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Changing together: Change tools for teams



Where business comes to life

CHANGING TOGETHER: CHANGE TOOLS FOR TEAMS

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INTRODUCTION

ABOUT THIS PROJECT

This practitioner guide was produced as part of a research project conducted jointly by The Henley Forum and the IES (Institute for Employment Studies) HR Research Network.

Researchers and Members from The Henley Forum and IES worked in collaboration to conduct the underpinning research and to develop these change tools for teams.

ACKNOWLEDGEMENTS

Research team:

- Dr Alison Carter & Megan Edwards, IES
- Dr Sharon Varney, The Henley Forum

‘Working together with both Henley Forum and IES members has been a pleasure. It’s enabled us to bring a richer range of perspectives to bear on this important topic.’

Thank you to the 13 project team members who helped to scope out the research, invite participants and interpret emerging findings, including:

Lucy Birch, Vicki Campbell, Gail Clark, Caroline Cregg, Sue Glenmere, Sally Kipping, Tarun Kohli, Lorraine Murtagh, Rugare Nyandoro, David Sheldon, Susan Tucker, Maddy Webster

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This guide briefly explains why and how we did this research; it shares key findings and offers **five** change tools for teams that want to enhance their readiness and ability in change.

ABOUT THIS GUIDE

HELP YOURSELF

Our research showed that what teams do *for themselves* is a powerful enabler in change. So, we decided to write this guide with that in mind. This guide is for YOU:

Help yourselves

Change vulnerable → Change ready & capable

5 tools for you and your team

In this guide we share some of the tools that we developed during this project. And we offer some ideas on how you can use those tools in your team. We hope they help you to enhance change-readiness and capability TOGETHER with your colleagues.

HELPING OTHERS

These tools will also be useful for change leaders and change agents, who want to support teams in dealing with change for themselves.

- Our project team members were clear that change leads can't and shouldn't 'do the change'.
- Change-capable teams are pro-active in co-creating the conditions required to translate change visions into implementing what needs to be done differently.
- So, some simple tools that help local teams to get themselves primed and ready for change are really useful.

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PART 1 – SETTING THE SCENE

A CHANGING WORLD

We know that the world is changing at a rapid rate. The already complex environment in which organisations operate is becoming even more challenging; organisations are struggling to adapt to technological advances, a global marketplace, political turmoil and ever-increasing customer and employee expectations. In order to survive, organisations must rapidly change to meet the growing demands made of them.

Organisational change has been under the microscope for many decades, and with good reason. Many strategic change initiatives fail: most often because of the ‘people dimension’. The rate of failure is estimated to have remained consistent over the last 40 years,¹ suggesting that

organisations haven’t been learning from past mistakes.

CHANGE – COMING READY OR NOT!

When it comes to change, organisations are encouraged to be agile and adaptable.² So, it pays to be primed and change-ready.

Teams are the primary unit of production in many organisations. We would therefore expect that having change-ready, change-capable teams would underpin any organisation’s dynamic capability.

Yet, most research in this area has focused on individual or organisational readiness for change. Teams have received little attention.

¹ Bennet, J L & Bush, M W (2013) *Coaching for Change*. Routledge

² Holbeche, L (2018) *The Agile Organisation: How to build an innovative, sustainable and resilient business*. Kogan Page;

Birkinshaw, J, Zimmermann, A & Raisch, S (2016) How do firms adapt to discontinuous change? *California Management Review*, 58 (4), 36–58

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OUR RESEARCH

We used an online survey to help us to calibrate change-readiness and capability in nine teams across contexts, organisations and countries. Subsequent analysis highlighted three themes: organisational climate, team climate and previous experience of change.

We interviewed a cross-section of survey participants to help us understand more about what helps teams to feel ready and able to deal with change. Key findings:

- Some teams see themselves as more change-ready and change-capable than others in their organisation.
- Teams who feel ready and able to deal with change have developed a clear sense of 'communityship'.³
- They are familiar with change and they are fairly self-confident in managing themselves.

Part 2 of this guide explains more about what we found in our research. **Part 3** shares some key tools for teams.

³ We borrowed the term from management guru, Henry Mintzberg (2018) Communityship beyond leadership. [Accessed 23 January 2019] <http://www.mintzberg.org/blog/communityship-beyond-leadership>

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PART 2 – WHAT WE FOUND

IT'S CHANGE, CHANGE, CHANGE

Once upon a time, change projects would come and go. Teams would go through change and come out the other side.

But times have changed. Many teams are now on the receiving end of multiple changes, all at once, with no let up. With little opportunity to pause for breath, people can feel tired, stretched and overwhelmed:

- *'It's change, change, change... it's too stretching'*
- *'There's too much going on, we are in fatigue'*
- *'As an organisation, we bring too many changes all at once. It overwhelms'*
- *'There are a lot of different things changing at around the same time'*

Against that backdrop, you might expect the teams involved in this research to be quite downbeat. Yet their responses to our survey showed the teams feeling *more* ready and capable to deal with change than we expected. We were surprised.

SOME TEAMS FEEL MORE *READY* THAN MOST

In the interviews, we discovered that some teams had created a micro-climate that was helping their change-readiness and capability. Several interviewees, from three different teams, described a more positive climate for change in their team than in the wider organisation:

- *'We are able to lift ourselves... if we worked elsewhere in the organisation, I suspect we'd be lower'*
- *'We are not working in a stable environment, but our team is very stable... like a safe haven'*

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- *‘As a team, we are responsive [to change]... but it doesn’t feel like the rest of the [organisation] are’*
- *‘We are involved in setting the vision and objectives, so we know what is going on. A lot of other people feel in the dark’*
- *‘We’re a team who will talk. We won’t make it secret. If people have a concern, we’ll still talk about it’*

SOME TEAMS FEEL MORE ABLE THAN MOST

In the interviews we discovered that teams who understand how change works, and who have a broad skillset that includes tools and techniques to manage change, feel more able to manage themselves in change.

Albeit, ‘taking your own medicine’ is not easy, these teams felt their change knowledge made it easier to cope with change.

- *‘We have the tools and techniques to know how to get us through’*
- *‘Everyone has a broad, generalist skillset so they are comfortable in ambiguous circumstances’*
- *‘Getting people involved in doing the change is getting them bought into the change’*

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WHAT'S HELPING TEAMS IN TIMES OF CHANGE?

We analysed all the interviews to find out what exactly was helping teams to thrive in change (and what was getting in their way).

We found both enablers and disablers at four levels:

- Organisational
- Team
- Immediate leadership
- Individual

The team-level enablers are shown on the next three pages.

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TEAM ENABLERS – What is it about the team and how they work that helps them during change?

Emerging theme	What teams are experiencing	Example quote
RELATIONAL CONNECTIVITY how connected the team feels, within the team and with others	Open communications within the team	<i>'Most people who come to our team experience very open and honest conversation'</i>
	Close relationships between team members	<i>'There's a lot of give and take, we challenge each other, we support each other'</i>
	Team spirit (in it together)	<i>'We have a laugh and a joke; there's a community feel'</i>
	Champions for peer learning	<i>'[We] would support new team members'</i>
	Collaboration across teams	<i>'People were not precious about team boundaries... it was a win for us all'</i>

(Continued overleaf...)

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Emerging theme	What teams are experiencing	Example quote
SITUATIONAL CONFIDENCE how well-positioned the team feels to deal with change	Team composition (skills, diversity, change positivity etc)	<i>'The positive buzz brings the rest of the team in'</i>
	Team maturity	<i>'I don't think I would have managed, or changed, or adapted so well... if I hadn't had such a stable environment'</i>
	Team capacity	<i>'We could share the task and give support'</i>
	Access to communication	<i>'We are fed a lot of information from a lot of people... so we know what is going on'</i>
CULTURAL SELF-RELIANCE how confident the team feels about self-management	Team micro-climate	<i>'We are not working in a stable environment, but our team is very stable... it's like a safe haven'</i>
	Active change positivity	<i>'Positioning change as an opportunity... something we should embrace rather than reject'</i>
	Self-regulation (team self-manages own behaviour)	<i>'Sometimes we need to go into "client mode" ... [for] ourselves'</i>

(Continued overleaf...)

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Emerging theme	What teams are experiencing	Example quote
CHANGE ENVIRONMENT how the team has experienced change	Acclimatised to change	<i>'[We] are really used to little change which helps with the big changes'</i>
	Change capability	<i>'We have the tools and techniques to know how to get us through'</i>
	Local autonomy/empowerment	<i>'We're allowed to manage our energy, not our hours... which does help'</i>
	Type of change (e.g. tech changes better received than structural)	<i>'It's the nature of our work to be open to digital changes'</i>

A note of caution...

For every strength, there may be a shadow side. Our analysis of team disablers highlighted a **fear of losing close team relationships** and a sense of community. It also highlighted the **risk of groupthink** (a shadow of team maturity) as a disabling factor in a team's readiness for change. Finally, our analysis showed that **change-capable teams** may experience frustration when they feel there are better ways to manage the change process.

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PART 3 – CHANGE TOOLS FOR TEAMS

TOOL 1: TEAM SELF-ASSESSMENT

About the tool

- Drawing on academic literature from the areas of change, team climate and ethical leadership, we developed an online survey with 52 questions to assess different aspects of change-readiness and change capability.
- We invited team members to assess their team on a seven-point scale (below).

Please mark each statement on the seven-point scale to indicate how much you agree or disagree with the statement as a representation of:

the way you and your team members typically think or behave.

Strongly disagree	Disagree	Slightly disagree	Neither agree nor disagree	Slightly agree	Agree	Strongly agree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- We received 228 responses from 9 teams across 5 organisations, in 4 countries.
- We conducted exploratory factor analysis to reduce the questionnaire to the most relevant 23 items, grouped under 3 themes:
 - Organisational climate [11]
 - Team climate [8]
 - Experience of previous change [4]
- A fourth theme, relationships, was also identified. However, it was the least robust theme and required more testing and development. While it is not in the final survey, it is included in other tools in the appendix.
- You can see the final 23 questions on the next two pages. This is followed by some suggestions on how **you** can use it with your team.

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Tool – Team Self-Assessment

Team climate

1. We have a 'we are together' attitude.
2. We feel understood and accepted by each other.
3. We share information across the team rather than keeping it to ourselves.
4. We openly discuss issues in the team.
5. There is a lot of give and take within the team.
6. Everyone's view is listened to, even if it is different.
7. We interact frequently.
8. We all influence each other.

Experience of previous change

9. My team members and I think that previous change initiatives have been successful.
10. My team members and I think that previous change initiatives have been realistic and achievable.
11. My team members and I think that previous change initiatives have positively impacted the team.
12. When changes occur in our organisation, we believe we are ready to cope with them.

Organisational climate

13. Leaders are approachable and willing to listen to problems.
14. Leaders are willing to accept and learn from their mistakes.

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15. Alternative choices of action are perceived as available.
16. Leaders are seen as fair and principled decision-makers.
17. Leaders make efforts to help teams deal with change.
18. Leaders ensure teams work in a way that is considerate of others.
19. Appropriate time is taken to resolve problems or conflicts.
20. Data and facts are available and analysed when making a decision.
21. There is a willingness to use resources to resolve an issue.
22. Generally, the purpose and goals of change are made clear.
23. The potential consequences resulting from decisions are anticipated.

How you can use it

- Arrange a team discussion around the three themes. [An away-day provides a good environment for this kind of conversation].
 - Team climate
 - Experience of previous change
 - Organisational climate
- We've changed the flow of the three sections to help your discussion.
For each item ask:
 - How are we doing?
 - What are we already doing to help ourselves here?
 - What can we do to make it even better?
- You might want to invite team members to warm up their thinking by completing the survey before your discussion.

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TOP TIPS:

- Having an open discussion and listening to everyone's views will help you to develop a positive climate in your team.
- Focus on what you can do to help yourselves. Our research found that teams that help themselves feel more ready and able to deal with change.

With the organisational items, think about what you **can** do – Are there any areas where you could begin to influence this for yourselves?

- Remember, it's the discussion rather than the survey results that is important.
- Try a pulse check on team climate every few months to keep it live.

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TOOL 2: TEAM DISCUSSION QUESTIONS

About the tool

- ❑ We developed an interview guide which invited team members to reflect on their team's readiness and ability for change.
- ❑ We held fourteen 30-minute phone interviews with volunteers drawn from across the nine participating teams.
- ❑ We pulled out the enablers and disablers and reviewed these with project team members to sense-check them.
- ❑ You can see some of the questions we asked opposite. This is followed by some suggestions on how **you** can use it with your team.

Tool – Team Discussion Questions

1. Thinking about your whole team, how **ready** and **able** are you to deal with **ALL** the change you're experiencing at work?
2. How would you rate that on a scale of 1–10? [1 = *not-at-all*; 10 = *fully ready*]
PROBE: What makes you say that?
3. What is helping your team to feel ready and able for change?
PROBE: What is it about your team, and the way you work together, that is helping here?
4. What is preventing your team from feeling more ready and able for change?
PROBE: What is it about your team, and the way you work together, that is getting in the way here?

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5. Thinking about the rating you gave earlier what are 2 or 3 things that could help you to push it up by 2 points?

How you can use it

These discussion questions lend themselves to a workshop session e.g.

- Q1:** Invite people to discuss in pairs or trios.
- Q2:** Put a big 1–10 scale on a flipchart or whiteboard. Invite people to come up and put a dot on their rating, then to explain why they put it there. [This gives everyone a chance to express their views and be listened to, so it's very important]
 - Invite everyone to identify any patterns they notice and explore what might be going on.
- Q3:** Invite team members to consider what is helping your team feel more ready and able

for change. Be specific – what is it about your team and the way you work together that is helping?

- Capture these items on a flip chart.
- Q4:** Repeat process from Q3, but allow **less** time.
- Q5:** Capture real, specific actions from everyone.
 - You might want to get people to write their reasons on post-its.

TOP TIPS:

- Allow at least twice as much time for Q3 than Q4. Positive psychology suggests that focusing on what's working can raise performance.
- Don't try and solve everything in one go. Think about small, do-able actions that will help you to nudge your self-assessment.

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TOOL 3: TEAM MATURITY MATRIX

About the tool

- ❑ We developed a team maturity matrix using qualitative data collected from our phone interviews with volunteers from the nine teams surveyed.
- ❑ We analysed that data to identify enablers at four levels:
 - Organisational
 - Team
 - Immediate leadership
 - Individual
- ❑ The team maturity matrix (overleaf) uses **Team enablers** to describe the characteristics of a change-ready, change-capable team. Teams can use the matrix to identify where they currently fall on the spectrum for each characteristic, with the aim to mature to the highest level of the matrix.

How you can use it

- ❑ Get together as a team with a copy of the team maturity matrix.
- ❑ Look at each characteristic one by one, and read the descriptors of emerging and maturing teams.
- ❑ As a team, drawing on examples of previous team behaviour, assess where you fall on the matrix.
- ❑ Identify actions you could take as a team to 'grow' and develop maturity for each characteristic.

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Tool – Team Maturity Matrix

	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
	Emerging		Maturing	
BUILDING TRUSTING RELATIONSHIPS	Team members are in-tune with their own emotions	Team members are willing to share their thoughts and feelings with each other	There is give and take, support and challenge. People experience very open and honest conversations	Team members feel safe to take risks and be vulnerable with each other
DEVELOPING TEAM SPIRIT	Opportunities to offload in a supportive environment	A common sense of purpose. There's a sense of all being in it together	Team members fundamentally believe that the work they're doing matters	Team members create a team environment which enables them to do their best
PEER LEARNING	Team members understand the value of learning from one another	Team members champion new ways of working and support colleagues	Team members are willing to share their 'failures' to help others learn	Team members create opportunities to share learning, even when under pressure

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	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
	Emerging		Maturing	
ACTIVE CHANGE-POSITIVITY	Team members feel that they are the targets of change	Team members ask questions about the change and offer feedback	Team members identify and support the need for change and can see the benefit to the team	Team members support one another to realise the benefits of change
CHANGE-CAPABILITY	Team suggests things that could be done better	Able to make improvements within their own reference framework	Seen as effective change practitioners by other teams	Team co-creates the environment, resources and processes required for change
LOCAL AUTONOMY	Team expects team leader to make change decisions for the team	Team actively offers ideas and opinions to team leader to support decision-making	Team members rely on each other to do high quality work in change	Team seeks out opportunities for expanding service beyond existing responsibilities

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TOP TIPS:

- ❑ Make sure that everyone in the team is heard. A good way to invite quieter people to contribute is to print out a large version of the matrix and stick it up on the wall. For each of the six characteristics, ask each person to place a red dot on the level that best describes the team on a typical day. [You can either use sticky dots, or a red pen].
- ❑ Page 1 of the Maturity Matrix broadly relates to the team's **change readiness**. Page 2 broadly relates to the team's **change capability**. If time is short, you might want to deal with the two aspects at separate meetings.
- ❑ Focus on what you can do to help yourselves. Our research found that teams that help themselves feel more ready and able to deal with change.

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TOOL 4: PREPARING FOR CHANGE MATRIX

About the tool

When thinking about readiness for change, it is often easy to identify the organisational barriers and blockers.

However, usually little thought is given to what makes change possible or to the role that the individual, the situation and the team play in successful change.

This tool is designed to make people reflect on the barriers and enablers for change from multiple perspectives.

How you can use it

- Get together as a team and draw the matrix on a whiteboard or flip chart.
- Individually, write your thoughts for each segment on separate sticky notes.
- After about 5 - 10 minutes, everyone should stick their sticky notes to the corresponding segment.
- Firstly, spend no more than 10 minutes as a team discussing the 'least ready' segments, identifying any possible action or learning points.
- Next, spend at least double the time discussing the 'most ready' segments, identifying any action and learning points that would enhance your team's change readiness.

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Tool – Preparing for Change Matrix

	Think of a time when <u>you</u> felt MOST ready and able for change 😊	Think of a time when <u>you</u> felt LEAST ready and able for change ☹️
What was it about <u>you</u> that made that possible? (Be specific) e.g. qualities, attitudes, behaviours, knowledge, skills, experience, emotional energy etc.	Saw the challenges for myself	Thought it was a bad idea
What was it about <u>your team</u> that made that possible? (Be specific) e.g. relationships, communication, ways of working, team energy, trust, team knowledge, skills, experience etc.	We've been working together for years	Low energy & negative talk
What was it about <u>your organisation</u> that made that possible? (Be specific) e.g. culture, organisational energy, infrastructure, HR processes etc.	There's a culture of learning	Command & control from top
What was it about <u>the situation</u> that made that possible? (Be specific) e.g. timing or pace of change, the nature of the change, resources available, information etc.	No choice, regulatory change	No resources

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TOOL 5: THE CHANGE CURVE

About the tool

A framework that is often helpful in understanding how individuals experience change is the change curve.

It is based on a model originally developed in the 1960s by Elisabeth Kubler-Ross to explain the grieving process. Since then it has been widely utilised as a method for helping people understand their reactions to significant change or upheaval.

The change curve maps the potential individual reactions to change along axes describing time and commitment to change. Starting with satisfaction with the current situation, an individual's commitment to the change typically begins to decrease when the change is introduced. This decline continues over time, during a 'Reaction' phase, until the reality of the change is accepted. After the point of acceptance initiates an 'Action' phase, there is a move

towards increasing commitment until there is full engagement with the new behaviour or state.

- ❑ The process often starts with a **denial** of the change: *'This isn't going to happen to me. I won't be affected.'*
- ❑ And then **resistance** to the change, when the reality can no longer be denied: *'I'm not having this. I'll find a way around it.'*
- ❑ The bottom of the curve represents the milestone moment of **acceptance**, where a new attitude of curiosity creates positive momentum and a willingness to explore the change: *'Could this work for me? Are there any benefits?'*
- ❑ Lastly, there is a future focus and **engagement** in the new behaviours: *'I think I can make this work! It might even be better than before!'* At this stage, there is often a willingness to

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advocate the change to others who are still in the acceptance process.

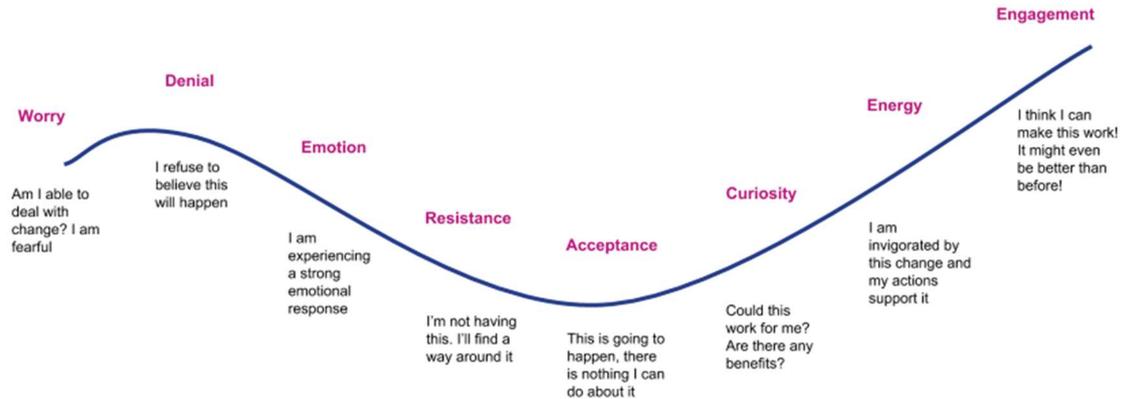
How you can use it

- ❑ **For yourself:** You can think about yourself and your own progress through the change curve. *'Where am I?'*
- ❑ **With your team:** Then perhaps reflect with your team mates. Where do you think you are? The curve can be a topic of conversation. While the majority of people go through some form of this curve during a transition process, some may take longer than others. You may find that team members, subject to the same change as you, may be at different points on the curve. This is quite common: everyone goes through the change curve as individuals, each at a different pace, and not as a group.
- ❑ **Support and challenge one another:**
So team members need to be patient with

each other. Thinking about change in the same way and using this shared language means you can reassure and support each other. Sometimes individuals experience setbacks to prior stages in the curve; progress through it is not a linear process. Some colleagues, or you, may need more support to help them move forward. People impacted by change move back and forth on the curve, often taking more time on one step than another – and perhaps even moving back to an earlier stage from time to time. As each individual learns more about the change and starts to see ways to embrace the new situation, teams can help one another adapt.

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Tool – Change Curve⁴



⁴ Adapted from Kübler-Ross, E. 1997. *On Death and Dying*, Scribner.

This guide was created as part of a joint research project between The Henley Forum at Henley Business School and the IES (Institute for Employment Studies) HR Research Network.

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