

# Organisations Don't Exist. People Do.



## Leading & Influencing Change

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## Introduction

In this short booklet, I'll help you to think about how to lead and influence change in teams and organisations. It's based on 25+ years' of working with teams and organisations internationally.

I'll introduce a number of generic change principles that you can use and apply flexibly to your own organisational context; depending on what's needed and what's being done well already. Don't worry about applying everything in this resource with equal degrees of rigour. You can choose which aspects and ideas are most relevant and useful for you and to the actual situations you work in.

As you work through these pages, you may want to consider questions such as: who in your organisation is already on board with the changes you want to see; who else might you need to influence or get on board to ensure organisational success in this arena; where is your organisation already doing work well that is consistent with your vision; what biggest changes are needed?

## Change and Transition

I'll start by explaining what I mean by 'change' and by 'transition' in this booklet. Different people use these terms differently so it can be confusing! At its simplest, we can think of *change* as what happens *around* us and *transition* as what happens *within* us. This means that change tends to mean practical, and transition psychological – which includes, for our purposes, emotional too.

Here's an example: Imagine introducing a new policy or practice at your workplace that will entail people *doing* something different to what they've *done* before. That's the change part. Now imagine how different people may respond to that change, depending on, say, what they *think* and *feel* about it and its potential impacts on their work. That's the transition part.

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Don't worry about remembering the words. This is more about noticing and being aware that different people may respond differently to the same changes, depending on what those changes could mean for them. The very same change can be welcomed as 'great news' by one person or group and resisted as 'bad news' by another person or group. We'll look at this idea further below.

*Reflection: When have you seen different people react differently to changes in your organisation?*

## Change Leadership

### Now and Next

You are likely to be thinking about where your team or organisation is at the moment on the spectrum of where you are now through to where you aspire to be, and within what timeframe. We can think of the gap between the aspiration and the current reality as the gap that needs to be bridged by a 'Change and Transition Plan'. This workbook will help you to create yours.

As you start to identify and order the main stages in your plan, it can be useful to start at the *end* – your aspiration and what it will look like in practice, and then to identify the key areas to focus on to achieve any changes that will be needed. Ask then, 'What will need to happen for that to happen?' and you can start creating a series of steps, leading back to where you are now.

*Reflection: What's your organisation's aspiration and what are the main steps to get there?*

### Quick and easy

You will notice, in doing this, that some actions can be achieved very quickly and easily. It could be, perhaps, because the changes only require small tweaks to what is being done already, or because there is already a high degree of support in your organisation for making those changes. In leading and influencing

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change, therefore, it can be useful to identify any 'quick wins' from the outset.

Sometimes the quick and easy changes won't be the most important changes to be made in the organisation, but they can help to create a positive sense of momentum, of things moving forward. They can also build confidence that change is possible and that it doesn't always have to be difficult and painful. It's easier to steer a metaphorical ship that's moving than one that's standing still.

At the same time, it can be useful to show the quick wins in the context of an overall change plan so that people know what further changes will be introduced along the line and when, and where the quick wins fit in. Quick wins can also be used to prove a case – that is, to demonstrate the positive difference that changes can make and, thereby, increase buy-in for further changes down the line.

*Reflection: What quick wins could you achieve in your organisation to get things moving?*

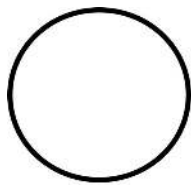
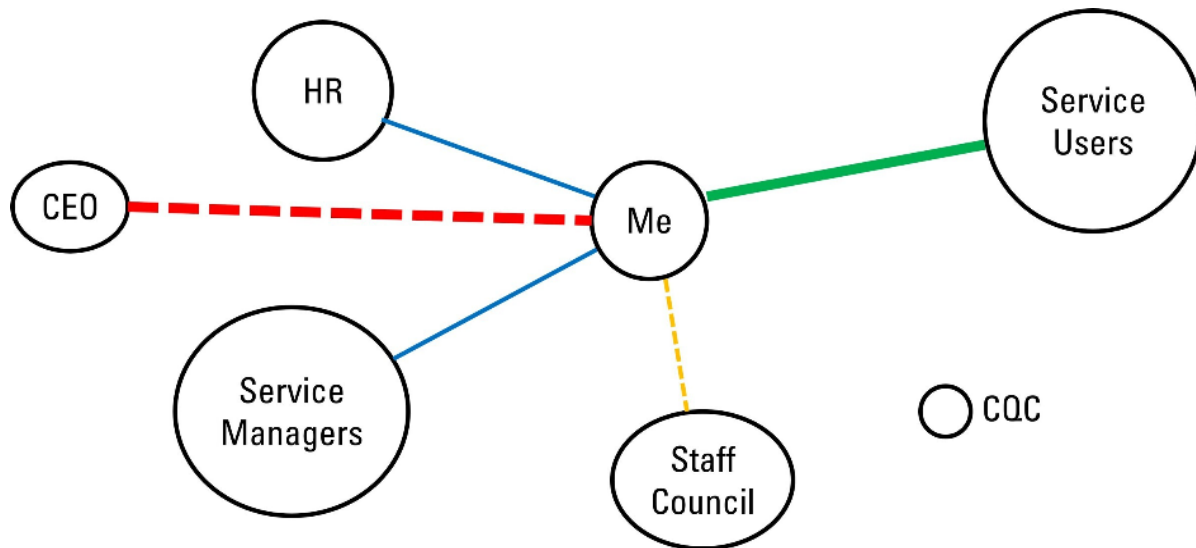
## Buy-in and Support

This question of *buy-in* often proves critical when leading and influencing change. If key people who have the power to exert influence or control over the outcome of the change effort are convinced by the case for change and find it compelling enough to support (see Minds and Hearts, below), you are half-way there already. Without their interest or support, the change process may struggle or fail.

It can be useful then to identify, at the outset, whom, in practice, the success of this change initiative will depend upon. Sometimes, this is called 'stakeholder mapping'. It involves identifying key players (individuals, teams or agencies) and what their level of interest or support is. If they are not interested or supportive at this stage, it will be important to consider what will bring them on board.

Here's an example of a stakeholder map, along with a key to interpreting it:

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**Larger** circle – lot of influence; **Smaller** circle – less influence



**Thick unbroken** line: High level of support for the initiative



**Thin unbroken** line: Lower, perhaps tentative, level of support



**Thick broken** line: Strong resistance to the initiative



**Thin broken** line: Degree of uncertainty or scepticism

**No line:** Currently unaware of the initiative

There are various ways enlist support. One way is to meet with each stakeholder, ask them to rate their support for the change initiative on a scale of 1-5, then ask what it would take to move it up a notch. This helps to surface what their priorities are and, if needed, what it would take to shift them. Remember that a stakeholder is any party able to exert formal, or informal, influence or control.

*Reflection: Who are the key stakeholders that will influence the success of your change initiative?*

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## Resource and Investment

Applying organisational changes effectively normally will require some investment of resources. The level and type of resources needed will depend on the organisation's aspiration; how close the organisation's current practice is to the desired end goal; the degree and type of changes that will be needed etc. Examples of resources could include: staff time, training, supervision, publicity etc.

An important part of leading and influencing change is to identify what resources will be needed and how to ensure they are available, in the right places and at the right times. It can be tempting to under-estimate resources in order to make an initiative look more attractive and financially viable, especially when budgets are tight. However, this can also create unrealistic expectations.

A more effective approach is to identify and communicate explicitly what the vision, purpose and benefits of the changes are and will be: e.g. to beneficiaries and their families; staff and volunteers; commissioners of services; donors/funders; quality assurance agencies etc; then to show how the resource commitments required are an *investment* to achieve those benefits.

*Reflection: What resource investments will you need to ensure that the benefits are achieved?*

## Monitor and Evaluate

*Monitoring* is a process of keeping an eye on progress on route, thereby enabling change leaders to make any course-corrections that may be needed as and when they happen, or as and when they become apparent.

*Evaluation* is a process of reviewing at the end to see if the initiative has been successful in achieving its aims, and to learn from that experience for future similar initiatives.

As a rule of thumb, before embarking on a monitoring and evaluation process it can be helpful to ask: Who wants to know? What do they want to know? When do they need to know?

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What will they do if they do know? This will help ensure that any such processes are outcomes-focused, and that the effort involved in gathering and processing information is efficient and worthwhile.

It will be important to consider carefully how to conduct monitoring and evaluation processes so that the methods you use model your ethics, values and desired culture. This will help to reinforce organisational congruence. It will also be valuable to look back at your stakeholder map (above), to consider how best to involve different stakeholders in these processes, when and how.

*Reflection: How will you apply your organisation's values to monitoring and evaluation?*

## Transitions Leadership

### Same and Different

You may have noticed how some people tend to like same-ness or continuity, whereas others prefer different-ness or change. Take, for example, what different people choose to do for a holiday. Some will go to the same place every year and, perhaps, meet with the same people there. Others will prefer novelty and variety, trying a different place each time. What do you tend to do and prefer?

This preference for same-ness or difference can be useful to bear in mind when introducing or advocating change. It's not that sameness or difference are necessarily fixed preferences, as if every person has just one preference and that it applies rigidly to all aspects of their life. It's more about being sensitive to how changes are communicated so that everyone can feel heard and included.

So, here's the idea: You've identified a specific change, or a number of specific changes, in e.g. policy, process or practice that will enable your organisation to move closer towards its goal. In communicating what will happen next, make sure to include not only what will *change* (which is normal in change communications generally) but also, importantly, what will *stay the same*.

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*Reflection: Why is your organisational doing well to build on, and what will make it even better?*

## Choice and Control

You may have heard it said, 'People don't like change', or 'People are resistant to change'. True or false? Ensuring an optimal degree of choice and control is critical to wellbeing and resilience. This principle applies more broadly when leading and influencing change too. It's about working collaboratively, with openness and honesty, to build (enough) safety, confidence and trust.

People will often push back against change that feels imposed on them (*even if* they agree with the nature of the change), and yet will often support change if they feel that they have been heard and understood. This means that, even if changes have been agreed at a senior level in an organisation, how other people are involved in reaching those decisions, and implementing them, is important.

One way to approach this is to start a change process by inviting as wide a group of interested and affected parties as possible to contribute to deciding, prioritising and designing any practice-related changes. Another way is to communicate agreed changes or standards openly, and then to invite stakeholder input on what it would take to implement them successfully in practice.

*Reflection: How could you ensure optimal choice and control in your organisational change process?*

## Minds and Hearts

We looked briefly (above) at how different people may make different life choices based on their preferences for same-ness or difference. You may also have noticed that some people are motivated to change if they find the rationale for the change *convincing* – in other words, if they believe there are good reasons for doing it. We could say this is about motivation based on what someone *thinks*.



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Other people are motivated to change if they find the change *compelling* – in other words, if it resonates at a heart-level with something (or someone) they hold a passion or concern for. We could say this is about motivation based on what someone *feels*. Again, this is not to say that everyone is either a 'thinker' or a 'feeler' in some fixed, polarised sense.

It is about noticing that different people may be more, or less, motivated to change, depending on what that change means for them at rational and emotional levels. In communicating changes within a team or organisation, therefore, it can be useful and important to convey the changes in terms of rationale (e.g. evidence/logic) *and* emotion (e.g. aspiration/values/people).

*Reflection: What are the key rational and emotional drivers for change in your organisation?*

## Clear and Not-Yet Clear

As you begin to introduce changes in your organisation, you may find that some aspects of what this will involve practically are clear, whereas other aspects (e.g. what specifically it will entail in different services, or in different types of client relationships) may yet need to be worked through in more detail – see Choice and Control and collaboration (above).

You may find, too, that some people will be happy to support the general vision, concept or need for change, and are comfortable and confident that things will work through over time. Other people may feel confused or concerned if they don't have all the details communicated up-front. This is sometimes about what different people need, e.g. in terms of clarity and certainty, to feel safe.

In order to address this, it can be useful to create a communications plan from the outset. This could include: e.g. What is known; What is not yet known; What will be done (and by whom and when) to address the unknowns; How and when updates will be communicated etc. Remember to ask different people how/when/by whom they would like to be involved, informed, updated etc. too.

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*Reflection: What can you do to close or minimise uncertainty gaps in your implementation process?*

## Past and Present

People's responses to change are influenced by what they have experienced in the past, what sense they made of it, how it felt for them and what impacts it has had in their lives – as much as what is happening here-and-now. We could say, therefore, that people always experience the present through the prism of the past. The past acts as a filter for what people see, hear and feel now.

This means that, if a person has experienced changes positively in the past, they may well look at fresh changes positively too. Their experiences of the past will influence how they imagine and feel about the future. Conversely, if someone has experienced difficult and painful changes in the past, they may hear news of forthcoming changes with concern and fear; even if they don't know why.

When leading and influencing change, therefore, it's important to pay careful attention to how people may be feeling. Their emotional responses may be, at times, less about what you are proposing now and more about what it triggers for them from their past. Stay close to people during change and, if you notice unusual or concerning behaviours, ask sensitively, 'What do you need?'

*Reflection: What signs do you need to look out for, that people may be struggling with change?*

## Respect and Change

There are other ways in which the past is significant too. If an organisation decides that radical changes are needed, it can feel to some people – especially those who have been in the organisation for a long time – as if what they have been doing until now is now viewed as being somehow defective or wrong, in spite of all the hard work they have poured in to ensure its success so far.

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Here's an example: Jane has been responsible for developing good practice in the service where she works. Paul, from her team, is now advocating changes to make the service more agile and adaptive. Jane feels threatened because it could appear to others that her own guidance on 'good practice' to date has been misleading and misinformed. Paul finds Jane resistant to change, and feels stuck.

What does this mean when leading and influencing change? In order to help avoid inadvertently triggering unhelpful emotional responses, especially if people may have felt hurt, vulnerable or criticised in the past, it can be valuable to acknowledge and affirm explicitly the good work that has been done to date, and by whom, and show, where possible, how the changes will *build* on it.

*Reflection: How can you best involve significant players from the past in creating the new future?*

## Story and Truth

We sometimes contrast 'story' with 'truth', as if the former is fictional and the latter factual. When it comes to leading and influencing change, however, the distinction isn't always that clear. We can, for instance, think of story as *narrative*; that is, a version of events that people tell themselves and each other about each any change that's happened, is planned to happen, or is happening now.

A narrative is always selective and reveals or hides (often subconsciously) dimensions of and perspectives on what is taking place. Here's an example: A service is working towards greater client-responsiveness. Andy: 'We're doing this because our manager has told us to.' Sandra: 'We're doing this because it will make an important difference to the quality of service people receive here.'

Which is true? Either, both? What else could be true in that situation? Notice the impact that changing the narrative has on how people feel, what they do, and the spirit in which they do it. We could say: Change the narrative; change the experience. When leading and influencing change, therefore, pay careful attention to the narratives you hear, and to the narratives you create and use.

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*Reflection: How can you help to create a positive and authentic narrative in your organisation?*

## Strength and Skill

An organisational shift will inevitably involve changes to: e.g. what people do, who does it, how they do it, when they do it, and why. Some people will welcome the changes and will work at implementing them with enthusiasm. Other people may feel more cautious, especially if they feel concerned about whether they can apply and meet the new standards in their own work.

Take, for instance, someone who has felt happy and competent in their work until now. They enjoy what they're doing, they know what's required of them and they receive feedback that they do it well. The introduction of e.g. a raft of new practice standards could make them feel anxious: 'I'll feel humiliated and may lose my job if I don't have what it takes to succeed with this.'

In communicating forthcoming changes, therefore, acknowledge that it will involve changing some things (see Same and Different, above), that you are confident that people *will* be able to make the changes, that training and mentoring will be provided to enable people to make the change; and in 1-1 conversations, enable people to reflect on how they have survived *and* succeeded in the past.

*Reflection: How can you enable people to make the changes needed, with confidence and skill?*

## Recognition and Reward

It can also be useful to consider how people and teams will be recognised and/or rewarded for achieving the changes or new standards. Some people may find it motivating to be recognised publicly: e.g. at an annual staff/volunteer event where exemplars of good practice are awarded certificates. Others may feel happier with a personal 'Thank You' note in their annual appraisal.

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Note: If applying the standards could or will result in substantial changes to any person's role, or the specific requirements (e.g. training/qualifications) to fulfil the role, it would be worth consulting with your service's relevant Human Resources, Learning & Development, Trade union and/or Staff Council representatives to check what policies, processes and procedures apply in those circumstances.

Even if the implementation plan will not result in formal changes, e.g. to jobs or remuneration, when leading and influencing change it can be valuable to consider what other forms of reward people would find encouraging and affirming for all their efforts and achievements. Remember to ask people what they would find most rewarding. You may be surprised by what they suggest!

*Reflection: How will you recognise and reward people's progress towards the new vision?*

## Change and Transition Plan

You are now ready to create your own Change and Transition Plan. What are the key actions you will draw from this workbook as you create yours?

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Nick is a Fellow of the UK's Institute of Training and Occupational Learning. If you would like to learn more about Nick and his work, or would be interested to enhance your own change leadership and transitions skills, see:

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