Enhancing Organizational Awareness:

An Analysis of Whole Scale™ Change

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Abstract

This article presents a case study analysis of the Whole Scale™ Change methodology's ability to enhance organizational awareness and information sharing. These research findings demonstrate the methodology's ability to enhance the level of organizational awareness, which includes a heightened understanding of organizational strategy, clarity around common group struggles, a unified view of the need for change, and an appreciation for the various roles across the larger organization. The case analysis also demonstrates the ability of the Whole Scale™ Change process in breaking down traditional organizational boundaries through information sharing. The space created within the events enabled system members to truly share. It provides the forum to initiate and mobilize an organization towards establishing system-wide solutions verses the traditional piecemeal approach, through the process of sharing information and creating greater organizational awareness.

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Change—radical and amorphous—has become the standard for organizations today (Conner, 1992; Kotter, 1996; Senge, Kleiner, Roberts, Ross, Roth, & Smith, 1999). What has not changed is the necessity of engaging people in the change process to enhance their commitment (Axelrod, 2000). Organizations need robust change methods that promote system-wide information sharing and enhanced organizational awareness in an accelerated fashion (Passmore, 1988). One possibility is large group interventions. In their book *Large Group Interventions* (1997), Billie Alban and Barbara Bunker state that "large group interventions for organizational and community change are methods for involving the whole system, internal and external, in the change process" (p. xv). They evaluate 12 major large group interventions, which include such models as the Search Conference, Whole Scale™ Change (Real Time Strategic Change), Future Search, and Open Space Technology. Bryson and Anderson (March/April 2000), claim that these methods are faster than traditional approaches and build participant commitment and knowledge across the whole system. Boyett and Boyett (1999) describe the advantages of such conferences to include disseminating more information, developing greater buy-in and commitment, providing better coordination, and driving change faster. However, much of the evidence surrounding these claims is anecdotal (Bunker & Alban, 1999; Weisbord & Janoff, 1995; Polanyi, 2001). This article

presents a case study analysis within a major publishing organization of one of these approaches, the Whole Scale™ Change methodology.

Whole Scale™ Change

Whole Scale™ Change methodology is used in a variety of applications such as strategic planning, work design, and culture change in which the whole system engages in the change process at a specific point in time (Jacobs, 1994). Kathleen Dannemiller created the large-scale approach during an experience with Ford Motor Company in the 1980s. These events have included as many as 2,000 people in the change process. Whole Scale™ Change is a model that can be used for many purposes at various levels and at different stages of a change process. The primary intent is to create "critical moments" across the entire system and develop a "one-brain, one-heart" organization (Dannemiller et al., 2000). The intention of this research project was to evaluate the ability of the Whole Scale™ Change methodology in driving the strategic planning process for a large metropolitan newspaper company by enhancing organizational awareness through the process of sharing information.

Methods

Data collection vehicles included event observations, participant interviews, structured surveys, and objective performance evaluations. Over 80 people were engaged in the data collection process as part of one-on-one interviews or during one of eight focus-group sessions. The research focused on three primary stages that included organizational context, event observation, and post-event evaluation.

Organizational Context

Organizational context information was collected primarily during the event-planning stage of the Whole Scale™ Change process, which included a two-day session, facilitated by Dannemiller Tyson Associate Consultants. The planning group represented 17 individuals from the various levels

and multiple functions within the organization. The focus of the session was to apply Whole Scale™ Change principles in the designing of an event. The output of the two-day session included an event vision, the guiding principles, and the event objectives.

Event Observation

As part of the Whole Scale™ Change events, I participated as a logistics team member to enhance my ability to observe the event mechanics. Within this role, I was able to observe individuals in the natural state of the Whole Scale™ Change process.

> To understand fully the complexities of many situations, direct participation in and observation of the phenomenon of interest may be the best research method . . . observational data, especially participant observation, permits the evaluation researcher to understand a program or treatment to an extent not entirely possible using only the insights of others obtained through interviews. (Patton, 1990, p. 25)

In my role as research observer, I took detailed field notes on the situation, behaviors, and actions observed. These notes acted as an important determinant for the qualitative analysis (Lofland, 1976).

During this stage, a pre-event survey was administered to evaluate the current state of the guiding principles. The survey was designed to evaluate each of the nine desired principles (Appendix A) that were established. There were two questions for each principle, and two general questions for a total of twenty. The survey was constructed to be as simple as possible, with no comment section available. A pilot test was conducted with the members from the event planning team. A sample guiding principle survey was provided to each of the 17 members and they critiqued the draft questions. They then provided

synthesized feedback, and a number of questions were rephrased to reflect typical organizational terminology. Some questions were also simplified for clearer interpretation.

Post-event Evaluation

The post-event evaluations included key interviews, focus group sessions, and post-event and survey results. The research focused on four sub-group case studies, each representing a specific division. Sub-group selection was based on extreme case sampling from pre-event survey results. That is, after a review of the guiding principle survey results, the highest (Newsroom) and lowest (Operations) performing divisions were selected. Additionally, Circulation and Advertising were selected in order to observe the norm. "Unusual or special cases may be particularly troublesome or especially enlightening" (Patton, 1990, p. 169). Ten months passed before the follow-up research reconvened within the organization. The qualitative post-event assessment took one of two forms: either a focus group session, or a standard interview. A structured questionnaire was used to maintain consistency throughout the collection process. An inductive construct was used to design a questionnaire that was simple, clear and open-ended. The primary purpose of this questionnaire was to standardize the open-ended interviews in order to effectively analyze the information collected. As part of the quantitative post-event evaluation, the original survey was also re-administered to event participants (see Questionnaire).

Results

There were actually three events that built upon one another, which included over 1,100 of the 1,300 employees. The focus for the first event was on determining internal needs and creating a shared strategic plan, while the focus on the second event was more specific to external issues and refining the strategic plan. The third and final event focused less on the strategic plan itself and more on the actions necessary to achieve it.

Questionnaire

Introduction Question

You all participated in the 3-day Whole Scale™ Change conference (April or May of 1999). What was it like? What happened after the session?

Key Questions

Since the Whole Scale™ Change conference (April or May 1999) I have .....? (interacted differently, taken more initiative, etc.)

Why (or why not) do you think that is?

Since the Whole Scale™ Change conference (April or May 1999), my department has ....? (improved climate, performance, nothing)

Why (or why not) do you think that is?

What are some of the benefits that resulted (or you anticipate)within your department, as a result of the Whole Scale™ Change process? (Subsidies, teams, open house, pagination, branding, etc.)

How has your department gone about accomplishing (planned to accomplish) these results?

Ending Question

Looking back upon the entire experience since the Whole Scale™ Change conference, what would you say the overall effectiveness (behavior, event objectives and business performance) of the process was? Why?

The Events

The purpose for all these events, as established by the event planning team, was:

> To involve all employees in an open forum to help establish the "company name" as the dominant information source in the area; to build an understanding of the direction we're heading, to participate in the design of how the company functions and grows, and to develop positively.

The event planning team defined the case for change as follows.

Case for Change

Falling numbers—Circulation, penetration and readership are all in decline, although the company has fared better than most in fighting these trends. Key indicators are dropping.

Urgent to change now—Today we have the resources: economic soundness, a healthy market, and a great audience to take charge of change and to invest in it. At a crisis point in the future, we could have less control over our destiny, and might be scrambling just to stay in business.

Time pressures, new life styles—Our customers' information needs for news and advertising are changing as much as their lives. In fact, at a moment when they are demanding more and more relevant and essential information, they are all too often finding it in other media and they are losing their connection to the company.

Unique role—-A free press has a critical function in a community and in a democratic republic. It is all based, however, on a strong economic for the company and on reaching a lot of people. We need to preserve those foundations.

Rivals—They are everywhere, aggressively pursuing our revenue and our readers. Technology continues to make it easier and easier to get into the information business and is creating an intensely competitive media environment.

Exciting era—Each of us can play a key role in the media revolution. It is a fascinating and challenging time, and we can all be part of the company's next success story.

Each event was a microcosm of the whole organization and included approximately 350 employees. Therefore, everyone within the organization had the opportunity to participate in at least one of the events.

The overall tone of the event evaluations was quite optimistic. One person described a true scenario where a press operator and an individual from Circulation were resolving a chronic problem that had taken place for years. Another person described a similar scenario with Pre-press and Advertising. After rating a nine (high) on the

question, "How confident are you that we will move forward," one individual said, "On Monday, I would have marked it as one or two. Expectations were low; however, today I am more convinced that they are sincere." Others made comments about being excited to be involved in such a major initiative. Some said that this meeting had brought the company closer together and created a more family-like atmosphere. As one individual stated, "I have found out that I work for a company that cares about the employees' concerns and ideas." The single most frequently stated benefit from the evaluations as outlined in the content analysis was "the sharing with other departments." This benefit was mentioned 211 times across all three sessions (Table 1). One person said, "It has brought us together on a personal level and helped us to appreciate one another." Individuals began to see each other in a different manner. While they previously viewed each other as dramatically different, the session produced a heightened awareness around the common struggles throughout the organization.

Eleven Months Later

There were eight focus groups sessions conducted across the four selected divisions. An interview was also conducted with each of the executive staff leaders from the selected divisions. The overwhelming response to the initial question ("Please describe your experience with the Whole Scale™ Change process? What was it like? What has happened since?") was that the "conferences were very good," but "nothing has changed." Frequently this response was followed up with a comment about how the momentum gained during the conferences dissipated shortly after. However, as the focus group conversations evolved, the events' impact became more apparent. By the conclusion of these sessions, almost everyone interviewed felt that the sharing that occurred during the events was critical. Some said that it created ongoing relationships that acted as the basis for shared understanding and greater awareness. This understanding continued to act as a unifying force long after the event. As one participant said, "It took on a life of its own."

Table 1. Content Analysis

| Benefits	Session 1	Session 2	Session 3	Total
Created a unified organization	4	12	5	21
Level of employee empowerment	3	4	3	10
Clear organizational direction	5	7	5	17
Created a hope and enthusiasm	7	16	16	39
Employees are still skeptical	9	5	8	22
Learned a lot about the organization	15	16	9	40
Sharing with other departments	56	93	62	211
Opportunity to be heard	15	27	19	61
Heard this before	27	28	20	75
Demonstrated leaders' commitment	23	26	30	79

Survey Findings

The intention of the survey was to assess the organization's ability to apply the guiding principles that resulted from the strategic plan. The original surveys were administrated at the Whole Scale™ Change sessions. There were a total of 581 responses broken down among departments. The follow-up survey was conducted on a more limited basis with a total of 398 surveys conducted. The survey results demonstrated some degree of improvement for every Guiding Principle as demonstrated in Figure 1.

These improvements were even more distinctive as they related to enhanced awareness and reinforced the qualitative information collected. When analyzed on a division basis, these findings became even more apparent. Divisional stratification was essential because each division proceeded in a different manner in the 11 months following the Whole Scale™ Change sessions.

Newsroom

In general, people felt as if they had been taken care of within the Newsroom. Decisions had been pushed down to the appropriate level and
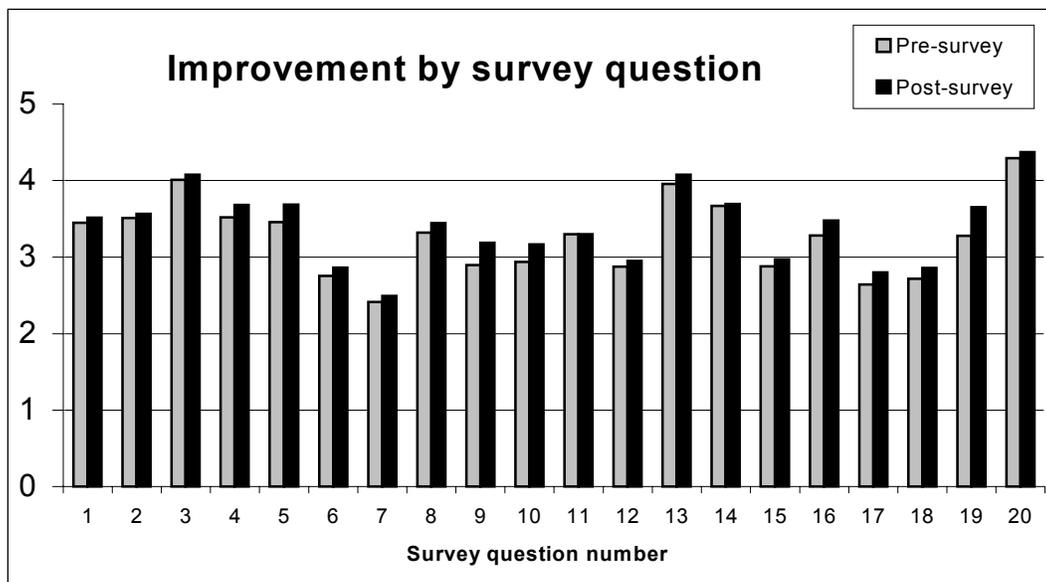
Figure 1. Improvement by Survey Question

individuals were recognized for their performance. One person said, "Overall, I am a damn happy little camper." Leadership had taken an active role in trying to boost morale and creating a productive work environment. One of the more frequently expressed impacts from the Whole Scale™ Change events had to do with the Newsroom's arrogance or at least perceived arrogance. Participants from other focus group sessions said that the Newsroom responded to this feedback by holding some "open house" sessions, which acted as a gesture to breaking down the arrogance barrier. One example that illustrated this new perception was the recognition given through the tough story awards. It was also mentioned, "We often get pats on the back." The employees truly respected division leadership, who believed in the participative approach.

While there were actually four areas from the survey that proved to be statistically significant (at alpha = .05) within the newsroom, question 19 ("I have a clear understanding of the company's strategy." was the one that most directly illustrated an enhanced level of awareness within the division. The average rating changed from 3.08 to 3.60 in the 11 months after the session, with a p-value of .005 (Table 2).

While a number of other responses demonstrated statistically significant changes within the Newsroom, these changes were difficult to connect with the Whole Scale™ Change sessions. This difficulty was partially due to their already heading down this path and partially because very little formal structure was applied. Since the pre-event culture was already more participative and autonomous, the Newsroom was able to progress on a more informal basis. People simply used the process as a catalyst for the ongoing change process.

Circulation

When asked to fill in the blank to the question, "My division has _____ since the Whole Scale™ Change event," one employee responded by saying, "Lost a lot of employees." A deeper probe into this response showed that nobody could actually provide the real turnover rates, but a respondent did go on to say, "that we feel under-appreciated even though we always get the job done." Respondents did feel as if attempts were made to improve communications and that they were much more aware of the struggles that other departments were going through as a result of the Whole Scale™ Change process. One person said, "We are working better across organizational boundaries today and we understand some of their issues." Prior to the session each department had its own goals, with little knowledge about how those goals aligned with the organizational strategy. It was also unclear which goals took priority. As one person stated, "The conference helped us to become more focused on organizational performance, and helped us to understand that we were members of a larger organization." The events helped to break down the mindset of protecting one's own turf. During the two focus group sessions people did recognize improvements in the sharing of information across boundaries.

Table 2. Two-Sample T-Test with Alpha = .05 for Newsroom

Question 19	N	Mean	StDev	SE Mean
99New19	86	3.08	1.14	0.12
00New19	65	3.60	1.06	0.13

Difference = mu 99New19 – mu 00New19
Estimate for difference: -0.519
95% CI for difference: (-0.874, -0.163)
T-Test of difference = 0 (vs. not =): T-Value = -2.88
P-Value = 0.005 DF = 142

Only question 15 from the survey ("The organization does a good job of retaining high caliber employees.") proved to generate a statistically significant change within Circulation, which has a P-value of .036. Overall, the department demonstrated relatively static performance with eight measures declining and 12 improving. They were extremely cynical about division leadership. One person responded, "Many of our leaders have not changed." This person went on by saying, "They said that they would listen to us and they haven't."

Operations

There were some noted improvements within Operations but they occurred on a fragmented basis. For example, one person stated, "I think employees are communicating much better, but there're still some managers that don't get along with one another." Another person mentioned that, "Pre-press is working much closer with the Pressroom and Advertising than ever before." People also took a stand for the vision statement, which was to "be the region's leading source of the information. We will enrich the lives of customers and communities with an excellent newspaper and other valuable products and services."

One very powerful illustration of improvement was observed during the post evaluation. An article, with what was perceived to be an offensive picture, was sent to the Press. The Pressmen refused to run the picture in its current form, referring to its impact on readers. Upper management got involved and the story was de-emphasized. As a result of this situation, one employee wrote a letter that stated,

> Since the [Whole Scale™ Change] meetings, many of the more blue collar workers in the building, including some from the press-room, believed their concerns and their opinions really didn't matter to those in upper management. I can't explain to you how wonderful I think it is that they stood up for what they felt was right and that their voices were listened to. Right on! Right on!

Once again question 19 ("I have a clear understanding of the company's strategy.") proved to be statistically significant with a P-value of .098 (Table 3).

While awareness of the overall strategy was enhanced and there were some noted improvements in communications, a "wait it out" attitude pervaded the division. There was a high degree of middle manager resistance and the feeling was that this was not any different from the previous change initiatives and that in due time it would go away. Individuals actually viewed middle managers as buffers, limiting the flow of information upward and downward. The sense was that senior leadership was supportive of this initiative, but they really did not know what was actually happening on the floor. One person stated that "upper management is oblivious to the

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Table 3. Two-Sample T-Test with Alpha = .10 for Operations

Question 19	N	Mean	StDev	SE Mean
99Op19	128	3.13	1.07	0.095
00Op19	107	3.38	1.21	0.12

Difference = mu 99Op19 – mu 00Op19
Estimate for difference: -0.250
95% CI for difference: (-0.547, -0.047)
T-Test of difference = 0 (vs. not =): T-Value = -1.66
P-Value = 0.098 DF = 214

situation as it exists on the floor." Another employee shared a story in which he was told directly by a middle manager and then instructed about a problem that existed "that doesn't go any further then me—you understand."

Advertising

It appeared during the follow-up evaluation, eleven months after the event, that Advertising had made great strides since the Whole Scale™ Change process. Their department applied more rigor and formality to the process than any of the other three divisions, and senior leadership fully supported the change process. Shortly after the conference, they chartered four teams to work on specific issues within Advertising. They included improving communication, increasing support staff, expanding teams, and cross training. A formal steering team was established and members were selected for each of these teams with given objectives to achieve. These groups were also tangibly supported. One senior leader was quoted as saying, "I don't care how much it costs. If it's the right thing to do, let's do it." Another person said, "We were given recognition in the form of praise and provided with coaching support." Formal presentations were made to the steering committee from all four groups. For example, the Increase Support Staff Team made specific recommendations on adding certain positions. They did so in a highly systematic way, looking at the monetary cost and benefits of such changes. The Improving Communications Team provided

specific recommendations on how to better utilize current technology as a vehicle, with some additional recommendations. The Team Expansion group provided formal recommendations that included everything from structure, layout, and individual responsibilities. The Cross Training Team reviewed the current training needs and provided specific recommendations for taking advantage of existing opportunities.

Advertising employees did think that the Whole Scale™ Change process improved communications and enhanced customer service, especially on the front lines through the process of cross-department cooperation. Advertising invited members from Pre-press to visit the division so that they could enhance internal customer service. One person said, "The culture change process acted as a catalyst to drive this process forward and we have succeeded." Another person said, "The conference provided us with a burst of energy necessary to mobilize us." It was as if the event moved the division by energizing the cynics into action.

While four questions proved to be statistically significant, question 19 ("I have a clear understanding of the company's strategy is most relevant to enhancing organizational awareness.") had a P-value of .004 (Table 4).

Discussion

While this case analysis does not demonstrate overwhelming objective performance

Table 4. Two-Sample T-Test with Alpha = .05 for Advertising

Question 19	N	Mean	StDev	SE Mean
99Adv19	103	3.34	1.19	0.12
00Adv19	84	3.81	1.01	0.11

Difference = mu 99Adv19 – mu 00Adv19
Estimate for difference: -0.470
95% CI for difference: (-0.788, -0.152)
T-Test of difference = 0 (vs. not =): T-Value = -2.91
P-Value = 0.004 DF = 184

improvements, it does demonstrate a significant impact of the Whole Scale™ Change process's ability to enhance the level of organizational awareness. The findings of this research demonstrate the ability of the methodology to enhance the level of organizational awareness, which includes a heightened understanding of organizational strategy, clarity around common group struggles, a unified view of the need for change, and an appreciation for the various roles across the larger organization. Whole Scale™ Change acted as a platform for the creation of a shared vision that extended beyond the sessions. Question 19 ("I have a clear understanding of the company's strategy is most relevant to enhancing organizational awareness.") proved to be statistically significant across three of the four divisions, demonstrating an enhanced understanding of the organizational strategy across the various groups.

Study Limitations

The intent of this study was to evaluate the effectiveness of the Whole Scale Change ™ process, so the findings can be considered only within the context of the organization studied. This research was truly exploratory and the limited information provided from this single case is too small for much generalization. To enrich the findings of these sub-cases and to enhance the potential for future a generalization, a triangulation research design was applied that included a mixture of measurement and analysis components. However, based on the nature of such an intervention, many interacting variables need to be considered, and I cannot be certain that all these issues were incorporated into the 11-month long study.

While there certainly seemed to be pockets of significant improvement within parts of the organization, the Whole Scale™ Change process itself may not have produced these changes. These changes may have been dependent on division leadership, culture and/or focused process improvements. However, it is apparent that the Whole Scale™ Change processes did enhance the degree of organizational awareness around such components as strategy, roles and responsibilities,

and system-wide problems. The most substantial part was the experience itself and its impact on individuals, not the action plans. The conference was an eye-opening experience. One person said, "The quality of the outcomes themselves did not improve; however, the organization's ability to implement those outcomes was significantly enhanced."

The Whole Scale ™ Change process created awareness across the larger system that helped people gain a better appreciation of everyone's efforts. Individuals shared their frustrations, their struggles and their beliefs. It was a highly effective way of demonstrating what other groups do within the context of the larger organization. As one person described the conference experience by saying,

> Each group had its own goals and we never really cared about how those goals aligned with the divisions' goals or the organization's goals. It was also unclear as to which goals took priority, for nobody even asked this question. So, naturally they were only concerned with their own.

He then went on to say, "The conference helped us to become more focused on organizational performance, and helped us to understand that we were members of a larger system." The case analysis also demonstrates the ability of the Whole Scale ™ Change process in breaking down traditional organizational boundaries through the sharing of information, as illustrated in the content analysis. The space created within the events enabled system members to truly share. It provides the forum to initiate and mobilize an organization towards establishing system-wide solutions verses the traditional piecemeal approach. The sharing of information and creating of new relationships that evolved through Whole Scale™ Change can act as the catalyst for broader change.

Appendix A

Rating Scale
1 - Disagree 2 - Somewhat disagree 3 - Not sure 4 - Somewhat Agree 5 - Agree

1.	Customer service standards are clearly communicated throughout the organization.	1 2 3 4 5
2.	Employees consider the implication of their own decisions/actions on customer service and satisfaction.	1 2 3 4 5
3.	The company has strong ethical standards for conducting business.	1 2 3 4 5
4.	Employees consistently act in a way that upholds the integrity of the company.	1 2 3 4 5
5.	The company provides the appropriate learning opportunities to develop the knowledge and skills I need to perform my job.	1 2 3 4 5
6.	Employees have the time to take advantage of development opportunities.	1 2 3 4 5
7.	Leaders are too slow in making decisions.	1 2 3 4 5
8.	Employees consistently push themselves to act quickly.	1 2 3 4 5
9.	Employees participate in making decisions that affect their departments' work.	1 2 3 4 5
10.	Employees can act independently and make decisions on their own.	1 2 3 4 5
11.	Employees often find creative new solutions to problems by challenging existing practices and assumptions.	1 2 3 4 5
12.	In our company, there are consequences to trying new ideas that fail.	1 2 3 4 5
13.	Generally, employees treat each other with respect.	1 2 3 4 5
14.	Generally, leaders treat employees with respect.	1 2 3 4 5
15.	The company does a good job of retaining high caliber employees.	1 2 3 4 5
16.	This organization does a good job of hiring qualified employees.	1 2 3 4 5
17.	Most employees have an opportunity to share in the organization's financial success.	1 2 3 4 5
18.	This company does not do an adequate job of recognizing employees for their contributions.	1 2 3 4 5
19.	I have a clear understanding of the company's strategy.	1 2 3 4 5
20.	I am proud to work at the company.	1 2 3 4 5

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