

# Becoming a Change Agent

What separates excellent organizations from the truly ordinary? What allows some organizations to rapidly change and continually reinvent themselves while others have trouble turning the boat even slightly? The best-selling business books and management gurus offer a dizzying array of silver bullets and panaceas. While all are sound theories, they continue to overlook the fundamental ingredient that must be in place for the improvement to work: the presence of change agents.

Change agents are individuals who have the knowledge, skills, and tools to help organizations create radical improvement. In short, the people that get tapped to make *it* happen, whatever *it* may be (leading the strategic planning retreat, facilitating a reengineering team, managing the new project, and so on). Rarely in a position of authority, they achieve results with their keen ability to facilitate groups of people through well-defined processes to develop, organize, and sell new ideas. They challenge teams to get outside of the box and utilize innovative tools to harness that creativity to make improvements that matter to the bottom line. Change agents are the invisible hands behind the scenes that turn vision into action. They are a leader's best friends. While it is true that you can have change agents and not have success, *you cannot have success without change agents.*

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*There is nothing more difficult to carry out, nor more doubtful of success, nor more dangerous to handle, than to initiate a new order of things. For the reformer has enemies in all those who profit by the old order, and only lukewarm defenders in all those who would profit by the new order, this lukewarmness arising partly from fear of their adversaries, who have laws in their favour; and partly from the incredulity of mankind, who do not truly believe in anything new until they have had actual experience of it. Thus it arises that on every opportunity for attacking the reformer, his opponents do so with the zeal of partisans, the others only defend him half-heartedly, so that between them he runs great danger.*

Niccolo Machiavelli

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*Change agents are individuals with the knowledge, skills, and tools to help organizations create radical improvement.*

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## The Change Agent Body of Knowledge

The role of a change agent is to *help*:

- Decide what to change
- Facilitate what to change to
- Sell the change
- Implement the change

The key word is *help*. Change agents do not ride in on a white horse to solve the organization's ills. Rather, they work *with* and *through* people to make improvement happen. They live by the credo that people only support what they help create. In order to carry out their role successfully, change agents must be skilled in five areas: business knowledge, change processes, change agent tools, facilitation skills, and the politics of change.

### *Business Knowledge*

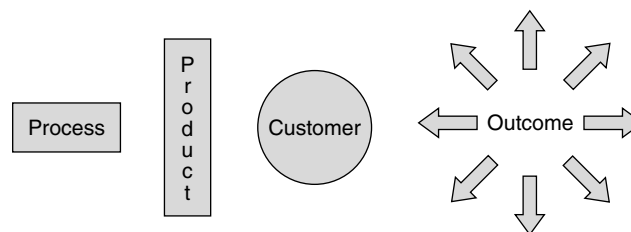
The foundation of a change agent is business knowledge. This knowledge is not so much what one might learn in an MBA program, such as marketing, accounting, or manufacturing; rather, it is a deep understanding of how work gets done. Change agents must understand the *system of work* (Figure I.1), its components, and their interactions in order to know where a change is needed and what change process is required. From a few known symptoms, the change agent must be able to diagnose what system to change and where in the system to make the change and must have a process to help a team change it.

There are three environments<sup>1</sup> in which the change agent must work, each with its own set of change processes and tools (see Figure I.2). **Organizational-level change** deals with the larger systems that help the organization set direction, develop plans, set priorities, and allocate resources. **System-level change** improves all of the components of the *system of work model*, whether that be determining customer expectations, redesigning products, or reengineering processes. **Individual-level change** deals with the products and systems that help employees excel and grow, including performance expectations, development plans, positive reinforcement, and training.

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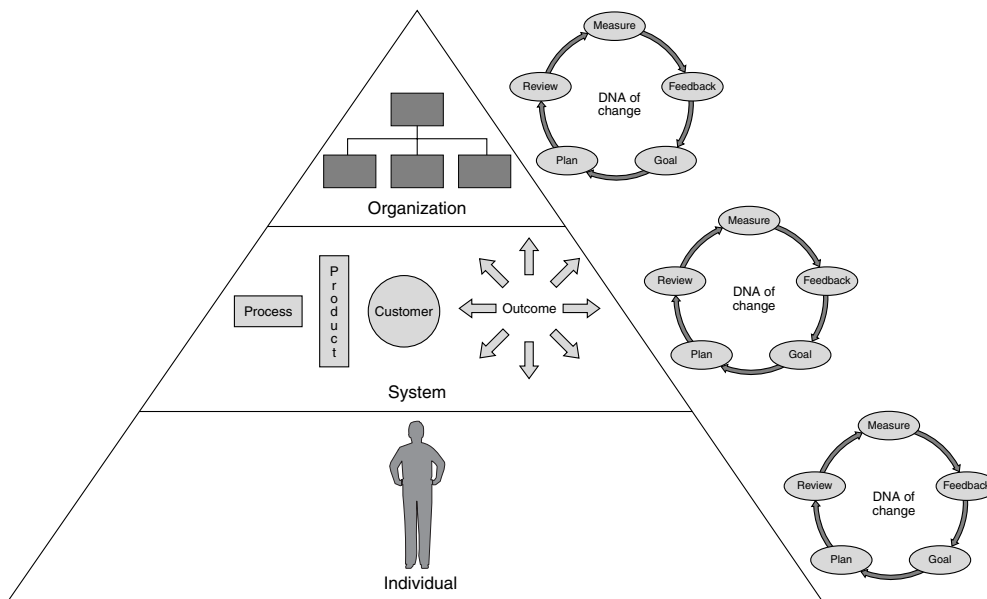
#### Good Change Agents

- *Are passionate*
  - *Are knowledge seeking*
  - *Have access to power*
  - *Are respected by the organization*
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**Figure I.1** The system of work.

Source: Adapted from IMT's workshop, "Creating a Customer-Centered Culture."® Used with permission. (See appendix A.)



**Figure I.2** Three levels of focus.

The change agent must be able to move freely between all three environments, applying the methods and tools to enhance performance at each level.

At the core of all three environments is the DNA of change (Figure I.3). Individuals, business processes, and organizations as a whole must have this DNA to make improvement continuous. The change agent understands this and knows how to implement it in all three environments.

## Change Processes

There is an old bit of cautionary wisdom that says if you give a man a hammer, everything looks like a nail. Unfortunately, this is how too many organizations and change agents function. They apply a seven-step problem-solving method to every issue that presents itself, whether applicable or not. Reducing errors by 25 percent calls for problem solving; cutting process cycle time by 80 percent does not. Whether the objective is improving customer satisfaction, reducing absenteeism, improving on-time delivery, or developing new innovative products, a different process with a different set of tools is required for each.

## Change Agent Tools

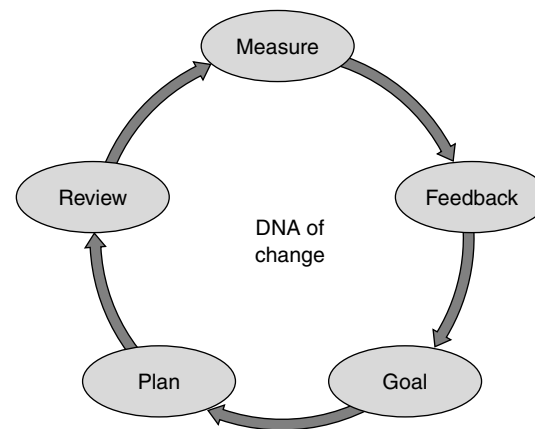
Associated with each change process is a set of tools. When used correctly, these tools make the change processes systematic, effective, and quick. They are designed to ensure that team members are asking the right questions and arriving at the best answers. However, it is important to stress that they are just tools. Without an organized change process, they accomplish little. The change process drives the tools.

### The Change Processes

- *Customer satisfaction*
- *Process improvement*
- *Problem solving*
- *Planning*

### Change Agent Tools

*Diagnosis worksheet*  
*Sponsor's interview*  
*Team charter*  
*Mission template*  
*Customer roles matrix*  
*Customer segmentation matrix*  
*Focus group technique*  
*Voice of the customer table*  
*Five whys of innovation*  
*FACT sheet*  
*Flowcharts*  
*Product flowchart*  
*Process analysis checklist*  
*Know/don't know*  
*Root cause analysis*  
*Affinity diagram*  
*Gap chart*  
*Relationship diagram*  
*Prioritization matrix*  
*Brainstorming*  
*Multivooting*  
*Idea filter*  
*Idea sponsorship*  
*Data-collection plan*  
*Measurement plan*  
*Action plan*  
*Project plan*



**Figure I.3** DNA of change.

In addition to the tools that support particular change processes, there are common sets of tools used by each process. These tools help organize projects, analyze data, and cultivate, express, and implement ideas.

### Facilitation Skills

All change is difficult, and most projects fail before they even begin. A change agent must understand how to organize a project so that it has the best chance to succeed. Tantamount to this is uncovering the project's success criteria, securing management support, and building the right team. From there, a change agent must be able to keep that team motivated and focused to accomplish its mission. Finally, the change agent must be able to make the group of individuals function like a team by building consensus, resolving conflict, and cultivating participation. The change agent must push the group members to think of what they never thought possible.

### Politics of Change

Brilliant ideas are produced every day in organizations. There are shelves full of binders with wonderful team recommendations, new product ideas, and cutting-edge strategies. Unfortunately, these things are rarely implemented. Successful change agents have the ability to navigate the politics of change. It is their job not only to make sure that the team generates dazzling ideas but also to build the compelling case for change and the sales pitch to close the deal. The change agent must understand the six layers of resistance and how to overcome them. They need to know the tactics for reducing resistance to innovation. Most importantly, they need to know who has the power and how to hit their hot buttons. The outcome should be determined before a team ever makes a presentation.

Business knowledge	Change processes	Facilitation skills	Tools	Politics of change	Result
✓	✓	✓	✓	✓	Radical improvement
0	✓	✓	✓	✓	Minor improvement with little bottom-line impact
✓	0	✓	✓	✓	Wrong solution for situation
✓	✓	0	✓	✓	Mediocre ideas with little consensus or passion
✓	✓	✓	0	✓	Lots of talk, little progress
✓	✓	✓	✓	0	Good ideas that never get implemented

It is the rare few that possess all five sets of skills (Table I.1). The rest of this book, through use of the change agent model, is designed to create a well-balanced change agent who is adaptable and successful no matter the challenge.

## Change Agent Model

Anybody who has ever been a part of a change project knows the journey can be a harrowing one; rife with drama, pitfalls, and fleeting moments of exhilaration. The success of these projects is often in the balance, hinging on many factors like scope, team-member selection, management support, fate, and so on. Despite all of these factors, many projects succeed and produce astounding results.

The change agent model was developed after observing hundreds of teams, many of them successful and many not. The truly successful projects consistently had three things in common:

1. The team was working on the right thing
2. The team was using the right change process
3. The team made a compelling case for change

### *Working on the Right Thing*

The problem with many teams can best be summarized by a headline that appeared in a recent newspaper: "University Team Attempts to Solve World Hunger." Too often team projects tackle a scope so large and so nebulous that success is nearly impossible. Successful change projects need to be focused on specific things such as outcomes, products, and processes (that is, systems) that will lead to tangible results. Teams cannot solve world hunger (or "improve communication" or "raise morale"), but they can improve the speed of a process by 80 percent or redesign a core product/service to improve customer satisfaction (ultimately improving morale and

### **Change Agent Skills**

*Diagnose issues to determine proper change strategies*  
*Work with senior management to pinpoint key areas for improvement*  
*Organize project teams*  
*Lead effective meetings*  
*Manage group dynamics and maximize team participation*  
*Create a compelling case for change*  
*Collect actionable data*  
*Analyze data for improvement opportunities*  
*Conduct customer focus groups*  
*Measure customer satisfaction*  
*Facilitate innovative solutions*  
*Eliminate 80 percent of process cycle time*  
*Get to "yes" by managing the politics of change*  
*Orchestrate large-scale change initiatives*

*Successful change projects need to be focused on specific things like products, processes, and systems.*

### **The Change Agent Model**

*Diagnosis*

*Organizing the project*

*Change processes*

- *Customer satisfaction*
- *Process improvement*
- *Problem solving*
- *Planning*

*Managing ideas*

*Creating buy-in*

*Implementation*

*Evaluation*

*Celebration*

communication in the process). The change agent model equips change agents with the ability to diagnose the real issue affecting the organization, to scope the project accordingly, and to select the right change process that will lead to dramatic results.

## ***The Right Change Process***

It is amazing how many teams try to fit square pegs into round holes. Although one size rarely fits all, too often teams try to apply a seven-step problem-solving model to every situation they face, or they define everything as a process and try to flowchart their way to improvement. A change agent has to truly understand how business works, how to determine what is preventing the organization from succeeding, and how to apply a change process that makes sense given the situation. Most improvement projects tend to fall into one of four categories: problem solving, process improvement, customer satisfaction, or planning. The change agent model teaches change agents how to manage each type of project. The model also recognizes that no matter what change process is required, the front end and back end of the project are the same. That is, a process-improvement team or a problem-solving team still must have a team charter, team sponsor, and team-member orientation. In addition, these teams will follow the same process once the solutions have been identified; that is, they will sell the ideas, implement the ideas, document their impact, and celebrate success. The change agent model diverges at the change processes and converges after the solutions have been rendered.

## ***A Compelling Case for Change***

Most seven-step team processes leave out two crucial steps: diagnosis and creating buy-in. While these models provide great guidance on how to solve a problem or improve a process, they do little to help the organization pick the right things to work on; equally as important, they do not teach the teams how to get their ideas implemented. Change does not happen because it is the right thing to do; rather, a team must be able to make a compelling case for change targeted at the right decision makers and supported by facts that matter to them. The change agent model ensures that teams work on projects that matter to the bottom line, produce dramatic results, and win the support of people in power.

The change agent model integrates the best practices in organizational development, team building, voice of the customer, reengineering, problem solving, creativity, innovation, and project management. In short, it is the whole elephant. By integrating all the pieces, it ensures that teams:

- Identify the right issues to work on
- Scope the project properly
- Identify the right team members
- Use the right tools and processes
- Make compelling cases for change
- Generate breakthrough ideas that get implemented
- Achieve results that are tangible, measured, and celebrated