESIGNING WHOLE SYSTEM CHANGE CONFERENCES: FACILITATING
ORGANIZATIONAL TRANSFORMATION, AND COMMUNITY PARTNERING
MEETINGS AND CONFERENCES

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The increasing pressure on leaders to continuously reinvent products, services, processes and organizations has stretched the ability of many companies to survive. Achieving the instant turnarounds and transitions has become essential to compete in today's global, internet world. Change is the constant that has been written and talked about for the past twenty years.

How we manage change in most of today's organizations is slow, self-defeating and woefully ineffective. The reliance on change leaders and senior level planning committees to "push" through change has limited the ability of people to fully understand and adapt to



change in a way that enables them to add their knowledge and experience to making change happen in a more effective and efficient manner.

The result of our current change approach is increased resistance, confusion and inertia. Change management has been happening in fundamentally the same way for the past twenty-five years. Go off-site. Create a vision. Communicate, communicate, communicate! The problem is that most strategic planning and

This article is about dramatically changing how we change.

“Of 100 top-down, management driven transformation efforts studied, more than one-half did not survive the initial phases”.

John Kotter,

Harvard Business Review, Mar/Apr. 1995

Common Traps That Block Change Efforts

As change consultants and facilitators, we have immersed ourselves in research on the reasons why most change initiatives fail.

We identified the following four traps that undermine the success of most change efforts.

Trap #1: Pushing ahead without the buy-in of staff and key stakeholders

Moving ahead without engaging the people who will be involved in actually implementing the changes usually results in lengthy delays, revisions and resistance. In one case, a department director had been trying for two years to push through a number of key changes. Management’s aggressive one-way approach created an unfortunate ‘us-them’ dynamic with staff. The result was a ‘lose-lose’ scenario and increasing resistance.

Trap #2: Defining the focus and scope of change too narrowly

A client had a very specific goal: an increase of 40% in efficiency. When we reviewed this change priority with a larger, representative group of staff, they saw a need to focus more globally on strategies for competing in a marketplace that was threatening to leave them behind. The staff would not have committed their energy and enthusiasm to looking at only the efficiency aspect of this larger and more pressing problem.

Trap #3: Using a “tell-sell” communication strategy to launch a change effort

Communication sessions, used in an attempt to transfer the sense of urgency and excitement of the original planners, simply do not work. In one project, we helped evaluate the impact of a series of professionally prepared communication sessions, aimed at launching a new corporate vision. When asked about the sessions, people were either apathetic (“This too shall pass”), or openly hostile (“ I know these people and they don’t walk the talk”).

Trap #4: Using a completely top-down leadership approach

While facilitating a change leadership course at a major financial organization, participants expressed their feelings and reactions to a current, top-down change effort. They were adamant that the lack of real information, understanding, and opportunity to dialogue and assess the new direction, was making their work impossible. Waiting to be told when and how to implement the change undermined their ability to lead, to stay motivated and be committed to the effort.

A New Approach to Change

Our new approach to implementing change must be fast and meet the following criteria:

- align everyone to the need for and urgency of change ,



- define the overall direction and allow flexibility in how it is achieved ,
- involve those impacted directly in planning the changes,
- enable leadership and initiative to come from all levels.

Using a “Whole System” Change Approach

The “whole system” approach assumes interdependence among all the groups, levels and individuals who produce a product or service. Without all those impacted by a change engaged, the implementation will falter due to lack of support and commitment.

The “whole system” is defined by is impacted and responsible for the issue or focus of the change effort or intervention. Once a representative cross-section or a “microcosm” group of the “whole system” agrees with the need for change, then an overall change theme or task can be determined. This theme becomes the overall goal of the change conference or session.

The results have been impressive. Business and community service organizations have implemented major restructuring efforts, realigned their operations, implemented new organizational strategies and increased their total dedication to the customer. Community service groups have created new partnerships, solved long standing issues and initiated innovative approaches to service delivery.

Whole System Change

Our approach to “whole systems” change is to custom design whole system conferences and meetings that involve a critical mass of those impacted by a change in planning the change. During these facilitated sessions, we generate support and action plans focused on implementing a common new direction or approach.

Focused on the conference theme, between 50 and 300 participants, create plans that everyone understands and commits to making happen. The result is a shared sense of ownership and a renewed spirit of teamwork and effort toward achieving success.

Resistance appears to disappear when people feel listened to and respected in these “whole system” change conferences. As each group hears the concerns and experiences of other groups that make up the larger “production” or “service delivery” system that they are a part of, they move out of positions of self-interest and focus on the needs of the “whole”.

Following four success guidelines (see box below) have accelerated the pace and effectiveness of these change efforts.

The key success guidelines for a “Whole System” approach to change are:

1. Involve the “whole system” or those impacted by a change in the planning of the change. Everyone, from top to bottom and across the stakeholders, can initiate and make the change happen.
2. Focus on a broader, inclusive goal. Inclusion ensures buy-in and support.
3. Conduct a change conference in which those impacted assess the needs and alternatives, generate new ideas and options and commit to specific actions for moving forward. People make happen what they help create.
4. Sustain the momentum by reconvening the entire group periodically to assess progress and remove barriers

Planning a “Whole Systems” Change Intervention

Designing a Change Conference has three main phases including:

1. **Planning and Alignment** to a common, urgent direction for change,
2. The **“Whole Systems” Change Conference** or meeting of the larger group impacted by a change,
3. **Maintaining Momentum**



The process begins by aligning key groups and stakeholders involved in an issue or organization to a common change goal or direction. To achieve this, a representative group of staff and stakeholders (a “microcosm”) from across the organization identify current change issues, concerns and priorities.

It is critical, during this session, that they explore the underlying or root causes of these issues. By listening for and asking about what people really care about, larger change issues and begin to emerge.

This representative group then meets with the entire leadership team, which has completed the same discussion. Together they create a common framework or theme for the change effort. One that everyone can support and commit to.

Remember trap #1: ‘pushing ahead without buy-in’. Put simply, change efforts fail because those planning the change don’t sit down and align their thinking and overall priorities with the people who will be impacted by a change.

Several criteria help to ensure the issue selected is successful as a focus for the change effort.

- Is it complex with multiple elements?
- Is it critical to the core business?
- Is it an urgent priority or “burning issue” from the perspectives of all who will be affected?
- Is the active support and commitment of those impacted critical to success

If the answers are yes, then proceeding with a whole systems change approach is the ideal choice.

These large group strategic planning sessions range from 50 to 500 or more participants, including
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everyone from senior management to front-line staff and support personnel, plus representatives of key external stakeholder groups.

The Leadership Team Role

The leadership team must assess and commit the time and resources to make the overall change effort successful. Also, they must assess the impact of a high involvement approach on the organization's culture and their own comfort levels. Using this approach they will need to agree to join with the entire group and become part of the process.

As a key part of the system, they do not delegate nor become the recipients of the recommendations of the "bottom" of the organization. This participative style of leadership is neither "top down" or "bottom up".

By encouraging shared leadership and ownership at all levels and across all key stakeholders, a "whole system" approach creates an environment in which learning, innovation and initiative can happen. The ongoing involvement of people in this environment of participation must be maintained in order for momentum to be sustained.

Managing a Whole Organization or Community

Change conferences range from 50 to 500 or more participants. They include everyone from senior management to front-line staff and support personnel. Anyone impacted by, or responsible for implementing a change becomes a participant in these sessions.

In a larger community or organization or division some options might include:

- conduct a change conference with a sizeable number of representatives of each key stakeholder group (critical mass) and have a strategy for engaging the others prior to moving forward.



- conduct a conference with a representative group of 100+ of the larger “system” then conduct implementation conferences at a divisional, departmental, business unit or regional level involving the local “whole system.”
- engage ½ of the “system” in one session and the other ½ in an identical session, then have everyone come together or the same groups reconvene to review the combined output and do the action planning (could be 1/3rds or 1/4s, etc.).

Designing a “Whole Systems” Change Conference

Change Conferences last anywhere from one-half to three days. For larger, more complex issues, they typically require two days of analysis and idea generation, and one day of action planning.

Facilitators, typically two for a larger group, guide the session to ensure maximum involvement and opportunities for everyone to be listened to and express their ideas. Ground rules and team self-managing roles are provided and reinforced throughout the conference.

The overall sequence of conference activities often follows the Change Formula developed by Dick Beckhard:

Dissatisfaction x Vision x First Steps must be greater than > Resistance

A Change Conference, using this approach, moves through the following phases:

1. **Personally Connecting** – across stakeholder groups and to the conference theme.
2. **Analysis of External and Internal Change Forces, Issues and Trends** – what is driving the need for and urgency of change.
3. **Creation of a Shared Future Direction and Vision** – what does the desired future look like, operate like and feel like.

4. **Generation of Action Ideas and Options** – what are possibilities for moving forward – the options.
5. **Action Teams** – what will be implemented and who will work on what.
6. **Momentum Planning** –how will communication, coordination and barriers be overcome.

For example, a conference might start with cross-stakeholder groups telling stories of about key events in the larger groups past. They might also share examples of how the conference impacts them personally. Then the whole group might do an environmental scan and examine the forces driving change.

A shared future vision exercise could then focus on a short-term concrete description of the immediate future. Action ideas are then generated with the entire group deciding on which ones to move forward. Action teams are formed with sponsors and champions selected to implement the agreed to ideas.

Maintaining the momentum generated at the conference is crucial for real change to happen. A momentum plan could include: a coordinating committee, communication strategies and a commitment to get everyone back together to assess progress and remove barriers to success.

“Whole Systems” Change Case Examples

The principles and methods of whole systems change have been applied hundreds of times in countries all over the world. The following examples illustrate the involvement of the “whole system” in making dynamic breakthroughs and real change happen quickly:



1. Aligning and Gaining Commitment to a New Strategic Direction

In the mid-nineties, faced with growing competition, the senior management team of a financial services organization, was struggling with how to engage people in taking ownership for a new organization-wide vision. Posting it on the walls or running a series of “communication sessions” simply would not work.

Six days were sufficient for a successful whole organizational shift. On Monday and Tuesday, 500 people attended an action planning session. On the following two days, the same session was conducted for the remaining 500. On the fifth day, the management team met. By Saturday, day six, all 1,000 came together to hear the conclusions of their input. The result was a highly focused, aggressive marketing and customer service improvement campaign. The entire organization took ownership, and acted together to dramatically increase their market share.

“The momentum is really building now! The commitment levels are increasing weekly, and we are rapidly moving to tangible actions with some early quick win deliverables already in flight.”

FCC Client

2. Preparing for Future Challenges

A department of about 100 computer support people at Intria-HP (a new technology services company) wanted to prepare themselves for handling new business and competing in fast growing and tough marketplace.

The whole department (120 people) came together for two and a half days, with a number of internal partners, to equip themselves to boost their competitive potential. Together, they assessed current market trends and their own ability to compete. The result: 26 action ideas that spawned the implementation of a dozen new initiatives, including new

work processes, customer feedback mechanisms, and technology research and integration vehicles.

3. Merging Two Organizations

A company decided to use a whole system event to accelerate the integration of a newly acquired company. The large group discussed the new acquisition and heard senior management's vision for the integrated business. They then worked in small groups to identify integration issues, and suggest improvements to the merger plan.

That same evening, the senior team reviewed input. On the morning of day two, they presented their revised plan. With a broad base of support and after some minor revisions, it was adopted unanimously. The rest of the day was spent developing detailed action plans in functional teams. One year later, a strategic review concluded that the merger had been completed successfully.

4. Creating a Team Culture across Departments and Groups

After spending two years struggling to implement a new team culture, resistance and inertia were still blocking any real movement. Senior management presentations, a new vision and commitment to people excellence, a highly successful self-managing work team pilot and a number of supervisory and management training sessions were not able to turn the ship.

Finally the whole plant of 160 went off-site for one day to focus on what it takes to create successful teams and what obstacles were getting in their way. They completed a team simulation exercise and talked openly about the behaviours that both helped and hindered their own teamwork.



The result was a set of plant wide team norms that promoted the kind of work environment they wanted to create. The entire plant left with an action plan and a groundswell of support for increased teamwork that broke the logjam of the past two years.

Conclusion

By involving *everyone* in the change process, an immediate dynamic shift occurs in the speed with which larger, change issues can be addressed, and changes implemented. The overall direction of the business and its ability to respond effectively to marketplace, technology and regulatory changes, shifts immediately and with the full understanding, alignment and support of the employees.

Results have included the re-design of organizational structures, streamlining of work processes and the generation of new product and service ideas worth millions of dollars.

Buy-in and shared ownership are created through the involvement process as the larger group works cooperatively to assess the current issues, trends and needs for change. Together, they determine what needs to be kept and built on, and what concrete changes need to happen.

Because everyone engages in attaining the goals of growth and excellence, a strengthened spirit of committed involvement infuses the organization.

About the Authors

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Has designed and facilitated a wide range of leadership training, team building, change management and community planning initiatives over the past 20 years. Whole System Change Conferences are a synthesis of his past work in the areas of leadership training, self-directed teams, change management and employee involvement programs.

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Has delivered computer skills training programs for people on social assistance and designed technical solutions for a major Canadian health care company. Whole System Change Conferences draw on her diverse background, strong analytical skills and intuitive understanding of underlying issues to assist clients in creating solutions.