



Learning from Change Initiatives (Retaining the institutional memory)

Observations

I am often involved in discussions with leaders and senior managers about organisational change initiatives which they have implemented or planned. In the vast majority of cases, the approach and process planned or taken fails to take account of two key matters: i) care to ensure that methodical planning-the-plan and plan-management practices are applied; and ii) consideration of previous experiences of change initiatives within the organisation.

Here, I suggest some approaches to the latter issue. For information and recommendations about planning-the-plan and plan-management practices, see elsewhere within the Subscriber Library, especially *Planning* and *Leadership* sections.

It strikes me as ridiculously inefficient that in very many cases people *re-invent the wheel* each time change needs to be implemented; the organisational memory of constructive change implementation processes is not easily located because it's not methodically passed on or held in readily-accessible resources. The process, each time, is improvised. Mistakes are repeated. Resources are squandered.

Assumptions

Leaders and managers are likely to improve their capacity for leading and managing change initiatives, to the extent that they study and learn from the change initiatives in which they have been and are currently involved.

Documenting and systematizing those lessons enhances that learning. Making them available in support of other change initiatives facilitates good practice in further organisational change projects.

Up-skilling one another in this competency reduces direct and indirect pressure and demands on those with responsibilities for managing change processes.

Organisational change initiatives led and managed well inspire the commitment to change, of those who are subject to it and reduces stress usually associated with unwelcome change.

These aims could be addressed in part, by producing from a collective action-reflection project, a written resource/guidebook/handbook for the organisation.

Try this

Get off the treadmill long enough to conduct an action-reflection project that addresses these matters by producing a written resource/guidebook/handbook for your group, section, department or organisation.

Involve selected contributors in reflecting on change initiatives they have led, managed or otherwise been involved in, and document their (individual and collective) answers to such questions as:

- *What worked best/least/was most successful? What failed/caused problems/was least successful?*
- *What should have done but wasn't? What would it be wise to do next time?*
- *What gained others' support? What attracted negativity and resistance?*
- *How were these things done – what actual behaviours, practices and processes are you commenting on?*
- *What methodical guidelines for future practice, can be drawn from these reflections?*

Record the responses within certain pre-determined headings (see suggestions below) and within other headings emerging from the discussion. Refer these to a (pre-determined) collator and editor - of drafts for further discussion and refinement, perhaps. Distribute the eventual final document throughout the organisation, as useful guide; make it freely available, perhaps as part of the organisation's "desk file" of standard management operating systems.

After 12 months, conduct further group reflections on change initiatives to re-visit the original document and update it to incorporate more recent collective learning.

Suggested Section Headings

- Preparation and planning
- Early steps
- Clarifying the need, requirement or challenge
- Defining direction
- Specifying parameters
- Holding boundaries
- Engaging with the target group
- Inspiring enthusiasm
- Motivating support and involvement
- Negotiating through differences
- Gaining commitment
- Getting people on board
- Problem solving/trouble-shooting
- Responding to negativity, opposition or subversion
- Staying on message
- Holding the focus
- Keeping to target

- Balancing attention to the task, with attention to the process
- Using the opportunity to develop/learn/draw out strengths/develop the group's capacity
- Following through and monitoring progress
- Embedding the change
- Holding the gains
- Skills and competencies most required
- Why people seem to react negatively to and resist change initiatives
- What people seem to need, to accept and embrace change
- Summary of what was learned.

Tom Watkins