Notes on *Changing Your Organization*

What

At the 2006 ACCU Conference I made a presentation entitles "Changing your organization". While this presentation was structured around traditional slides it was designed to get the audience talking - and it did!

This note lists some of the ideas and problems the audience proposed. Its not an exhaustive list, although I tried to keep the points listed on flipcharts I inevitably missed some of them. The points and the comments made here are my own interpretation of what was said by myself and others. I couldn't possibly hope to cover everything that was said.

In addition, in writing up these notes some additional ideas and comments have come to mind so I've included them too.

The presentation is now posted on my website http://www.allankelly.net/Presentations/ACCU2006.

If you find this interesting you might like to know that this presentation builds on my presentation from the ACCU 2005 conference, Software Development as Learning - also on my website and also with a set of post-conference notes, see http://www.allankelly.net/Presentations/ACCU2005.

Points

- Don't expect people to thank you - you might get more criticism than thanks

  Not everyone will have cause to thank you; obviously such people will not give you thanks. In fact they may give you criticism.

  Those that do have cause to thank you may not actually recognise they have you to thank - after all you may work so subtly that they don't realise you've changed things.

  Expecting or chasing thanks may actually get in your way - learn to take your thanks from the fact that things do change.

- How do you deal with a difficult individual?

  People are social animals - we all like to belong. In the beginning of change it may be you who are alone, over time as people rally around your position you will feel less lonely. And as more people adopt the change the *difficult individual* may themselves feel lonely and change - consider it a mild form of peer pressure.

  Be prepared to listen these individuals. Give them time and respect their position. Try to understand their arguments and give them a fair hearing. This can be difficult when many people are holding out against a change but try to deal with everyone as an individual.

Leadership from one who the individual respects or considers to have legitimate authority can also help. When a change position is endorsed by a more senior manager the difficult individual may accept the new way.

You can try authority - if you yourself are in a position of authority, or can persuade someone who has it to back your position. But on the whole authority does not work.

Sometimes people paint themselves into a corner. They start out objecting to the change agenda and six months later they find it difficult to modify their position and join in the change. So, don't make it hard for them to change themselves, don't remind them of their previous position, give them opportunities to experiment, embrace them when they do change. Maybe a little leadership or authority from elsewhere can actually help them jettison their previous position.

Ultimately if the individual refuses to change then the organization may have to consider letting them go but this should be the last step.

- The Luddite might be right

  Of course the *difficult individual* may actually be right. Your change programme may be wrong in part or whole. The individual may have actually seen a problem you missed.

  Jim Coplien and Neil Harrison have a pattern called *Wise Fool* (Organizational Patterns of Agile Software Development, 2004). This pattern points out that the fool often sees things others don't, be prepared to listen to them with an open mind.

- Conformity v. Difference

  Organizations need a degree of confirmatory: individuals needs to share values and goals, individuals need to work together as a team.

  Individuals who don't conform can be difficult to work with. After all, its hard to work with someone who thinks everything is wrong. But, organizations also need individuals who are different. After all, if everyone conformed we would have nobody to introduce the change!

  So, we need to balance conformity and difference: we need to do this as individuals (we must conform within our organizations) and as organizations (companies must tolerate differences). We need elements of both.

- Labelling causes problems

  Once a label is attached to someone it can be difficult to let go. It can lead to stereo-typing and may be a self fulfilling prophecy. Try not to label people and when individuals are labelled challenge the label.

- Ask "What does this person do better than me?"

  One way to challenge labelling and stereo typing is to ask yourself the question: "What does this person do better than me?"

- Impossible to predict who will change

  People can surprise you, it can be impossible to predict who will accept the change agenda and who will resist. Perhaps labelling people as "changers" or "resisters" might be part of the problem in persuading people to change.

- Experimental change

  Change isn't always a linear process: you don't change A then B, then C and never go back. Some changes won't work and need to be undone. Be prepared to experiment with change and reverse it out if it doesn't work well.

  If you start with a solution you may find it is not the right one. Far better to start with a problem then look for a solution, probably the one you had in mind will help but it might not be the best.

  Experimenting will help you learn what changes will work best for your organization, but remember...

- Evaluate change effectively

  We don't change for the sake of change - we change to improve things. So, we should try to evaluate all changes to see how effective they are. Ideally we can evaluate them by placing some value on them - perhaps monetary, perhaps time, perhaps something else. But it is not always possible to measure things so accurately, still, you must be honest with yourself and your team when evaluating changes.

  If we are not honest, if we call a failure a success when it isn't we won't be able to learn from our failures, we won't be able to experiment with change and we won't be able to come up with the best way of undertaking our activities.

- Awareness

  Awareness has an important role to play in the change process. Without awareness we can't evaluate change effectively, neither can we try experimental changes.

  In fact, it will be difficult to start the change process at all if people are not aware of the problems and need to change.

  So, start by increasing the level of awareness. Awareness of the problem, the need to change and the options for change.

- Information on Success and Failure

  Providing information on success and failure is one form of awareness.

  Ones man's success can be another's failure: case studies exist of projects were management considered the project a failure but developers considered it a success. In one story a team considered their project a success but the management never expressed a view, however, the management did not authorise the payment of project bonuses. So, the team was left wondering if their project was a success or a failure.

Where possible it is best if the project team has a clear set of success criteria. These criteria should be established by management and agreed with the team. However, few teams actually have clearly defined criteria. This can lead to...

- Sub-optimisation

Sub-optimisation occurs when we optimise one process only to find that another has been rendered less successful, e.g. software teams meet a deadline but the quality is low. A bigger example is the British rail network, usage of trains and tracks make it financially the most efficient network in Europe, however, delays and cancellations are frequent, passengers are squeezed into carriages with not enough seats.

It is particularly important to avoid sub-optimisation when setting success criteria for a project.

When sub-optimisation occurs, or to prevent it occurring, we need to use systems-thinking to explore all the interlinked connections and possible consequences.

- Spread the Success

To keep change going, to increase the amount of change you create you need to spread the success. Start by celebrating your successes, this will encourage your team show your heading in the right direction.

Success can be hard to come by so celebrate every little success - sometimes you might want to do this in private, only you may know that you have achieved a success, or it might not be a suitable time to shout about change, e.g. during redundancies.

Over time your success will be noticed, a successful team can become a role model to others, people may want to join your successful team, copy them or just get their advice.

And when your team is successful you will find a ripple effect...

- Granularity / Ripple effect

Sometimes it can be hard to decide at what level of granularity you should introduce change: the team? the department? the division? Starting small may increase our chances of success but ambition can be a good thing.

Starting small can have a downside, if your team changes but the teams you interface do not change the scope of your changes will be limited. You will have to continue using practices and process that could be improved - in other words, the teams around you can stop you from changing. One way around this is to increase the size of the change so you change these teams too. But on the other hand, waiting until you can co-ordinate a change across several teams may prevent any change from happening.

However, this effect can work in reverse too. When one team changes, and is seen to be successful it can produce pressure on those outside the team to change too. For example, a development team may find it hard to change if the test team

cannot or will not change too, yet if you can introduce change into the development team and demonstrate success the test team will come under pressure to change too.

Successful can ripple out in other ways too: disconnected teams seeing one team's success may decide to copy the team. Company leaders may start to see team as an example of what can be done.

- Risk

    All change involves risk: the change might not work, things might get worse, people may leave, the change might be wrong for the environment.

    But risk is a complicated subject and we don't always understand what risks change brings, or what risks not changing brings...

    - Risk of doing nothing

    Not changing, preserving the status quo itself entails some risks. A team that is under performing and refusing to change runs the risk of being disbanded.

    Organizations that meet deadlines but ship faulty products (i.e. buggy code) risk annoying their customers after the product is delivered.

    In both cases it might be risky to change but what are risks of not changing?

    - Risk and Control

    When faced with risk some people respond by trying to take control - many of us have seen project managers who faced with a slipping schedule get involved with technical decisions or start asking the team to work weekends.

    Conversely those in control often view change as risk because it will reduce their control. Again, project managers faced with a team that adopts Agile processes (e.g. stand-up meetings, card-and-board and group prioritisation) may feel they are loosing control, if they don't trust the team they will see risk.

    - Risk perception

    Our perception of risk is not always at one with the actual level of risk: cars are more dangerous than trains but after a train crash people respond by driving to work instead of taking the train.

    - Risk tolerance

    Perception of risk plays intricately with our tolerance of risk. We will tolerate some risk because our perception is low or because the inconvenience is high.

    - Individual and corporate tolerance of risk

    A bank may be prepared to take a risk with £25million on a deal; but an IT manager in the same bank may not be prepared to take a £2,500 risk on a decision if his bonus could suffer.

Individuals who take great risks and win can be handsomely rewarded, but those who fail may be punished. How we as individuals respond to corporate incentives to take risks, or not, will effect are propensity to change.

- Need Slack

  Changing takes time. Change is learning and learning too takes time.

  We can't expect an organization to carry on working 100% and change at the same time. You need slack to learn new techniques, to evaluate progress, consider the next change and celebrate successes. If you don't have slack in your organization you can't do this.

  Tom Demarco's book, *Slack* (2002) gives a more detail description of this effect.

- You change too

  The presentation started by suggesting that before introducing change into an organization we should look inwards. We should ask: *are we prepared to change?* And we should look our credentials for introducing change.

  The session finished by recognising that when you introduce change you will yourself be changed by the process and the changes you introduce. You can't call for change and not change yourself.