A FRAMEWORK FOR ORGANIZATIONAL CHANGE: PURPOSE

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ABSTRACT

The purpose of this paper is to present a systems based framework for organizational change initiatives in order to help organizations plan, prioritize and better implement change initiatives. Our framework is based on a synthesis of existing literature and an Action Research (AR) study. The AR study originated in the idea to develop a performance measurement system to measure all the steps (divided into sub-steps) in change projects from start to finish in a longitudinal study. Over more than two years, we followed and actively contributed to the developments in two separate, major transportation related infrastructure change projects in the same case organization. The results include not only a performance measurement system for change initiatives, concrete practical results for the case organization, but also "higher level learning" in the form of a systems based framework for understanding organizational change. The framework includes criteria for change management success, with a specific focus on the need for a clear and jointly accepted purpose. Furthermore, these criteria cannot be studied in isolation and thus a systems based approach is required.

Keywords: organizational change, process management, measurement system, systems theory

1. INTRODUCTION

Operations, logistics and supply chain management deal with suggestions for changing structures and redesigning processes (Persson, 1995; Stevens and Johnson, 2016), but surprisingly articles are published in the domain regarding change management (see e.g. Carlsson and Sarv, 1997; Greer and Ford, 2009; van Hoek et al, 2010; Sabri and Verma, 2015). Change is problematic for organizations and change initiatives do not seem to deliver the expected results for most organizations. Many authors indicate that 70% of transformations such as reengineering, six sigma and TQM fail (Beer and Nohria 2000; Balogun and Hope Hailey, 2004; Soti, 2009; Chakravorty, 2010; Leonard and Coltea 2013).

Obviously, it is often difficult to pin point exactly why a specific organization struggles with its change initiative. One contributing problem is that it seems difficult for organizations to sustain change efforts (Doyle et al., 2000; Sirkin et al. 2005; Todnem 2005). Part of the problem is that it takes time to institutionalize the change. Womack and Jones (1992) mean that change efforts often require more than three years before showing organizational improvements. Similarly, Furnham (2001) states that most change efforts take up to four years to deliver results.

Another major problem is the management fad phenomenon (Abrahamson 1996; York and Miree 2004) meaning that organizations keep chasing "the next thing", the latest change method. Although there are several approaches and models for how to implement change, many relates back to the approach by Lewin (1946). He divided a change project in to three main steps (that further could be divided into sub-steps): *change readiness* (unfreezing the present conditions), *implementation* (moving to the new condition) and *institutionalization* (refreeze the new condition). Thus, an organization moves from an "as is" condition (behavior, structures, processes and culture) to a "to be" condition in a planned manner (Bamford and Forrester, 2003). Naslund (2013) structured critical success factors into three categories: purpose, process and people. Issues related to the purpose category are aspects of why and how change initiatives are initiated, planned and driven. These pre-implementation aspects seem to significantly influence project implementation, the organizational ability to keep the momentum, and, ultimately, project success.

Another criticism is the lack of a systems theory/systems thinking approach (for both research and organizations). Senge (1990) argues that rather simplistic frameworks are applied to complex systems and that organizations (and researchers) tend to focus on the parts rather than seeing the whole. The goal of this research is therefore to develop a systems based framework for organizational change, where this article focus on the purpose of the change initiative.

2. METHODOLOGY

A mixed method approach has been used in this research with action research (AR) as the overall method used. AR studies focus on real-world organizational problems and AR projects should, ideally, contribute both to practice and science (Argyris, 1993; Ellis and Kiely, 2000; Coughlan and Coghlan, 2002; Raelin and Coghlan, 2006). Thus, AR is a form of case study that places significant emphasis on relevance (Naslund, 2002). The outcome is typically both an action and research (Coughlan and Coghlan, 2002), where research is used to inform practice, and practice is used to inform research (Naslund et al., 2010). Unlike more traditional case studies, AR projects are often characterized as cyclical in nature (see Figure 1), including cycles of planning, action (implementing), observing (evaluating), and overall analysis and reflection as a basis for new planning and action (Coghlan and Brannick 2001). The original goal of this AR project was to develop a performance measurement system (PMS) for change initiatives (Naslund and Norrman, 2019). It was based on the steps as suggested by most change models we reviewed (e.g. Kanter et al., 1992; Kotter, 1995; Kettinger et al.,1997; Armenakis et al., 1999; Luecke, 2003; Fernandez and Rainey, 2006; Greer and Ford, 2009; Sabri and Verma, 2015). Change readiness (unfreezing the present conditions) was operationalized into the five sub-aspects i) having a clear vision and goal of change; that is based on ii) a solid problem analysis; iii) that the need for change is jointly accepted; iv) management is supporting; as well as v) change recipients (future users of the change). Implementation (move) was operationalized in four sub-aspects where two were measured from the start: vi) perceived planning; and vii) organization and resources.

The idea behind the PMS was to measure all the steps (divided into sub-aspects) in change projects from start to finish in a longitudinal AR study. Over more than two years, we followed and actively contributed to the developments in two separate and major change initiatives in the same case organization. We followed both initiatives in the first planning phases, i.e. before actual implementation where the focus is on increasing change readiness. Currently, both projects are entering the implementation phase. In this paper, the observations are from the third round of measuring for one of the change initiatives.

Following the tradition of triangulation as a means of rigor in case studies, we used a variety of data collection methods. The actual PMS was one of the vehicles for collecting the data

and for the observations. Others are the analysis and reflection meetings with the change managers and their teams. We also presented and discussed general observations, findings and reflections with "corporate level" managers and controllers during several meetings (Figure 1). These activities, in combination with our cyclical reflections and literature reviews, generated the "higher level learning" which resulted in the suggested framework in this article. For planning before each round of measurements, we had meetings with the project groups. The change initiative had problems (confirmed by our previous measurements and by the project management team). The change readiness was not on the level aimed for after two years of work. During the spring of 2019, we thus had several meetings with the project team in order to design the third round.

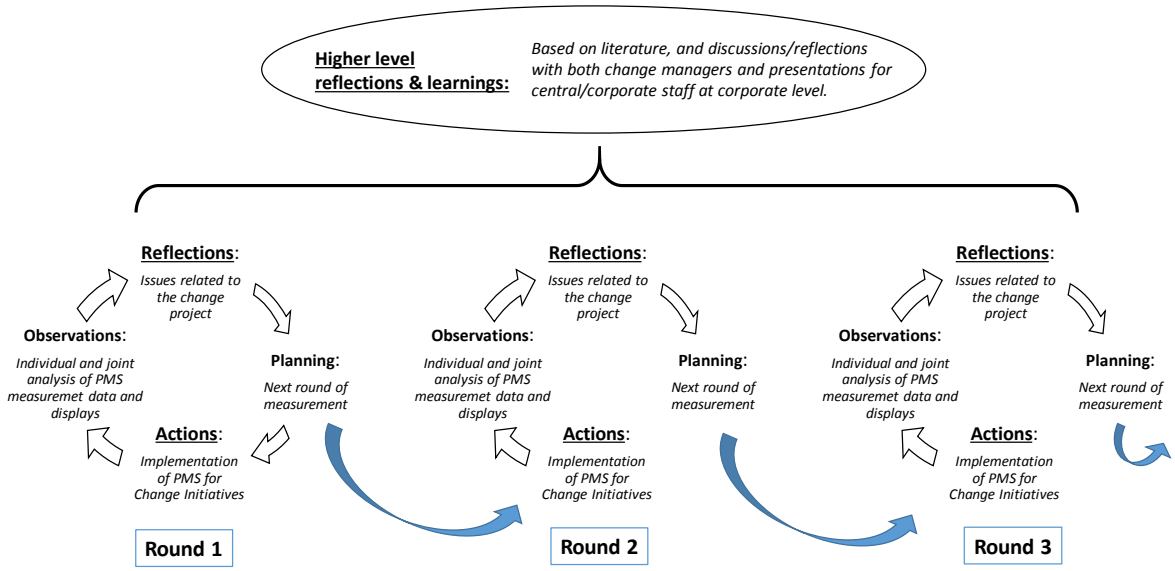

Figure 1. Action research approach of the study

As action, we collected data for the PMS via surveys from respondents who were divided into different stakeholders groups (representing top management, project management team/change leaders, steering committees (or similar), future users, and others). The questions asked about the respondents individual perceptions regarding the status of different sub-aspects. Normally three items were researched per sub-aspect and perceptions were given on a Likert scale from 1-7. Both results on item level and per stakeholder (e.g. top management) were calculated. We also calculated average indicators for the change step (e.g. change readiness), each sub-aspect (e.g. problem analysis), and for the overall organizational "change temperature". In this way, the PMS provides insight of different stakeholder groups' relative perceptions. To note is that the value of perceptions will be affected by how well a certain aspect is conducted, how well it is communicated to the different stakeholders, and how well the stakeholder receives and understands the communication. This way of measuring provides a useful picture of the "change temperature". The third survey was sent to 1074 employees in June 2019 and closed after two weeks and two reminders. We received 514 responses, which equals a response rate of 47.9%. This is about the same as for the previous two rounds of measuring (58.4% and 48.3%).

We summarized the survey data into data displays indicating the temperature for different sub-aspects and we sent these displays to the project group for their individual analysis. After each round of measuring (observations, reflections), and as a basis for the next round of measurement (action), we had meetings with the project teams. These meetings were preceded by several rounds of analysis. First, each researcher and the project team conducted individual analyses of the

collected data and data displays. Then, we all discussed the various analyses to reach consensus about the analysis and make further reflections. In addition, we had full access to internal data and documents.

Following the tradition of AR, the researchers conducted reflection and evaluation of each cycle. That means that not only did we reflect on the actual measurement system for the change initiative, but also that the researchers "stepped away" from the actual project for reflection if a "higher level" learning exists for the case organization in how they approach and implement change initiatives (Figure 1). We shared our reflections with the project teams, and, at numerous occasions, we presented findings and reflections at different senior manager meetings "at corporate staff level" and challenged them – with feedback that confirmed our reflections.

The clear observations of low change readiness from the first two measurement rounds were once more observed in the third round. Although we had discussed that problem after the previous rounds in the project, we now intensified our reflections on this problem, and especially around how well the purpose aspects of the change initiative were established and communicated. In the next sections, we first describe the observations regarding the change readiness as it was measured in the PMS, followed by the analysis based on both discussions with the project team as well as related literature. This analysis serves as the foundation for our framework.

3. OBSERVATIONS FROM THE CHANGE INITIATIVE PMS

The observations from round three clearly indicated that the organization still has issues with the problem analysis (Figure 2). The overall problem analysis is still a major concern for many stakeholder groups (it never reached 2 for the organization in any of the rounds of measuring), and the impression is that it is getting worse for most stakeholder groups.

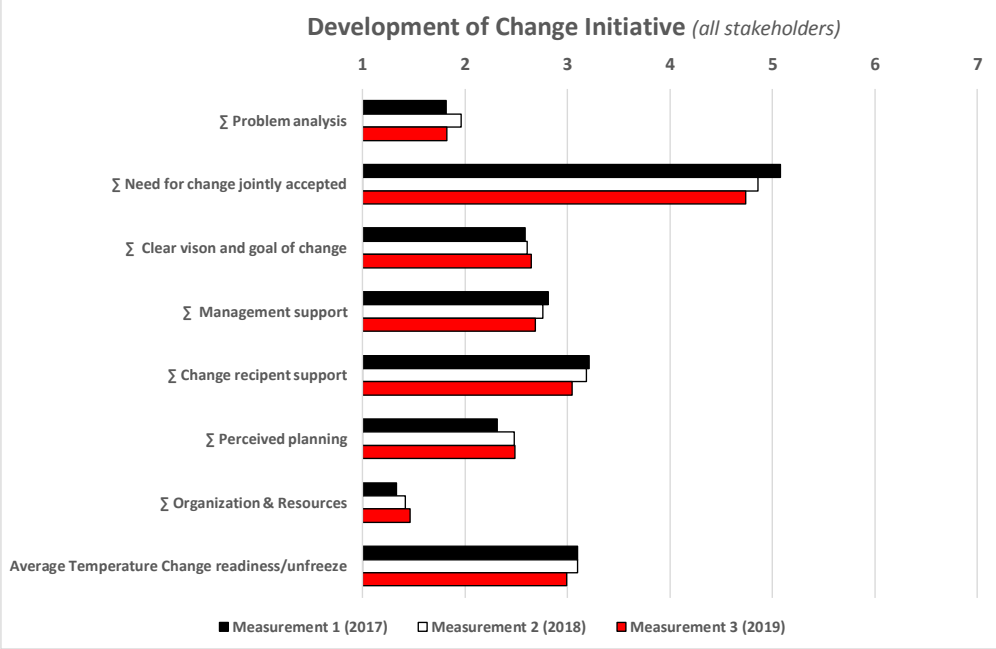

Figure 2. The overall development of the change initiative.

The results did not surprise the project management team. During the last year, they have focused on communication to the Activity group (a kind of steering committee that before had very low perceptions) and that also was involved in a pilot implementation. The project

management team confessed that they "had lost the others" in their communication. The overall perception among all stakeholder groups except the project team (Figure 3), is that facts were not used to identify/define the problem. Similarly, the perception is that the gap between "as is" and "to be" was/is not properly defined.

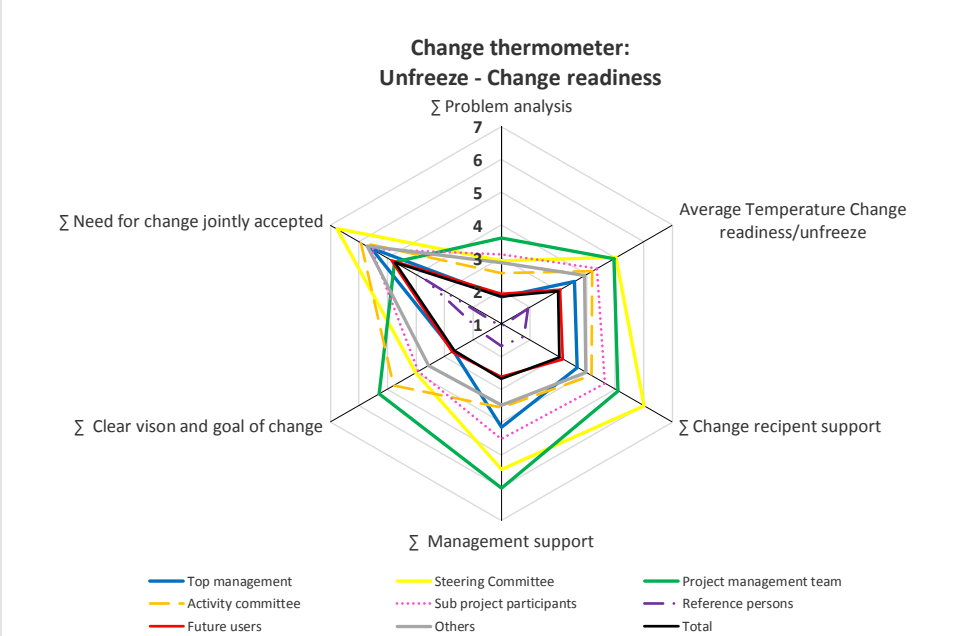

Figure 3. Change readiness, measurement round 3.

On the other hand, the expressed need for change in the organizations is one positive aspect captured in the survey. The overall scores are high for all stakeholder groups with scores close to or above 5. We also see a similar strong response when it comes to a sub-question whether this particular change is important for the organization (which indicates a strategic alignment). While the overall expressed need for change is high, and the importance of change is high, the belief in this particular project is not as high. The case organization has issues with that even though the goals of the change initiative were expressed, they were somewhat vaguely defined. It was still difficult to know what "success would look like" and how they would measure improvements. The overall score for most stakeholder groups were fairly low, and even the project group did not rank the goal category very high in the third round. While the project team rank the questions higher, the scores are not very high.

Top management support was an issue. The measurements showed that top management is somewhat supportive in some more broad sub-questions, but very weak when it comes to actual support. The overall numbers for Top Management support are relatively high for all questions when it comes to the perception of the project group and project steering group) – over or close to 6 - but they are lower from the actual top management itself. Furthermore, the scores are especially low when it comes to the question whether top management (actively) support project progress. Given the important of active top management for project success in all theory, this result is a major concern. The measurement system highlighted several additional issues, e.g. with organization and resources. One aspect is that there is a perception that too many projects are started, which also leads to problems with resources, commitment, and attention in competing projects. Starting projects, which probably should not have been started, not only means too many projects, but also that the risk of a failed project will increase too as projects compete for resources

and for managerial attention All stakeholder groups are worried about these competing projects and if there enough resources for the project with generally low scores for both questions. However, top management is the most concerned stakeholder group.

4. ANALYSIS AND FRAMEWORK DEVELOPMENT

In the discussions with the project group, they realized several "red flags" or significant risks for project progress. Even though the previous two rounds of measuring had highlighted similar issues, we, as researchers, felt that this time it was different. The severity of the problems and the lack of progress were deeply troubling for the project team.

On a higher level, given the similarity of problems in this phase for both the studied change projects, we suspected that some of these problems may be of general nature for the organization, and that the problems were rooted in how the organization approaches change initiatives. The problems especially relate to how they define, communicate and support the purpose of the change initiative. During seminars with managers at the organizational headquarter, they agreed in very open discussions with our analysis, and they also suspected that their organizational approach was lacking when it comes to how they select, prioritize, start and manage change projects. We have related the issues to existing literature, but in this extended abstract we only present the structured findings and the overall final framework.

4.1 Problem Analysis (and Reasons to Start)

In our meeting after the third round of measuring, we discussed the issues with the problem analysis. One explanation for the weak perception among various stakeholders is that even though a problem analysis had been conducted, many of the identified problems were neither properly presented nor communicated due to political reasons. On a positive note, the stakeholder group, which had received extra communication improved their score. On the other hand, other stakeholder groups, which did not receive the extra communication decreased in temperature.

Another aspect was the actual reason for starting the project, and where the idea originated (who initiated the project and why). This aspect is important in order to justify the project (purpose) to future users as well as to top management. The actual problems were first observed by middle managers and not by top management. As a result, the change initiative was initiated by a middle manager, it is run by middle managers and also owned by the middle managers in the project management group. In reality, top management is not involved in this change initiative.

Ideally, the decision to start a new change project should be based on substantive factors such as experienced problems, a potential opportunity or a genuine desire to improve performance and not by institutional factors or internal political factors (Miller and Hartwick 2002). If the actual reason behind the change effort is not based on a substantial reason, then there is both a risk that people do not believe in it (justification) and that the problem analysis was not very thorough. Furthermore, if the perception is that the problem analysis was not conducted properly and/or not based on appropriate facts, it may decrease the potential for project success.

A problem analysis should include which processes that are problematic, what these problems are as well as their root causes. A weak problem analysis can lead to change initiatives with vague goals, which in turn often lead to confusion about the change initiative and/or unnecessary resource commitments (Chakravorty 2010). In short, one cannot solve a problem one does not understand. The purpose must be clear and accepted by the organization. Thus, a solid problem analysis would define the current process state (as is) and it would present what the future process state (to be) could be (Table 1). However, as indicated in the case, the actual reason

behind the change initiative and the initiator of the change initiative will also influence its development and potential success.

Table 1. Purpose attributes and explanations related to different areas

	Attribute	Explanation
Problem analysis	Relevant purpose	Problem analysis of "as is" is fact/data based, as is versus to be
	Relevant purpose	Business processes are defined and addressed, which will be helped, and how
	Justified purpose	Actual reasons: Problems are substantial and not institutional, political, or copied (fad phenomenon)
	Justified purpose	It is clear who initiated/started the change (and who drives/runs and owns the change)
Jointly accepted and urgent need for change	Urgent purpose	Business processes need change
	Urgent purpose	Burning platform
	Destination	Understandable future business processes "to be"
Scope of change and Explicit goals	Timeline of change	How long is the change initiative
	Scale of change	Incremental, transitional or transformation (radical) change
	Scale of change	Strategic, tactical or operational
	Scale of change	One time (project) change or continuous change
	Functional or cross-functional change	Addressing the silo phenomena or not
	Speed of Change	Slow or fast, short-term, long-term.
	Explicit goals	Related to changed business process outcome (effectiveness and/or efficiency)
	Explicit goals	Attributes
	Explicit goals	What does success looks like?
	Explicit goals	Can progress towards the goals be measured?
Top management and Resources	Supported purpose	Top managements level of Involvement: Talk the talk
	Supported purpose	Top managements level of Involvement: Walk the walk
	Prioritized purpose	Resources and decision making
	Powerful paladins	Who initiated/started the change, drives/runs the change, owns the change?
Organizational context	Purpose aligned to strategy	Is the organizational strategy defined, clear and communicated?
	Purpose aligned to strategy	Does the change initiative align with and support strategy
	Purpose aligned to processes	Does the change initiative fit with process effectiveness and/or efficiency focus?
	Purpose aligned to values	Is the change method values aligned with organizational values

4.2 Need for Change – Jointly accepted and urgent: burning platform

The case organization has worked significantly with aspects related to getting ready for change, and the PMS indicate a strong willingness and a need to change. However, the willingness to change seems to be more talk than action. People have bought into the idea that "change" is important on a conceptual level, but actual change is harder to achieve. The urgency to change, the "burning platform" is not as significant as the more general acceptance that change is important. Common for the change models is the importance of establishing the need and purpose for the

change, as well as a sense of urgency. Creating change readiness is a key issue in managing an organizational change project successfully (Armenakis et al. 1993). Both Kotter (1996) and Schein (2004) argue that not establishing a sense of urgency is one of the most common mistake in change efforts. A weak problem analysis and vaguely defined reasons also makes it harder to develop a burning platform to logically explain and motivate the purpose for change.

4.3 Goals and Scope

The observed measurements related to the goals of the change initiative were discouraging. The project team realized that they have not worked sufficiently on these issues and thus the goals are, unfortunately, fairly vague, not business process oriented and not truly measurable. The difference between and the actual state of affairs (as is) and the expected destination (to be) has to be expressed (Byrne 2003; McFadden et al 2015). Clear and challenging goals lead to more successful results in terms of performance compared to ambiguous and mediocre goals (Neubert and Dyck 2016). Martin and Mankin (2017) add the importance of specific and "high" goals for increased performance and public commitments of the goals and tight deadlines. Studies show that frequently monitored change initiatives are more likely to succeed than short projects, which are not reviewed frequently (Sirkin et al. 2005).

To be able to state explicit goals for the change initiative, the scope needs to be considered. Failure of correctly scoping a project may increase the risk of wasted resources and not achieving substantial results (Wasage 2016). Scope creep is a common problem as the scope often widens over time, resulting in diversion of employee attention, and that the core team loses focus (Darragh and Campbell 2001). The scope of the change initiative is also influenced by aspects such as the scale of change (e.g. if change is incremental, transitional or transformational/radical (Luecke 2003; Burnes 2004), the silo phenomenon and the speed of the change.

Many of the "traditional" change methods (e.g. TQM, Six Sigma and lean), are primarily incremental change methods (Imai 1997) that often are operational and departmental (functional) in nature (Nadler and Tushman 1989; Burnes, 2004). Transformational change, such as reengineering, is more drastic, radical or revolutionary and can result in an organization that differs significantly in terms of structure, processes, culture and strategy (Kanter et al., 1992; Weick and Quinn, 1999). Thus, transformational change is often more strategic in nature. Finally, transitional change is an in between version of change. Obviously, the scale of change will significantly influence the scope and goals of the change initiative. The scope also depends on whether the change should be functional or cross-functional, process oriented. As significant problems tend to exist between functions in the core cross-functional processes – in the white space - many authors mean that change in the form of process re-design often is the only way to significantly improve performance (Rummler and Brache 1991). A functional approach could lead to fragmentation of projects and too many projects, making prioritization and top management support even more difficult (Spector 2006). The speed of change will influence the scope and the goals. Change efforts can be incremental (such as TQM and lean) or fast paced projects like re-engineering with the intention of creating immediate, radical change. Either way, the speed of the change has to be considered when the scope is defined and when the goals are developed.

4.4 Top Management Commitment and Support

Top management support was an issue. The project management group used a phrase which translates into *"they sit on the bleachers and applaud, but they do not come down to the court to play"*. Even though this problem was seen in the first two rounds of measuring, the urgency of this aspect is more concrete after this third round of measuring. Top management

commitment and support is often cited as one of the most important critical success factors for any change effort (Cotte et al. 2008; Naslund 2013). Not only top management, but also the paladins (champions like initiators, sponsors, drivers) are important for moving a well defined and relevant purpose to a jointly accepted purpose in the organization. The planned model is a top-down approach while the emergent model suggest more of a bottom-up approach. Still, for both models, top management support is emphasized as critical for success.

4.5 Organization and Resources

The results for organization and resources are very discouraging, particularly when it comes to the answers from top management that are primarily responsible for these two aspects. In order to improve potential project success and to avoid wasting resources, organizations must prioritize and select projects carefully (Arumugam et al., 2016). Lagrosen et al. (2011) state that selected projects should ideally be aligned with the organizational strategy and the objectives of the organization and evaluated according to business benefit, feasibility, and organizational impact. Too many and often overlapping projects. This will lead to a fight for attention, resources and prioritization where relevant project may actually suffer while irrelevant ones may benefit.

4.6 Additional Issue - Strategic Alignment

In the case organization, it is somewhat unclear if this project is actually aligned with strategy and/or help support implementation of the organizational strategy. Strategic alignment is another key component of any change initiative and the link to the business strategy and vision is a frequently mentioned CSF for change initiatives in existing literature (Chong et al. 2001; Cotte et al. 2008). If institutional or political factors are the driving the change effort, it may not be linked to strategy and thus the probability of success may diminish (Naslund 2013). Furthermore, organizations have to consider whether the chosen method actually fits with the organizational strategy and processes. Not all change projects align with the organizational strategy and not all change methods are equally appropriate for all organizations in all industries. If a change initiative does not align with the strategy and/or values of the organization, then it should most probably not be started either. Thus, a proper evaluation of the alignment, may result in fewer projects, which may also increase the probability of success of other projects.

5. A SYSTEM-BASED FRAMEWORK FOR UNDERSTANDING CHANGE PURPOSE

One main point of our framework is that these aspects and attributes cannot be studied in isolation for change initiatives' success. A systems perspective allows for the study of each component and how the components relate to each other. As can be seen by our analysis, many different sub-aspects and attributes are important for successful change. By starting from observations in different sub-aspects of the change readiness, we have seen the importance of having a clear and jointly accepted purpose. We have identified several different attributes related to purpose. They are all important by themselves, yet they are also interrelated (Figure 4). First, the purpose of the change initiative should be perceived relevant, which in turn requires a fact based problem analysis, conducted early and addressing important business processes. The reason behind the change initiative, and who is initiating the change, may influence if members in the organization find the purpose justified and thus these aspects will influence the change initiatives outcome. Similarly, while the problem analysis is important in itself, it may not mean much if the urgency for change, the burning platform does not exist, or if it does not address a need for changed business processes. A clear destination of the change journey must be defined when defining the purpose: the "to be" of future business processes. Finally, explicit goals must be

provided, goals that are both measureable and related to the desired future business processes state. However, if the scope of the change initiative is not clear, (e.g. its timeline, scale, cross-functional ambitions, or speed) it will be difficult to define explicit goals. All of the purpose attributes (relevant, justified, urgent, clear destination, clear scope, and explicit goals) are interrelated, and many build on or are antecedents of others. If all the attributes are in place, the purpose of the change initiative will be easier to define.

On the other hand, for the purpose (and change initiative) to be jointly accepted in the organization, it must also be communicated to and received by the different stakeholders. Related to these aspects, we observed several problems. First, the change leaders must take communication seriously. Second, the purpose must be supported by top management and prioritized (both in terms of resources and other decisions). Third, the paladins spreading and establishing the purpose must also be powerful, especially if the support from top management is weak. Finally, the change initiative should align with as well as support the organizational strategy, but that implies that the strategy is clearly formulated and communicated.

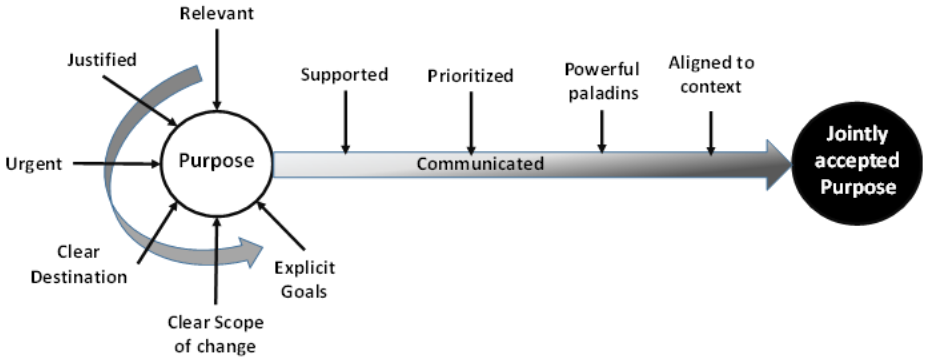

Figure 4. A Framework for understanding purpose of change.

6. CONCLUDING REMARK

Organizations need to work with change related to operations and SCM, but organizations struggle with change. A single characteristic can not explain why organizations have problems implementing and sustaining change efforts as complex problems seldom have simple solutions. This study is based on an AR study over more than two years. We present the "higher level learning" from the study as related to criteria for change management success and especially the need for a clear and jointly accepted purpose. We further develop and describe the context and attributes for the Purpose category in the Naslund (2013) framework– related to change readiness. Future research should focus on understanding change management from an interorganizational perspective. Given the importance of top management, another area to explore is what transformational leadership actually means, especially related to change in operations, logistics and supply chain management.

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