**Part III - Chapter 09: Integration**

*Mike Green*. [**Change Management Masterclass : a Step by Step Guide to Successful Change Management.**](http://proquest.umi.com/pqdweb?RQT=318&pmid=122424&TS=1324347272&clientId=29440&VInst=PROD&VName=PQD&VType=PQD). London: [2007](http://proquest.umi.com/pqdweb?RQT=572&VType=PQD&VName=PQD&VInst=PROD&pmid=122424&pcid=52162351&SrchMode=3). pg. 243, 11 pgs

**Abstract (Summary)**

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| **Full Text** (3632  words) |

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The completion at last

We were once only the embryo, implanted by faith

Cultivated from ideas, some old - and some new

Nourished with a desire - to seek our fate

Beginning to flourish - from dreams, left - from the cool

Morning dew -

If we survive the drought in the summer, of prejudice and hate,

Where lack of love - threatens to cut us down, like an unwanted

Weed

Providing winter's cold heart, - doesn't uproot us in war, only -

To fill - its own selfish plate.

Then perhaps - the following season, will bring us the promise

We so desperately need

For spring may bring us warm hearts, to expose our unstable

Petals, to a whole new light,

With April's tears of remorse, for discrimination, and ignorance,

Which, created such gloom

Replenished with hope - we continue to grow, there's no stopping

Us now, for now, - it's all done right.

From here it unfolds, - the completion at last, for all of God's care,

Will soon be in full bloom

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Introduction

The aim of this chapter is to look at how change becomes embedded in the organization and the degree to which learning has occurred and how changes can be sustained going forward.

Looking through the lens of the machine metaphor, the changes will be completed once the project plan is done. If the diagnosis, design and implementation were effective then the change will have occurred. In terms of Lewin's unfreeze, change, refreeze model, integration occurs at the time of refreezing the organization. If part of the design was to move from one state, as described in the From > To analysis, to the future state then this end state will be achieved when, for example, the strategy is in place, the new structure and systems are functioning, the staff with the appropriate skills and the management with the appropriate style are all working in line with the shared values. This will have been achieved though the organization and implementation of the changes, and the mobilization and transition of the stakeholders.

From the perspective of the organism metaphor, we can see that integration has occurred when the organization has fully adapted to its new environment. Integration will have occurred within the political metaphor when the new configuration of the power base has settled in and a new status quo has been negotiated. Within the flux and transformation metaphor, integration isn't necessarily the prime concern. Given that the way the changes have evolved has allowed scope for emergent themes to take hold and take shape, it may well be that some things which work, or which have 'stickability' have become a part of the way of life whilst other things have faded away. In some of these other metaphors it is as if the organization were in free-flowing mode and for change to occur it had to be frozen and then unfrozen - the mirror image of Lewin's original idea. From a task point of view, integration occurs when the project plan is completed and the change team goes home. From a personal perspective, integration occurs when people have gone through the transition curve individually and entered Bridges' new beginnings zone.

Embedding change

In a sense we are back at the beginning, because if we have orientated ourselves, organized and mobilized, implemented and made the transition, then we will have achieved our aims. Roberto and Levesque (2005) interestingly say:

the seed of effective change must be planted by embedding procedural and behavioural changes in an organization long before the initiative is launched. . . to achieve effective institutionalization, core process and enabling conditions must be embedded into the organization well before the change initiative is rolled out. . . to embed change in an organization, managers have to create the conditions that enable employees to take ownership of the new procedures and systems and integrate and apply the key principles of the initiative to the way day-to-day work is done... These enabling conditions occur in three contexts: structural, procedural and emotional.

By 'structural' they mean the way in which the organization structures itself to enable its people to focus where and on what is needed, which links into the way they will be rewarded for the behaviours and the outcomes that are preferred. The 'procedural' context is the degree of fairness with which the change process is initiated and implemented, as perceived by the employees. Depending on whether the organization is doing it commensurate with its stated values and with an attempt to involve and engage staff, there will be more or less integration of the changes into the fabric of the organization. The 'emotional' context refers back to many of the aspects of transition that we have previously discussed. If preparation for the change does not seek to address the fears and anxieties of those who it will affect, there will be less support and mobilization.

As a precursor to these embedding mechanisms, Roberto and Levesque define four antecedent processes which contribute towards an enabling environment in which change can occur; see Table 9. 1 .

Learning

However, in all cases learning will have happened and it is this ability to learn new things and learn about the process that allows change. Weinberg (1997) describes this well in his model of how transformation occurs. Often the status quo is so strong or the prevailing paradigm so hard to shift that any attempt to introduce something new (what he calls 'the foreign element') is resisted. Initially, resistance takes the form of outright rejection, but if that fails then there is an attempt to absorb the new element into the existing state. If a new counter-culture leader comes into the organization then there may be attempts to undermine them; if that fails then there are attempts to get them to play by the existing rules. It's only when that fails that there's an attempt to adapt to the new element and transform the organization, and this attempt can either succeed or fail. If the latter then the cycle begins again; if it succeeds then we can see that the organization has shifted.

We have seen that a key capability of the organizations that manage change successfully is to be learning as they make the changes. They may pilot something and see what the consequences are, and then adapt their change initiative accordingly. But they may be doing something in addition: they may also be looking at the way they take those decisions, implement those initiatives and review their practice. This is what Argyris and Schön (1978) call 'double-loop learning'.

Single-loop learning happens when an action is taken and the intended outcome achieved or, when there is some deviation from the outcome, you try something different to achieve the outcome. There is not any thought about how you went about this or the underlying assumptions you may have. With double-loop learning you seek to understand why these actions are not working and then develop other strategies - with that knowledge - to remedy the situation. The additional thought process is about gaining some understanding of cause and effect and insight into prevailing assumptions or beliefs.

A further loop can be incorporated if the change principles themselves come under scrutiny. The challenge might be what kind of organization we want to be. If single-loop is concerned with whether we are doing things right, and double-loop concerned with whether we are doing the right things, then triple-loop learning is concerned with how we decide what is right. It is similar to the transforming idea in individual change since it involves a paradigm shift - a shift in the way you perceive the world around you.

As an example, the IT department wants to install a new system in the finance department. It meets with resistance in the shape of certain processes not working. It rewrites the processes (single-loop). It continues to meet resistance and recognizes that maybe it hasn't gone about it in the right way and decides to make sure that stakeholder discussion is part of the project plan (double-loop). It continues to meet resistance and realizes that it is operating within the machine metaphor when what is really called for is for it to fit with the prevailing political metaphor. It shifts its paradigm (triple-loop).

The learning organization

Senge et al (1999) suggest that for organizations to sustain change through learning and learning through change, there are five disciplines they need to master:

1. Personal mastery. Formulating a coherent picture of the results people most desire to gain as individuals alongside a realistic assessment of the current state of their lives today.

2. Mental models. Discipline of reflection and inquiry skills focused around developing awareness of the attitudes and perceptions that influence thought and interaction.

3. Shared vision. This collective discipline establishes a focus on mutual purpose... by developing shared images of the future they seek to create, and the principles and guiding practices by which they hope to get there.

4. Team learning. Through techniques like dialogue and skilful discussion, teams transform their collective thinking, learning to mobilize their energies and ability beyond the sum of individual members' talents.

5. Systems thinking. In this discipline, people learn to better understand interdependency and change, and thereby to deal more effectively with the forces that shape the consequences of our actions.

Pedler et al (1996) identified five dimensions of an organization's operations with 15 supporting aspects that would characterize a learning company. It is interesting to note that there is a focus on flexibility, permeability, participation and, of course, learning, which correlates well to the aspects of good change management within the case studies.

1 . Strategy would include a learning approach with regular reviews, pilot projects and plans modified and built on as progress is achieved. Also within this category would be the notion of participative policy making, which would involve all members of the organization and other key stakeholders, with policy being co-created rather than being driven purely from the top down.

2. Looking in to the organizations would be areas such as the use of information technology to inform and empower people and their actions (informating); accounting and control mechanisms which enable learning and freedom to act within less rigid compliance and risk averse regimes (formative accounting and control); internal exchange covers the idea of their being mutually productive relationships between internal suppliers and customers with a free flow of information across the organization; and flexibility of reward allowing for more creative and flexible ways of motivating staff, with a degree of involvement from all.

3. Structures and how work is organized is flexible enough to allow creativity, innovation, development and responsiveness to occur (enabling structures) to meet current needs as well as preparing for the future.

4. Looking out covers the use of boundary workers as environmental scanners and inter-company learning. Both these areas allow for permeable borders and are aligned to that of a healthy organism where information flows between customers, suppliers, partners and others with a stake in improving the business.

5. Learning opportunities address the learning climate and the opportunities for self-development for all. A climate is fostered whereby people can experiment, take risks, make mistakes and learn through doing. This would be supported by the necessary training and development opportunities. There would be a two-way contract here, with the organization enabling learning but with individuals encouraged to take responsibility for their development as well.

Case study analysis

At Aster, after the change process, it needed to address some key issues:

\* how to hold a strategic view across the Group whilst attending to operational issues within one's own business;

\* how to spot and transfer best practice across the Group;

\* how to build one's own identity as a business but be true to the Group ethos; and

\* how to equip managers to be able to manage still more change in the future.

Aseries of workshops were designed to address these issues:

\* to help managers share knowledge and understanding across the whole Group;

\* to develop skills to better manage change;

\* for managers to understand their management style and the impact it has on others; and

\* to address the important and pressing issues arising from a dynamic and changing organization.

Managers and staff were involved, in a variety of ways, with developing the ongoing agenda for change. In addition to the workshops there were staff briefings, staff discussion groups and staff conferences where the forward agenda was communicated, ideas generated and potential obstacles highlighted and worked on collaboratively. Over time a number of working groups were set up to address different organizational development themes as they emerged:

\* Develop practical ways in which people will 'buy-in', own and act out the values.

\* Develop ways for managers to keep their 'finger on the pulse' - know the key issues emerging for staff and the organization to take action on.

\* Generate ideas as to how people can take on responsibility and grasp opportunities.

\* Direction - guided by Aster's vision and values and taking account of the strengths and weaknesses of the Group, where would you want Aster to be in five years' time?

\* Improvement - examine current service improvement practices to confirm, a) whether they are appropriate for Aster Group, and b) how they can better engage and be made more meaningful to staff and customers.

\* People - taking account of the staff surveys across the organization, examine and made recommendations of what we need to do to make the Aster Group a better place to work.

The Institute wanted to embed the changes by broadening and deepening the networks across all of Ireland, which would lead to better health for all. By developing the network and having open dialogue with all stakeholders, the vision of health equality could take hold across the island.

The leadership programme was a good case in point as its aim was to build leadership capability and capacity across all organizations working on the island. Four programmes have been run with 100 people from all health sectors nominated or self-selected to attend, including academics, public health doctors and community health workers as well as managers from local government.

The programme didn't just focus on individual leadership development but also on the impact on their respective organizations - creating a cadre of leaders, making wider connections and operating in an all-Ireland system. The ongoing peace process has helped, creating more porous borders, more fluid, less threatening. Likewise this increased level of communication and understanding has helped the peace process.

For Biogen Idee there were four key things that needed to happen as a result of the change:

1. a new fully functioning headquarters in Zug;

2. a more devolved and autonomous culture;

3. centres of excellence established in specific specialisms and functions across Europe; and

4. greater empowerment and autonomy to the affiliates.

The physical movement from Paris to Zug coupled with the reduction in staff ensured that the changes would last. The old way of doing things clearly could not be sustained. Likewise, movement of some of the key functions away from the HQ and the establishment of these functions (centres of excellence) in locations that were naturally better placed to operate them - international regulatory, clinical research, data management and pharmaco-vigilance centre close to the European drugs regulator and logistics at Hoofddorp, building on an already established centre with a central location, excellent transport and distribution facilities. At the same time the company's resources were devolved to the centres and the affiliates. Reporting fines were reconfigured to put power and authority in local operations rather than a controlling centre. All the changes were monitored, not just for effectiveness of execution, but also for how well they were received by staff, customers and investors.

At the British Council the programme office had created stabilization criteria for each part of the process and used a traffic light system to track progress. From the implementers' point of view they needed to manage the balance between focusing on the next phase - rolling the system out overseas -and addressing the stabilization issues in the UK.

System users had to manage the tension between accepting the new system with limited knowledge and creating 'workarounds', and gaining the necessary expertise to fully exploit the system. Management attention was needed to ensure business optimization and exploitation of the system, by attempting to engender inquisitiveness and to stop any backsliding by, for example, minimizing the amount of paper that was printed out.

Business process ownership resided within the business, within the process itself. This idea fitted with ensuring empowerment and indeed ownership where it belonged, but it did require specific responsible managers to be appointed and also enough resources attached to those roles. As often happens within organizations, managers with a full load of duties and responsibilities are asked to take on the additional responsibilities. Unless the role is reconfigured around the process, the role might be either too large or cumbersome, or deflect from giving the process adequate focus.

The programme support office worked on establishing a set of key performance indicators (KPIs) to have a reasonably objective measure of how things were going and which were used to:

\* decide on areas that needed following up;

\* decide which areas were a priority for action;

\* illustrate and illuminate where things were going well; and

\* manage expectations of the stakeholders.

Managing expectations helped at this stage in introducing the new system, as it addressed the following key questions:

\* Does each part of the system function - yes or no?

\* Are we able to process sufficient volumes at sufficient quality?

\* Are we operating more efficiently than before?

\* Are we demonstrating best practice?

The KPIs need adjusting as you pass through these phases. By focusing to start with on 'Does it work, yes or no?' you indicate that this is the level of your expectation. Going straight into assessments of whether you are immediately more efficient is unrealistic and can be dispiriting, as the answer can often be a no. The reviews of KPIs themselves can form the basis of an understanding of what has worked well and what now needs to change.

Within the kitchenware company the strategy continues to work well, with customer orders continuing to grow. The UK kitchenware market, however, is declining, so standing still is not an option. It needs to grow organically or through acquisition, and this growth can be through existing or new products. It had demonstrated it could grow organically through greater customer relationship management and fulfilment; it had responded to customers' needs and suppliers' ideas and enhanced the brands and developed the product range. In the last 20 months it has made two acquisitions of companies with similar product profiles (low value, high volume) covering similar accounts. The challenge for Dennis and Nick is how to embed the current success into a sustainable growing business. As the company grows there is probably the need for more formal training and development, more formal soft management skills and perhaps more attention being paid to sustaining an entrepreneurial culture. Such a large expansion will require different skills and capabilities across the organization; issues both of organizational capacity and capability will have to be addressed.

For the primary school the key ways that the changes were embedded were through the continued use of the processes that had been set up. These processes became part of the cultural shift and tapped into all the major stakeholders:

\* All the power originally invested in the head was devolved to the leadership team, and further devolved to curriculum heads.

\* The establishment of the children's representatives through the School's Council and Pupil Voice became ongoing parts of the termly cycle.

\* Parents' Forum and the forward-looking annual general meeting became regular events, along with focused working groups looking at key aspects of the school and its curriculum.

\* Discussions with the Local Education Authority led to the school being able to have greater degrees of decision making as it was deemed to be operating effectively.

\* Links were made with a newly funded group of networked schools that exhibited many signs of sharing the same ethos, with an action inquiry approach to learning and a growing international dimension.

\* Links were established with the National College for School Leadership's Leadership Network of over 250 heads engaged in similar innovation and reform in their schools and informing national policy development.

Summary

Paradoxically, integration processes need to be designed, developed and implemented at the beginning of the changes.

Roberto and Levesque suggest you have to install enabling conditions in three contexts: structural, procedural and emotional. As a precursor to these embedding mechanisms they define four antecedent processes that contribute towards an enabling environment in which change can occur: chartering, learning, mobilizing and realigning.

Senge suggests for the learning organization to take root, organizations need to practise the five disciplines of:

1 . personal mastery;

2. mental models;

3. shared vision;

4. team learning; and

5. systems thinking.

Pedlar, Burgoyne and Boydell identified the following components of a learning company:

\* strategy, with a learning approach and participative policy making;

\* looking in to the organization, with informating; formative accounting and control; internal exchange; and flexibility of reward;

\* structures, to include enabling structures to meet current needs as well as preparing for the future;

\* looking out, covering the use of boundary workers as environmental scanners and inter-company learning;

\* learning opportunities that address the learning climate and provide opportunities of self-development for all.



**Indexing (document details)**

|  |  |
| --- | --- |
| **Subjects:** | Organizational change,  Management of change,  Organizational learning |
| **Classification Codes** | 2310 Planning,  2500 Organizational behavior |
| **Author(s):** | Mike Green |
| **Document types:** | Book,  How-to Guide |
| **Publication title:** | [Change Management Masterclass : a Step by Step Guide to Successful Change Management.](http://proquest.umi.com/pqdweb?RQT=318&pmid=122424&TS=1324347272&clientId=29440&VInst=PROD&VName=PQD&VType=PQD). London: [2007](http://proquest.umi.com/pqdweb?RQT=572&VType=PQD&VName=PQD&VInst=PROD&pmid=122424&pcid=52162351&SrchMode=3).  pg. 243, 11 pgs |
| **Source type:** | Book |
| **ProQuest document ID:** | 2034757281 |
| **Text Word Count** | 3632 |
| **Document URL:** | http://proquest.umi.com/pqdweb?did=2034757281&sid=1&Fmt=3&clientId=29440&RQT=309&VName=PQD |