

HACKING CHANGE MANAGEMENT

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CHAPTER ONE

CHART YOUR COURSE TOWARD OBJECTIVES, NOT DESIRED OUTCOMES

ARTICLE SUMMARY

- We define “hacking” as solving complex, yet very common problems by leveraging non-traditional methods
- In leading transformation, nontraditional techniques enable rapid pivoting in response to volatile challenges
- In a real-world example, the client’s attention had been stolen by competing priorities and an overemphasis on desired outcomes – instead of defined objectives – and needed to be reclaimed

What is your reaction when you hear about a hack? Maybe “hacker” elicits thoughts of a sinister group of computer experts in a fortified basement committing acts of espionage and cyberwarfare. Hacking is frequently associated with illegally gaining access to critical personal, organizational, or government information. Oh yes, and of course, dark hoodies. It’s obviously very cold in the basement.

It is not surprising that the term “hacker” often creates a feeling of apprehension. After all, we’ve recently seen some nefarious hacking hit quite close to home. Personal information of nearly 44% of the U.S. population was illegally obtained in May to July of 2017 when criminal hackers infiltrated the servers of Equifax, a consumer credit reporting agency¹. The hackers gained access to data that enabled them to conduct identify theft on 145.5 million Americans.

Not all hackers, however, aim to steal data or create chaos. Many hackers leverage a hacking methodology to solve healthcare problems or cure diseases (biohacking), and improve environmental quality or rapidly innovate, test, and deploy new technology. These helpful hackers have also been called “hactivists.”

We are not here to argue the merit of hacking necessarily, but rather to consider that there are many times in life and business, especially when undergoing big change, when traditional methods no longer cut the mustard.

All hackers, whether sinister or benevolent, are after rapid and disruptive results. In organizational change management, rapid and disruptive are the names of the game.

For the sake of this paper, we define hacking as solving complex, yet very common problems leveraging non-traditional methods.

This ebook examines some examples of when my teams embedded “hacking” techniques into a transformation or project as part of our Organizational Change Management (OCM) processes. We see that, when the transformation, or OCM, leader becomes the lead hacker and champions the use of non-traditional techniques to lead change, we were able to rapidly pivot, overcome volatile challenges, and reach the desired state of operations more quickly.

COMMON PROBLEM #1

SUSTAINING EXECUTIVE SPONSORSHIP

Executive Sponsorship is a key contribution to success in implementing change. Leveraging robust Sponsor Plans and Roadmaps, my teams have not typically had issues in gaining executive sponsorship with an initial representation of strong, visible and vocal leadership. A Sponsor problem that I have encountered, especially in larger (Fortune 500) or quickly growing companies is sustaining visible and vocal sponsorship after initial kick-off.

Executives (or senior leaders) that are assigned to sponsor change initiatives are commonly in a position where they have broad organizational responsibility. Often, their time is overtaxed leading to a restricted ability to demonstrate sustained visible and vocal sponsorship on each of their assigned initiatives.

Real-world Example

In 2016, I led an initiative for a Fortune 500 financial services company that involved implementation of a well known cloud-based contact management tool. Implementing the solution required broad stakeholder engagement and strong Executive Sponsorship.

The Executive Sponsor kicked off the project by participating in some initial key meetings and sending out broad communications discussing the benefits of the solution being implemented. Our OCM team and Change Champion Network met biweekly to implement the activities listed on the Engagement and Communication Plans.

Within weeks of our kick-off, our Executive Sponsor was pulled in multiple directions. He had to allocate his time and resources to various strategic initiatives that had competing priorities. We continued to write key messages for the sponsor which he disseminated among his direct reports. Our messages focused on the benefits that would be attained with the new solution.

Our OCM Strategy, although thorough, did not enable us to maintain the enthusiasm from the Executive Sponsor demonstrated in the planning and kick-off of the project. This lack of enthusiasm cascaded to senior leaders and some of our Change Champions.

Key leaders and influencers failed to timely cascade messages. Additionally, although we managed a microsite with key information of the system and provided updates to the key talking points, we did not get the end user engagement and active adoption we had hoped for the first release.

Applying the Hacks to our Real-world Example

We took a step back to observe our Executive Sponsor. **We had to focus on the behavioral economics at play – we looked for patterns and methods of his prioritization, and allocation of resources. We were looking for opportunities to reengage and exploit these opportunities to prioritize our project back to the top and sustain top prioritization.**

We made sure to schedule the retrospective for the first release with the project team when the Executive Sponsor was available. With the Sponsor in the room, we brought up the fact we did not hit our target for user adoption. Users were still reverting to some of the old ways of doing things. The same pains that led to the decision to implement the new solution were continuing despite the positive momentum created at during the project kick-off.

We looked back at the original problem statement. It contained several pain points inherent with manual, offline management of contacts. Eliminating the pain points drove initial excitement in the Executive Sponsor and Senior Leaders.

We took immediate action to mitigate our missed widespread user adoption and usage metrics on the first release. We called a meeting for all the leaders and Change Champions representing the impacted stakeholders for the first release. We discussed the original pain points and conducted a survey to quantify the amount that each pain was resolved. **By putting the focus back on the pain points that existed before the solution, we maintained focus on the objectives related to eliminating those pain points, thus regaining the attention that had been diverted to competing priorities.**

Leveraging what our team observed about our Sponsor's prioritization (financial and reputational incentive for timely completion of strategic initiatives), we frequently called out risks in timely completion of the initiative with projected user adoption without Sponsor action.

Specifically, our risk mitigations for timely completion and user adoption called for the Sponsor to sustain visible, vocal advocacy of the solution. We created a dashboard that contained 4 "gauges" for the Sponsor which were linked to the metrics created on our user adoption/readiness scorecard. By incorporating this dashboard into the weekly status report, we were able to directly tie the Sponsor's Performance to timely completion and user adoption. It was also vital to set accurate expectations: we agreed that if the mitigations were not ambitiously executed, the results identified in the business case would not have been achieved; thus, the Executive Sponsor would not be rewarded for completing the initiative.



For the second and third releases, using our aggregated analysis of the behavioral economic assessment, we directed focus to **reiteration of the pain points as part our key “what’s in it for me” messages. Combining this redirected focus with tracking weekly Sponsor Performance metrics, we improved visible and vocal Sponsor support which cascaded to senior leadership and change champions.** This resulted in the project hitting our user adoption metrics for both subsequent releases.

Summary of Lessons Learned

Admittedly, the steps taken in our “hacks” are not transformative in nature to the OCM world. These steps did, however, fundamentally shift the way this company implemented change, setting them well within our “hacking” definition boundaries described in the introduction.

Why does this matter?

This is something we’ve found to be true as we’ve “hacked” our way through many OCM engagements: success often hinges on how one approaches problem-solving, not necessarily the elegance or brilliance of the solutions applied. The hacker ethos does not have to include wacky, left-field solutions. In fact, the hacker ethos may often leverage best practices. As we continue through this series, remember to constantly examine your approach and to maintain a relentless focus on defined objectives over desired outcomes. How one swings the hammer matters more than the hammer itself.

Hacking Executive Sponsorship Summary:

1. Observation of patterns, reverse engineering networks, and exploiting vulnerabilities
2. Keep the Sponsor & Leadership focused on the objectives, not just the desired outcome – understand the situation’s behavioral economics and shift mindsets

References

Weise, E. 2017, September 26. **A Timeline of Events Surrounding the Equifax Data Breach.** Retrieved from <https://www.usatoday.com/story/tech/2017/09/26/timeline-events-surrounding-equifax-data-breach/703691001/>

CHAPTER TWO

STOP FIGHTING HUMAN NATURE AND START LEVERAGING IT

ARTICLE SUMMARY

- Resistance to change is human nature, and it may manifest as active or passive behaviors that reduce the speed to anticipated benefit
- To successfully navigate change, creating engagement and reducing resistance are challenges that people must own themselves – Micro-managing change can take that away from them
- Gamification is a clever way to fight fire with fire, allowing another aspect of human nature to do business with the human propensity to resist change

COMMON PROBLEM #2

ENGAGEMENT & RESISTANCE MANAGEMENT

We humans have a tough time with change. In fact, humans often push back against change, regardless of a population's experience or maturity. At a macro-level, the combination of shifting demographics, stakeholder preferences, geopolitical turmoil, and emerging technologies leads to an unprecedented rate of complex change and volatility. There is a compounding effect leading to greater resistance when a change happens in our own environment for which we did not plan or for which we have limited flexibility in addressing.

Maybe resistance to change is an obvious human phenomenon, but the less obvious truth is how we resist change. Resistance is often not active.

Resistance may be seen as active or passive behaviors that reduce the speed to anticipated benefit. I have witnessed stakeholders, even key leaders, disengage with a change initiative (passive resistance) due to competing priorities, as discussed in the first part of this series, or due to a lack of motivation to change. Because of a **lack of personal alignment with an enterprise change**, I have also had to address stakeholders that were **intentionally sabotaging the company** (active resistance) to try to stop the change.

Real World Example

I was the lead on an initiative wherein our team was tasked with revamping Project Management processes and tools. We had great sponsorship – we met with executives biweekly via video conferences and face-to-face meetings. Our communication plan was tailored to deliver specific messages to impacted stakeholder groups throughout the implementation. We set up a robust Change Champion Network, had a Resistance Management plan, and had a Training Plan that was timed appropriately to deliver content to stakeholders before they were expected to move to the new process and tools.

End user adoption was a major concern on this initiative given the amount of resistance we encountered during early assessment of stakeholders. Forty champions were recruited to our Change Champion Network to manage resistance and engagement of the 600 impacted stakeholders. We were able to generate enthusiasm during kickoff of the project and our Change Champion Network. Despite the initial enthusiasm and sticking with our robust plans of engagement, communication, and resistance management, there was more resistance than expected. **We used a readiness scorecard to identify and quantify pockets of resistance.** The goal was to get each stakeholder group to score as high as possible across a specific set of questions. The results made it clear that some groups of stakeholders were much more resistant than others.

After closely evaluating the scorecard results with our Change Champions, **we found that the more resistant stakeholder groups were assigned to Change Champions that were less engaged.** Despite consistently engaging each Change Champion, levels of enthusiasm and engagement were drastically different.

A Hacker's Approach

In terms of mindset and motivation, hackers (and hactivists) commonly have an insatiable desire to explore and seek adventure, **often inviting and compelling others to join adventures.** They have extreme curiosity and take on unique challenges, qualities that entice crowds.

For the sake of this paper, Crowdsourcing is defined as bringing together a confluence of forces to rapidly decompose a problem and identify several alternate solutions. For this solution, we define a Hackathon as the forum in which we can Crowdfund with a time limit of 4 hours.

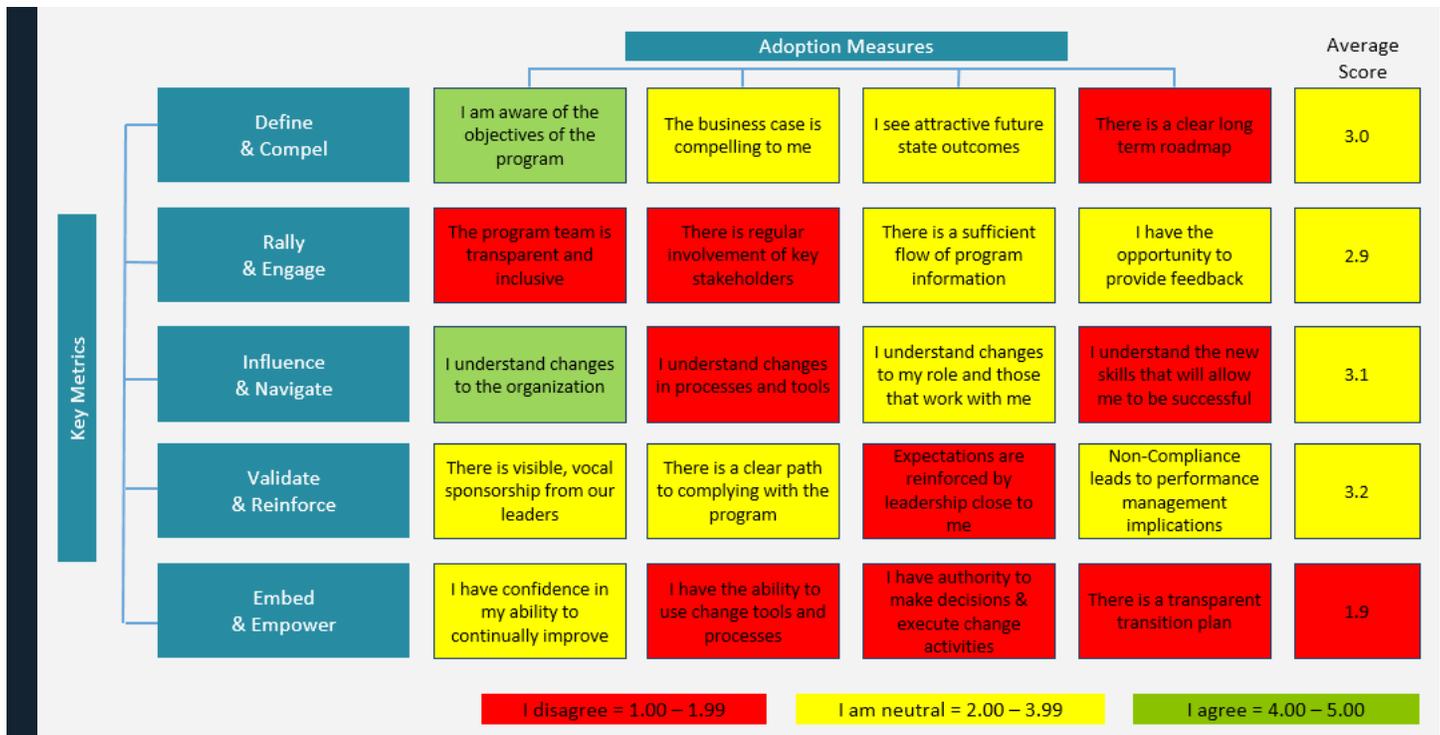
Applying Hacks to our Real-World Example

A second pulse check (aka survey) during the initiative garnered scorecard results that were not very positive. We decided it was time to bring together our Change Champions in a Hackathon to Crowdfund potential solutions.

During our Hackathon, Change Champions revealed they did not feel challenged in their role. Many advised they were being “spoon fed” the talking points and engagement material. They did not feel like they had ownership or the authority to use their own creativity to generate meaningful engagement with their assigned stakeholder groups.

As the Lead, I had taken away the ability for the Change Champions to explore and seek adventure. **I had inadvertently taken away the challenge of creating engagement and reducing resistance when I micro-managed the change network.** Humble pie sliced and eaten.

Flexible guidelines were given during the Hackathon, along with accountability to each Change Champion for managing the Readiness Scorecard for their assigned stakeholder groups. The Change Champions would be held accountable for getting their assigned stakeholders to higher numbers on the scorecard, rather than having that activity centralized within the core OCM team. (As a side note, not only was a Change Network something new for this organization, they had never seen OCM as a quantifiable metric which has been particularly helpful for many project, financial, and data oriented teams).



(Sample Scorecard)

Improving the scores became a new challenge and got the creative juices flowing. **The Change Champions took it upon themselves to “gamify” the Readiness Scorecard.** Getting the highest scores on the Scorecard meant winning to them...which translated to winning for my OCM team. The inherent desire to win this game led to Change Champions leveraging the material we had created for the initiative, and requesting new items such as infographics and stakeholder specific personas and journeys that could be printed for strategic placement. The excitement of the Change Network cascaded to the impacted end users, creating a desire to engage with the initiative.

Offering unique challenges and opportunities inspired and engaged stakeholders such that the aggregated scorecard for all the stakeholder groups reached higher scores much faster than we had planned. This allowed us to launch some of the new processes ahead of schedule. Ultimately, the initiative came in under budget. **The client spent less on training and transition activities due to the enhanced engagement and lower resistance** following the reinvigorated Change Network.

Summary of Lessons Learned

Human nature can be an enemy or a friend during transformation and it's up to those facilitating the change whether they will harness it or not. Whether it be active or passive, and whether it's strident or minimal, resistance is often inevitable during times of significant change. This is human nature. Gamification is a clever way to fight fire with fire, allowing another aspect of human nature to do business with resistance to change. If facilitated correctly, transformation can become an adventure and a healthy competition, rather than an affront.

Hacking Engagement & Resistance Summary:

1. Utilize a Hackathon in which you can Crowdfund solutions leveraging your network of stakeholders to eliminate obstacles and encourage engagement
2. Offer unique challenges and opportunities that psychologically inspire and engage stakeholders

CHAPTER

THREE

TRANSFORMATION WITHOUT OCM IS WISHFUL THINKING

ARTICLE SUMMARY

- Failed Transformation Red Flag #1: Project team does not embed the OCM team with the delivery team
- Failed Transformation Red Flag #2: Project team fails to create an end-to-end view of the value stream
- Physical visualizations create transparency on the timing and impact of OCM activities, allowing non-OCM team members to easily provide inputs

COMMON PROBLEM #3

TREATING OCM AS A DISPARATE METHODOLOGY

Many companies have evolved their delivery methodology from traditional, or waterfall, to Agile. In such cases, stakeholder engagement changes, as does the timing of stakeholder impacts. Despite a change in delivery of projects that introduce change (sometimes significant), the process that focuses on the people side of change (OCM) has not evolved at the same pace.

When the OCM work stream does not align to the delivery work stream, **stakeholders do not receive the right information or engagement at the right time, leading to increased resistance and slower speed to benefits.**

In a traditional, or Waterfall delivery model, a business case and a bulk of the specifications (aka requirements) for a solution are documented up front, resulting in a timeline of months or years for the delivery team to produce a working solution. The OCM teams' roles include heavy, up-front interaction with the project teams and then follow a predefined path that aligns with the waterfall delivery.

As more companies have embraced the philosophy that speed wins and we are in a constant state of change, they have moved to an Agile delivery model. In this model, a requestor provides a problem statement and enough specifications for a development team to produce a working solution in a short period of time. Importantly, the requestor stays very involved, sometimes daily, with the delivery team to answer questions about certain features of the solution. The requestor then gets to test a basic working solution (sometimes called a Minimal Viable Product, or MVP) within, for example, four weeks. Additionally, the requestor can provide more specifications for the next iteration of the solution, aligning the specifications to real-time conditions within their operational environment and systems. This method obviously has implications for end users with respect to the timing and complexity of impacts.

Real World Example

A financial services organization with 2.5k employees wanted to move away from manual processes in their project and portfolio management. I was hired to assist in this transformation with respect to the process for budgeting and the supporting technology. The new processes and collaborative, cloud-based tools were a complete deviation from the manual processes in place. Working with the client as part of the discovery effort, we chose to use an Agile methodology to achieve quick, iterative results with a Minimum Viable Product (MVP) while creating a culture of collaboration that was not present at this organization.

Importantly, **this organization experienced a failed transformation of the same tool and similar processes for the same end users just a few years prior. Not only did the project team fail to create an end-to-end view of the value stream, they did not closely embed the OCM team with the delivery team.**

At the time of my engagement, the culture of the organization did not seem ready to embrace the close collaboration required by Agile delivery. Teams were siloed and did not often communicate or agree on methods for problem resolution.

The combination of a culture that did not support collaboration and the history of a failed change with the same solution created a situation in which stakeholders did not believe we would successfully implement the new tool. They believed their current processes would not change. This led to a very difficult project initiation in which we had little engagement.

A Hacker's Approach

Being nimble is paramount to hackers. This requires constant collaboration and accepting a bi-product of high speed and agility: failure. The important thing to hackers is to fail fast. Valuing fast failure for its lessons is a mindset that fuels the Agile methodology, as well as Change Management, but it does not always work out that way in the real world. Ironically, not valuing fast failure could lead to more complete and irrevocable failure.

Applying Hacks to our Real-World Example

For this implementation, **I embedded the OCM team within the delivery team.** Our Change Team participated in the delivery team's Agile Ceremonies (aka meetings) in which we discussed daily progress, impediments, and had frequent demos and planning (daily stand-ups, biweekly demos, retrospectives, and sprint planning).

For additional methodology alignment, I conducted daily stand-ups with the OCM team and several Change Agents to discuss near term impacts based on the evolving transformation roadmap.

Mashing the OCM approach with the Agile delivery approach created a stronger sense of collaboration and accountability among business subject matter experts, developers, testers, and OCM participants. **There was a spirit of one team with a unified mission.** We used shorter duration, but more periodic Hackathons to crowdsource ideas to resolve impediments, improve end user engagement, and reduce resistance.

We further strengthened the culture of collaboration and trust required in an Agile environment by leveraging a multi-dimensional physical storyboard to create visualization (and transparency) into our activities and progress. Having this visual radiation allowed not only the OCM team to track our progress, but also IT and Business stakeholders to easily see our work. This often helped us identify activities that should be reprioritized based on the changing roadmap of the delivery effort.

We enabled our team members and stakeholders that were not co-located to track the activities and update story cards by including the OCM user story cards on the project team's digital storyboard – a tool called Rally (I have also found value in similar online tools like Trello, Jira, Team Foundation Server, and VersionOne). For our non-technical stakeholders, I sent out a picture via email each week with a note that focused on progress updates, key wins, and upcoming activities.

Summary of Lessons Learned

The key to all this is that we increased the company's "speed to benefits" from the transformation. This was a result of enmeshing the OCM and delivery teams, which improved the timing of stakeholder communications and engagement activities. We not only achieved a successful implementation of the transformation on time and within budget, but with adoption rates that beat all forecasts. We felt strongly that this was all due to a renewed culture of collaboration.

In view of the bigger picture of any transformation or change, it's important to keep in mind that a linear approach to OCM may not align well with the rest of the transformation team's roadmap. Enable the OCM team to be Agile and leverage the processes, and tools, that come with the Agile methodology. Create activity transparency and broader collaboration beyond the OCM team to ensure an end-to-end view and real-time updates via daily stand-ups with the project team.

Takeaways: Hacking Disparate Methodologies

1. Mash your OCM Team with the Delivery Team to enable alignment of methodologies
2. Use physical visualization to create transparency on the timing and impact of OCM activities, allowing non-OCM team members to easily provide inputs

About the Author

[Kevin Smith](#) is a Lead Consultant with Impact Makers. He has a proven track record of successfully creating and implementing governance structures related to Transformation, Project/Program Management, and Organizational Change Management. Kevin has robust experience in managing multimillion dollar transformational and core programs while managing resources across multiple disciplines and geographic proximities.

Kevin has an insatiable desire to learn and continuously improve.

Knowing that the world is not static, and that every barrier can be penetrated, Kevin embraces opportunities to bring together a confluence of forces to seek out better ways of doing things. Kevin strives to create meritocratic cultures where competence is key, and the risk of failure does not impede innovation.

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TOGETHER

WE GIVE

EVERYTHING

FOR YOUR BUSINESS & TO THE COMMUNITY

BUSINESS IMPACT

HELPING MANAGE THROUGH TRANSFORMATION IS OUR PASSION, ACROSS IT, DATA, CLOUD, SECURITY, AND PEOPLE.

COMMUNITY IMPACT

COMMITTING 100% OF NET PROFITS TO THE COMMUNITY OVER THE LIFE OF THE COMPANY MEANS OUR CONTRIBUTIONS RIVAL COMPANIES 100X OUR SIZE.