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Idealized Design of A Leadership from the Middle Process

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Idealized Design of A Leadership from the Middle Process

Abstract
This slide presentation describes the origin, approach and deliverables of course Org. Dynm.633, on “Leadership from the Middle” (LftM). Course participants were middle managers taking responsibility without authority for producing results in uncertain organizational environments, under high pressure. This course involved students in analyzing their current organizational challenges and realities and then in designing an idealized leadership approach in class. Between classes students adapted the class idealized design to their own opportunities and challenges. The course had two phases; analyzing the current reality followed by the design of an idealized general LftM process. After using the nominal group technique to define class learning objectives; the current reality analysis involved using system thinking tools to analyze, and project a base case of the opportunities and challenges assuming no change in trends. The idealized design involved using group facilitation techniques such as brainstorming, affinity diagramming, process mapping, nominal group technique, prioritization matrices and others to design and validate the version 1.0 LftM process against top priority requirements. Based on the validation results, the class added and dropped elements of the idealized design to produce a version 2.0 idealized LftM process design. The presentation includes a flowchart of the third and final LftM process design and identifies next steps for further development of LftM.

Keywords
Leadership, Mid-organization, Legitimacy, Idealized Design, Systems Thinking, Power, Influence, Organizational Change, Process Design

Disciplines
Business Administration, Management, and Operations | Entrepreneurial and Small Business Operations | Organizational Behavior and Theory

Comments
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LEARNING TO LEAD FROM THE MIDDLE

A PRESENTATION TO THE
INFORMS NORTHEASTERN REGIONAL CONFERENCE MAY 7-8, 2011
AMHERST, MASSACHUSETTS

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Center for Organizational Dynamics
(978)-692-1818
Background

- Organizational Dynamics at Penn
  - Graduate degree program for mid-career and advanced professionals (M.S., M.Phil.)
    - 400 professional working adults with min of 5+ years of full-time management or executive level experience (most have 10+ years)
    - 50 Penn faculty representing 17 academic domains and Six of Penn Schools
  - Focuses on the art and science of organizational change
  - Author teaches MS course on Process Improvement Strategies and Tools
Dynamics 633-10c class members who participated in developing content in this presentation

- Daniel Alonzo
- Tonita Bell
- Brent Buford
- Michael Falkie
- Diego Gomez-Abrahams
- Scott Larmore
- Richard McGreal
- Erica Wexler
- Joshua Zimmerman
Origin of LftM course

• Demand arose spontaneously from top students in previous process improvement classes – Examples of “voice of the student:”
  • “I took your course on Process Improvement because I thought my department suffered from poor processes. Now I realize that we suffer from a lack of leadership and have concluded that I must become the leader that I have been searching for.”
  • “I am tired of waiting for the top management to set direction and lead. Please tell me how can I lead from the middle?”
  • How can I take the initiative for necessary changes when my department head opposes changes that do not come down from higher ups?
  • How can I establish the legitimacy of changes I know we need to make when I am not responsible for several areas that must be involved in those changes?
Course development timeline

• Spring and Summer, 2010 -- Course designed and developed
  • Literature search turned up little on LftM, but many articles relevant to narrower aspects of topic

• First class offered Fall, 2010;
  • Required texts: Heath and Heath, *Switch* – how to change things when change is hard; also *Made to Stick*.
  • Most course readings assignments were articles published in *Organization Science* and *Academy of Management* publications
    • Conservation and amplification of organizational power;
    • Dynamics of action-oriented problem solving;
    • Legitimization,
    • Social construction of leader-follower relationships;
    • Organizational citizenship behavior and others.

• Course listed for Fall, 2011
Key terms

• **Leadership from the Middle** -- Middle managers taking responsibility without authority for producing results in uncertain organizational environments, under high pressure. *(Source: Class’s description of the course content on last day of course)*

• **Idealized Design** -- A group design process first employed at Bell Telephone Labs in the 1950s to design the ideal Bell System and its closest feasible approximation.
  - Idealized design (“design thinking”) popularized by Russell Ackoff from the sixties to 2009. According to Ackoff its principles are:
    - Solving all problems in as-is organizational situation does not yield better system
    - Achieving the best that could and should be (ideal situation) requires design unbounded by current constraints.
    - Replacing current problematic situation (mess) by the closest feasible approximation to the idealized design yields greatest feasible improvement.
  - Idealized Design involves all stakeholders in a *messy problem situation* in:
    - Designing their *ideal present* (what they would wish for, if all their wishes came true today.) This is very, very difficult for them.
    - Ensuring that all design elements used are feasible, sustainable, and adaptable to changing requirements.
The final product: LftM = A proven leadership model driving action-learning

LftM Simplified

Taking Responsibility without Authority for Actions That Will Make YOU The Leader YOU Have Been Looking for in an uncertain environment with high risk

Start

Pre-Conditions (Gut Check) on
- Smarts
- Appetite for Change
- Ambition
- Persuasiveness

Idealized, Could-Be Reality

GAP

Current Reality

1 Clarity of Purpose and Intent

2 Communicate Upward and to Stakeholders

3 Attract and Retain Resources

2 Connecting

3 Managing Energy

4 Chunk Change & Bias Toward Action

4 Engaging

5 Experiment and Experience

6 Evaluate Results and Look for Cues

7 Promote Success and Expand Legitimacy

1 Positive Framing

2 Communicating Upward and to Stakeholders

3 Attracting and Retaining Resources

4 Chunking Change & Bias Toward Action

5 Experimenting and Experiencing

6 Evaluating Results and Looking for Cues

7 Promoting Success and Expanding Legitimacy

Barsh, Mogelof, and Webb’s CENTERED LEADERSHIP

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Affinity diagram of class “care abouts”
Class learning objectives (from Nominal Group Technique)
Basic instructional cycle repeated 6x during course

1. Go to the next step in idealized design approach
2. Coach students in using tools
3. Students use tools in their own situation
4. Whole class discusses what did or did not work well
5. Students complete this stage for their own opportunity.
Overall LftM course design

START  Write LftM success stories

1. Qualitative analysis of content and assumptions in LftM Successes

2. Develop Is-Is Not Table and 3Level 5View system description of LftM opportunity

3. Develop current reality analysis for “messy” situation

4. Develop prioritized design requirements Ideal Design should satisfy

5. Create idealized design that meets vital few design requirements

6. Validate design against actual situations, refine and revise
Approach Step 1 Identify elements in LftM success (qualitative analysis of success stories)

- Inventory elements of LftM successes
  - Each student wrote a detailed narrative of a real opportunity as a success story.
    - Fiction allowed if needed to make the story successful
    - Students identified all assumptions necessary for the story’s success.

- Involve class in identifying “moving parts” of LftM situations
  - Students present stories to peers who prepare Post it Note on each story element at a “what it is/does” level of detail

- Create affinity diagram of LftM success elements by arranging all Post-it notes in time sequence (see next page)
Elements of LfM success stories in approximate time sequence

Composite Affinity Diagram of Leadership from the Middle elements derived from Dynm633 Class LfM "Success Story" writing assignment

Define and Bound the Opportunity for LfM
Organize and Frame the Opportunity and Assemble Resources Equal to the Challenge/Opportunity
Work, Pilot Test in Fail Fast Mode and E
Learn from Pilot Tests and Scale Up What Works

Legend:
- Brown: contact with a critical mass of commitment and ownership is not solid
- Brown/gray: contact with a critical mass of commitment and ownership is not solid
- Blue: dominance is the most critical element for success
- Yellow: dominance is the most critical element for success
- Red: interaction with co-worker networks is essential
- Red with bold: interaction with co-worker networks is essential
- Green: contact with a critical mass of commitment and ownership is solid
- Green with bold: contact with a critical mass of commitment and ownership is solid
- Black with bold: contact with a critical mass of commitment and ownership is solid

4/29/2011
Martin F. Stankard  Penn Center for Organizational Dynamics
Approach Step 2 – system description of scope and moving parts of LftM opportunity

• Whole class develops a system description of a LftM opportunity or challenge
  • **Is - Is/Not Table** defines scope
    • Entries in Is/Is-Not table based on LftM elements from previous step
  • **3Level - 5View** Iterative description of the opportunity as a system at 3 Levels
    • **Focal level**: The LftM opportunity itself;
    • **Containing level**: The organizational system containing the opportunity;
    • **Contained level**: The stakeholders and subsystems that make up the opportunity
  • 5 Views
    1. **Function**: What results from the as-is system (job, process, challenge, opportunity),
    2. **Structure**: What are the parts of the system,
    3. **Process**: How the parts work together as a process,
    4. **Purpose**: What is this level’s mission within higher level system containing it,
    5. **Assumptions**: what assumptions must hold for successful working of system?

• Students then describe their own opportunities as a system, form into small groups to share and discuss
Example: Scope definition Is/Is-Not Table

<table>
<thead>
<tr>
<th>Containing Organization</th>
<th>IS</th>
<th>IS NOT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture</td>
<td>Non-profit, client service, action oriented</td>
<td>Innovative, agile or permissive</td>
</tr>
<tr>
<td>Critical Values and Strategic Priorities</td>
<td>Expand program coverage, increase program participation and success rate, be seen as valued resource</td>
<td>Profit seeking or competing for demand already served by for-profit organizations.</td>
</tr>
<tr>
<td>Chain of command</td>
<td>Board of Directors, Board of Advisors, Executive Director and professional staff</td>
<td>Highly formal, nor highly oriented toward accountability</td>
</tr>
<tr>
<td>Organizational Units and Partners</td>
<td>Many volunteers, with excellent working relationships between programs and volunteers</td>
<td>Proposing new links or relationships with volunteers and the organization</td>
</tr>
<tr>
<td>Impacted Processes</td>
<td>Working relationships between programs and client companies/supporters</td>
<td>Proposing entirely new links or relationships with volunteers</td>
</tr>
<tr>
<td>Measures of success on the Critical Values &amp; Strategic Priorities</td>
<td>Aimed at improving rate of current client company participation in programs</td>
<td>Proposing to expand client base with new relationships</td>
</tr>
<tr>
<td>Impacted Policies</td>
<td>Working relationships between organization staff, volunteers, and participant companies</td>
<td>Leaving existing links and relationships unchanged</td>
</tr>
</tbody>
</table>
Iterative sequence use to develop 3-Level, 5-View system description  (Assumptions – 5th view not shown)
Example – First (stakeholder) level of a triadic system description

Level 1: View of LftM Opportunity Level -- Group of people who see an opportunity to lead change from the middle

FUNCTION
• The stakeholders working on the issue should validate and build a case for collaborating on the opportunity for change.
• They should next self-assess their group membership and identify any additional stakeholders who need to be involved in discussions of the identified change opportunity.

PROCESS
• The stakeholder group should agree upon and pool data supporting the need for change.
• The data should be validated from two perspectives:
  • Does addressing this issue add value to our the organizational level we are all members of?
  • Does addressing this issue add value to us as stakeholders?
• Gain an outside opinion of the value added by addressing this issue.
• The case should be reframed to accommodate all objections raised during the validation process.
• At this point, the group should re-assess the group membership.
• The opportunity should be partitioned into themes.

STRUCTURE
• Plan on 15-20 minutes of airtime for discussion per person.
• To enable full participation in larger groups, form subgroups for discussion.
• Each sub-group reports out the themes identified to the whole group.

PURPOSE
• To identify success for the company at a higher level by developing and utilizing the talents and skills of the stakeholders involved in the change opportunity as framed.

ASSUMPTIONS
• There is an actual real opportunity for change.
• The group has identified all the right people to involve.
• The group will be able to bring in all the right people if they are not already at the table.
• This is a high-leverage opportunity (small input, big output).
• The group will be able to implement the decisions it comes up with.
• All who accept the validity of the case also accept the validity of the data used to make the case.
Approach Step 3 – Analyze current reality and project future for “messy” system

• Identify problems, invalid assumptions, risk factors, barriers to progress and undesired effects (UDEs) in the current reality

• Organize each problem and UDE into a cause and effect flow chart of current reality

• Project cause and effect trends to describe likely future outcomes (assuming no change occurs).
  • Usual base case forecast (no change in current trends) is for a very undesirable future
Map of problems and undesired effects (UDE) in the current reality

Legend:
Assumptions are shown with green fill
Gut reactions to risk are shown in light pink
Undesired Effects (UDEs) are shown in dark pink
Approach Step 4 – Develop and prioritize design requirements for idealized LftM design

• Brainstorm design requirements suggested by the current reality analysis

• Affinity and group design requirements into categories such as:
  • Aesthetics, Leadership behaviors, Change management, Managing up, Risk management, Politics, Network maintenance, etc.

• Create prioritization matrix for design requirements (Next slide)

• Students rate requirements for their situation
  • 0 = Does not apply; 1 = Nice to have; 3 = Important to have; 7 = Must have.

• Combine ratings across individuals and sort requirements from Hi to Lo
### Portion of requirements prioritization matrix (Excel spreadsheet)

<table>
<thead>
<tr>
<th>11 Mission, Objectives and Values of Ideal LTM Approach</th>
<th>Class Total</th>
<th>Median</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>28 3.3.2.3. Clearly communicate the goal of what we are trying to do</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>57 3.9.3.1. Positive framing of our problem; how a solution will make our lives better</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>35 3.1. Frame problem or opportunity positively</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>50 3.9.1. Cognitive legitimacy of solutions (explain why they are better)</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>72 4.2. Celebrate small successes to boost morale and sustain momentum</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>35 3.5. Address people's fears about Undesired Effects</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>46 3.7.4. Have the right people at the table</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>56 3.9.3. Pragmatic legitimacy</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>6 2.1. The ideal LTM approach should be simple, stick, easy to follow</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>23 3.3.1. Communicate the purpose (to address false assumptions)</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>24 3.3.1.1. Ensure clarity of intent</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>36 3.8.1. The person leading from the middle must believe the approach</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>49 3.9. Maintain legitimacy</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>61 3.9.3.5. Seek out and use &quot;bright spots&quot; of best practices in other places</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>73 4.2.1. Credit people with successes</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>18 3.2. Gain acknowledgement of problem</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>21 3.2.3. Be honest about knowledge of the problem</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>39 3.6. Secure engaged sponsorship</td>
<td>7</td>
<td>7.0</td>
<td>7</td>
</tr>
<tr>
<td>48 3.8.1. Clear definitions of roles and responsibilities</td>
<td>7</td>
<td>5.0</td>
<td>7</td>
</tr>
<tr>
<td>64 4.1.1. Staff must be willing to make change in current paradigm</td>
<td>7</td>
<td>5.0</td>
<td>7</td>
</tr>
<tr>
<td>40 3.6.1. Leadership must agree that there is a critical problem</td>
<td>7</td>
<td>5.0</td>
<td>7</td>
</tr>
<tr>
<td>39 4.7.1. Ensure leadership understands the problem</td>
<td>7</td>
<td>5.0</td>
<td>7</td>
</tr>
<tr>
<td>32 3.4.2. Focus on sustainability rather than immediate short term solutions</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>37 3.5.2. Identify defensive behaviors (such as avoidance, blaming or self-preservation)</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>9 2.2. Lean and transparent</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>75 4.2. Clarify responsibilities for doors or SMMs within the new model</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>1 1.1. Establish performance measures that establish trust first, then measure</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>45 3.7.4. Capture resources</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>47 3.5. Use social mechanisms to define roles (work out agreements)</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>61 4.1.1. People must agree to &quot;fight fair&quot; and stick to agreed issues</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>12 2.3.1. Align effort with parallel efforts/approaches such as Lean Six Sigma</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>26 3.3.2.1. Acknowledge and consider interpersonal dynamics during conversations</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>37 3.2.2. Have multiple conversations with peers</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>23 3.3.1. Staff must not participate in negative gossip</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>69 3.1.3.1. Make use of existing elements such as Lean Six Sigma</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>70 4.1.4. Take compound effects into consideration</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>44 3.7.2. Influence other departments or units to dedicate resources</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
<tr>
<td>12 2.4. Continue external benchmarking with veteran companies</td>
<td>7</td>
<td>3.0</td>
<td>7</td>
</tr>
</tbody>
</table>

2 Aesthetics and agility of Ideal LTM Approach
3 Functional Requirements (What the Ideal LTM Approach must do)
62 4 Create an environment of "continuous improvement."
Prioritization of design requirements

[Diagram showing prioritization of design requirements with various criteria and values.

- 1. Clear communication of the goals and what we are trying to do
- 2. Facilitate a positive frame of the problem by highlighting solutions
- 3. Problem or opportunity described
- 4. Power of the problem or opportunity
- 5. Address people’s fears about the solution
- 6. Address people’s fears about stakeholders
- 7. Address people’s fears about the change
- 8. Address people’s fears about the future
- 9. Increase the right people’s understanding
- 10. Increase the right people’s participation
- 11. Increase the right people’s communication
- 12. Increase the right people’s knowledge
- 13. Increase the right people’s awareness
- 14. Increase the right people’s understanding
- 15. Increase the right people’s confidence
- 16. Increase the right people’s support
- 17. Increase the right people’s involvement
- 18. Increase the right people’s confidence
- 19. Increase the right people’s participation
- 20. Increase the right people’s involvement
- 21. Increase the right people’s understanding
- 22. Increase the right people’s awareness
- 23. Increase the right people’s knowledge
- 24. Increase the right people’s confidence
- 25. Increase the right people’s participation
- 26. Increase the right people’s involvement
- 27. Increase the right people’s understanding
- 28. Increase the right people’s awareness
- 29. Increase the right people’s knowledge
- 30. Increase the right people’s confidence
- 31. Increase the right people’s participation
- 32. Increase the right people’s involvement
- 33. Increase the right people’s understanding
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- 37. Increase the right people’s participation
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- 82. Increase the right people’s awareness
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- 86. Increase the right people’s involvement
- 87. Increase the right people’s understanding
- 88. Increase the right people’s awareness
- 89. Increase the right people’s knowledge
- 90. Increase the right people’s confidence
- 91. Increase the right people’s participation
- 92. Increase the right people’s involvement
- 93. Increase the right people’s understanding
- 94. Increase the right people’s awareness
- 95. Increase the right people’s knowledge
- 96. Increase the right people’s confidence
- 97. Increase the right people’s participation
- 98. Increase the right people’s involvement
- 99. Increase the right people’s understanding
- 100. Increase the right people’s awareness
- 101. Increase the right people’s knowledge
- 102. Increase the right people’s confidence
- 103. Increase the right people’s participation
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- 105. Increase the right people’s understanding
- 106. Increase the right people’s awareness
- 107. Increase the right people’s knowledge
- 108. Increase the right people’s confidence
- 109. Increase the right people’s participation
- 110. Increase the right people’s involvement
- 111. Increase the right people’s understanding
- 112. Increase the right people’s awareness
- 113. Increase the right people’s knowledge
- 114. Increase the right people’s confidence
- 115. Increase the right people’s participation
- 116. Increase the right people’s involvement
- 117. Increase the right people’s understanding
- 118. Increase the right people’s awareness
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- 120. Increase the right people’s confidence
- 121. Increase the right people’s participation
- 122. Increase the right people’s involvement
- 123. Increase the right people’s understanding
- 124. Increase the right people’s awareness
- 125. Increase the right people’s knowledge
- 126. Increase the right people’s confidence
- 127. Increase the right people’s participation
- 128. Increase the right people’s involvement
- 129. Increase the right people’s understanding
- 130. Increase the right people’s awareness
- 131. Increase the right people’s knowledge
- 132. Increase the right people’s confidence
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Approach Step 5 – Created idealized design that meets “vital few” design requirements

- Students brainstorm idealized “how to” approaches they would wish for if they could have any approach that is:
  1. **Technically feasible**, does not require new technologies or methods, but relies on bright spots that already exist.
  2. **Sustainable** in the current environment and will not elicit destructive opposition or push-back inside or outside the organization.
  3. **Agile and adaptable** as requirements, conditions or environment change.

- Arrange and integrate ideal “how-to’s” into version 1 idealized design.
Version 1 idealized design LftM process

Green items were created as needed to make the flow of how-to items logical and complete.
Approach Step 6 – Validate Idealized Design against vital few requirements and revise

- Each student checked v.1 idealized design against his or her opportunity to identify:
  - “Drops” non-value-added activities which may be deleted and
  - “Adds” or needed changes (that conform to the three design conditions)
- Whole class examines and rates all proposed Adds and Drops as before and sorts design changes from highest total priority rating to lowest
- Revise V1.0 design with highest priority additions and deletions and integrate into V2.0 idealized design (not shown)
Step 6 – Verify Idealized Design against vital few requirements in actual situations to generate “add and drop” ideas for revision

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<tr>
<th>Phase</th>
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1. **Provide vision** - build sense for change among colleagues
2. **Assure guiding principles** for key decisions in actual situations
3. **Generate more individualized conversations**
4. **Train team members** in process improvement, metrics, etc.
5. **Consider bringing in outside expertise**
6. **Knowledge sharing** with others/stakeholders
7. **Evaluate strategies** for adding resources or new resources, including people, subject matter on/within or related to these areas
8. **Consider new uses for existing resources**
9. **Motivate innovation** to achieve results that offer a competitive advantage, not just incremental improvements, specifically addressing conventional obstacles in order to help change, not incremental
10. **Assure we improve not just parts of system but whole system**
11. **Small changes** to build legitimacy - under initial scrutiny only?
12. **Bring in tight hidden agendas of stakeholders**
13. **Bring more engagement** of support processes or change, more than initially seemed
14. **Identify assumptions - actively seek any contradictions**, bring to front for discussion
15. **Use of organization’s mandatory tools (RAO, BPR, etc.)**
16. **Agreement about specifications** for prototyping
17. **Confirm original solution/business case is still valid**
18. **Communicate revised solution as needed to frame it**
19. **Align roles, responsibilities, performance measures and jobs to support realization of goals**
20. **Who has responsibility and/or costs**
21. **Evolve scope over time**
22. **Document new procedures, success stories, etc.**
23. **Utilize existing, adapted performance metrics where possible**
24. **Assess political landscape before you start**
25. **Focus on pain**
26. **Use flat hierarchy of decision making** to improve cycle time?
Taking Responsibility without Authority for Actions That Will Make YOU The Leader YOU Have Been Looking for in an uncertain environment with high risk

1. Clarity of Purpose and Intent
   - Positive Framing

2. Communicate Upward and to Stakeholders
   - Connect

3. Attract and Retain Resources
   - Managing Energy

4. Chunk Change & Bias Toward Action
   - Engaging

5. Experiment and Experience
   - Meaning

6. Evaluate Results and Look for Cues
   - Promote Success and Expand Legitimacy

7. Promote Success and Expand Legitimacy
   - Idealized, Could-Be Reality

Start

Pre-Conditions (Gut Check) on Smarts
- Appetite for Change
- Ambition
- Persuasiveness

GAP

Current Reality

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A next step – incorporating cultural and political toolkits into the LftM process

• Cultural and political toolkits
  • Cultural toolkits – created by social activists or changes in the environment -- help people create opportunities to challenge institutionalized status quos they find unfair or wrong:
    • Injustice framings – ways to explain how an institutionalized status quo is unfair or illegitimate for a “we.”
      • EX: From higher pay for breadwinners (men’s pay >> women’s pay) to equal pay for equal work (men’s pay = women’s pay.)
    • Alternative identities – ways to redefine expectations for change by using alternative racial, sexual, gender, religious practices to empower people to reject a status quo that demeans them.
      • EX: Workers formerly identified as “hourly workers” may appropriate the identity of “colleagues” or “associates” and adopt appropriate new behaviors.
    • Contentious tactics – practices that individuals in an organization can draw upon to challenge the status quo and its defenders.
      • EX: Borrowing tactics from other social movements to challenge some aspect of the status quo.
  • Political toolkits
    • Accessing influential higher ups or to organizational subsystems for staffing decisions, pay, promotion, privilege and punishment that create a sense of security about change and help people coordinate change efforts.
References

Required Texts

Required Articles

Also Recommended