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Human Centered Transformation: A Repeatable Process to Effect Organizational Change

Introduction

A client's liaison recently wrote to us with some questions (edited for length and clarity, and to preserve anonymity) about the imminent launch of their transformation initiative:

"I am thrilled, but also nervous, to share with you that after completing your learning labs and creating a database story from the results of Radical EQ's organization readiness assessment, we are ready to begin actually transforming our legacy systems, policies, and structures.

The excitement is that leadership and staff are ready to take action, but there is also trepidation because we don't know what this journey will look like, nor how long we will be on it.

Here are some of our questions:

- What is the purpose of our organization transformation team?
- Who should be invited to be a member of this working group and what is expected of everyone? Is there a selection process we should follow?
- What actions should we be taking and over what period of time?

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- Should we instead draft a broader, coherent “strategic” action plan? How do we do this?
- Should we be acting throughout the organization concurrently or take a more incremental approach to change?

These are the most important burning questions weighing on us at this moment. But we are ready to take action to create a culture that is equitable, inclusive, and just.

We are committed to seeing it through until we realize the new vision we have for our transformed organization. We just don't know at this moment how to begin nor how we will sustain this initiative.”

On the surface, this inquiry is a request for an empirical, time tested approach that describes the processes and tools for *organization transformation*—a radical and total change to an organization’s policies, procedures, systems and structures.

But just as important, this inquiry is also a human entreaty for psychological and emotional relief, because creating a healthy, human centered organization via a transformed business model is not for the faint of heart. It does not matter how committed an organization is to creating a new reality or how progressive leadership and staff believe themselves to be. Doubt and uncertainty are quite normal.

It is worth reiterating that the pathway to transforming an organization to one that is diverse, inclusive, and just requires that everyone engages in the creation of a complete **systemic cultural change** that entails new organizational:

- Systems
- Structures
- Practices
- Behaviors
- Values
- Goals

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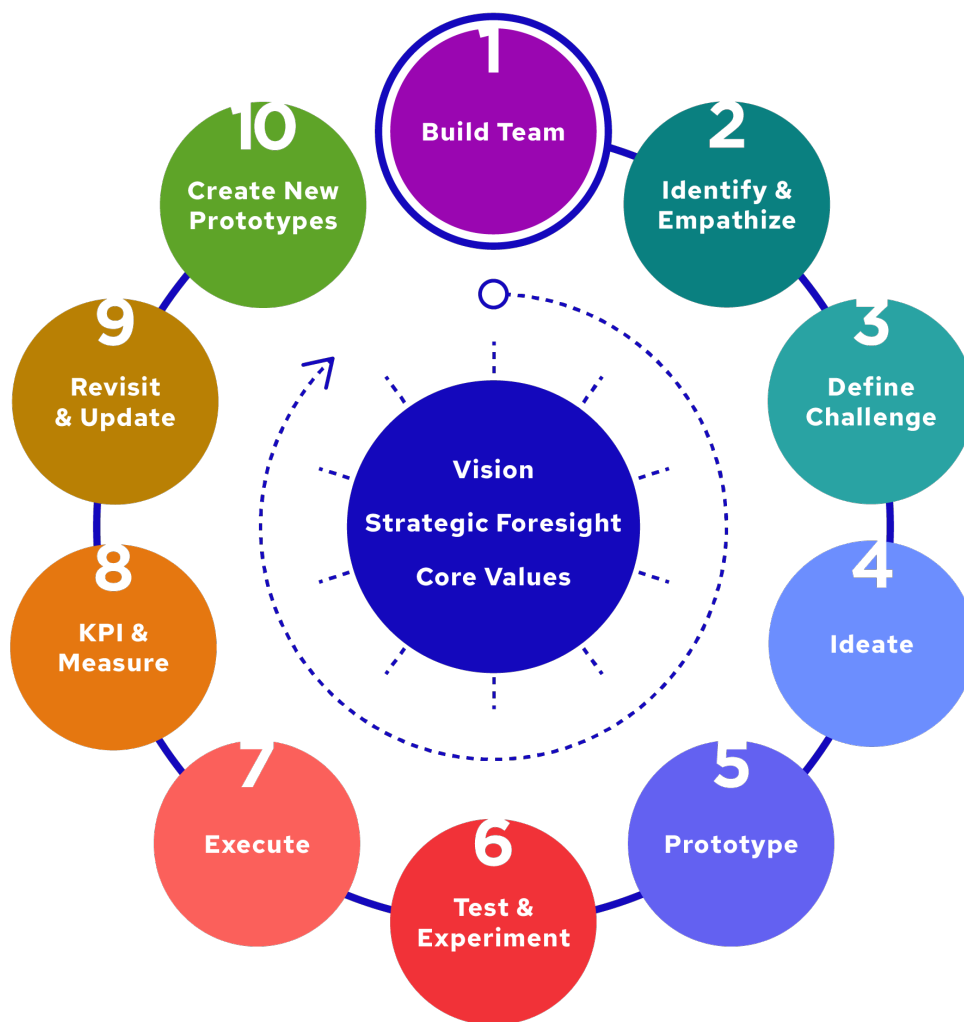
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- Accountabilities

This paper describes the transformation process we developed with this client in response to their letter. This baseline model is tweaked to fit the unique challenges of each client engagement but the general framework remains the same.

Please enjoy your reading, and don't hesitate to contact us to answer any questions you may have about this process and how to apply it to create a better future for your organization.

The 10 Steps of Human Centered Transformation



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Step 1: Build the Transformation Team

Assemble an interdisciplinary team.

Human centered organization transformation works best with an interdisciplinary advisory team that is comprised of a mix of thinkers, makers, and doers. This transformation advisory board is tasked with devising, analyzing, and proposing changes to the organization's systems, structures, and policies.

Team roles

Here are the typical advisory team roles you should seek to fill. Note that you can have more than one person in each role, and that these recommended roles can be expanded, contracted, or combined based upon the organization's needs and resources.

- **Change authority or sponsor** – Responsible for authorizing changes based upon a clear comprehension of the prospective solutions' feasibility, risk, and impact, as well as alignment with the organization's emergent vision, strategic foresight, values, business objectives and priorities.
- **Change owner** – Accountable for the successful implementation of change. This person coordinates the testing and implementation change strategies and tactics, communicates with key stakeholders, and uses qualitative and quantitative feedback to report on the status of the change progress, including outcomes and value created.
- **Change implementer** – Responsible for managing the execution of the change tasks. This person follows the guidelines provided by the change owner. The implementer also verifies and validates the changes, and reports any issues or deviations to the change owner.
- **Change enabler** – Responsible for supporting the change initiatives and thereby enabling change outcomes by ensuring that the necessary resources, skills, tools, and expertise are available.
- **Change evaluator** – Responsible for assessing the impact and effectiveness of the change. This person synthesizes the lessons learned during implementation into recommendations that can be applied to future change initiatives within the organization.

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How to match the right person to the right role

Formal or informal assessments can be conducted to discern what each individual is good at. For example, is there a clear technical capability that is needed and does someone have this skill set?

Team attitude

Beyond ensuring that empirical skills are available and roles are clearly delineated, it is equally important that every team member is optimistic and believes that progress can be achieved even if the ultimate outcomes cannot be confirmed with the information at hand.

Moreover, the team should give themselves permission to explore a multiplicity of possibilities so that the “right” answer can ultimately reveal itself. This necessitates that the members get out and talk to the people that will be impacted by the proposed transformation; this is a collaborative effort at the end of the day. We discuss this in greater detail in Step 2.

Finally, the team should have an attitude that they will pursue an array of different ideas, *even ones that at first glance may seem far-fetched and may not appear to be successfully if implemented.* Effectively, all ideas should be under consideration because one may have lasting (positive) impact.

Step 2: Identify and Empathize

Grasp the context and the complexities.

New solutions are revealed when team members get to know the people who will be impacted by the proposed transformation.

Empathy is the capacity to “put oneself into another’s shoes.” With empathy, the team can more clearly see opportunities to improve the organization through new and powerful lenses. Talking directly with people is an ideal way to build a more accurate understanding of the context and complexities of the lives of those who will be directly affected by organizational culture change.

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Step 3: Define and Establish the Challenge

Correctly frame the issue(s) and the challenge(s).

To develop and implement an effective plan for transformation, the team must accurately frame the challenges confronting the organization.

Clarity in this regards starts with drafting, in writing, a summary of the challenges at hand. This summary should be succinct, with just a few sentences for each challenge, but comprehensively capture the scope of what needs to be done.

These descriptions can then be rewritten as questions, which can set the team up for a solution orientation that welcomes a lot of insightful recommendations to be seriously considered and evaluated. Possible constraints should be taken into account as well.

When describing your organization's challenges, pay attention to scope. A challenge too narrowly defined will not allow for an exploration of creative solutions. Alternatively, a challenge too broadly defined will not provide enough guidance to generate relevant ideas.

Step 4: Generate and Refine Ideas and Solutions

Ideate, ideate, ideate.

Working from the questions you created in the previous step, your team should now shift into an iterative problem solving process that incorporates feedback from those who will be impacted.

Continually ideate, refine and improve upon prospective solutions. under consideration. Try a variety of approaches that will unlock the team's creativity, and that adds clarity to the details that are being considered. The goal is to advance valid solutions without investing an inordinate number of hours and resources chasing the "perfect" (i.e., only) solution.

Don't forget to continuously empathize (see Step 2) with those people who will be impacted by the transformation process. Doing so will help your team continue to learn more about both the challenge and the environment in which it the solution will be implemented. This will help them refine their ideas into more appropriate and effective solutions.

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Step 5: Create a Prototype

Figure out what to pursue.

Up to this stage, the team has been generating an array of ideas. Now it should critically (re-)examine them to determine which to pursue and which to discard.

Once this is done, the team can move to the prototyping phase of the remaining solutions. The goal of the prototyping phase is not to arrive at a perfect expression of an idea, but rather to test the critical elements of the idea. People might ask themselves, for example, “How big should this particular transformation be?”

There are two types of “low resolution” prototypes that you can use to quickly test your ideas. Both require minimal resources to be effective, but still provide useful results:

- **Storyboard**

Visualize the idea/transformation solution from start to finish. The entire proposed transformation does not need to be storyboarded, but only what is felt to be critical components of the transformation solution.

Storyboarding is not meant to be a laborious process. The team may take an hour or less drawing the idea(s).

When creating the storyboard, ask yourself, “What is most important?” Use this process to fully think through the transformation concept (or its key components), rather than trying to create something that is perfect.

- **Business model canvas**

This is similar to storyboarding but has a key differentiator, which is that the team is always mindful of the organization’s business model by considering questions like, “How will the transformation impact revenue, key partnerships, and vital resources necessary for the operation of the business?”

Step 6: Test and Experiment

Dry run before actual implementation.

The prototype you created in the previous step was on paper or screen. Now the task is to conduct a “live prototype” by “running” the solution, either in part or in whole, within your organization for a couple of weeks. Doing so will help your team empirically understand the feasibility and viability of the total solution.

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Step 7: Execute

Develop a roadmap and action plan with a timeline.

With feedback from Step 6, the team can now craft a plan of action—a “roadmap”—to fully implement the prototype into the real world. The roadmap is also the way in which the team can identify key stakeholders that will be impacted, figure out a timeline for implementation, assign responsibility for each element of the transformation, and establish (tentative) milestones.

Along with the roadmap for implementing the prototype, the team should establish the baseline goals that they expect from the prototype. It’s important to be clear about these goals, as they will be what the team measures results against in the steps that follow.

Step 8: Measure and Evaluate

Use feedback on your solutions to understand their impact and to develop KPIs.

The underlying goal all along has been for the transformation to have **big impact**. Now that it is being implemented, the team needs to (empirically) monitor and evaluate whether it is having the type of impact that has been sought from the beginning.

The key component of this monitoring and evaluation phase is **feedback from the community that is impacted**. Feedback from this group is how the transformation team explicitly knows what is working, what needs improvement, and what needs to be discarded.

Qualitative first, then quantitative

The first step in monitoring and evaluating is collecting anecdotal feedback and tracking qualitative indicators to assess the impact of the transformation more accurately. These should be measured against the baselines established in Step 7.

These qualitative indicators will also provide the team with the data they need to establish quantitative **Key Performance Indicators** (KPIs).

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Step 9: Revisit and Update

Revisit both vision and values—and update if needed.

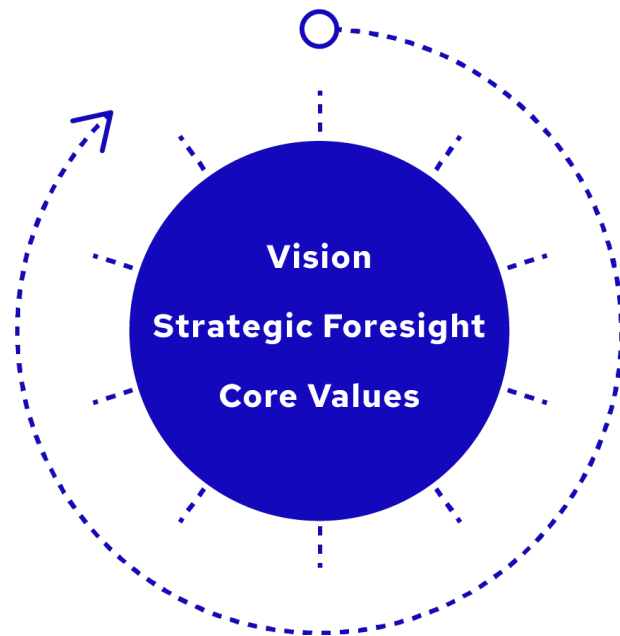
Now it is incumbent upon the transformation team to utilize its real work experiences and feedback, along with its foresight, to reflect upon the organization’s emergent vision and values to discern if any adjustments need to be proposed to these.

Step 10: Create New Prototypes

Move on to other areas for transformation.

Now the transformation team can begin the processes of generating “next order” transformation initiatives with the lessons learned from the initial initiative(s).

This is also the ideal time to look inwardly at the team’s experiences during this process, to determine whether it needs to be expanded or contracted, and whether individuals in the team need to cycle off new members are brought on. The toll this work exacts upon individuals, who still continue their daily assigned responsibilities, should not be underestimated. New team members also bring with them new viewpoints and skills, which helps the team generate fresh ideas as they return to the start of the cycle.



Afterword

The process laid out here is a disciplined, time-tested approach that results from deep and thoughtful work with clients over time. It is a Human Centered Transformation Process.

It has proven to be effective in transforming business models, organization policies, systems, structures and ultimately an organization’s culture through a Human Centered Transformation Approach.

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Undergirding it are Radical EQ's prerequisite learning labs and proprietary assessment instrument as essential foundation stones. There is an epigram that says: **"Change your thoughts and you change your world."** We fervently believe this, and it is why in our foundational work with client organizations, via our learning labs, we use, amongst other things, story circle methodologies that advance important conversations regarding what centers the heart and soul of individuals, what is the emerging vision for the organization as well as core values that give direction to individual and group behavior. This approach ensures that from leadership to front line workers, everyone is authentically involved in co-creating an organization culture that is equitable, inclusive, and just. A human centered community.