AGILE CHANGE
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Cascading change throughout an organisation

Author

Melanie Franklin
Director
Agile Change Management Limited

Introduction

Organisations all over the world are experiencing high volumes of change as a result of Agile methods, which create continuous, small scale change, disruptive technologies which increase the pace of process, role and system changes and continuous demand from customers for innovation.

This generates a need for greater capacity for managing change to keep pace with this increased volume. This increase in capacity comes from existing staff volunteering their participation in the change, but we have to generate the motivation for this in an environment where staff are experiencing a constant state of uncertainty, and struggle to maintain 'business as usual' when everything they rely on to do their jobs is restructured, replaced or enhanced.

This paper sets out a structure, processes and responsibilities for mobilising all staff to be a part of the change effort, minimising the risk that change is the sole responsibility of a few transformation specialists who have change management expertise but who do not work in and are not impacted by the business they are transforming. This enables a change to move from being a strategic objective to actual adoption as new ways of working.

Increasing the capacity for change management

Creating capacity for new ways of working is not a simple, linear set of activities. In this paper I highlight three themes that taken together will increase capacity:
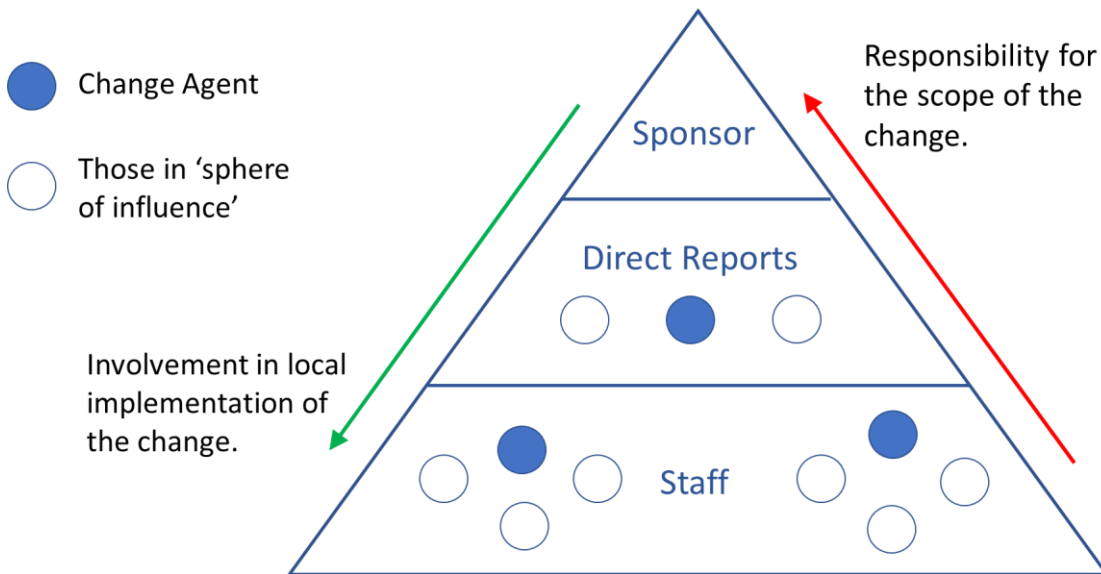1. Transmitting change through layers of the organisation:
   - Cascade Model
   - Roles and responsibilities
   - Transferring information up and down the hierarchy of the organisation
2. Allocating change responsibilities to everyone
   - Business as usual versus change management responsibilities
   - Organisation design that reflects this balance of responsibilities
3. Developing skills for managing change
   - Explaining how behavioural change occurs
   - Creating a simple, intuitive approach for leading behavioural change

Cascade Model

Change management can no longer be the preserve of a few highly trained 'transformation specialists' sitting in senior positions within the organisation. Change needs to be democratised so that all staff can take part in making change a reality for themselves and for their colleagues.

To do this I propose a Cascade Model, enabling the responsibility for change to flow through the organisation, being interpreted and implemented locally at each level of the organisation structure. It creates a model of distributed leadership that allows the change to move through multiple locations, divisions, departments and business functions. Essentially, I have created a 'franchise' model, familiar

to anyone who knows how businesses expand by giving their idea to passionate committed people to take it forward in their local areas.

There are three levels of responsibility for the change: Sponsor; Direct Reports; Staff, and these are repeated as the change moves into each layer of the organisation.

Roles and responsibilities
Sponsor

This role is undertaken by the most senior person at that point in the organisation. The key responsibilities for this role are:

Championing and promoting the change, ensuring that everyone in the Sponsors sphere of influence understands not only why the change is important, but why it needs to be done at this point in time. There are many important ideas, but we also have to explain why this idea is the top priority now, and cannot be left until later.

Direct reports

This group report to the Sponsor for this layer within the organisation. For example, at the top of the organisation, the Sponsor will be the Chief Executive Officer or Director General. Therefore, the Direct Reports will all be directors of the various business units or directorates.

Their role in change is to plan, budget and resource the required change management activities. There is some overlap with the Sponsor role, as they must champion and promote the change within their area of the business and role model the new behaviours that they are expecting their staff to adopt.

Staff

These are the people who are managed by the level above, i.e. the Direct Reports. At the top of the organisation, these staff will be senior managers, reporting to members of the Board of Directors. Further down the hierarchy, these will be individual members of staff reporting to supervisors and team leaders.

Change Agents

Within each of these levels, change is more likely to be successful if those expected to work in new ways are supported, encouraged and connected to relevant help and guidance as they develop and practice new approaches.

We need to create a network of Change Agents, whose responsibility is to guide people within their sphere of influence through change. These individuals are people whom others naturally look to for guidance, as they are seen as reliable, knowledgeable subject matter experts. This is coupled with their belief in the criticality of change as a mechanism to improve and enhance what has been achieved to date. In other words, they are natural early adopters of new ideas.

I have worked on the assumption that this Cascade Model is created for a single transformational change. However, I recognise that some organisations might use these ideas to create a permanent structure that is used to support continuous change. If this Cascade Model is established as a permanent structure, then consideration must be given to how to rotate individuals within the structure to prevent the creation of a two-tiered environment, where some staff are responsible for encouraging others to change, and the rest are only responsible for their own change.

Lessons Learned

I have created this type of cascade model to establish networks of Change Agents in many organisations, and have learnt the following lessons:
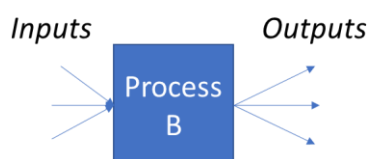
1. It feels odd to bring such a mechanical process to change, when change is about human interaction and the ability to persuade others. However, it is hugely beneficial to take this analytical approach to identifying and planning how the messages about the change are going to flow through each layer of hierarchy, in every location and team. It cannot be left to chance, because otherwise the change is only fully communicated and only generates the necessary participation in some areas, which is not sufficient to ensure the change becomes sustainable.

2. Ideally people will volunteer themselves as Change Agents because of their interest in the change. This ensures they have the motivation for the role, but it does not ensure that others find them sufficiently compelling that they will follow their lead. Therefore, it is important to establish a range of things that Change Agents are expected to do and measure their progress so that you can step in early to coach those who are not having a beneficial impact.

3. Keep the activities that you want Change Agents to undertake to be small, clearly defined and well supported. For instance, if I want my Change Agents to undertake a briefing about the change for their colleagues, I get them to help create the message, but I make sure the central change team has developed the presentation materials, written up guidance notes and helped with the invitations and the attendee lists so that the Change Agent can get on with the actual persuading.

Transferring information up and down through the hierarchy of the organisation

For an Impact Assessment to contain relevant and meaningful information, it must be carried out by those who are directly affected by the change, defining how their current ways of working are going to have to change. The benefit of the Cascade Model is that it pushes the responsibility for Impact Assessments, Readiness Assessments and assigning resources to specific change management activities to those who are the most appropriate to carry them out in the local level.
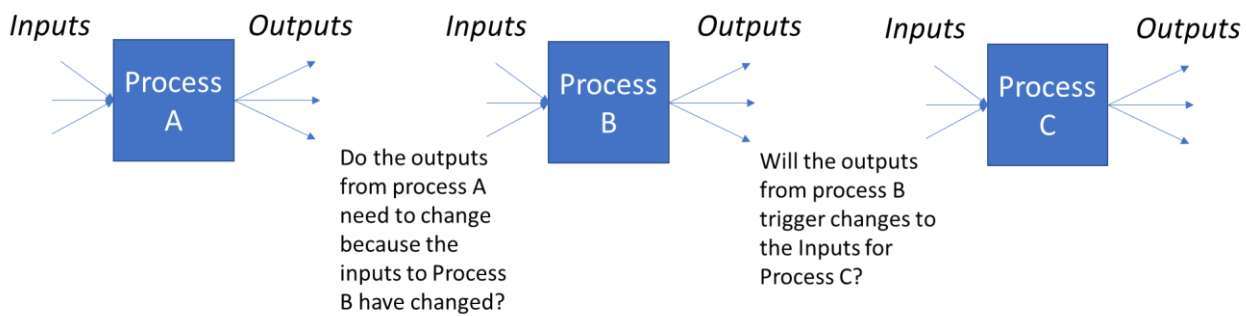
However, one of the biggest impediments to effective change occurs when the ownership of the local impact of the change is denied by the next level up in the hierarchy. This occurs when the level above requests the impact information, and then seeks to amend it according to their own perspective of the impact of the change. This dilutes the truth of the information, because it is being amended by those who do not carry out the tasks that were assessed.

Impact Assessment for individual process

A better way to validate the impact of the change is to align it to the impacts identified at the same level of the organisation. If the impact of changing process B has been assessed, an effective way to validate if all the impact information has been defined is to put it into the context of other connected processes.

Validating the Impact Assessment by cross referencing with other processes

Inputs → **Process A** → *Outputs*

Do the outputs from process A need to change because the inputs to Process B have changed?

Inputs → **Process B** → *Outputs*

Will the outputs from process B trigger changes to the Inputs for Process C?

Inputs → **Process C** → *Outputs*

Allocating change responsibilities to everyone

One of the biggest challenges to making change happen is the conflict between resourcing the current business whilst at the same time enabling staff to participate in creating new ways of working. If staff are only evaluated against their 'business as usual' performance, there is no motivation to become involved in the change. Whilst some staff will try to balance these two priorities, it will be on a 'best efforts' basis. Too often they will be pulled back into their daily role, meaning that change is delayed or stalls completely.

Executives
Senior Managers
Managers
Front line staff

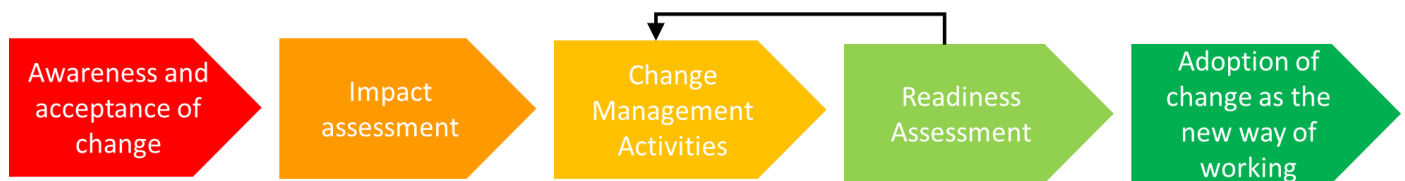**Run the business**   **Change the business**

Everyone must have their job descriptions amended to ensure they feel empowered to participate in change. Different roles will require varying levels of involvement in change. Some management roles will need to oversee business as usual whilst a significant amount of their time is involved in project and change management activities. Front line staff need to spend the vast majority of their time servicing business as usual, but they should still have some responsibility for improving how things are currently done. They might have KPIs for the number of improvement ideas they share, or that a few hours a week are dedicated to the design and testing of new procedures and the adoption of new systems.

Developing skills for managing change

As we have seen earlier in this paper, all those that we need to involve in change already have significant responsibilities for business as usual. These managers and staff are not change management experts, so to maximise their participation in the change, we need to make the process of change simple and intuitive.

There needs to be a replicable process for every layer of the cascade model. The steps in the process remain the same, it is the level of detail that deepens as the change moves down through the organisation.

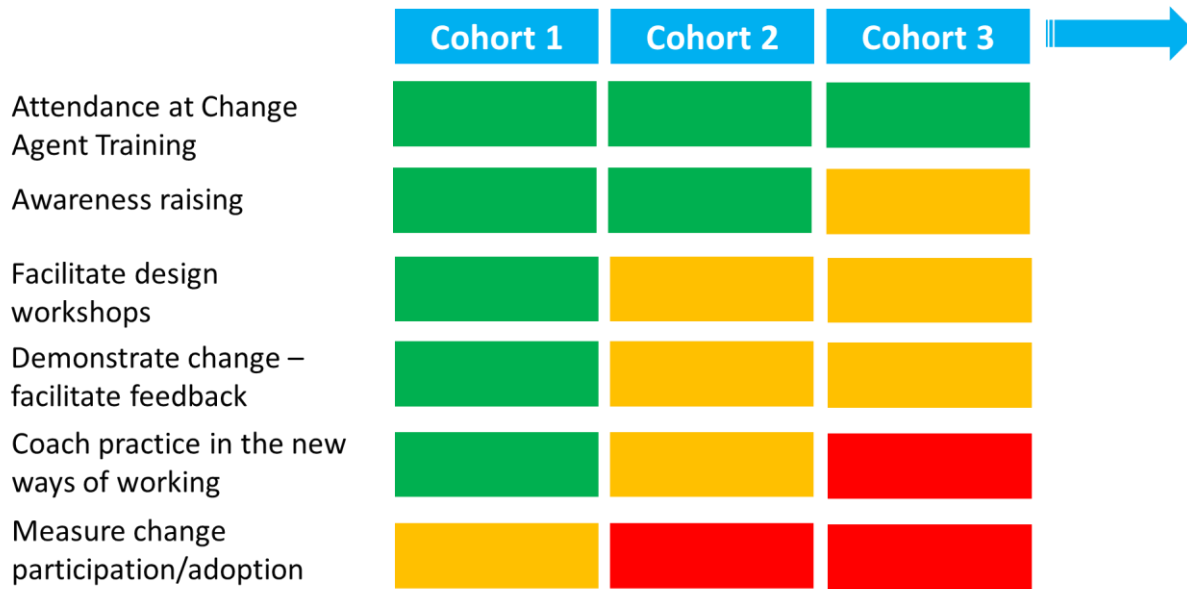| Awareness and acceptance of change	Impact assessment	Change Management Activities	Readiness Assessment	Adoption of change as the new way of working

This process should be supported with checklists, identifying the questions to ask and the activities that they need to have carried out. They do not need complicated theories, models and templates to complete, as this will act as a barrier to their involvement.

It is not enough to provide training without on-going support. To encourage completion of the steps in this model host workshops where those leading the change in their areas can be brought together to share ideas and benefit from working as a team. This enables them to be coached in these change activities as a group, which is time and cost effective. It also enables the group to act as an action learning set, enabling members to support each other between workshop sessions.

This simple model of change needs to be owned by a central Change Management function that is responsible for the assurance of all change initiatives across the organisation. This function uses portfolio management to identify, authorise and track the progress of an agreed sub-set of changes taking place. This sub-set represents the most strategically valuable, most resource intensive and those initiatives which have the greatest impact against the largest possible scope of the organisation. The responsibility for all other change initiatives is devolved to business units and teams who manage the change for themselves. However, to build and maintain the capacity for change management within the organisation, the central team support these initiatives with a model/methodology that moves an idea through to adoption. This methodology includes a step by step guide to the activities required, pre-prepared guidance for how to successfully complete each of these activities

Tracking progress

Change only happens if all those that need to work differently make a personal commitment to working in a new way. To track the development of the change management capability throughout your organisation, use Heat Maps to identify the depth and breadth of activity.

	Cohort 1	Cohort 2	Cohort 3	
Attendance at Change Agent Training	🟩	🟩	🟩	
Awareness raising	🟩	🟩	🟨	
Facilitate design workshops	🟩	🟨	🟨	
Demonstrate change – facilitate feedback	🟩	🟨	🟨	
Coach practice in the new ways of working	🟩	🟨	🟥	
Measure change participation/adoption	🟨	🟥	🟥	

Experience has shown that however many staff are given training in change management skills, deploying those skills is not successful in all cases and some stop carrying out their change management responsibilities over time. It is a good idea to establish practical examples of the activities these networks of Change Agents and Sponsors are expected to carry out and then track how many have actually done so.

In one organisation, we found that the sign up rate for training was very high, but the participation rate following the training was low. In part this was because very little training was offered by the organisation, so staff were keen to accept any personal development opportunities. By setting out the things we wanted them to do after the training helped those most interested know exactly what was expected. Also, as each of these activities increased their level of participation, it was easy to weed out relatively early those that attended the training for their own reasons and were not intending to be part of the change effort. This enabled us to go back and reiterate the roles and responsibilities as part of the invitation for training.

About the author

I have been responsible for the successful delivery of effective change and for creating environments that support transformational change for over twenty years. I have an impressive track record of successful consulting assignments and I am an acknowledged thought leader in Change Management.

I am the Co-Chair of the Change Management Institute UK and a respected author of text books and articles on change, project and programme management. I am a talented communicator with a reputation for delivering complex information with humour and passion. I draw on my wealth of practical experience to illustrate concepts and to engage my audience in lively debates on advantages and disadvantages of each approach that I outline.

To access more resources about change management, connect with Melanie on LinkedIn
https://www.linkedin.com/in/melaniefranklin1/