# Getting Past ‘Yes’, to Genuine Action: Using the Dark Arts for Purposes of Good

## Things you may have already tried toward improved accessibility:

* Make a compelling business case of the large underserved market which no other competitor is making an attempt to capture
* Show how inclusive design & accessibility make things better for everyone
* Let your leadership teams hear from customers who are being excluded from your services and how disappointed and frustrated they are
* Connect the work with your organization’s values and mission - for example, pointing out that building accessible products and services is literally a ‘little help’
* Point out the legal requirements and argue the need to protect from needless risk of litigation
* Articulate how the creation of well-designed, accessible, modular UI components means there is an additional cost for their individual creation, the savings created by their re-use at scale are huge
* Talk about ethics - because eff it, it’s a hot topic and why not use that too?

## So why do we hear "Yes" but still not see action? [tactics]

* How are those with power to cause change being rewarded?
  + How are they really being rewarded?
* Are there other competing or similar messages?
* Is someone expecting cultural change to be successful using project management & delegation (aka the wrong tools for that)?
* Is there no formal culture change being attempted?

## Leading Change

Most of the following content has been carefully curated and successfully used by:

Jan Hillier, PhD

Jan was formerly with McKinsey & Company, now is retired from Indiana University Kelley School of Business. She literally took over Tom Peters’ desk; Tom wrote In Search of Excellence, one of the top-selling business improvement books ever.

## Change initiatives require taking inventory, envisioning a future and continually adjusting

Current state

* Where are we today?
  + Current strategy
  + Organization design
  + Culture
  + Competition

Change program

* State of transition
* Implement change program
* Organizational learning process

Forces for change

* Market changes
* Leaders
* Change champions

Forces against change

* Culture
* **Habits**
* Beliefs and values

Vision of future

* Where do we need to be to grow and compete?
  + Strategy
  + Aligned organization design and culture
  + Lean/agile

## Where does change come from?

“The reasonable person adapts himself to the world. The unreasonable one persists in trying to adapt the world to himself. Therefore all **progress depends on the unreasonable person**.”

Cite: George Bernard Shaw

“Get in trouble: good trouble, necessary trouble.”

Cite: Congressman John Lewis

## Change creates uncertainty

* Demands extensive **leadership** time, attention, and hands on sponsorship
* Requires a **vision** that serves as a road map to future
* Calls for robust two way **communications** process
* Uses **open-ended planning**; project management is insufficient
* Creates **resistance** – and not always where expected

It is complex and time consuming.

## An effective change program requires long term senior leadership engagement

* Lead
  + Open ended planning
  + Commitment and support
  + Build change team
* Plan
  + Understand employee response
  + Identify and address resistance
  + Communicate, communicate, communicate
* Support
  + Engage employees in implementation
  + Reinforce individual and team change
  + Lead, listen, respond

No more “business as usual”.

## The change process

* Engage leaders
  + Prepare leaders
  + Define needs
  + Create vision
  + Assess resistance
  + Plan open-endedly
* Communicate + Inform + Involve
  + Inform change recipients
  + Establish change teams
  + Implement in small units
  + Be open to changing the plan
* Support + Reward + Align
  + Develop protocols
  + Assess managerial strength
  + Adjust as needed
  + Create adaptive culture
  + Align rewards systems

Tell people where they are going and why they are going there.

Ask for involvement to plan implementation.

Listen to what they have to say.

## Change requires learning. Learning takes time.

* Leaders must change the way they lead and manage.
* Managers and staff must learn different behaviors.
* Paradigms and behavior patterns must be broken.
* A company changes only when people change.

Participation and buy-in at the beginning saves time and resources over the long-term.

## Long term change requires same attention to planning as strategy but with internal focus

* Understand change recipients (rather than customers)
  + Anticipate employee response
  + How and why are they responding?
* Engage employees
  + Identify the *specific behaviors* that cause problems and need changing in order to create a new culture
* Implement the change
  + Drive and model the change unit by unit
  + Use trained change teams to coordinate

Change takes longer than expected. Resistance will emerge.

### Post-presentation notes:

Human cognitive biases which promote poor decisions.

Planning Fallacy: Humans don’t estimate time requirements well. We will overestimate our abilities. And cruelly, we will also underestimate how much we are overestimating them.

Prospect Theory: Losses and gains are not measured equally (in terms of our emotion toward them). Losing $100 feels much worse than the elation of finding $100. And once we have something, not only do we not want to give it up, but we also overvalue it’s worth.

## Change goes through three overlapping stages [tactics]

* Recognize need, plan and commit
  + Take inventory
  + Create vision platform and from-to statements
  + Generate leadership commitment
  + Define new strategy and organization design/culture
  + Commit resources
* Build the new infrastructure
  + Deploy cascading workshops
    - Communicate vision and need for change
    - Involve participants in the process
  + Begin skill training
  + Implement change with coordinated teams
  + Institute new performance appraisal system
* Align, reinforce, evaluate, adapt
  + Align people, processes, policies, procedures
  + Reinforce new behaviors, beliefs, and values
  + Assess effectiveness of initiative and make adjustments

There will be looping between all of these stages. Change is messy.

## Successful change begins with strong foundations [tactics]

### Organization Vision

* Define the vision
  + Involve leaders in pre-retreat buy-in. (What needs to change and why?)
  + Hold one day retreat (Create vision statement)
  + Paint the picture (What will we look like in three years?)
  + Complete contrast analysis (From-To statements)
* Create vision value proposition
  + Why important?
  + Why now?
  + What is the cost of not changing?
  + How will vision provide value?
  + Identify trade-offs between changing and staying the same.

### Leadership and Sponsorship

* Build support for vision
  + Assess readiness for change
  + Understand and address areas of concern with 1:1 meetings
  + Determine what will get in the way of success
  + Identify pockets of resistance and work to overcome barriers
  + Anticipate problems and build into plan
* Establish strong vision sponsorship
  + Sponsors will
    - Advocate for vision
    - Run interference
    - Stay informed and involved
    - Communicate passionately about vision accomplishment

## Cascading workshops inform, engage, involve [tactics]

Workshops occur at every level in the organization.

Senior team has theirs first (CEO – COO, Finance, Ops, Marketing, IT, HR) (writing homework for them: “What’s your vision?”) Deliverables will be a single vision statement and shared From-To statements.

Next levels down, and eventually including front-line (writing homework: “How will we get there?”) Deliverables will be From-To statements, and more and more detailed initial plans.

All workshops are to

* Create vision
* Develop buy-in
* Self vision
* Build change teams
* Support initiatives & implementation
* Adjust as necessary

## As the saying goes…

Image: Barefoot man leading a pony into the surf. The pony is hauling a chariot, with a human in a wheel chair in it. This picture intended as a fun visual representation of the adage that “you can lead an equine to water, but you make it drink.”

## Remember…

Change is about people. People will surprise you.  
Cite: Fast Company 4/30/97

## Resistance is a slippery slope

Exists on a spectrum of passive resistance to active resistance

* Passive resignation
* Indifference
* Apathy
* Lack of interest/time
* Non-learning
* Lack of follow-through
* Working to rules
* Withholding information
* Doing as little as possible
* Withdrawal
* Errors
* Sabotage

## Resistance increases as change becomes personal

(Imagine a cube, with three sides labeled Focus of Change, Sources of Resistance, Causes of Individual Resistance)

Focus of Change has an intensity spectrum moving from Workplace to Others to Self

Sources of Resistance has an intensity spectrum moving from Facts to Beliefs to Values

Causes of Individual Resistance has an intensity spectrum moving from Misunderstanding to Different assessment to Lack of skills (habits) to Lack of trust to Parochial self-interest to Low tolerance for change)

Cite: Adapted from Near Organization Design lecture notes, Kelley School of Business, Indiana University - Bloomington. Kotter and Schlesinger, “Choosing Strategies for Change” Harvard Business Review, 1968.

## Some people never get onboard.

* 5% are Innovators (risk takers willing to try new ideas)
* 18% are Early Adopters (credible, knowledgeable opinion leaders; serve as role models and change champions)
* 35% are Early Majority (careful decision makers who are middle of the road followers)
* 35% are Late Majority (skeptical and cautious by nature; social pressure causes them to conform)
* 8% are Resistors (an “always done things this way” mentality; intolerant of change and may never adapt)

## Culture and institutional barriers to change

* Structural Inertia
  + **Structure, systems, policies** and daily operating procedures provide stability and inhibit change
* Lack of alignment and mixed messages
  + Leaders and managers often give **conflicting signals** about strategy and change
* Limited change focus
  + Because divisions and departments are **interdependent**, one part cannot be changed without affecting other parts
* Group Inertia
  + Well established **group norms** constrain change
* Threats to expertise
  + People with specialized skills may oppose change that threatens this expertise
* Threats to power relationships
  + Change that alters **power distribution** will be resisted
* Threats to resource allocation
  + Change that alters current **resource allocation** will be resisted

## Choose change tools based on type of resistance [tactics]

| **Reasons for resistance** | **Tools for reducing resistance** |
| --- | --- |
| Different assessment of need | * Education & Communication |
| Misunderstanding & mistrust | * Participation & Involvement * Facilitation & Support |
| Parochial Self-Interest | * Negotiation & Agreement |
| Low Tolerance for Change | * Manipulation & Cooptation * Explicit & Implicit Coercion |

Cite: Kotter & Schlesinger, “Choosing Strategies for Change”, Harvard Business Review, Mar.-Apr. 1979.

## Understand the cause of resistance to effectively reduce it [tactics]

### Strategies to minimize resistance

Education & Communication

* Addresses different assessment and misunderstanding
* Use at the beginning of change process

Participation & Involvement

* Effective when buy-in is very important or change agents don’t have all the information
* Time consuming

Facilitation & Support

* Identifies underlying issues
* Supports change recipients and involves change targets in process

### Strategies to overcome resistance when there are clear losers, other approaches don’t work, and speed is important

Negotiation and Agreement

* Offer incentives to change recipients

Manipulation & Co-optation

* Use only as last resort when no other options are available.
* This one burns bridges!

Coercion

* Use only when speed is crucial and change agents have sufficient power.

## Staff and front-line personnel must learn new skills and maybe new jobs

* Leaders must change the way they lead and manage.
* Managers must learn different behaviors to support vision/strategy.
* Requires more than education, training or skill building.

### Who is verifying this is happening as needed?

* Break patterns
* Address resistance
* Requires constant messaging from leadership

## Change requires learning. Learning takes time.

* Leaders must change the way they lead and manage.
* Managers and staff must learn different behaviors.
* Paradigms and behavior patterns must be broken.
* A company changes only when people change.

Participation and buy-in at the beginning saves time and resources over the long-term.

## Leaders are inclusive because staff do not resist change so much as ***they resist being changed*** [tactics]

* Leaders serve as hands-on guides and engage staff at all levels.
* Town halls and info sessions emphasize open communications.
* Use teams extensively.
* Involve and inform recipients.
* Engage staff.
* Adapt, adjust, learn.

## Change and implementation Key Factor for Success: it’s about resistance (Kotter)

Establish a sense of **urgency** for change.

Form a **coalition** to guide the change and a change team to coordinate and manage the process in conjunction with leadership.

Create a **vision** and strategy for change.

Understand **resistance** and develop plans to overcome it.

**Involve** participants in the change process.

Use multiple **change teams** for implementation.

Foster **change champions**.

**Reward**, support, reinforce, celebrate wins.

## One more time: How do you manage change?

“The honest answer is that you manage it pretty much the same way you'd manage anything else of a turbulent, messy, chaotic nature, that is, you don't really manage it, you grapple with it. It's more a matter of leadership ability than management skill.”

Cite: Fred Nichols, Change Management 101: A Primer, <https://nickols.us/change.htm>

## Key factors for success in leading change

* **Presume it will take longer than expected**
  + Consider implementation impediments at onset.
  + Assess the political implications of recommendations.
* **Engage leaders** to champion and model change
  + Leaders must walk the talk.
  + Consider the implications of that.
* Use **focused, strategic communication & education** to the right people early and often to **inform and involve** as well as correct misinformation and misunderstanding.

Presume politics will affect any change project.

## How do you efficiently generate change?

You don’t change culture through emails and memos. You change it through relationships, one conversation at a time.

Cite: @steelethoughts on Twitter

## Tips for managing change

* Create a **clear sense of mission** or purpose.
  + “Kick ass in the marketplace” is more meaningful than “respond to market needs with a wide range of services…”
* **Build a team.** Lone wolves have their place, but not during change.
* Pick people with relevant **skills and high energy**. You’ll need both.
* Toss out the rule book. Change requires a configured response, not adherence to prefigured routines.
* Shift to an **action-feedback** model. Plan and act in short intervals.
* Set **flexible priorities**.
* Treat everything as a temporary measure. **Don’t lock-in** until you have to and then insist on the right to change your mind.
* Ask for volunteers.
* **Give the team what they want – except for authority.** If they need authority, it is not a good sign.
* Concentrate knowledge. Start and maintain an **issues book**.
* Jump in. You can’t do anything from the outside.

Cite: Fred Nichols, Change Management 101: A Primer, <https://nickols.us/change.htm>

## So let’s chat and have fun!

Image of man and pony trotting in the surf, the pony is pulling a chariot with a joyful child in a wheelchair.

### Post-presentation notes:

Without a named owner (single human allegedly responsible for doing or responsible for seeing that thing gets done), that thing won’t get done.

Anything with more than one named owner won’t get done either. All named will hope or presume the other(s) will do it.

Prompts for a successful one on one meeting with someone:

1. Ask them “What’s on your mind?”
2. At the end of the discussion, ask them “What’s most useful for you about this conversation?”
3. After they answer, share with them your own most useful takeaway from the conversation. That re-sets the power balance between you both, and shows you are willing to share, also.

The question “What’s most useful for you about this conversation?” is a Jedi mind trick, which makes them presume the conversation was useful. It forces them to consider ‘What’s actually the Big Thing?’, so they must reflect on the conversation. The “for you” part makes it personal; most people trust their own advice over that of others.

That question also give you feedback, and perhaps an opportunity to clarify something immediately. It is about learning, not judgment. And it also plants the seed in their mind that you are useful to them.

Long Email Scenario: Someone sends you a very, very long email, which will require a great deal of effort to respond to. Instead of sending that long response initially (you may have to send one, anyway)), send the following response:

“Thanks for your message, before I jump into a longer reply, please let me ask you: What’s the real challenge here for you?”

End of content.