

HR Directors' Retreat 2024

Managing Change

#changemanagement

Thursday 26th
& Friday 27th
September 2024

Mercure Hotel
Brighton BN1 2PP

ies institute for
employment
studies

Agenda for the day

9.15 *Opening Chair Remarks*

9.30 *Panel discussion chaired by **Nita Clarke, Director, Involvement and Participation Association (IPA)***

10.30 *Leading change with others **Kathryn Perera, Senior Consultant Leadership and Organisational Development, The Kings Fund***

11.15 *BREAK: Coffee*

11.30 *How to integrate health and wellbeing into the management of change? **Claire Agate, Consultant Psychologist, Affinity Health at Work***

12.15 *LUNCH*

1.30 *Managing Complex Change: Lessons from Experience **Marc Weedon, Senior HR Director (International), Zurora***

2.15 *Managing staff engagement and employee voice in times of change **Nita Clarke, OBE, Director, Involvement and Participation Association (IPA)***

3.00 *Summary and close*

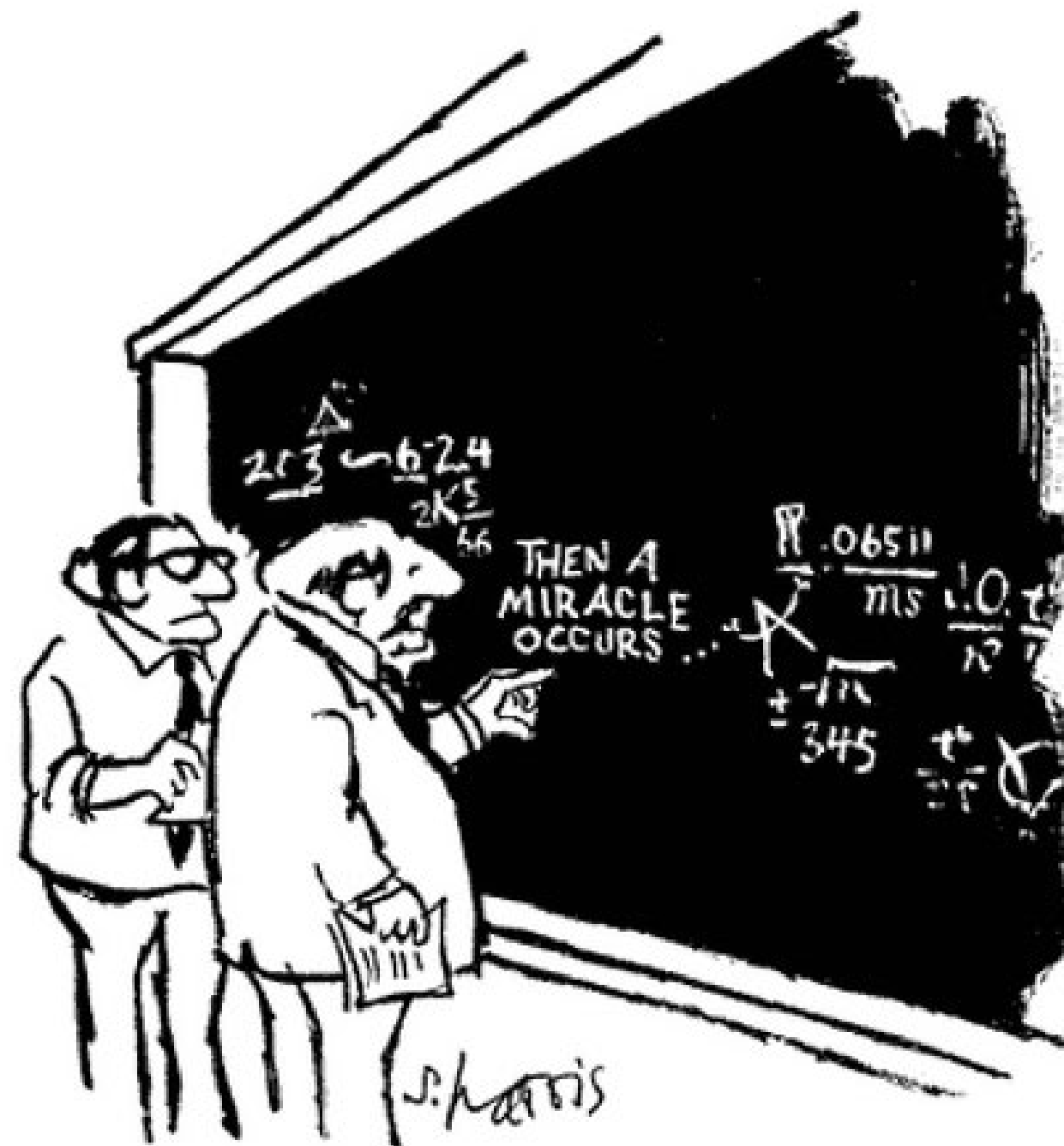
3.05 *Depart*

#changemanagement

LEADING CHANGE WITH OTHERS

KATHRYN PERERA

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The King's Fund



"I think you should be more explicit here in step two."





Source: iStock photo

Leading “from the outside in”

- **Connect across boundaries**
- Be ambidextrous
- Shape networks not opinions
- Find many ways to many



chaofann from Getty Images Signature

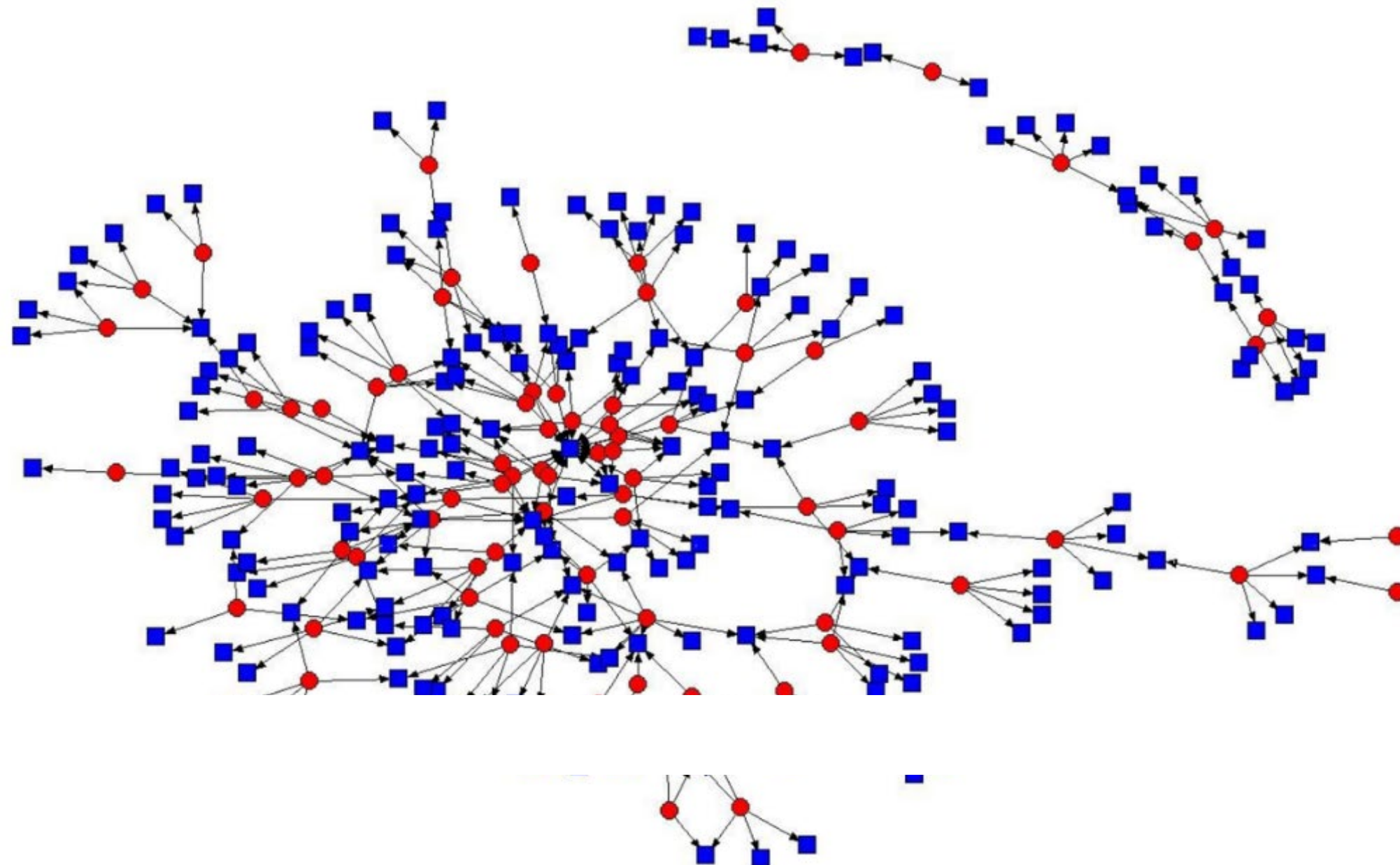
Relationships make the biggest difference when it comes to our ability to effect change and influence improvement

Evaluation of NHS hospital systems that undertook comparable improvement initiatives with vastly different outcomes

The difference? **The level of social connections between those leading local improvements**

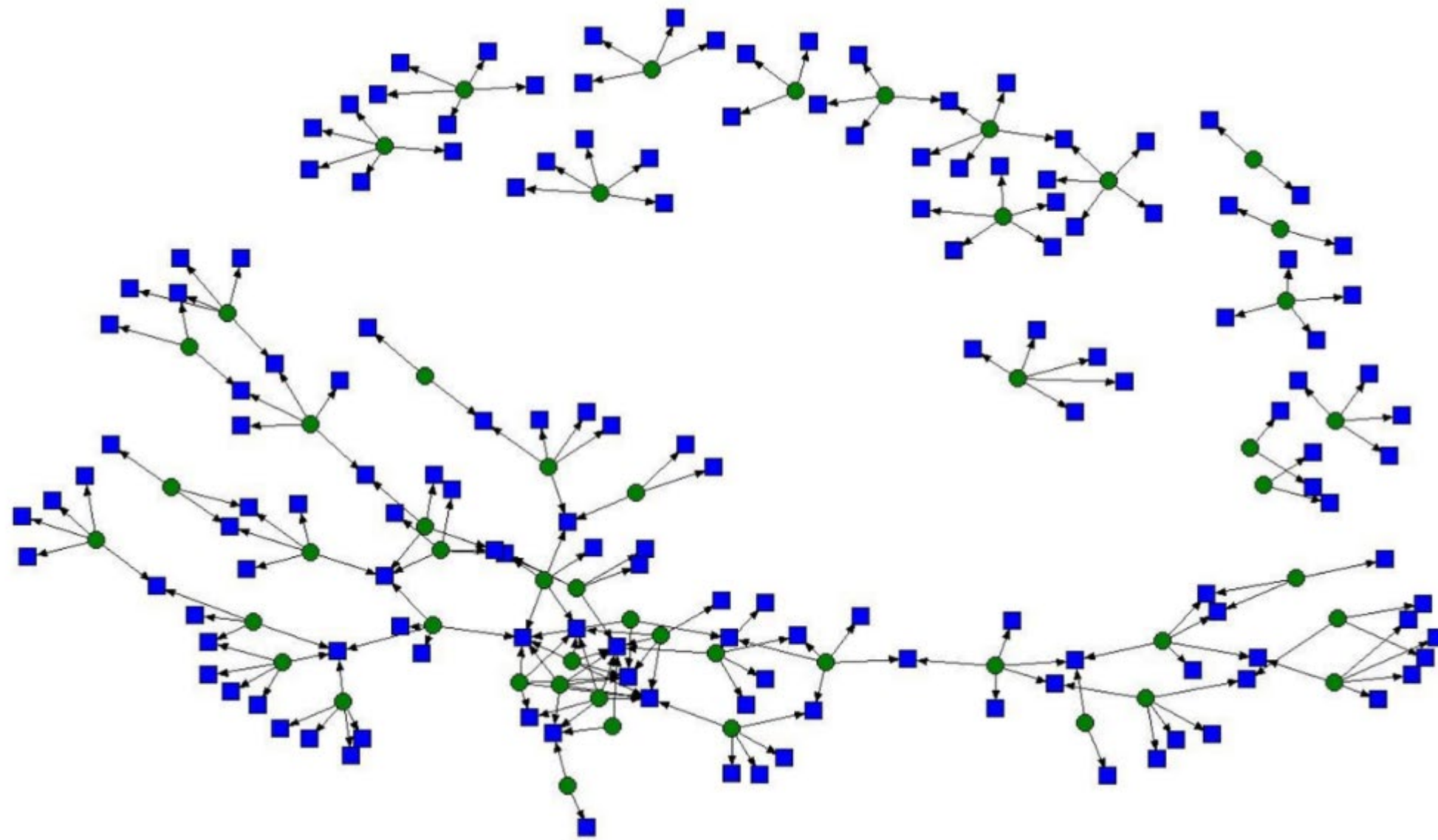
System A: “Outstanding”

Trust A – an ‘outstanding’ trust



A distributed network with a high degree of connectivity associated with high capacity to facilitate knowledge exchange and learning

System D: “Special measures”



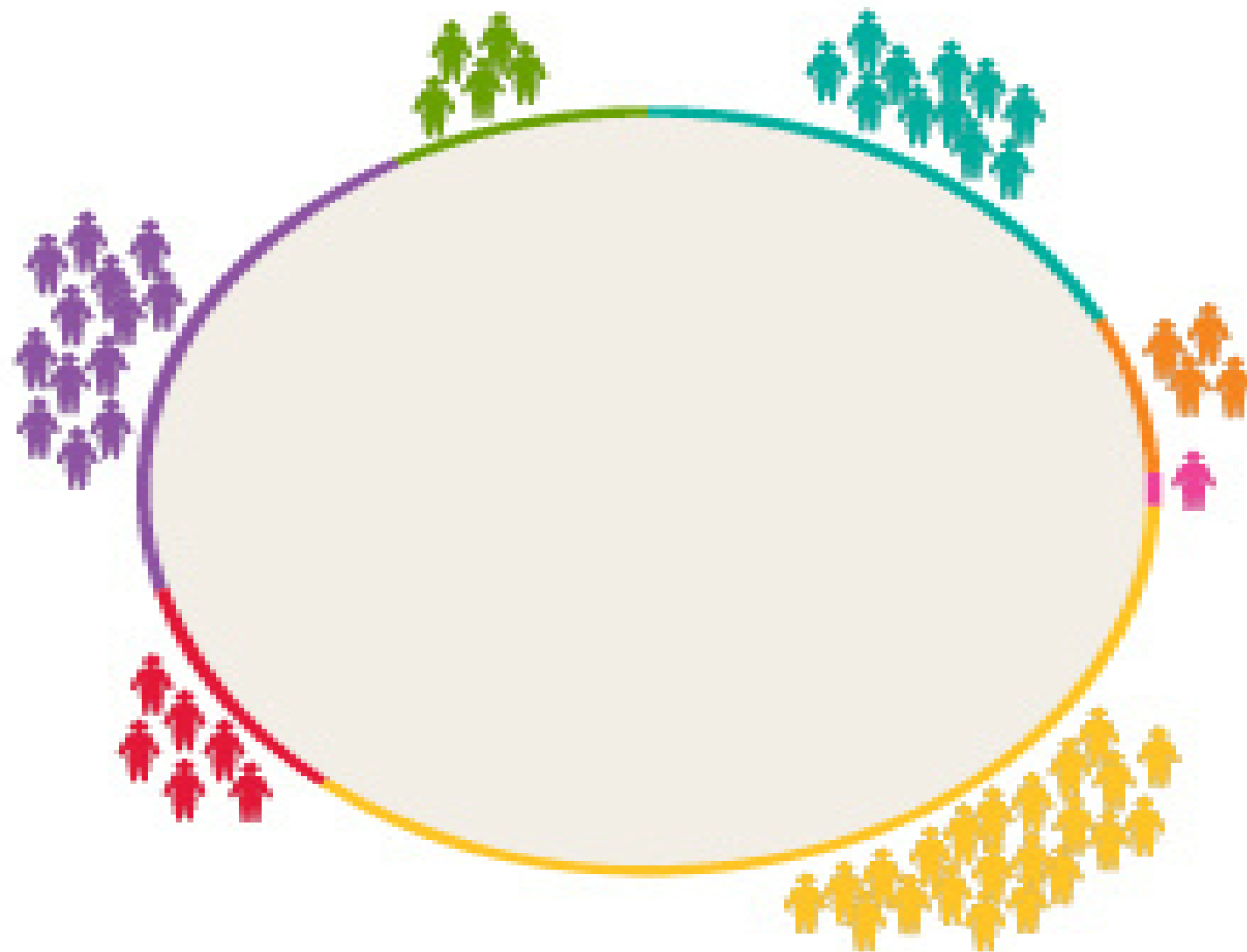
Two thirds of the core network is decentralised and is chain - like

Lower connectivity associated with low/moderate capacity to facilitate knowledge exchange and learning

Connect across boundaries:

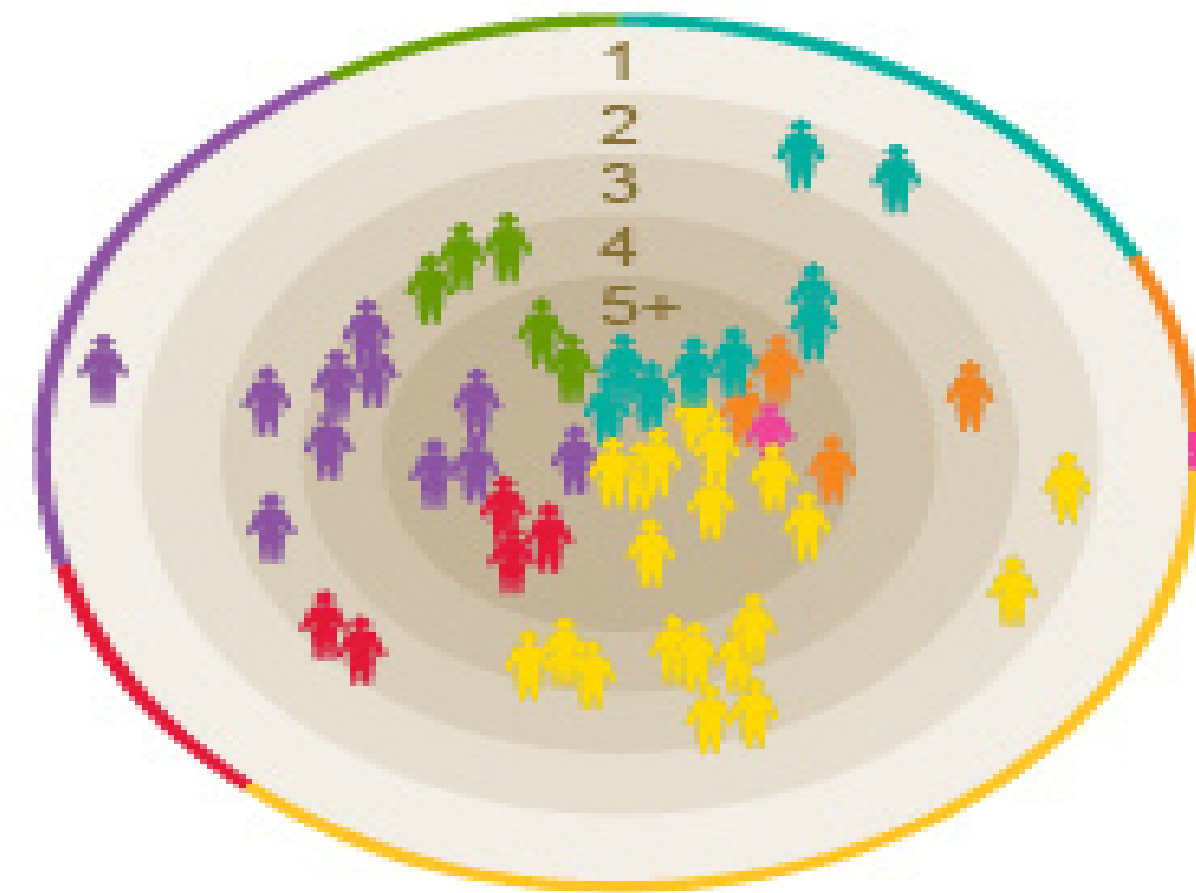
Connecting Nesta over coffee

Week 0



Week 15

Number of other departments staff have connected with



How to create a culture of serendipity. Nesta's *Randomised Coffee Trial* generated hundreds of new connections in four months.

Leading “from the outside in”

- Connect across boundaries
- **Be ambidextrous**
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Currency

Current

Held by a few

Made by many

Pushed down

Pulled in

Commanded

Shared

Closed


Open

Transaction

Relationship



Be ambidextrous:



Who do you go to for information when you have concerns at work?

Whose advice do you trust and respect?

Be ambidextrous:

Find your allies

- Get their insights
- Engage them in change
- Consider their role in the change
- Stay connected for the long haul

Be a connector

- Build networks and connections around the change
- Be a role model of trust and positive behaviour
- Always, always follow up

Leading “from the outside in”

- Connect across boundaries
- Be ambidextrous
- **Shape networks not opinions**
- Find many ways to many

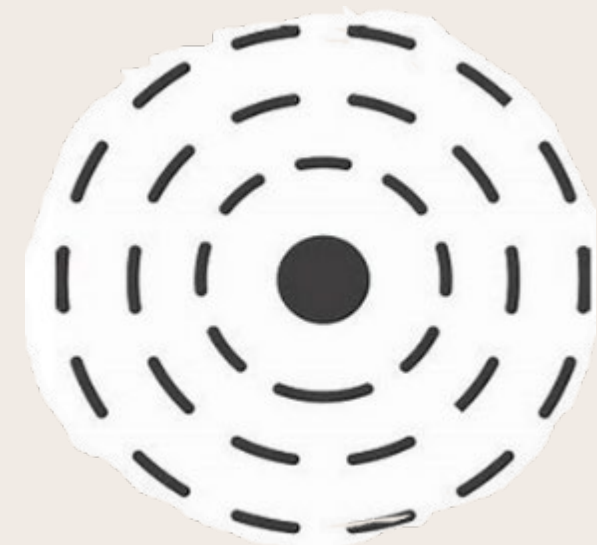


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“Don’t try to shape opinions, shape networks”

- People don’t change their opinions as a result of “effective communication”
- The best indicator of what people do and think is what the people around them do and think
- Working to shape opinions is fruitless unless we are able to shape the networks in which ideas, attitudes and behaviours form

Source: [Greg Satell](#)



- **Start with a majority** : find enthusiasts, willing to support your idea, to strengthen it and help troubleshoot
- Leading networks means helping people who **share a purpose, or intention** , to connect and be inspired around their values → *through action*
- Change that shifts systems is **driven by small groups, loosely connected** , united through their shared intention (or ‘purpose’)

Source: adapted from the work [@GregSatell](#)



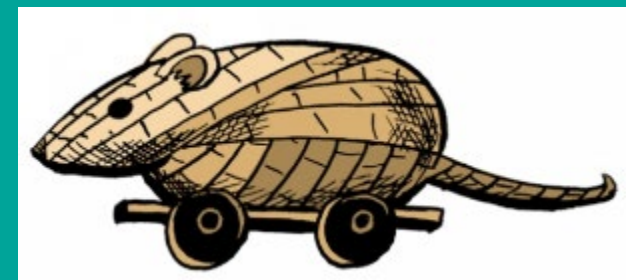
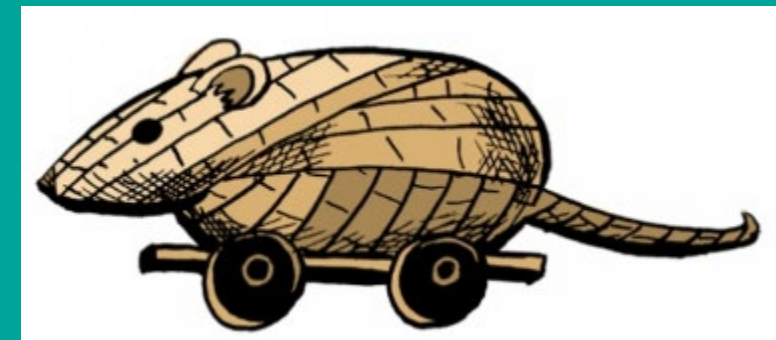
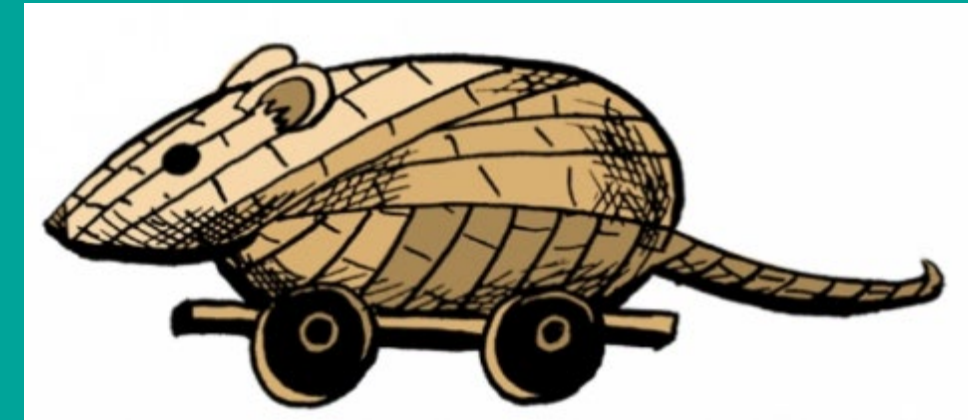
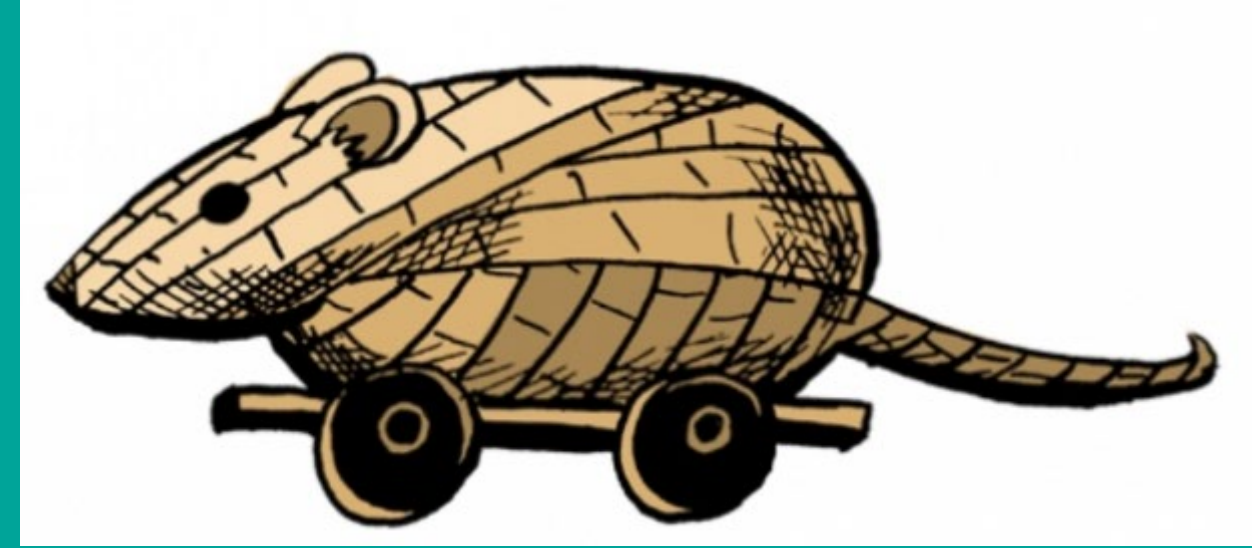
Leading “from the outside in”

- Connect across boundaries
- Be ambidextrous
- Shape networks not opinions
- **Find many ways to many**



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Be a Trojan mouse...



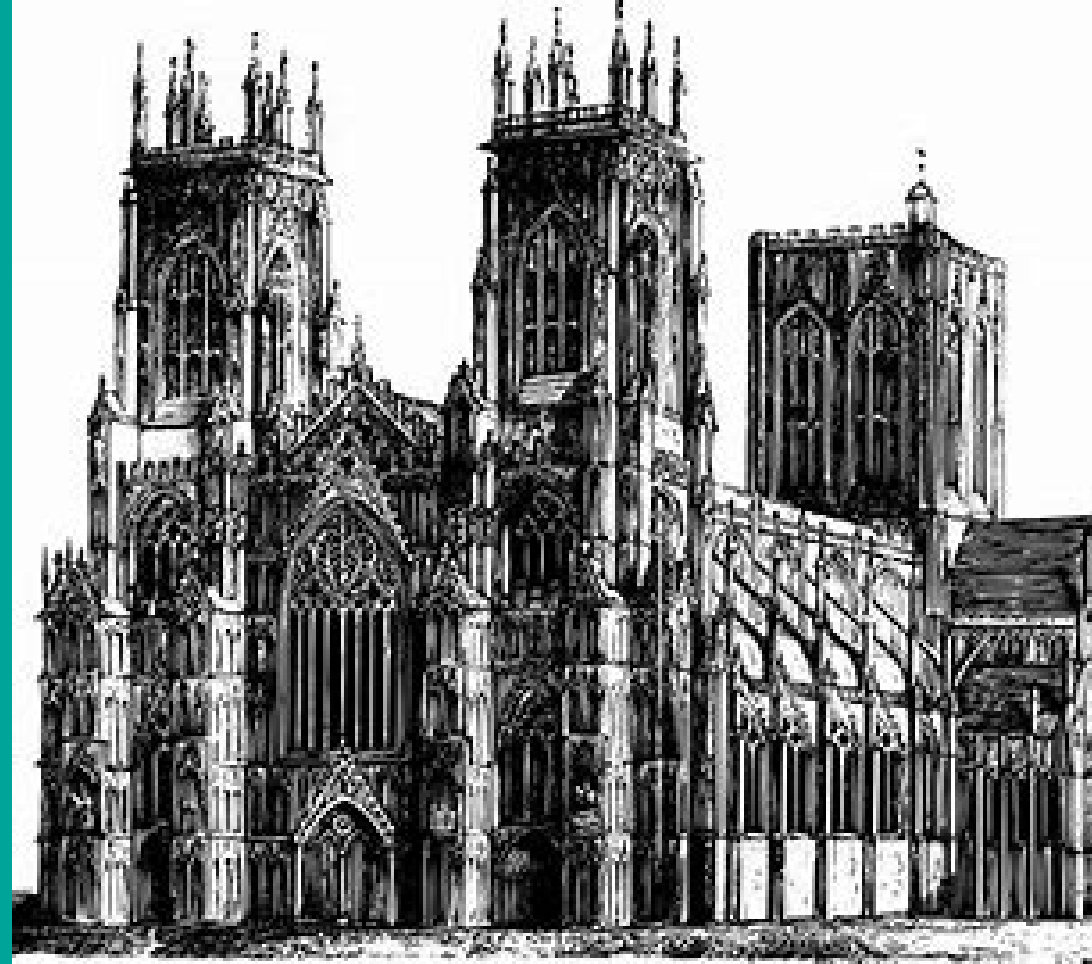
Source: adapted from the work of Dr. Helen Bevan

From pilot to platform ...

“Trojan mice... are small, well focused changes, which are introduced on an ongoing basis in an inconspicuous way. They are small enough to be understood and owned by all concerned but their effects can be far-reaching. Collectively a few Trojan mice will change more than one Trojan horse ever could.”

Jar che, 2012

Bring a brick, not a cathedral



Cathedral

When you bring a complete and fully formed idea that you are emotionally invested in and attached to (the cathedral), it can block collaboration in its tracks.

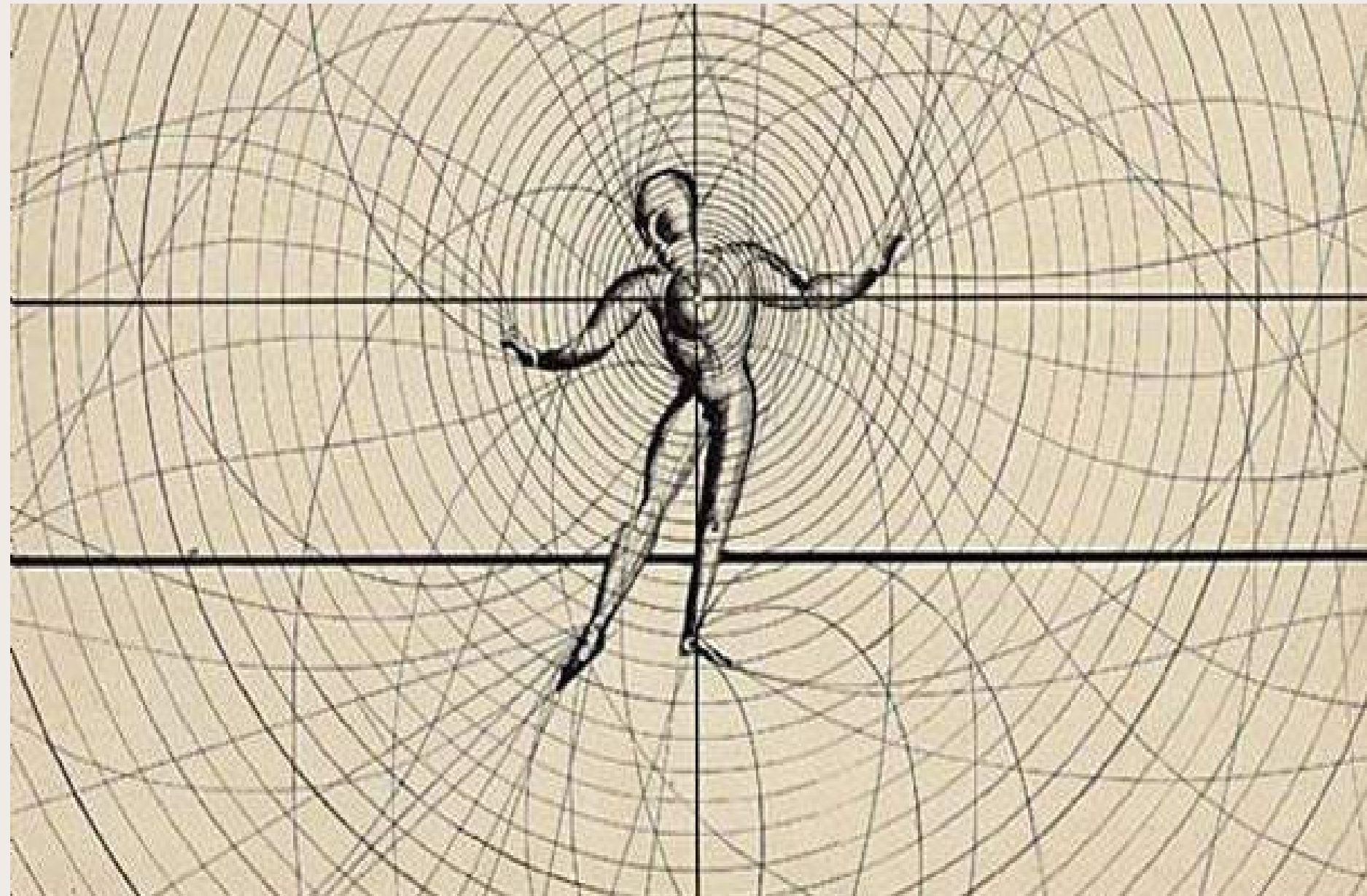


Brick

Create the space for each person to contribute (a brick). You help them have an emotional connection to the collaborative process as each person contributes their brick. Brick by brick, you start to create something better than what one person would have done alone.

Source: Ally Muller
Adapted from: Helen Bevan, NHS Horizons

Leading “from the *inside* out”





agsandrew from Getty Images

When we experience the world as
“too complex” we are not just
experiencing the complexity of the
world.

We are experiencing a mismatch
between the world’s complexity and
our own at this moment.

Professor Robert Kegan

4 'inner skills' for development

Sensemaking – Getting our heads around how data, issues, relationships and our felt sense (feelings) interconnect (mainly cognitive).

Perspective-shifting – 'Zooming out' to seek more nuanced and multi-faceted ways of experiencing (primarily *interpersonal*).

Self-relating – Attending to how we regulate and integrate new learning within ourselves – our own reactions, thoughts and feelings (mainly *intrapersonal*: looking within our selves).

Opposable Thinking – Holding tensions, contradictions and paradoxes without seeking to resolve them.

Module 5



The CHANGE AGENT of THE FUTURE

WHAT I KNOW:

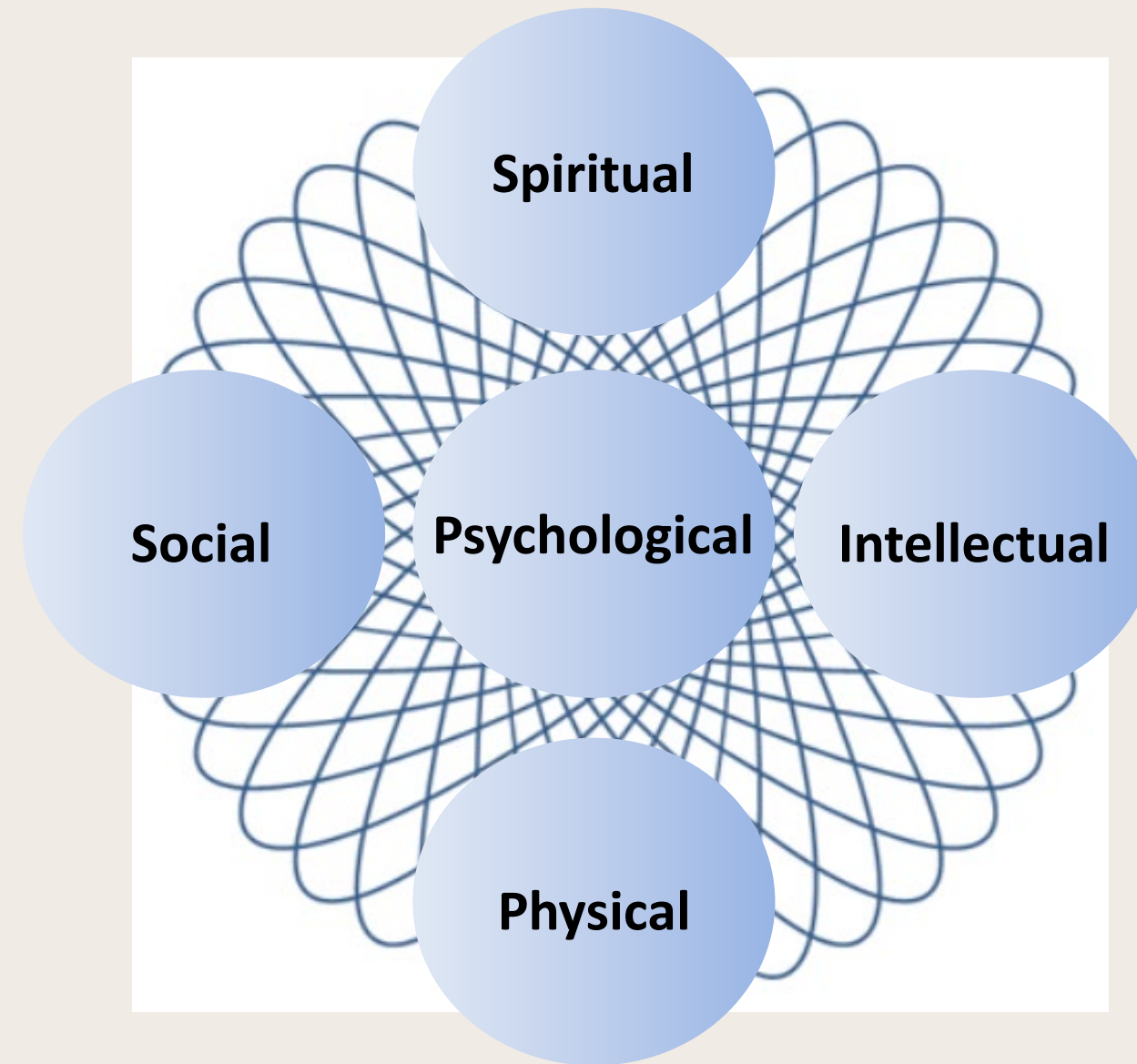
-  IMPROVEMENT METHODS
-  PROJECT & PROGRAMME MANAGEMENT
-  INNOVATION & DESIGN METHODS
-  ANALYTICAL & PROBLEM SOLVING SKILLS
-  RELATIONSHIP BUILDING
-  PROCESS FACILITATION SKILLS
-  COACHING SKILLS
-  PRESENTATION SKILLS



HOW I THINK:

-  in interdependent ways
-  see systems, patterns and connections
-  hold multiple perspectives at the same time
-  short term and long term
-  realist YET unreasonably optimistic
-  comfortable with tensions, paradox and contradictions
-  the best of people

The capacity and drive of a team, organisation or system to act and make the differences necessary to achieve its goals



Source: [Building and aligning energy for change](#)

Research by Bruch and Vogel (2011). Fully Charged: How Great Leaders Boost Their Organization's Energy and Ignite High Performance

The 5 Energies of High-Performing Teams

Social

Personal engagement, relationships and connections between people.



Intellectual

Analysis, planning, thinking.



Spiritual

Commitment to a common vision for the future, driven by shared values and purpose.



Physical

Getting things done!
Making progress.



Psychological

Courage, resilience, feeling safe to do things differently... and take risks.



How do we build social energy?

We build social energy in a group (socially) so first define who is part of the group:

- Who is part of the extended team and needs to be included?
- Include people with lived experience

Make time for the informal “water cooler” moments

In the team, create “power with”, not “power over”

Listen like an ally

Work on key tasks together

Build a climate for social energy: openness, fairness, inclusion and welcoming uniqueness

Social

Personal engagement, relationships and connections between people.



Build routines that create social energy eg, checking in and out of every meeting

Focus on what unites us rather than what divides us

Encourage space for creativity and play

Demonstrate what we appreciate about each other

Get to know everyone – knowing someone, understanding how they think, how they feel about topics, understanding the unique things about individuals

How do we build spiritual energy?

Spiritual

Commitment to a common vision for the future, driven by shared values and purpose.



Take action to build shared purpose:

SHARED:

- Start with each individual talking about their own stories (“what matters to me”)
- Talk about the parts of the stories that unite the group
- Discuss differences in perspective and how differences will be addressed

PURPOSE

- Consider how the sense of “us” (shared values and ambitions) can be translated into a statement of shared purpose that we can all unite around

Use “our shared purpose” as a road map towards our collective destination

When presenting data, build a compelling story around it that takes it back to higher purpose

Avoid “de facto” purpose

Make space to discuss moral injury and other aspects that makes people feel that they are being asked to do things that go against their basic principles

Mobilise people for change by connecting with emotions, through values

Keep shared purpose alive:

- Connect shared purpose with the work you are doing
- Tell stories that connect with spiritual energy
- Talk about it
- Build it into organisational routines, eg, induction processes, performance reviews, 1:1 conversations

How do we build psychological energy?



Actively build a safe environment by:

- Asking people how they are and getting to know everyone by understanding how they think, how they feel about topics
- Regular group and 1:1 conversations to deeply understand colleagues and team members
- Dealing with things when they come up

Destigmatise feedback by:

- Practicing giving regular constructive feedback and asking for feedback
- Making the giving of feedback a team norm
- Working out loud. Share your work when it's in progress, even if it's messy, and ask others to do the same

Create norms (a "team charter") that build psychological safety and agree to hold each other to account

- Determine what the actions will be if people break team norms

Promote intelligent failure: talk openly about past failures and good things that came from them

Reframe "failure"
as learning

Make quick debriefs part
of finishing up projects

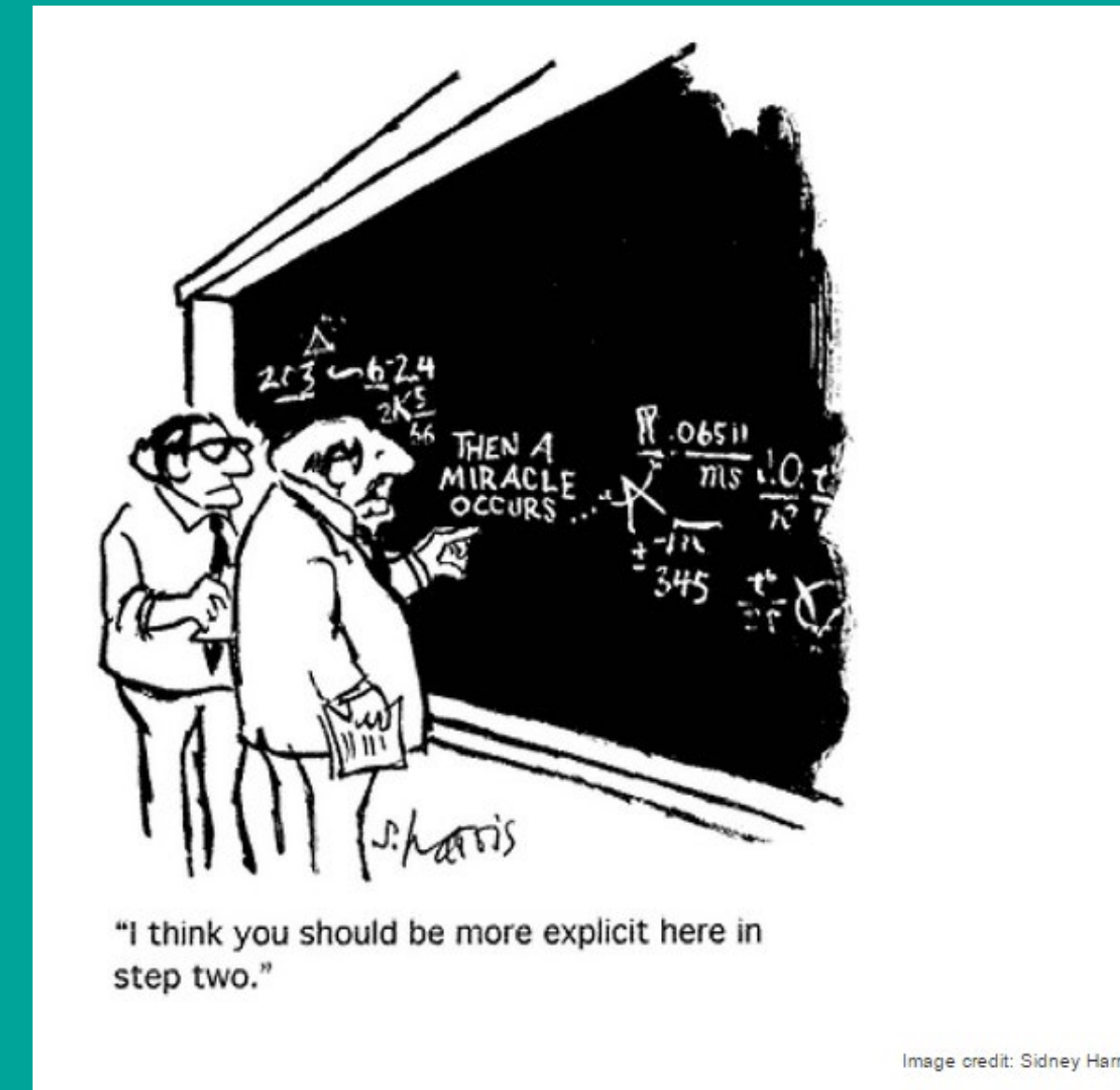
Promote speaking up. Publicly praise others for being candid or going against the grain. Endorse discussion techniques that hear from everyone

Always give credit to
the right person
when their ideas are
taken up

The very best
way to make
speaking up
worth it is to act
on suggestions

Leading for a radically different future

- **Connect across boundaries...** because relationships are a precondition for leading change
- **Be ambidextrous...** by combining 'old' and 'new' power
- **Shape networks...** connect with people's shared intention
- **Find many ways to many...** by bringing a brick
- **Develop 'inner skills'...** because how we think matters as much as what we know
- **Build energy for change...** for ourselves and others



THANK YOU



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The King's Fund

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- Bruch H Vogel B (2011) Strategies for creating and sustaining organizational energy
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- Edmondson A (2021) Psychological safety is not a hygiene factor
- Hunt R (2018) Coaching NHS leaders to build energy for change
- Kiefer T, Barclay LJ (2012) Understanding the mediating role of toxic emotional experiences in the relationship between negative emotions and adverse outcomes
- Mandel KE, Cady SH (2022) Quality improvement as a primary approach to change in healthcare: a precarious, self-limiting choice?
- NHS Horizons team (2021) A practical guide to the art of psychological safety in the real world of health and care
- Russell C (2019) Cormac Russell Four modes of change: to, for, with, by
- The NHS Institute for innovation and Improvement (commissioner) (2011) Building and aligning energy for change

Integrating health and wellbeing into the management of change

IES HR Director Retreat
September 2024



About Affinity Health at Work

- Founded in 2006, we are a multi-award winning research and consultancy organisation.
- We work with policy makers and professional bodies, and organisations of all sizes and sectors across the globe.
- We are recognised as the experts in evidence based wellbeing at work



About me

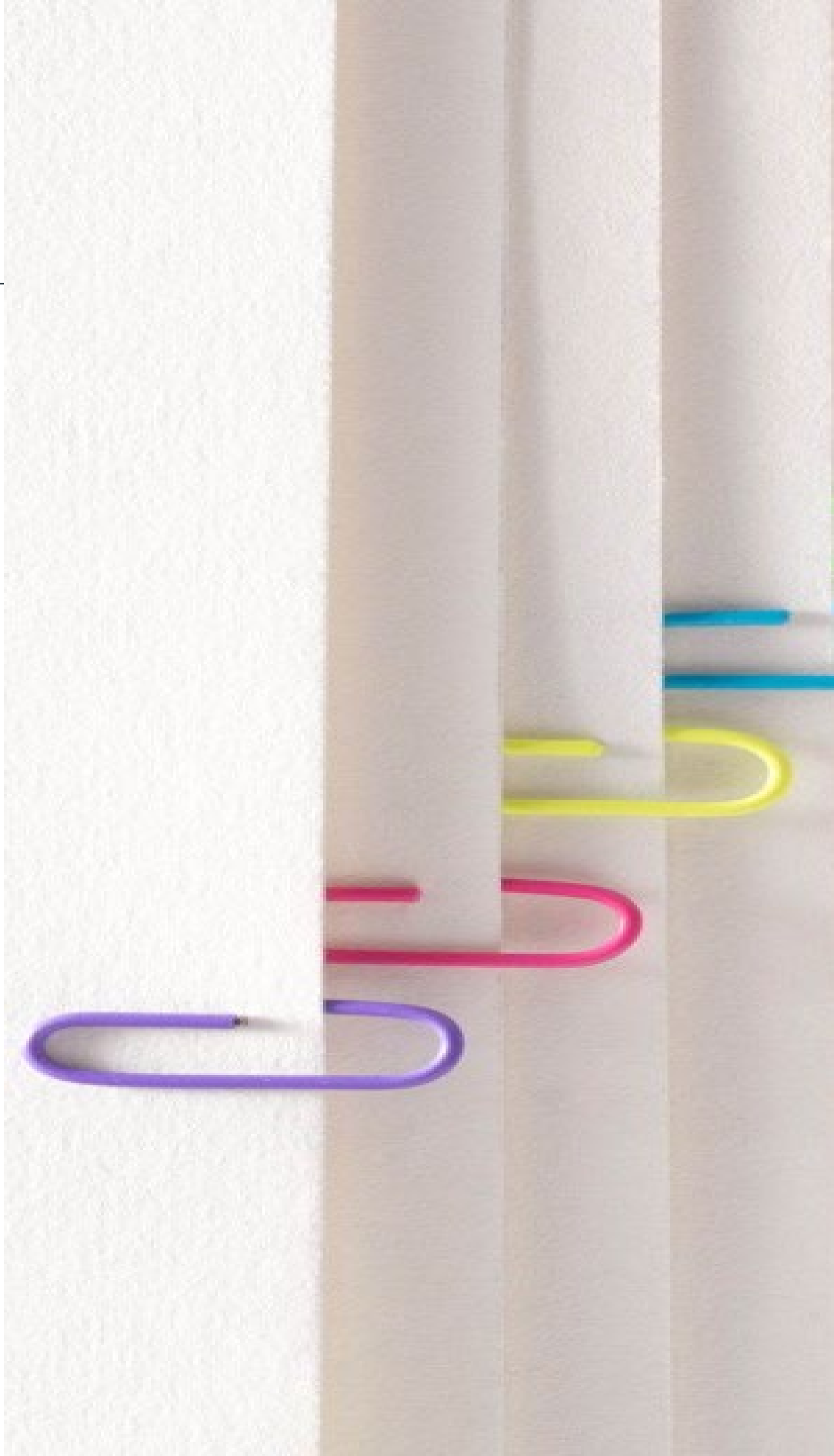
Claire Agate, MCIPD, MSc, PGDip, GMBPsS

- Senior Consultant at Affinity Health at Work
- Previous career in HR for organisations such as Virgin Atlantic, Black & Veatch, and PwC
- Working towards professional doctorate in Occupational Psychology.
 - HCPC registered Occupational Psychologist in early 2025
 - Research exploring the identification and management of psychosocial risk in Aviation



Aims for today

- Exploring how change impacts individuals
- Understanding reactions to change
- How to support individuals through change
- Case study of our work

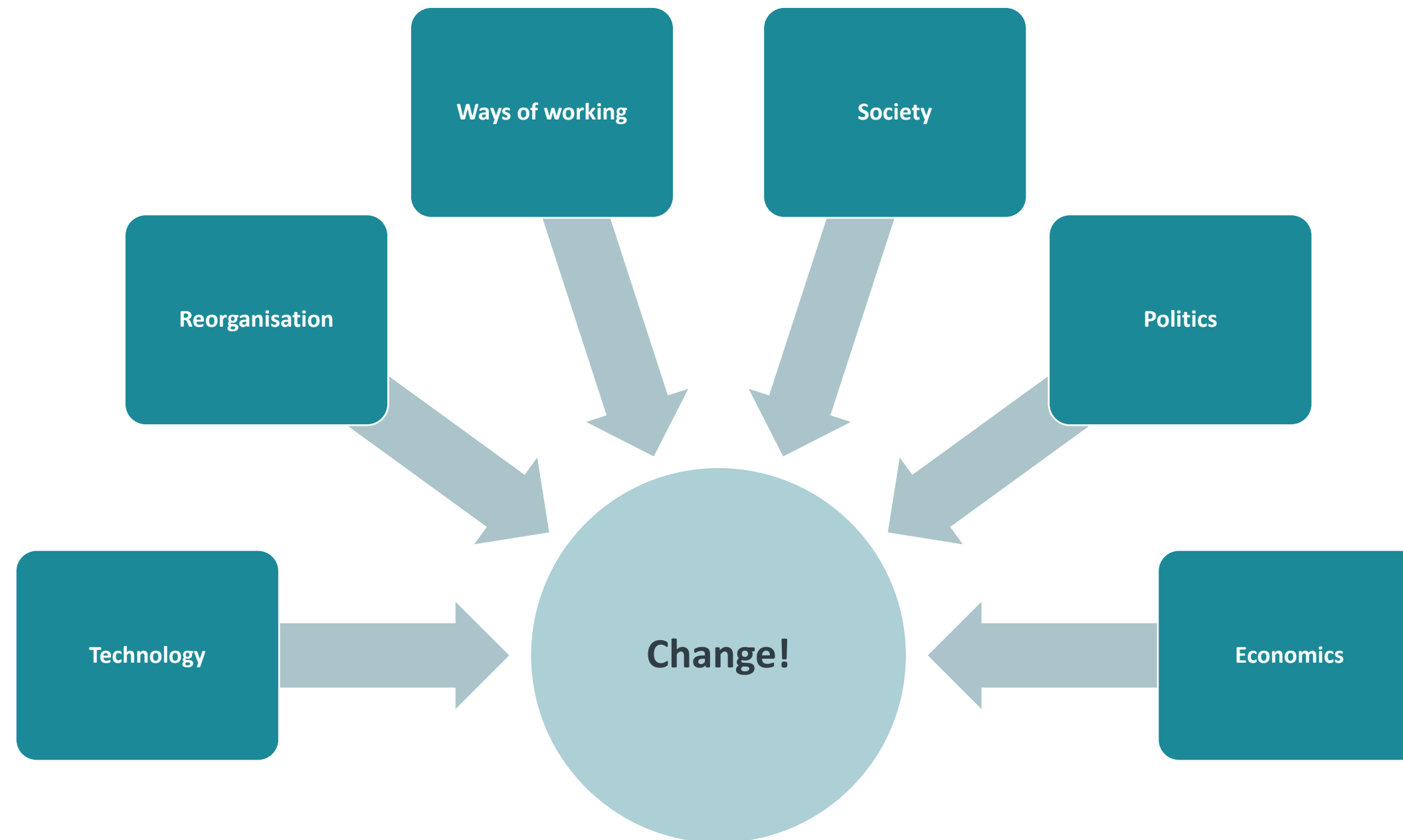




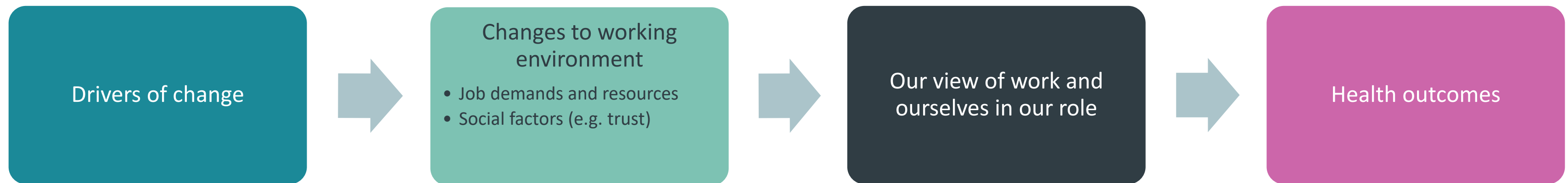
Change in context

Organisational change in the modern world

Drivers of change



Organisational change impacts individuals





Reactions to change

Understanding our individual responses

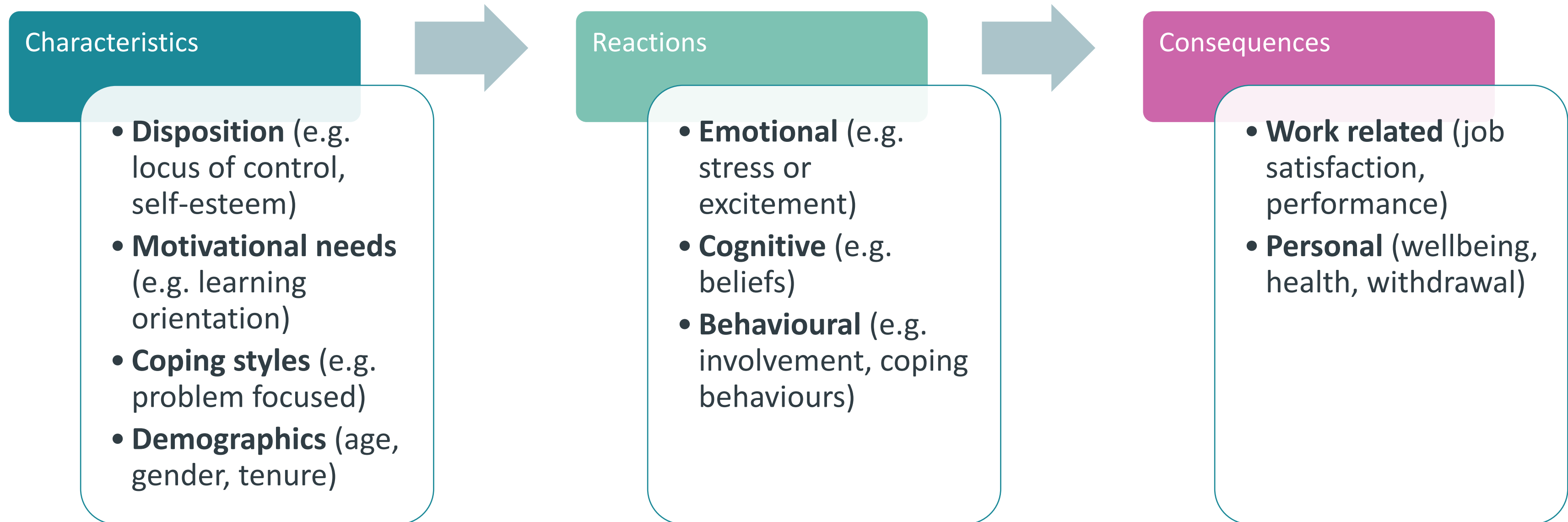


Impact on our resources

- Change can threaten our resources
- Individuals are motivated to obtain, retain, foster and protect those things they value
- Conservation of Resources theory
- Resources interact between work and non-work domains

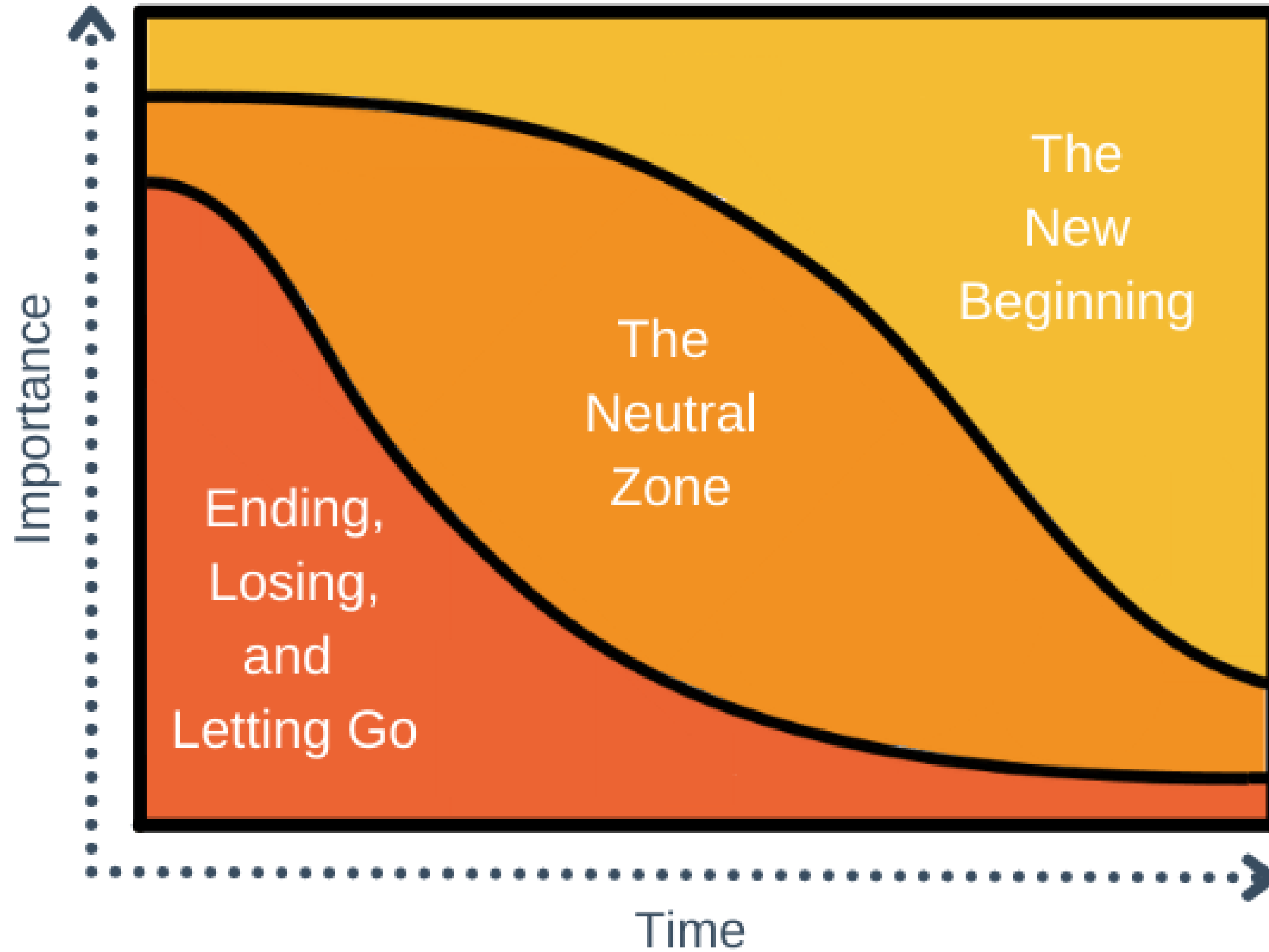


Personal characteristics and change



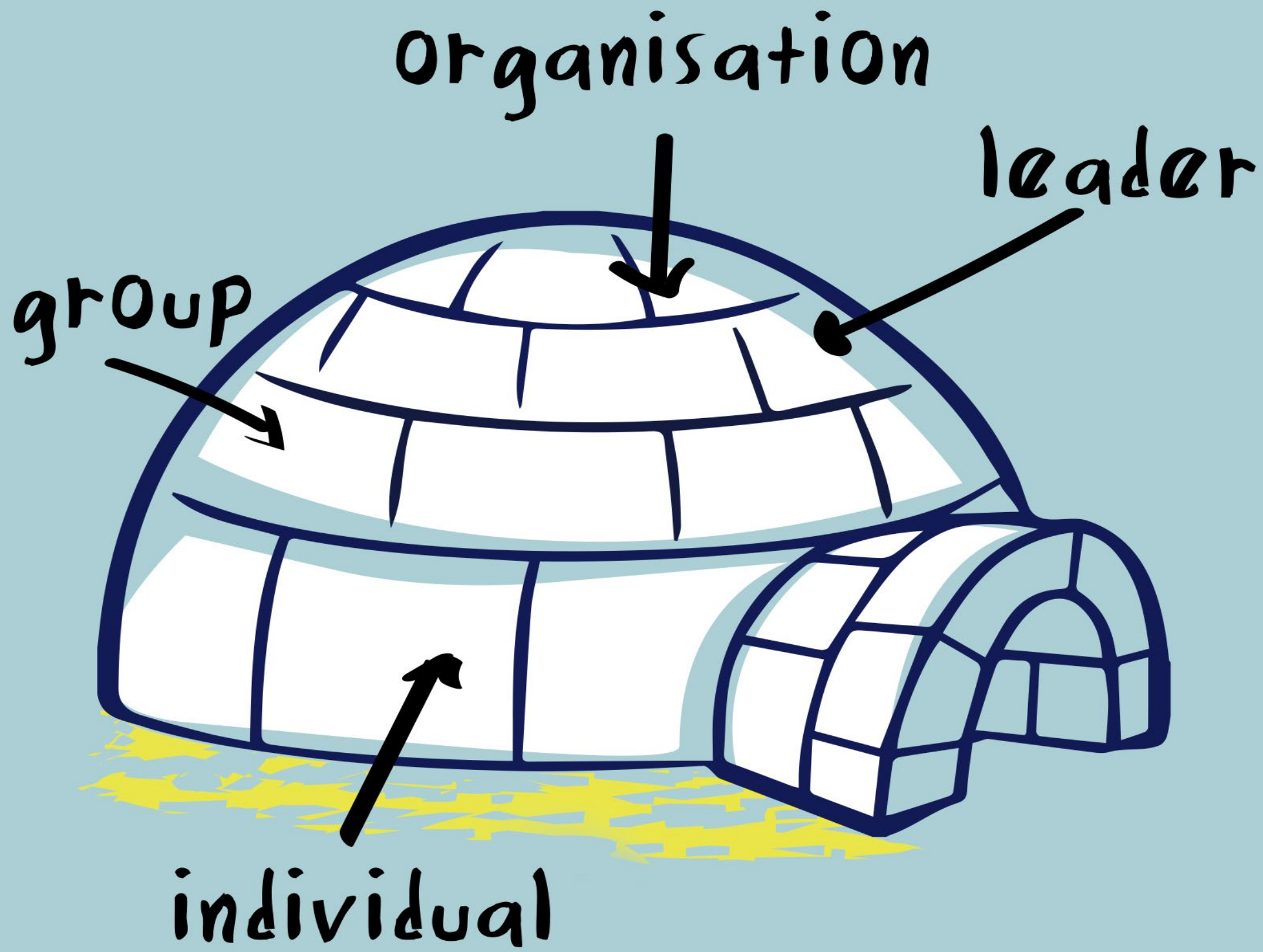


Supporting others through change



Bridge's Transition Model







Developing Change Readiness in a Local Authority

The context

Local Authority c. 600 employees

Increased frequency of change due to:

- Local elections and new Town and District Councilors
- Changes in leadership
- Digital change (Finance system, Open Housing)
- Structural and leadership changes
- CPC Action Plan

70% of managers indicated that they felt ill-equipped to manage change effectively.



Our approach



'The psychology of change' webinars

- 1 hour live webinars for all employees
- Content focussed on:
 - understanding change in an uncertain and complex environment
 - drivers of change
 - individual responses to change
 - positions in change



'Embracing Change' workshops

- Half-day face-to-face 'Embracing Change' workshops
- 'Recognising change' exercise, where groups of employees explored what and how changes have affected and will affect their work.
- 'Action' exercise, where multi-functional groups worked through examples and developed actions around how best to address and manage that change.



'Supporting others through change' online modules

- 3x20min pre-recorded webinar series for managers
- Each session accompanied by resource packs

Module 1:
Understanding your own
and others' response to
change

Module 2:
Reframing change and
developing change
readiness in those you
support

Module 3:
Managing amidst
constant change

Evaluation

Feedback collected before, soon after and 5 months after stage 2 workshops

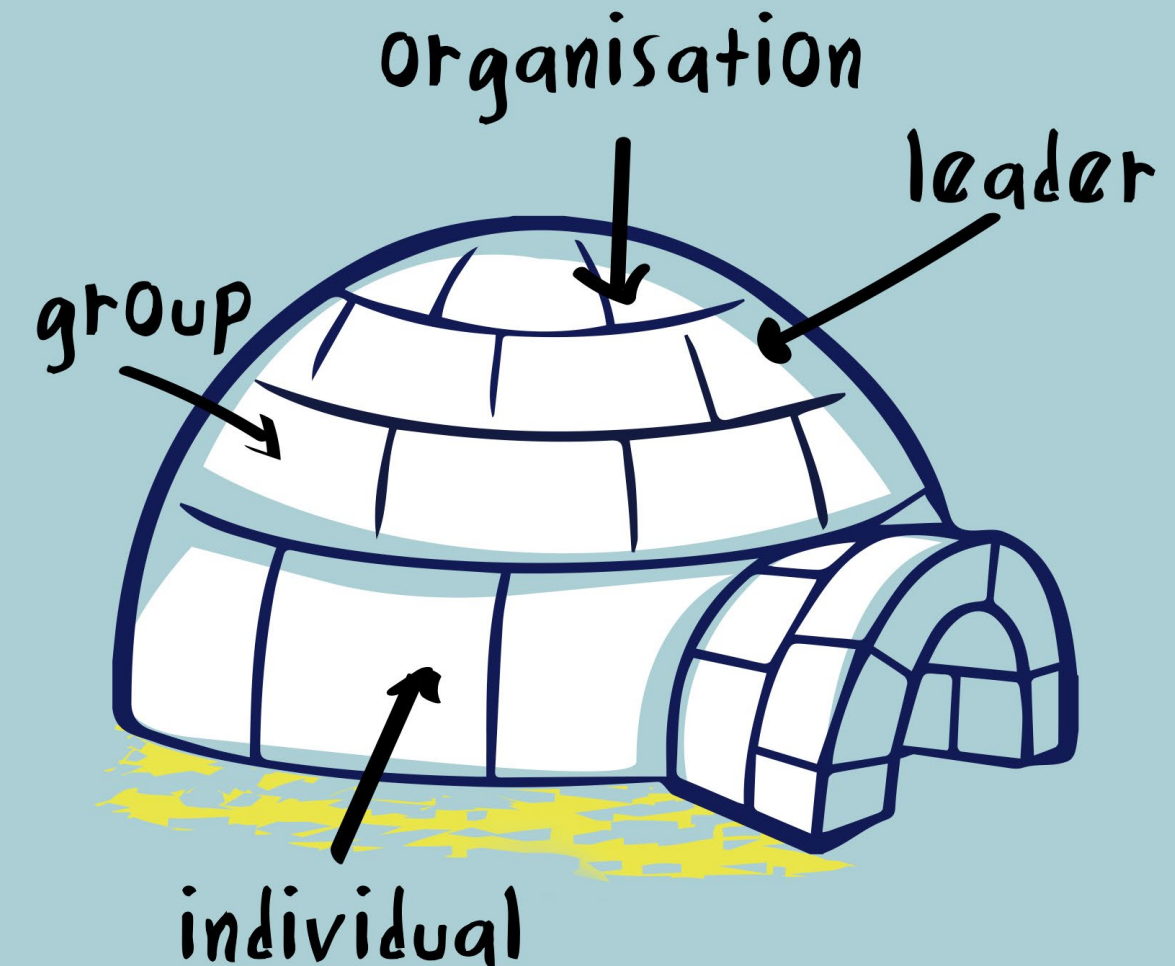
Results revealed that by the end of the workshop:

- **71%** thought that the workshop had helped them to think differently about change
- **85%** felt OK about change (12% increase from before).
- **86%** felt that they could talk openly about change (3% increase from before).
- **90%** felt they would think about other people's views on change (14% increase from before).
- Results remained **largely unchanged** at the 5 month evaluation



Top tips for professionals supporting change

- Engage employees as early as possible
- Seek out diverse voices and provide feedback mechanisms
- Clearly signpost to external and internal sources of support
- Recognise the varied and dynamic responses to change, and assess risk to wellbeing
- Provide agency
- Take a systemic approach – use the IGLOO!
- Protect and support yourself



Thank you!

For more information about Affinity Health at Work:

www.affinityhealthatwork.com

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CHANGE

Some Reflections

About me

- Currently Sr. Director, HR, EMEA & APAC at Zuora, Inc.
- Predominantly international generalist HR roles in tech companies
- Chair, International HR Forum
- Change junkie



Context

Some stats

HBR:

- Between 70% and 90% of acquisitions fail.

BCG:

- 75% of transformation efforts don't deliver the hoped-for results.

McKinsey:

- 46% of CEOs feel that culture is the biggest barrier to success.
- The success of transformational change increases by 71% with employee involvement.
- A transformation is 5.8x more likely to succeed if there is a compelling narrative.

Forbes:

- 31% of CEOs are fired for failed change initiatives.

Gartner:

- 73% of employees affected by change are suffering elevated levels of stress.

We are in a change-intense time

- Cost of living crisis
- Regional and global geo-political tensions
- Covid
- Different generations in the workplace
- AI
- Future of work
- Changing employment laws and industry standards
- Tech crunch
- etc. etc.

Some high-profile casualties over the years





Why do change initiatives fail?

Why do change initiatives fail?

Reasons can include:

- Insufficient imperative for change
- Underestimating the complexity of change
- A failure to anticipate resistance to change
- Lack of leadership commitment to the change
- Poor communication of the reasons for, and the impact of, change
- Inadequate project management throughout the change cycle
- Insufficient employee engagement about, and involvement in, the change
- A focus on numbers and product at the expense of people and culture



Success factors

Recognise that change can happen at multiple levels

Individual:

- Change in role, comp, manager, skills, etc.
- Requests on the org that relate to the personal

Team:

- Agile teams means constant change in “north star”, composition, dynamics, roles... Think Lencioni, Tuckman, etc.

Enterprise-wide:

- Strategic shifts
- M&A

Be clear on the need for change

Zuora:

- Manage economic headwinds
- Drive for profitability
- Rediscover our “disruption mojo”
- Transform our go-to-market

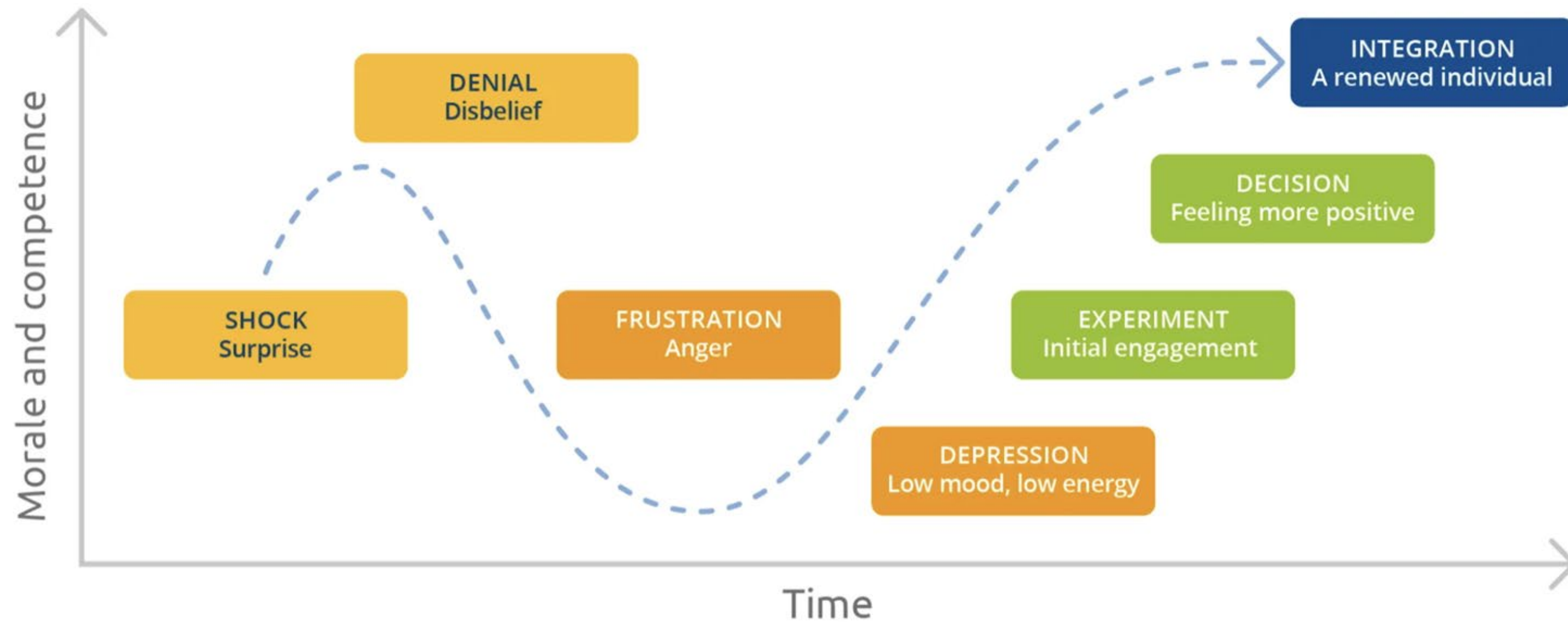
Other examples I have lived through:

- Expansion into new markets
- Acquisition or disposal
- Technological developments
- Pressure from competitors, customers, suppliers, etc.
- Government legislation

Build in sufficient time

- Exec sponsorship
- Project management
- There are multiple stakeholders in the RACI
- Things don't move as fast outside of the US
- Plan the comms
- Prepare your leaders
- Understand workforce implications – before and after states
- Follow up and reinforce

Remember that it's natural to resist change



Kubler-Ross, 1969

Engagement is key

- Leader visibility
- HR visibility
- Tapping into informal sentiment
- Measuring formal sentiment

Don't underestimate the cultural impact

Zuora:

- Loss of trust
- Impact on job security

Ensure leavers are ambassadors, not detractors

- Your employees are watching...
- Be available
- Arrange outplacement
- Maintain EAP
- Be flexible with leaving “arrangements”
- Don't nickel 'n' dime the severance
- Keep in touch



Summary

Top 5 tips

- Don't rush in
- Be clear on the imperative for change
- Consider change through multiple lenses
- Equip leaders with the tools and skills to champion change
- Tap into sentiment, informally and formally
- Prioritise people and culture

Upcoming programme

- ***Webinars***

Using behavioural science to encourage healthy lifestyles at work – 17th October (pm)

Neurodiversity at work – 21st November (am)

- ***Research projects***

Unbound working (in progress)

Skills based planning (autumn/winter 2024)

Working Carers (tbc)

Bringing our expertise in-house

- **Critical friend support** – to go through your ideas with a subject matter expert and stimulate thinking
- **Capability Building workshops** – to share latest thinking and upskill your team
- **Consultancy projects at discounted Member rate**

To continue the conversation... **ies** institute for employment studies

- Get in touch...

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About IES:

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