

## **Case Study**

### **Leading Change: Are You Really Engaging Employees**

*...or do you just think you are?*

Let me share a client story. A long-term client who usually brings me in to lead training sessions with employees mentioned to me over lunch one day that the organization was in the early stages of a large change initiative and they were having some problems. She wanted to talk to me about coming in to do some consulting with the executive team around how to better manage the change and ensure it was successful. She shared with me that they had just had a stakeholder meeting (the 3<sup>rd</sup> one since the start of the project) last week and the feedback from stakeholders about the project to date was not good. In fact, a number of the stakeholders didn't come to this recent meeting. Those that did come had less than positive things to say about the change initiative. When my client reached out to those stakeholders who didn't show just to find out what was going on, they all said pretty much the same thing – *leadership is doing what they want so why bother participating.*

Let's step back and share more about this change initiative.

#### **The Change Project**

The change project started 3 months ago. It was a large initiative that was expected to be about 12 – 14 months in duration. There was significant restructuring going on within the organization to enable for improved growth and expansion. There would be no job losses due to the restructuring. In fact, the organization was expecting to hire about 8 – 10 new employees over the next 6 – 8 months in both management and non-management roles. The change was being led by the senior leadership team. At the behest of my client contact – the VP of Human Resources – the leadership team agreed to pull together individuals from throughout the organization to serve on a stakeholder committee. My client's goal was that this group would provide input to the change project and help to champion the change throughout the organization. She had shared this goal with the senior leadership team and had assisted them at selecting a number of individuals from across the organization representing both management and non-management roles.

Due to required travel, my client was unable to attend the first two stakeholder committee meetings. The first one she had attended was the third one. As mentioned earlier, this meeting was not a positive one. She had spoken to the senior leadership team and they agreed to have me come in and speak with the stakeholder committee to determine what was going on and how we could get the project back on track.

#### **The Stakeholder Committee Meeting and Survey**

In collaboration with my client, we decided the best way to get information was through a survey and then a follow up meeting with the stakeholder committee members. The survey would enable us to structure the conversation with the committee members. Our goal was to get information as quickly as possible that we could use to correct course.

The survey had three open-ended questions:

1. What were your expectations being part of the stakeholder committee?
2. Are those expectations being met?
  - If so, how are they being met?
  - If not, why are they not being met?
3. How would you like to be involved in this change project?

We gave the stakeholders five (5) business days to respond to the survey and then set up a follow up meeting to talk further.

The stakeholder committee consisted of 20 individuals, both management and non-management and representing all departments within the organization. Every one of them responded to the survey questions, and, in fact, did so within three days of the survey being sent. I contributed this response to an initial meeting of the group where we shared that I was asked by Human Resources to learn more about their involvement in the change initiative so that we could structure a committee that worked for them and to help accomplish the project's goals. I shared that we didn't want to waste their time, but needed them to help us if the project was going to be a success. I also knew that by committee members being willing to respond, they cared and wanted things to change.

### Survey Responses

In a summarized format, here are the responses received to the three open-ended questions posed to the committee members in the survey:

Question	Summarized Response
1. What were your expectations being part of the stakeholder committee?	Participants to the survey noted that expectations included: <ul style="list-style-type: none"> <li>• Helping to structure the change</li> <li>• Providing feedback on proposed changes to the structure</li> <li>• Sharing ideas and suggestions with leadership</li> </ul> There was consensus among participants that the committee was purely "for show."
2. Are those expectations being met? Why or why not?	All participants noted they were <i>not</i> being met due to the following reasons: <ul style="list-style-type: none"> <li>• Input was not being asked for by leadership</li> <li>• The stakeholder committee meetings that had been held were simply leadership sharing what they were doing</li> <li>• It was apparent that the path was already decided upon by leadership</li> </ul>

Question	Summarized Response
3. How would you like to be involved in this change project?	<p>Participants commented that they wanted to be involved as follows:</p> <ul style="list-style-type: none"> <li>• Providing ideas and thoughts for the restructuring of the organization</li> <li>• Being a part of the decision-making process on the change project</li> <li>• Collaborating with leadership in committee meetings rather than just listening to what had already been decided</li> </ul>

I scheduled a follow up meeting for the following week. The meeting would be a working meeting (lunch would be provided) and would be 3 hours in duration. The goals of the meeting were as follows:

- Share the results of the survey
- Gain commitment from the group to stay together
- Develop a proposal to present to leadership about how to work together on the change initiative

The follow up meeting went well. It was obvious this group was committed to staying on in the committee but were adamant that things needed to change for them to do so. Overall, they felt the initiative being undertaken was a good one for the organization, but felt that the leadership team was not taking the best approach to it and therefore were worried about whether it would be successful.

The proposal to present to leadership included the following:

- Taking a step back and looking at how the leadership was proposing to restructure the organization and providing feedback on the restructuring
- Meeting on the initiative every 2 weeks in order to stay engaged and keep the initiative moving forward

I told them this information would be shared in a rolled up summary format with the leadership team at an upcoming leadership meeting. At this time, I would also share the proposal the committee developed in how they might work to support the initiative.

### **The Leadership Meeting**

The leadership was committed to this project and wanted support of employees. They realized that it was important to have this support if they were going to be successful. They just really didn't understand what that meant for employees. The biggest issue, we learned, was that their perception of involvement by stakeholders was *dramatically different* than the stakeholders' perception of their involvement in this project. My goal in this meeting was to come to agreement on a model that would work for both the leadership team and the stakeholder committee.

Let's jump to the outcome of the leadership meeting.

After 30 minutes of presentation on the results of the survey and the meeting with the stakeholders, as well as discussions around a number of questions and concerns proposed by the leadership group, the following was agreed upon:

- Meetings with the stakeholder committee would be held bi-weekly and leadership team members would be represented at each meeting (not necessarily the entire leadership team at each meeting.) Meetings would include time for review and discussion around problems that needed to be solved related to the change initiative. Stakeholder committee meetings would be provided time to provide feedback and ideas on how to address issues and solve problems that were discussed during the meeting.
- Stakeholder committee input would be considered and questions addressed prior to final decisions being made. (It should be noted this did not mean that the leadership team was giving decision-making authority – nor did the stakeholders expect they would – but rather would listen to the input of those doing the work and use that input to develop a solution that made sense. This was particularly important to stakeholders as they wanted to be able to champion the project and explain decisions made to the rest of the organization.

The leadership team did agree to hold a stakeholder meeting to review decisions already made regarding the restructuring of the organization to see how those decisions might be adjusted based on new information from the committee.

A day after this meeting, I met with the stakeholder committee to share this information. This was exactly what they wanted and they were pleased that the leadership team was willing to engage them differently on this project.

### **In summary**

Not every initiative I have intervened in has been this easy; they can sometimes be a struggle. For some of those initiatives where it is more of a struggle it takes more effort to sell the value of including non-leadership in decision making about organizational changes. In this particular case, both the stakeholder committee and the leadership *wanted* this to be successful. In order to structure these collaborative situations effectively from the start, it is essential to be clear about expectations around involvement. For some leaders I have worked with this has been difficult because they feel that employees than want to make all the decisions. This is rarely the case. In most all situations the employees simply want to be heard – their ideas, thoughts and suggestions taken into consideration in making a final decision. This is a good thing! This shows the employees are engaged and care about the organization. And, let's face it, they are doing the work that helps the organization to be a success. It just makes sense to listen to what they have to say.