Smallscale Work Enables Wholescale Change:
Seamless Implementation of
Redesign in the Central Intelligence Agency

Too many organization change efforts result in frustrated leaders,

disillusioned workers and, few, if any positive lasting changes. Fast changing

environments leave organizations struggling to implement new strategies, which

often lose their relevance by the time they are implemented. Skeptics complain

about "flavor of the month" change efforts. That is because they continue to see

new programs and initiatives launched to do what others have failed to deliver.

Leaders and employees alike have learned to live with these suboptimal results as

no better choices seem available.

The vast majority of these change efforts fall short for one simple reason.

Many people who are affected by these changes are not included in deciding,

planning and implementation of them. Engaging people at this deep and profound

level seems risky and often impossible to do.

It is not, however, impossible at all. More and more technologies are evolving

beyond the "event" focus (whether the event be a training program, a process

redesign, an action research effort, etc.) to much more high-involvement process-

oriented, continuous change efforts that encompass the entire change process from

identifying the need through full implementation. One such methodology,

developed over the course of the past 15 years by Dannemiller Tyson Associates,

has been variously called Real Time Strategic Change, Large Group Interactive

Processes, or Real Time Work Design. This approach brings together hundreds of

people at the same time and place to address substantive organizational issues; to

create their collective futures; and to decide the courses of action necessary to

sustain change.

This article describes the integration of this Wholescale (whole system)

approach was integrated with the use of "smallscale" groups to create the seamless

implementation of a change initiative within an organization. We use the term

"seamless" to describe the conjunction of change design and implementation. The

design of this change program involved the whole system and enabled small groups

to do the detail work in support of the effort. Everyone was engaged, there were no

bands of outlaws, no star chambers; and few hiding places for people who resisted;

everyone was pulling in the same direction, looking at and talking about the same

things.

What we found was that teams doing focused work within this broader

aligned context, enabled (1) smallscale work which moved the whole system and (2)

the work done in Large Group Interactive Sessions (efforts) to truly move the

organization faster and faster, and (3) each Wholescale event to ratchet up the

slope of the change curve. Conversely, the Wholescale efforts (4) created a culture of change, within which smaller groups could work.

Insert Smallscale leads to Wholescale model Here

The Process and Key Learning

Background

This effort began in the Fall of 1995 when the internal OD consultant met with the consulting organizations that would partner to re-engineer the 100 employee department within the Central Intelligence Agency. At that time the idea was to integrate the Large Scale Interactive (Wholescale) approach of Dannemiller Tyson, with the re-engineering efforts pioneered by Champy and Hammer, and the implementation methodologies of Keystone International. This department needed (1) to re-engineer itself and the way it conducted business; (2) a strategy that assured commitment and ownership among its workforce (each person being a functionally focused craft-person); and (3) to implement the solutions within FY 1996.

Over the course of the next several months the detail plan and budget were put together by the consulting team. The intent was to work together, as a team, focusing simultaneously on the solutions and their ease of implementation. One group would work to create high involvement solutions while the other would look longer term to the risks associated with implementing the final decisions.

Lessons Learned:

- As a consulting team, do a better job of walking through what the intervention would look like. Because we each came from different disciplines and experiences, we had very different images of how the words on the page would play out. As a result, as the project unfolded the team spent quite a bit of time "recalibrating ."

- We could have facilitated the change effort for a little less money and a lot less time. The entire project would have been completed 6-8 weeks earlier with better planning. The time between our Wholescale events was not as thoughtfully planned out as possible and time during the events was therefore not as outcome focused as possible.

Getting Started:

Once the approach and budget had been completed and approved, two activities were initiated to support the longer term implementation. First an Executive off-site was held. During this session the Leadership team reviewed the purpose, objectives, and plans for the effort. This session surfaced a lot of early resistance. The result of this meeting was (1) the leader and consultants knew exactly where the gaps in sponsorship were; and (2) the leaders were given an opportunity to decide for themselves if they could support (a) the high involvement process and (b) implementation of significant changes within the Department.

Our second effort was to prepare an internal cadre of people (called Change Guides), capable of facilitating and supporting the individual initiatives necessary to create the change. Our intention was for this group to begin, day one, to manage and oversee implementation risks. Ideally, this group would have also conducted benchmarking visits, and provided creative ideas to the process. The Guides became task team facilitators, supporting the process and organization improvement activities. They acted as an internal consulting team and coached us as we worked with the larger organization to redesign the ways in which customers were served.

Lessons Learned:

• Use Executive Briefings early in the process to develop a clear, common vision of change, and to assess the willingness of leaders to sponsor the change. The primary risk to implementing change is the quality of sponsorship: the extent to which they understand the change, embrace it, see it changing their world and not just that of the workforce, and are willing to model the desired behaviors. This is a critical ingredient for the seamless implementation of change.

• Signal to leadership that they can take the "off ramp." In this particular effort, leaders were given the opportunity to change roles and even positions throughout the process. In exchange for support in finding alternative roles, leaders were asked to not stand in the way of change.

• Key factors are: vision clarity, sponsorship and case for change. Having the ability to clearly articulate these three continued to align and focus the organization. Early engagement of the entire leadership in this conversation first, enabled them to speak clearly with employees about the future.

• Delineate the opportunity costs for total employee involvement. Give Leaders an accurate picture of the "size of the bite" up front. In this particular instance it was 19,000 hours of opportunity time, invested in involving employees in the decisions necessary to affect change.

Launch:

In March of 1996 we brought all employees, key customers and providers (approximately 150 people) together to Launch the change effort. The purpose of this session was to create the understanding of and momentum for the changes needed within the CIA Departmental group. This session sent a signal to the organization that this was serious; it provided a wake up call to the group and surfaced the reality of the case for change.

This session created alignment among employees, customers, providers and

leadership regarding the need for and a vision of the changes

that would take place. It also strenghtened the case for change and weakened the argument that "everything is fine, no change needed."

As a result of this session, task teams were created, involving over one half of the organization, to solve specific organizational problems identified during the Launch. These teams were chartered to address specific customer issues, process improvements, employee concerns and implementation barriers. Teams were made up of customers, providers and employees. The purpose of these teams was to continue the high involvement approach, in small groups (or what we came to call "smallscale" work). These teams wrestled with the details of process redesign, organization structure and employee development to support implementation. The output of these task teams became the inputs to a series of Wholescale sessions over the next three months, as the organization pursued the "right" process and organization designs.

Lessons Learned:

- Because Task Teams were created live, during the Launch, it took several weeks for them to get organized and to begin their work. We lost three weeks of quality work. Our ongoing question and dilemma was how to ensure whole-system involvement, after the launch event?

- Conduct customer satisfaction surveys before the launch of the change effort. These data would have served two useful purposes: (1) as data for the whole system to see, supporting the case for change; and (2) as a baseline against which to judge future performance in the new organization design. A comprehensive survey was done, but too late to have maximum impact.

- Change Guides could have mapped the process BEFORE the Launch. Staff were asked to map the current process, during the event and they were unable to do so. What we discovered was that very few, if any, employees understood the entire process for providing customers the products they were requesting. Also, not everyone understood how to map processes.

Philosophical question: Do you want incremental improvement or breakthrough thinking? Teams weren't created with evenly distributed talent. Low hanging fruit objective was met. For some, low-hanging fruit looked like success and reinforced an incremental approach.

Lessons Learned:

- The Task Teams created chaos (theoretical sense of the term) in the form of whole system involvement. This process did help unfreeze the culture. Involving customers and providers on task teams provided a real incentive to make sure that improvements really did happen.

- Do more thinking about team makeup: Open registration didn't necessarily work. Open registration certainly identified those interested in a particular topic. It did not necessarily identify the "right" people (skills or microcosm), nor did it provide a balance in views. Many who signed up for these Task Teams had as their incentive "protecting the status quo."

- Our post thinking about organizing work after the session could have been sharper. We could have anticipated the direction of the changes needed, better structured the task team sign ups and created a follow-through, post event strategy that did not require three weeks of start-up time.

The Design Sessions:

Over the course of the next three months we conducted three more Wholecale events. Each event was scheduled approximately one month apart. These sessions were attended by roughly the same individuals as

attended the first. Variation in attendence was due to changes in customer representation and the absence of some employees, due to vacations and other schedule conflicts. We called these "Deep Dives" because each was intended to focus on a specific set of issues and to look "in-depth" at that topic.

The first Wholescale event focused primarily on process improvement opportunities for the organization. Each task team, working on a part of the process, shared their thinking, received inputs from others, participated in creativity training, and committed to actions necessary to significantly improve the customers experience of the organization. Benchmarking and bringing in other organizations who had redesigned similar processes was not possible. Therefore, in order to create "out of the box" thinking creativity training was conducted, wholescale. This event created momentum. The smallscale work done between the Wholescale sessions informed and moved the work done during the deep dives. We would never have been able to move as far, as fast without the task teams.

The second "Deep Dive" developed a common understanding of the new organization process and began discussions of the new organization structure and jobs. At "Deep Dive II" everyone was able to see the entire process (many had never before seen or understood the whole process) and to come to agreement on the new way the work flow would be accomplished. During this session, as with the first "deep dive," implementation issues were

surfaced and plans were made to address them. As a result of this

Wholescale meeting we chartered new task teams to now focus on (1) creating

new organization design options; (2) fleshing out more detail on the process

model agreed to; (3) beginning to develop training plans to support the

transition; and (4) the technology issues associated with the redesign.

"Deep Dive III" became the launching pad for implementation of the entire effort. During this two day session, again attended by all employees, and key providers and customers, participants consensed on the new organization design and structure. Task teams brought in options and choices for whole system consideration and as a result, new jobs and roles within teams and a new hierarchy were agreed upon by all. The final design captured the key features important to each stakeholder group and has become a benchmark for others within the Agency. With a clear organization design in hand, the final hours of the "Deep Dive" were spent on identifying implementation barriers and hurdles and planing next steps. Again, task teams were created to work through the specifics of implementation.

Lessons Learned:

- We got them thinking *whole* Department and *whole* process for the very first time. Everyone was able to be involved throughout the effort, whether during the Wholescale sessions or during smallscale task team work. They saw the big picture and the work flow from beginning to end, sometimes for the very first time.

- Need to sustain momentum: by specific tasks, charters and deliverables. The organization was able to move at incredible speed because the momentum never let up! A consequence was signs of burnout and stress, throughout the unit.

- We needed a way to truly check for consensus in the Large Group. It is not always clear in the large group that everyone is, in fact, agreeing on the new answers. Having had some groupware technology would have given us a better sense of the extent to which people were really "buying-in" to the new solutions.

- Process is "informed" by the structure and structure was informed by process. In other words, you need to do some process mapping to get the structure right, BUT the detailed process work on starts AFTER the structure is in place. Process understanding made it possible for folks to move to the new organization structure.

- We could have cut six weeks out of change effort if we had known what we know now.

"Go Live" Preparation and Training:

As a result of the wholescale involvement in this effort, we moved almost immediately into implementation of the agreed upon changes. Task teams worked out the details of (1) the selection process to new teams; (2) the training schedule to assure that the teams had sufficient skills and capability; and (3) the metrics to track performance improvements in customer satisfaction and cycle time. Within 45 days of the last Deep Dive everyone had chosen a new team; new Team Leaders were selected and in place and the first team meetings were conducted. We began "all-hands" meetings to keep everyone informed and involved. These sessions, lasting no more that four (4) hours, utilized the same large groups processes people had learned over the past six (6) months.

Within 90 days of the final decisions, even though the physical structures had not changed, the new Customer Service Center opened for business. Teams had each received five (5) days of off-site training (teambuilding and customer service). The teambuilding training included

ropes course events and was primarily intended to loosen the bonds of the existing social structure and to create trust among the new team members. Many of the people involved had worked together for years and there was considerable anxiety about the breakup of long standing work relationships. We also provided the cross-training necessary to assure overall team capability. In retrospect this training, while needed, was insufficient. Staff did not have the cross-functional skills to assume the broadened range of tasks and as a result struggled early on to meet the customers demands and reduce the existing backlog.

On October 15 this Department opened its doors to a new way of doing business. Customers were notified and key CIA leaders arrived for the "ribbon cutting" ceremony. In less than seven (7) months an organization had been able to move from a lack of awareness that problems existed to the implementation of a total redesign of the customers and employees experience.

Lessons Learned:

- We significantly underestimated the amount of technical training required to assure that teams had sufficient back-ups. People had not performed some tasks in many years and as a result they were unprepared for some of the new work. Our emphasis was on team skills (interepersonal skills within the teams) and should have been on technical.

- We piloted new processes live with the customers. While this added some stress to both the staff and customers, it speeded the introduction of better ways of doing things.

- Giving everyone choices regarding their new jobs and teams significantly aided commitment and ownership as we moved forward.

Promoting Client Autonomy

During the year-long involvement of the consulting team, new norms and practices were developed which are being used by the client to sustain change after the consultants' departure. As we move into the second year of this new organization, the leadership team is preparing an offsite which will resemble the initial Executive Briefing in many ways. The vision will be revisited and modified in light of the changes and learning during the past year. Leaders on the new team will be given the chance to commit to the new plan, or the opportunity to seek new jobs. "Whole system" thinking will be embedded in the leadership offsite by a presession with customers and stakeholders who represent the whole client population.

The rythm of Wholescale-smallscale change implementation continues in the interplay between regular large-scale events (All Hands ---see paragraph below); teams which can either be long standing (Core Process---see the paragraph on the CI 44444 process) and ad hoc (a small team designed to represent the whole organization responsible ofr shoring up communications).

An organization which once rarely looked over its own outer fence for anything, let alone benchmarking, nowregularly considers benchmarking a key part of ongoing change. The new deputy chief of the organization recently returned from the Saturn automobile company and now wants to send a team to Saturn for additional benchmarking!

In addition to the above, key features of this ongoing commitment
include:

All Hands/Checkpoints:

Every thirty (30) to forty-five (45) days the employees meet for a 3-4 hour meeting to check the progress of implementation. The Wholescale sessions have served to address issues, revisit design choices and provide feedback on the progress of the transition. These sessions have been instrumental in maintaining the focus and sustaining the momentum for change. As a result of these sessions the Department is on track to achieving its goals and employees have a forum to address implementation concerns.

CI 44444:

CI 44444 is code for continuous improvement within the Department. A cross-functional task team (made up of leaders, team members and others) meets regularly to assess the progress of implementation. This team then charters CI 44444 sessions to address process and policy issues negatively impacting the change. Selected groups then convene for one day with a very specific problem solving agenda and process. These temporary teams have the responsibility for process solutions and policy decisions on the issue that they have been asked to solve. Solutions must be implementable within a 30 day time frame. This was done to remove obstacles in the path of implementation.

Lessons Learned:

- The continued integration of Wholescale activities with smallscale task teams has sustained the momentum, and continued to enact the principle of full participation.

- The "Core Process Team," which is acting as the steering committee for implementation has been essential. Having a microcosm of those involved in the changes, overseeing the process, has kept everyone focused and assured that barriers and hurdles are removed quickly.

Summary

One struggle throughout this engagement was to understand how fast people within the system could adapt to change. While the process could have been shortened, it is not clear how much "soak time" is/was needed by people, in order for them to make to transition. To most employees the pace at which change was happening was warp speed and very hard to cope with. The integration of wholescale and smallscale activities enabled the organization to maintain very high levels of involvement. This enabled the speed and seamlessness of implementation.

Throughout this effort the given was that change would occur. It was never in doubt. Only the solutions were in question. As a result, we spent considerable time, up front, discussing how to assure implementation. Our question was always: "How far upstream from having solutions in place do you go to have the implementation conversation?" We found that beginning the implementation discussion at the outset facilitated the seamlessness of the transition. The effort was seen by everyone as "implementing the right solutions," it was just a matter of determining what those were.

Finally, this effort demonstrated the capacity of people to change, when they are involved. People wrestled with tough issues and struggled to hold on to some of the old methods. In the end they were able to shift because (1) they had a voice; (2) they had the information necessary; (3) their relationships with each other, their providers and their customers improved; and (4) they were able to identify with the entire process.

Dynamic Tensions

Transformational Change	Incremental Change
Involvement	Mandated
Design Focused	Implementation Focused
Consultant Focused	Employee Focused
Facilitated	Directed
Externally Resourced	Organization Resourced
Smallscale Involvement	Wholescale Involvement

Wholescale Enables Seamless Implementation

Creating the Change Roadmap
- Introductions and negotiations

Getting Started
- Executive Briefings
- Change Guide Training

Launch
Task Teams

Deep Dives
- Whole System Involvement Between Events
- Process and Organization Redesign

"Go Live" Preparation
- Fleshing out Implementation Issues
- Detail Risk Assessment
- Details, Details, Details

"Go Live" Training
- Technical Skill Enhancement
- Teambuilding in New Teams

All Hands/Checkpoints
- Staying the Course
- Sustaining Momentum

CI 44444
- Workouts on Selected Hot Topics
- Continuous Involvement