

Is Your Organization Change Ready?

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I have watched with great interest, the downfall of General Motors. I am not referring to the past few months but the protracted failure that has seen one of the top companies in the world head into bankruptcy. Their recent commercials put a fine point on what we can all learn from the downfall of an icon. In them they talk about a need to not just redesign their organization but to enact fundamental change. How could they have let things get so bad? I am left wondering what would have happened had the recession not hit? How long would they have accepted mediocrity before being forced to change?

Change doesn't just happen in short bursts, it is continual. If you feel you have avoided it or are not addressing it, you are on the same path as General Motors and many of the other casualties of our current economic times. While the times have been hard for all parts of the economy, those who embraced change and proactively addressed it were ready to adjust to the game changing events of the past few months.

Over the next few editions of our briefing, we will talk about what is required to be an organization capable of on-going positive change. It is not as simple as implementing Six Sigma or Lean Manufacturing, or joining the National Quality Institute. It is not about improving your technology, implementing business process management or a new business intelligence service. It is certainly not about changing your organizational structure. Surprisingly, it is also not about developing a new strategic direction. While all of these are a step forward, any of these individually will leave your organization with a single tool where you need a full toolbox. Our experience has shown that every change process requires an adapted approach, yet there are a set of common tools that when integrated can develop a resilient organization that monitors its environment, notes the coming change and adapts to it quickly.

In this briefing we will introduce you to an integrated model that allows for quick wins, revolutionary change and on-going evolutionary change to make your organization truly adaptable and resilient. Each aspect will be discussed in greater detail in future editions. We will look at the make-up of an effective change leadership team. Finally, we will look at the development of agents of change. We hope you will enjoy our briefings and will share them with your team.

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Lean Manufacturing, Enterprise Architecture, Business Process Management and other Organizational Change Myths

By Michael Dumelie B.Admin. CMA MBA (Oxon.), Partner

In his seminal work, *The Principles of Scientific Management*, a monograph published in 1911, Frederick Winslow Taylor began what is now a constant barrage of theories and approaches to organizational improvement and change. The pace of change has quickened over the past century, so too has the proliferation of management books and theories. Each spends time explaining why their approach is an improvement over their predecessors. To prove it, they talk of the specific results from a specific implementation, the more famous the company the better. Each develop their own followers, create training programs and continue to sell their idea as the only one you need to get the results they experienced. Our experience and that of most others would say that one size does not fit all.

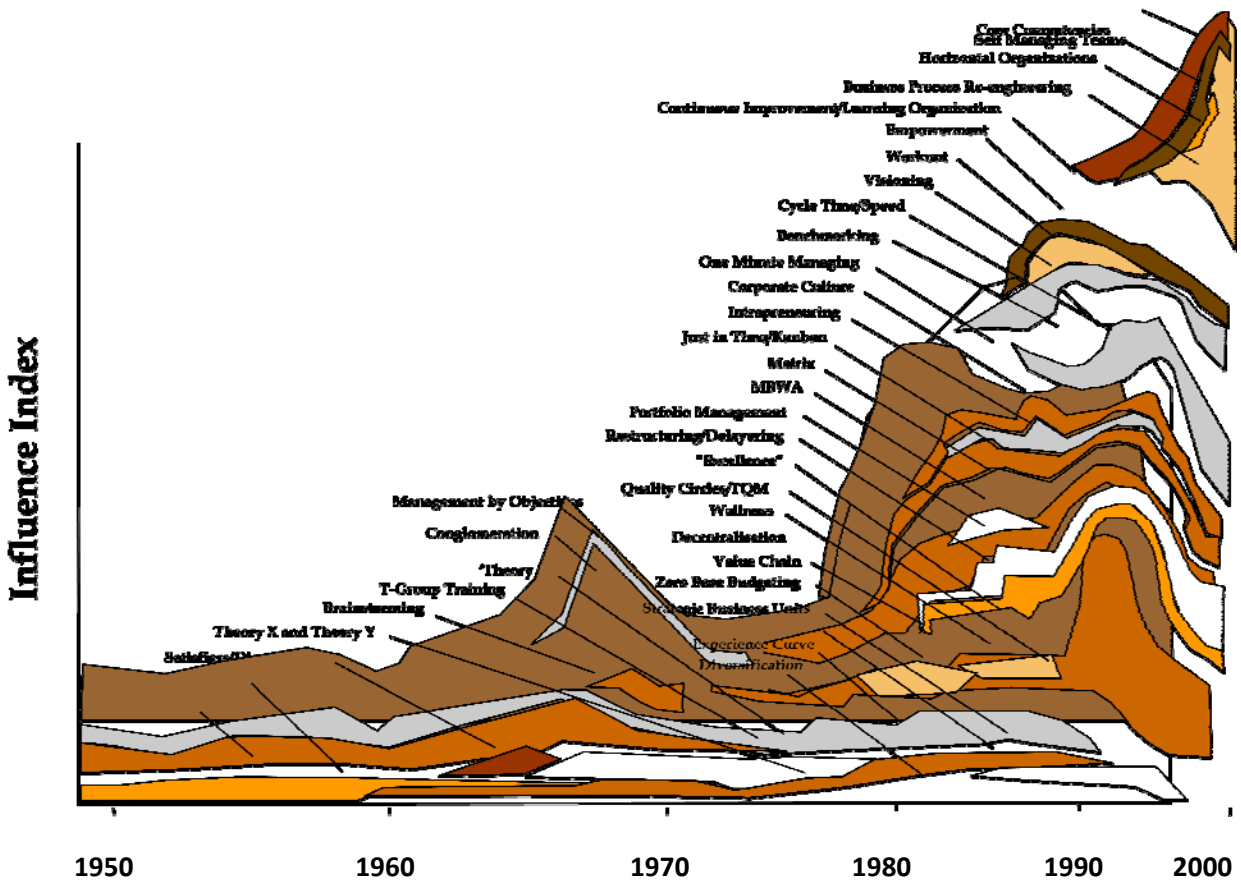


Diagram 1: Ebbs, Flows and Residual Impact of Business Fads * 1950-2000 (Pascale)



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The authors of management theories and methodologies must sell their ideas to a broad audience. To do this requires taking an approach, built for specific situations, and adapting it to make it generic enough to have broad appeal. Even those philosophies that have a broad development group (eg. TOGAF, DSDM, etc.) tend to attract like-minded individuals often leading to incomplete development of the concept. Cracks in the concept inevitably develop as projects vary from the core, ultimately leading to the next business fad casualty.

This scenario has played out many times over the past century as is shown in Diagram 1. Any of us who have been in the business world over the past few decades probably have a library full of the latest thing in management theory only to see these concepts disappear before we finish the book. This is unfortunate as many great ideas are lost by overselling the relevance of these methodologies.

My former step-father was an academic. In his role as University Secretary and Administration professor he was able to develop an extensive collection of books across the spectrum of management science, many dating back as far as the 1920s. He left me his collection when he died. I have added a few books and essays from the late 1800s, mostly of a military nature to broaden the collection. Each time I hear of the latest concept, I make it a game to try to find the same concept in history. Much of our current management innovation is based in concepts developed in the 1950s and 1960s but many date back further than that.

I have been involved in over 40 change processes, having led the majority. My experience has shown that, while there are similarities in most situations, no two are alike. Attempting to follow a structured methodology would have led to inevitable failure. Structured methodologies are a good starting point for those with little or no experience in organizational change. My only caution is to understand that you are attempting to fit a square peg in a round hole and be willing to adapt the approach to your circumstance. In most cases, the methodology is secondary to the process of sitting down with the people in your organization and opening the discussion of change. The results are in the process and not the tools. Your approach should seek to optimize this interaction while collecting the information you need to feed those who will be charged with enacting the change.

A decade ago, some of my most productive and organizationally changing projects used Structured System Analysis (SSA), as the primary analysis toolset. I added a customized presentation document that bridged the gap between the business experts and those who would be charged with providing technical solutions. SSA is an approach from the late 1960s. The book I used to learn the method had already been out of print for over a decade when I first began using it. Why then did I select this as the method of choice?

At the time, I was working with an extremely talented developer. My experience was in organizational change and redesign. I was asked to redesign three major government programs and develop new



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technology to support them, which had been a weakness in previous projects. The developer favoured simplicity and recommended using SSA as our documentation approach. Fortunately, SSA was simple enough that I could educate my project team in it within 15 minutes and could adapt it to my facilitation approach. Even as we moved to a more rapid application development (RAD) approach using the Dynamic System Development Method (DSDM) we were able to continue to use the SSA method to collect requirements and facilitate organizational change. My point? We could still be using SSA today if there was training available. A methodology can be highly restrictive often leading to frustration with clients of the process. It is important that the approach you take fits your organizational objectives, generates excitement in your organization and is respectful of participant's time and talents.

I will review some of the more prevalent methodologies favoured in Saskatchewan at this time. They have many positive aspects to them but generally are incomplete in their ability to generate sustainable organizational change.

The Good, The Bad and The Ugly

Enterprise Architecture

Many think of Enterprise Architecture (EA) as a change management methodology that can be used to redesign and enact change in an organization. This is only partially true. Much like the role an architect plays in the creation of a building, so too does enterprise architecture impact organizations. Architects provide plans detailed enough to have others build their vision, these plans then act as a historic reference of how the building was designed. An enterprise architecture is a collection of artefacts that describe the business, information, application and technology aspects of an organization. It provides the design and subsequent history that assists in the redevelopment of the organization. It is effectively the Dewey Decimal System of organizational design, acting as a cataloguing system for the natural work product of organizational change initiatives. This ensures structured design and history for future redevelopment initiatives.

The concept traces its origins to the Zachman Framework for Enterprise Architecture developed by John Zachman in the 1980s while with IBM. I took my EA training directly from John Zachman and was fortunate to spend time with him in the evenings. He made it clear his intent was to design a structure to store artefacts but was never intended to be a process for developing the artefacts. He decided to leave that to the next generation.

Enterprise Architecture is not a complete program for organizational change but can act as a significant component of patterned, repeatable, sustainable change.

TOGAF

TOGAF stands for The Open Group Architectural Framework. The Open Group is a group of technologists formed to develop a process to populate an enterprise architecture. It was founded in the mid-90s and has evolved its process to the point of becoming one of the pre-eminent architectural frameworks for enterprise architecture. The strength of the TOGAF is in the technical spectrum.

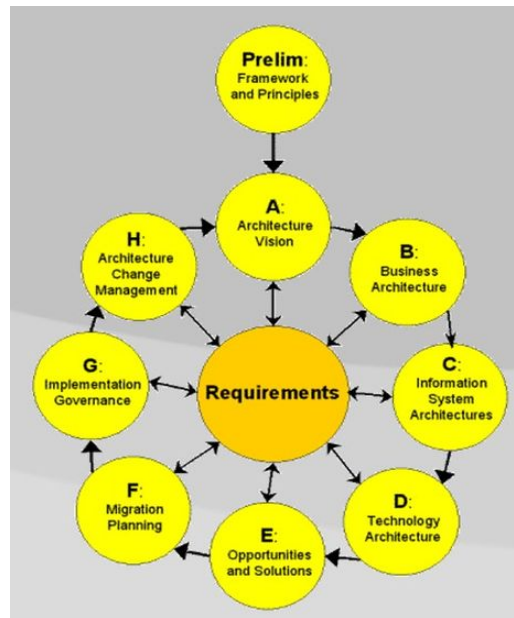


Figure 2: TOGAF Framework

TOGAF's objective is: "The primary reason for developing an enterprise architecture is to support the business by providing the fundamental technology and process structure for an IT strategy. This in turn makes IT a responsive asset for a successful modern business strategy." Much like the Zachman Framework, TOGAF has been built from an IT perspective and looks to build out to encapsulate the business architecture of the organization.

When assessing TOGAF as an organizational change methodology the business architecture approach falls well short. TOGAF documents current business designs of the organization. It does little to create organizational change, especially of a strategic nature.

When a clear strategic direction has been defined, organizational change enacted, accountability redefined and the organization stabilized TOGAF steps in to ensure appropriate technical and information environments to make IT a strategic asset of change. It is an incomplete organizational change methodology but a good technical approach that can be useful as part of a suite of tools.



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Lean Manufacturing and Six Sigma

Taylor's original theory of scientific management was adapted by Frank and Lillian Gilbreth in the 1950s to develop time and motion studies. This was further adapted to create both Lean Manufacturing and Six Sigma. Both use simplified process analysis to optimize processes by reducing waste.

Both Six Sigma and Lean Manufacturing are offshoots of many generations of continuous improvement processes such as Scientific Management, Time and Motion Study, TQM and other similar programs. Like their predecessors, Six Sigma and Lean focus on:

- Continuous efforts to achieve stable and predictable process results (i.e. reduce process variation).
- Creating manufacturing and business processes with characteristics that can be measured, analyzed, improved and controlled.
- Achieving sustained quality improvement with commitment from the entire organization, particularly from top-level management.

Lean Manufacturing operates on the philosophy that any process that does not add value to the end product is waste and should be eliminated. The intention is to eliminate this waste to improve the overall quality of the process. It is based on the Toyota Production System and has been minimally adapted to be used in non-manufacturing situations. The success of Toyota in growing from a small company to a dominant presence in the automotive industry has led to great interest in how this was accomplished.

Six Sigma's strength is its rigid process and significant oversight. Features that set Six Sigma apart from previous quality improvement initiatives include:

- A clear focus on achieving measurable and quantifiable financial returns from any Six Sigma project.
- An increased emphasis on management leadership and support. A structure of "Champions," "Master Black Belts," "Black Belts," etc. to lead and implement the Six Sigma approach.
- A commitment to making decisions on the basis of verifiable data, rather than assumptions and guesswork.

Both programs intend to accomplish similar objectives but are evolutionary in focus. They are programs that will deliver continual, usually smaller, improvements that accumulate as significant changes over time. These programs fit organizations that are functioning well and are looking to improve incrementally over time. These are not programs that fit well in a revolutionary change program such as an organizational restructure or new program implementation. These programs work well as a supplement to a comprehensive change process. After improvements are implemented or new

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programs introduced, using these programs as continuous improvement processes will ensure that another major change will not be needed for years to come.

Business Process Management

Business Process Management is the grandchild of time and motion studies, created by Frank and Lillian Gilbreth in the 1950s. The intent of this approach is to optimize the efficiency of business processes by improving workflow.

Traditional business process methods use workflow adaptations to optimize process efficiency. The intent is to assess current processes, redesign and implement new improved processes. Business Process Management is the next natural adaptation of the traditional approach. Business Process Management adds a continuous improvement capacity to business process analysis. It provides for a five stage change cycle.

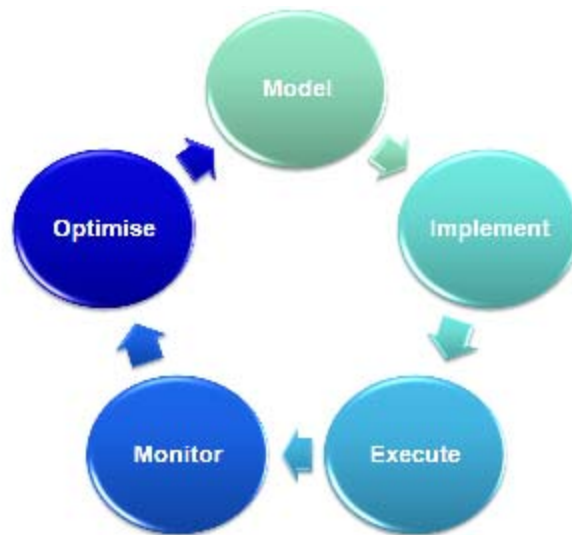


Figure 3: Business Process Management Cycle

Model

During this phase of the BPM cycle, analysts develop high level process models. The intent is to collect enough information to understand how the process works but not enough to fully implement a reformed process.

Implement

The implementation phase requires the analyst to develop process models to sufficient detail to allow for full implementation of a reformed business process. This will include: process players, process recipients, tools required including information systems, etc.



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Execute

This is the actual introduction of the process into use.

Monitor

This is the most significant improvement over previous methods. BPM calls for the development of process metrics that are monitored and used to assess bottlenecks in the business process. This leads to further process reviews and improvements.

Optimise

As opportunities are identified through the SLA monitoring, analysts are engaged to improve the business processes. Using “what-if” scenarios, process changes are identified to fine tune the process effectiveness, thus improving efficiency.

Continuous Improvement

This approach allows for on-going improvement and provides the tools necessary to identify those areas that should be focused on for improvement. This continuous cycle keeps process models current and relevant as the organization matures and adapts to the environment.

BPM is an excellent tool when defining a process architecture and looking to do either revolutionary or evolutionary change projects. Much like the other methodologies it is incomplete. BPM does an excellent job of optimizing business processes. Unfortunately, that does not equate directly to improved organizations. There are many other aspects of organizational change necessary to make sustainable change.

What is the Answer?

Our experience has shown that Enterprise Architecture including TOGAF, Business Process Management, continuous improvement methods such as Lean or Six Sigma are all parts of a comprehensive program. Appropriate organizational change also requires strategic analysis tools, organizational design tools, business intelligence, clear strategic intent and an understanding of your organizational culture.

This may seem complex and unwieldy to develop. Fortunately, our numerous opportunities to fine tune our approach means that Oxford Libero Consulting’s method is no more difficult to implement than any one of the less comprehensive options.

The Oxford Libero Approach

Our approach is built from the principle of complete, sustainable and adaptable organizational design. By defining the problem more broadly than other methods, we have built an approach that has a broader application. We see each project as an opportunity to effect sustainable change in your organization; not just change a system or develop a new organizational chart.

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We use our approach as a template rather than a set of hard and fast rules. We recognize every project as an opportunity to further adapt and improve the method, even though it has been adapted over 40 organizational redesigns and many more projects. To reach the goal of a sustainable organization requires consideration of all aspects of our model. We will recommend optimal approaches to completing all portions of the model but ultimately the work product is the most critical result.

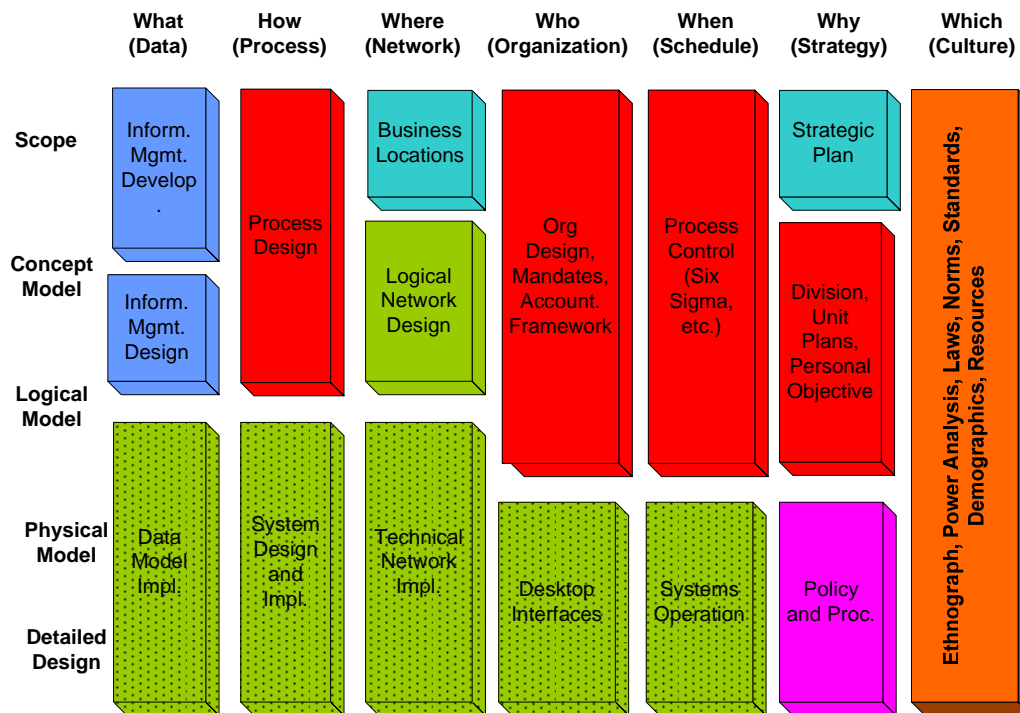


Figure 4: Oxford Libero Consulting Organizational Design Model (Modelled after Zachman)

Each box in our model (Figure 4) has a recommended approach attached to it. Each is a natural work product of an efficient set of facilitations. Our goal is to collect the relevant information once and use it for multiple purposes. We follow a structured progression through the required deliverables, ensuring each time a client group is asked to attend our facilitations, information collection is maximized (Figure 5). We have seen too many projects where multiple consultants come back continuously to clients asking the same questions in many different ways to satisfy a never ending string of specialized design documents, mostly targeted at technical solutions. Our approach uses well trained analysts (business analysts on steroids) to drive our facilitations.

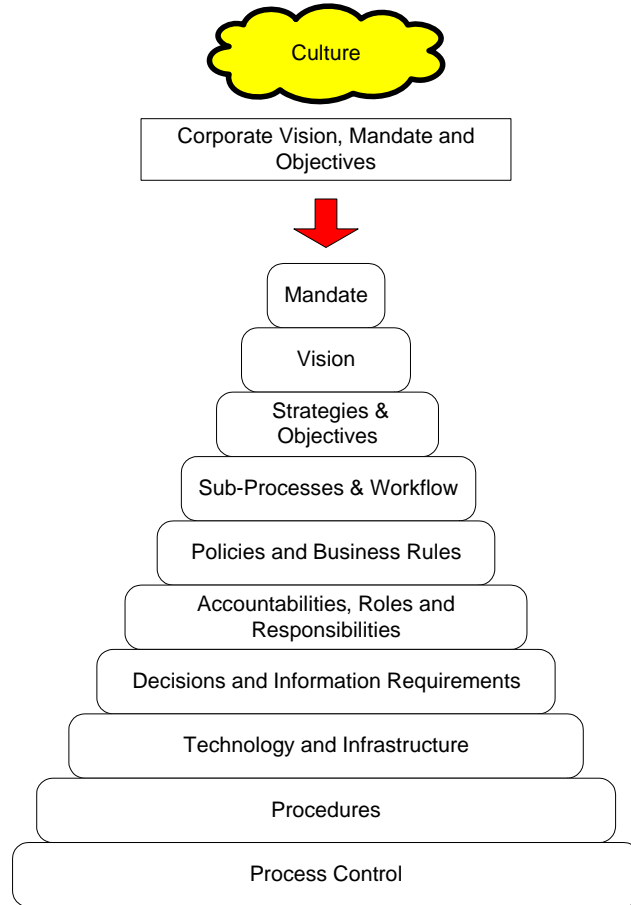


Figure 5: Oxford Libero Structured Progression

Over the next few briefings we will provide more details on the approach to completing all aspects of the model. We will also provide recommendations for team member profiles and training to develop internal capacity for sustainable organizational design and on-going adaptation.

Is This Just Another Fad?

We hope not. This is a method developed over more than 15 years of change projects and continues to evolve with every new project. To continue this progression and to create an integrated community, Oxford Libero Consulting is in the process of developing a social network where practitioners are able to share their knowledge, seek assistance and look for feedback from like-minded professionals. We hope to have the preliminary network available in the next few months.

Rather than overselling the relevance of our approach to your specific needs, we provide a sound foundation in the program with the expectation that it is a comprehensive change process. In all likelihood, it will not address every aspect of your change initiative, exactly. We provide the community



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to assist you as you experience situations with unique requirements, while requiring members to keep their organizational information confidential. By providing this support we are able to ensure a highly successful implementation and an ability to continually improve our approach. In future briefings we will introduce our network and invite you and your teams to join us.

Oxford Libero Consulting is also in the process of developing a training program for analysts to create “Business Analysts on Steroids” to assist in your implementations. These are the primary drivers of many of the facilitations. They are also the primary communication point for the technical team who will be responsible for developing technology solutions to support your organizational change. In the interim, we have a number of fully trained team members able to assist you in your implementations.

Each of the methodologies described in this paper have a specific purpose and are valuable in redefining your organization. Practitioners of each methodology would likely criticize my assessment as sticking to the letter of their approach and not recognizing the ability to customize the approach to make up for the deficiencies. The important point for your organization is to define the objective of your program and determine if the toolset will meet your objective. I would encourage you to consider your change projects as part of a broader initiative to improve the efficiency and effectiveness of your organization. Doing so will mean that future change initiatives will be built on a solid foundation and will provide a well documented baseline allowing for incremental change rather than further revolutionary change.

General Motors spent many millions of dollars on new technologies, improved strategy, enhanced business processes, etc. , yet ended up in bankruptcy during the recent recession. The goal of any of these changes was to make a better, more resilient organization. Unfortunately, perfect strategy without the ability to implement it is as counterproductive as system implementations without linkage to organizational direction. If you are spending the money anyway, it doesn’t cost more to do it right. In fact, it will likely save you money in the future. Given the events of the past few months, it might even save your organization.

Is Your Management Team Change Ready?

By Michael Dumelie B.Admin. CMA MBA (Oxon.), Partner

If senior management is lucky they will only experience major change initiatives once or twice in a complete career. Even many change consultants do not have the experience of living with the impacts and complexities of implementing and managing a changed organization. This is where a well built and effective management team becomes critical to the success of organizational change. Our experience has shown that no two initiatives are the same and that there is no standardized change approach that will meet your needs, no matter what your high priced consultants tell you. You and your management team need to have an ability to adjust and adapt for the inevitable issues that change initiatives create.



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Change is not for all management teams. Your organization can be made up of individually talented managers who are unable to effectively implement even the most rudimentary change initiatives. Those same managers, when put in another management group may form a team capable of complex change. Understanding the make-up of your team will help to determine if you are likely to succeed or fail in your project. Without the ability to adapt and deal with the unexpected changes in your environment, you will have a rough ride to your ultimate goal.

Ensuring You Have the Right Team for Your Change

Bob Lane B.Admin. BA MHRM, provides our strategic human resource management services. He is currently completing a successful redevelopment of a critical operation in a local crown corporation. He has developed complete profiles of the existing management team. He assessed their capacity to manage a forward thinking and progressive organization. This provided valuable information for senior management and was used in the restructure of the organization.

Mr. Lane used a complex set of assessment tools, administered by psychologists, to develop 360 degree profiles of each critical manager. This left little to chance as to the characteristics of the individual managers. While these were extremely valuable, you needn't go to the expense of such a comprehensive profile to begin the process of assessing your management team. While not nearly as definitive, we recently completed IPIP-NEO profiles of a management team with very interesting results. These tests are a few hundred dollars versus the thousands of dollars a comprehensive program will require. It allows you to get a directional sense of make-up of your team, which can help to determine if a larger investment is warranted.

What Does a Good Change Management Team Look Like

In most significant change projects organizations are seeking to get out of their comfort zone. Organizations can bring in consultants or outside experts to assist in the process of generating a new vision for the organization by bringing other perspectives or experiences. Ultimately, the relevance of these new ideas needs to be assessed and enhanced by the internal team or organizations may suffer from the superficial changes often associated with consultant led change programs.

To build a relevant and sustainable strategy the management team needs to work as a think tank, reviewing new ideas, researching alternatives, brainstorming and ultimately generating practical solutions to complex issues. The characteristics of a think tank include the ability to critically assess ideas and improve on them. This takes a strong leader willing to accept that decisions made by a group of intelligent managers are far superior to the opinions of one.

This is often difficult, especially for inexperienced change managers, which would be most. These initiatives are generally high profile and critical to the success of the organization. Just when we need the leader to be confident and create an open and collaborative environment we put the added



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pressure of the future of the organization and his/her own career on his/her shoulders. You can only hope he/she will be a manager who flourishes in this environment rather than one that becomes controlling, trying to do it all himself/herself. We will review the make-up of a change leader in a future briefing. This is not a time to hope the manager, with a history of doing it himself/herself, will change his/her ways. In times of stress, people tend to go where they are comfortable. If you have a manager capable of doing the work of two people themselves, yet get the results of two when they manage twenty people, they are not the right person for this job. Send them on your pet project instead and don't waste a good team.

An Example Management Team

If I gave you a profile of two teams and one had three MBAs with many years of management experience as well as an extensive area specific knowledge, and the other had a manager who was demoted twice, a team of rookie (less than three years) managers with undergraduate education, a manager with little education beyond high school and only one MBA, I am sure you would assume the first to be stronger. You would be terribly wrong.

Both teams were involved in the reform of the same major organization, the first, while making progress, could not make the changes necessary to truly reform the organization. Team members from the first team nearly caused the organization to post its first loss in corporate history while playing corporate politics as they worried about their career to the detriment of others and themselves.

The second team was an example of the whole being better than the sum of the parts. This team immediately meshed. Their innovative ideas won international acclaim and created significant organizational value. Most of these managers have now gone on to lead their own change teams in other organizations.

Profile of Team 2

Team 2 was made up of the leader, two direct reports, 6 managers and numerous senior professional staff.

The Leader

When asked to describe the Leader, the direct reports came up with a number of examples including; Willy Wonka, the Wizard of Oz and King Arthur. The common theme is that he has crazy ambitious ideas that many would see as impossible. His history has shown differently.

The management team saw themselves as the 'round table' with full control over their destiny while working to a common goal. They achieved successes, never before considered possible in the company. His primary contributions to the team were: a focus on a think tank style environment; ability to excite



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people with a grand vision; ability to convert that vision into a staged practical implementation; and ability to select the right people for the situation.

His profile shows him to be an extreme extravert, altruistic, sympathetic, but extremely confident. He is self-deprecating, highly achievement oriented but not terribly organized, relying heavily on his support team to make up for those deficiencies. On the neuroticism scale he is at zero while being extremely open to new experiences. This indicates that organizational change is a natural for him as he faces little self-doubt, an openness to change, and the skills to get people to follow.

Direct Report #1

Direct Report #1 was promoted from a management position in the former IT Division. She is a unique sympathetic personality. She is considered to be a mothering type of manager who keeps the human side of the team in focus at all times. She is extremely open to new learning and keeps her team focused on being the best educated and forward-thinking team possible. She never loses focus on development of the 'elegant solution'.

Her profile shows her to be extraverted, extremely agreeable, conscientious, unflappable and open to experience.

Direct Report #2

Direct Report #2 was promoted from a management position in the quality program and was formerly a member of the IT department. He had proven himself as a solid developer of new programs and was outstanding at researching and developing innovative solutions. He was the voice of reason in the senior team who strives for the 'big idea' but keeps an eye on the practical delivery of the program as well.

His profile shows him to be neutral on the extraversion scale, very agreeable, conscientious, unflappable, and more cautious on the experience scale. He is the perfect counterbalance to the less cautious nature of the other two senior members of the team.

The Managers

The team reporting to Direct Report #1 was a highly successful team able to take on a number of challenges, especially related to the outsourced nature of the IT function. Both the IM and Enterprise Technology positions needed to be visionary to help to drive the required innovation in their areas. Both were leaders in the industry due to the creative programs they developed.

The Relationship Management program was responsible to hold third party suppliers accountable. It required their team to be focused both on relationship building and detailed analysis of metrics and financial results. The Relationship Managers were excellent relationship builders. Their manager supplemented them, and the management team, with experience and a details focus.



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This team, reporting to Direct Report #2, had two players who were driving change in the Loyalty and Quality programs. They relished their role in changing the organization and worked to be leaders in the industry through innovation and a firm resolve to implement positive change.

The other role in the group was responsible for dealing directly with service providers and business units to ensure that extremely complex systems were optimized. They were also responsible for documentation of all policies in the company. The team was experienced and challenging. This manager was extremely personable and able to work with a difficult team in a structured environment.

Why Was This Team Successful?

The IPIP-NEO is an assessment that measures the big five personality traits of individuals. While not a complete assessment of management competence and style, it provides an empirical indicator for your management team. It provides a detailed analysis or a short form option to assess your leanings in the area of Openness, Conscientiousness, Extraversion, Agreeableness, and Neuroticism. It also provides details of sub-indicators under these subject areas.

Overall the management team showed a number of similarities and an appropriate amount of differences to maintain effectiveness. All of the team members were willing to state their position and challenge any of their team members. They had a good balance of people with the willingness to take on new challenges. They also had a skeptical audience for many of their initiatives. The team's willingness to challenge each other helped to prepare them for this skepticism.

The team scores using the IPIP-NEO scale show:

Scale	High	Moderate	Low
Extraversion	5	3	1
Agreeableness	3	5	1
Conscientious	4	3	2
Neuroticism	1	2	6
Openness to Experience	6		3

The profile shows a good balance on each factor. In general, they were an extraverted group which assisted in their ability to sell the change program and reduce resistance. They were agreeable, which helped their relationship building with their client groups.

Their conscientiousness scale was interesting. This is an area where they have a good balance en mass. Those areas where some were weak were areas of strength for others. Overall, they were strong as a group where they may be weak individually.



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A low level of neuroticism is useful in dealing with the skeptical and challenging nature of those entering change initiatives. This team is generally low on this item. Fortunately for their team they had a few members who have moderate or high levels. This allows for a bit of ‘devil’s advocate’ thinking on their initiatives which resulted in a better product for clients.

Finally, openness to experience is welcomed in change organizations. The example group has teams responsible for initiating change and those who must maintain a cost effective solid direction. This mix helped to temper the ‘take the hill’ mentality of many of the team members with a voice of reason.

Overall, the team had developed a level of respect that allowed them to challenge but not offend. They were a team made up of individuals with different perspectives and backgrounds who were willing to use their skills. They proved to be a valuable force for change.

Intuitively, this team is much stronger than the team that the leader inherited. While that team managed many significant improvements in the company, their cohesion, respect and willingness to challenge were not nearly as strong. The profile of that team showed the reason for these issues.

Scale	High	Moderate	Low
Extraversion	4	3	3
Agreeableness	6	2	2
Conscientious	5	3	2
Neuroticism	5	1	4
Openness to Experience	5	2	3

There are a number of critical differences that make the example team stronger than the original team. The original team was more agreeable, while also being more neurotic. This was a concern given the fact the team was asked to prioritize and challenge each other as part of the open management approach of the Leader. The role of change agent requires a firm resolve and confidence. This was clearly an issue with the level of neuroticism of the original team.

The original team also suffered from having introverts in critical roles required to sell their program. Finally, the example team usually had one or two members on the opposite end of the scale, of each category, from the prevailing group. The original team had a number of the categories where there were large clusters of opposition from the norm. This allowed the team to develop factions, especially in times of extreme stress. These factions would often seek out others within the organization to back their position against their management team members. It was much more challenging for the Leader as he was required to aggressively manage this situation. All managers were either developed or



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encouraged to leave the organization on their own schedule. All who left landed in better external positions, due to the innovative program they were a part of.

Too many times organizations face the need for change and bring a knife to a gun fight. Change leaders are inexperienced and try to do too much themselves. They bring in consultant-led change programs that are the 60% solution and see the process as a temporary project to fix the organization and then go back to normal. The manager practices 'management by magic wand' where they believe just saying change is happening is enough to make it happen. While not optimal, all of this can be counteracted by a long term view to organizational change and an environment that adapts to the inevitable unique circumstances of your change requirement. Without an engaged management team capable of leading such a change, you are going to get the experience you lack, as your next change initiative is likely only a short time away.

If you are currently in a major change initiative or are hoping to develop an on-going change program, Mike Dumelie, Bob Lane and our team of professionals are available to assist you.

Analyze This: Are You Getting the Maximum Value from Your Business Analysis Investments?

By Michael Dumelie B.Admin. CMA MBA (Oxon.), Partner

The only constant is change. If you aren't changing you are falling behind. There are a number of clichés people use when talking about the ever changing environment we operate in today. This has never been more obvious than during the recent recession.

While the recession was a terrible experience that impacted many families throughout the world, there was a side benefit to the stress of such a significant change. Those organizations that did not prepare for change, and have processes in place to deal with change, were more likely to struggle than those who did. It has forced organizations to rethink every aspect of their operation, which should make us stronger going forward.

Many of the organizations that struggled spent significant money on change. New information systems, organizational restructures and new strategic directions were common in many of our larger organizations, yet they were unprepared for the recent change. How is this possible? Most managers are trained to maintain organizations and diagnose individual problems. This tends to result in focused change projects seeking to solve singular issues. Unfortunately, this approach has been shown to be ineffective in building sustainable organizations capable of weathering major storms.

The same can be said for business analysts and for that matter, project managers. These areas of expertise can spend most of their time working on projects that are intended on improving the



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functioning of your organization. 'Professional' project managers generally are required to take a five day course and pass a single exam and they too can hang out a shingle.

It is even less onerous to become a business analyst. Most will take a three day course that provides little opportunity to build practical experience. This training is based on tools required to collect information to build information systems. Presentations I have done to the International Institute of Business Analysts (IIBA) have encouraged them to consider BAs as agents of change rather than collectors of systems requirements.

To be fair, the large IT consultancies would say that their business analysis process requires their analysts to consider the business as they develop these requirements. As a former consumer of these services, the capability of these consultants falls well short of agents of change. In fact, most required retraining to be allowed to interact with our clients as their approach was detrimental to comprehensive change.

So why buck the trend and require more of your analysts? In most organizations funding for improvement projects is often difficult to come by. As budgets tighten these seem to be the first to go. When you have an opportunity you need to be prepared to take advantage of it. As your most likely change project participants, your business analysts should be seen as agents of change and trained to optimize your projects in the long term interest of your organization, not just prepare requirements or develop test scripts. This will make them a strategic asset in the development of an organization that is resilient and sustainable. Not only is this possible but it is nearly criminal to not do it.

Profile of a Top Business Analysis Candidate

With proper training, your staff can improve their analysis skills. Top candidates for effecting organizational change should have the majority of these characteristics:

1. Be naturally analytical and preferably inquisitive by nature;
2. Have good common sense and the ability to exercise good judgement during projects;
3. Excellent facilitation skills;
4. A passion for improving processes;
5. Calm and thorough;
6. Good verbal and written communication skills;
7. Ability to work alone or as part of a team;
8. Can handle conflict; and
9. Capable of managing projects.

The best analysts will have context for your business. This helps in the facilitation of organizational change.



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Training for Building your Analyst Capacity

To build analysts who are capable of comprehensive organizational change, does not happen in a three day training course as has been the approach of many of the major consultancies. To move from a raw rookie to a seasoned professional can take a few years and requires experience as well as training.

There is a natural progression for analysts. In our terminology, the progression is from business analysts, to senior business analysts and then senior quality improvement analysts. Business analysts would be team members, under the direction of a senior business analyst or senior quality improvement analyst, who provide support for requirements gathering, test script development and regression testing. This role is especially important on larger more complex projects where significant analyst skills are required.

Business Analyst training should include:

1. Common business analysis techniques for requirements gathering (what most business analyst trainers provide today in their 2 and 3 day courses);
2. User acceptance testing;
3. Regression testing;
4. Technical tools training (Excel, Word, Powerpoint, and MsProject);
5. Introductory Project Management training; and
6. Business Process Management training.

This training provides a good grounding in the tools of business analysis. This will provide analysts who can provide valuable support to larger change projects while gaining valuable experience.

Senior Business Analysts are those who will lead well defined organizational change initiatives. They have the skills to lead/facilitate team members through thoughtful redesigns that lead to sustainable organizational change. These will be experienced business analysts who have shown good leadership skills and are naturally inquisitive. These are good characteristics for effective facilitation of change initiatives.

Their role will include facilitation of groups through process and organizational redesign sessions, project management of change initiatives and interaction with the technical team to provide requirements for technology solutions to support the organizational change. This will include information systems to support business processes as well as business intelligence services to support reformed accountability frameworks.

Senior Business Analysis training should include:

1. All of the training already identified for Business Analysts;



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2. Advanced project management training;
3. Customer Loyalty and Quality program training;
4. Information Profiling training for business intelligence services; and
5. Facilitation training.

These analysts will be able to lead most organizational change initiatives. These analysts are also natural prospects for management and senior management positions as they show leadership characteristics and have developed leadership experience as part of their change projects. Their understanding of the inner workings of the organization and focus on building sustainable organizations will lead to a better managed organization.

The Senior Quality Improvement Analyst is the most strategic of the business analyst progression. These are the analysts who will also facilitate strategy sessions as part of their organization design initiative. These are seasoned facilitators who can lead strategy sessions at the individual, unit or organizational levels. These analysts are the most valuable as they will be able to take a concept and implement a reformed organization. When you are looking to make an investment in sustainable change these people are extremely valuable.

In addition to the training of the Senior Business Analyst, Senior Quality Improvement Analysts should receive training in strategic planning processes, strategy facilitation and environmental analysis. Coursework for organization wide strategy is more comprehensive than more specific individual strategy development.

Business Analysts should be some of the most strategically important assets in your organization. Sustainable organizations need to invest time in working on the organization as well as in the organization. That is where business analysts can earn their money. Those who are satisfied with the analysts developed in their three day training course are likely wasting their analysis investment. Organizations paying for consultants similarly trained are likely paying too much. It doesn't take much to get the maximum value out of your analysis investment. Don't settle for second best.

Oxford Libero Consulting LP is currently developing a progression of training courses to assist you in developing your analyst capacity. We have a number of analysts available to assist you with your analysis needs and to mentor your internal resources. Our Director, Business Process Management is also available to assist you in the development of a business analysis program within your organization.



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Enhancement of Services Provided by Oxford Libero Consulting LP

The focus of our Regina operation is in complete organizational design. We have skills in both business and technical architecture development that allow for high quality service delivery that is both adaptable and sustainable.

Mr. Michael Dumelie, Partner, has experience in the redesign of over three dozen organizations. He has assembled a team of professionals with experience in enterprise architecture, quality program development, project management and project management office development, business continuity, business analysis, strategic human resources management and business process management. In addition, we have unique skills in information management and decision system design.

We Offer Project Management Training

Oxford Libero Consulting LP is pleased to offer project management training for our clients. We can offer 2 and 3 day comprehensive project management training that is both practical and actionable. As a further enhancement we are now able to offer Project Management Institute (PMI) preparation courses that will lead to a Project Management Professional (PMP) certification. We can offer 5 day courses as well as a two day supplementary exam preparation course for those who have previously taken our 3 day course. We are excited to offer these services to the Saskatchewan marketplace.

Coming Soon Business Analysis Plus Training

In addition, Oxford Libero Consulting LP is currently developing a series of business analyst courses that will lead to fully trained change agents for your organization. Our intent is to have a phased approach that will develop the basic skills, change analysis skills and then change leadership skills in your analysts. As your analysts grow, so too will their training. Finally, this program will be supplemented with a social network of like-minded professionals to assist in those inevitable unique situations. We are excited about the development and look forward to launching in early 2010, with the potential for courses available in advance of that.

We would be pleased to discuss how we might be able to assist in meeting your organizational needs.

Contact Information

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