

## Abstract

*Never before has the pace of change been so rapid. Environmental and social regulations are continuously accelerating at astronomical rates. The competitive environment is becoming increasingly more challenging. While at the same time, the complexity of doing business continues to increase at a parallel pace. Unfortunately, traditional change approaches are incapable of accommodating all of these dimensions.*

*While Whole Scale™ Change, in comparison to traditional approaches, accelerates the cycle time of change and enhances the level of commitment through the process of engaging employees based on the research outlined in this article. Whole Scale™ Change reduced organizational barriers so that system members were encouraged to fully participate, which precipitated an increase in the level of enthusiasm. This enhanced level of energy created the capacity to increase both engagement and acceleration, concurrently. Therefore, Whole Scale™ Change negated traditional change management methodology limitations.*

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Never before has the pace of change been so rapid. Environmental and social regulations are continuously accelerating at astronomical rates. The competitive environment is becoming increasingly more challenging. While at the same time, the complexity of doing business continues to increase at a parallel pace. The expansion of global markets and radically changing distribution systems are making business virtually impossible to understand. The turbulence that has resulted from all this has forced organizations to become more fluid and agile than ever before. Unfortunately, traditional change approaches are incapable of accommodating all of these dimensions.

# Changing the Way We Change

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If your organization is like most, you have been involved in an organizational change process that has proven to be something less than effective. And if so, then I am sure that you have spent countless hours trying to figure out why. If only senior management would have supported it, or if middle management truly understood the significance, or if the organizational systems would have been properly aligned. It is human nature to seek such answers. As a practitioner, I often rationalized these failures by thinking, if only they would have listened to me. Then a client would, yet the unfulfilled results persisted. Therefore, I had to seek a deeper answer, which in turn meant that I had to better understand the question itself. What if the fundamental question isn't whether or not our methodically

planned actions are flawed, but that our machine like tactics to changing organizations are simply inappropriate? Most traditional approaches of analysis and change use the mechanistic view of systems, which forces us to believe that we must take things apart to develop an understanding of the whole. Margaret Wheatley (1999, p.10) summarizes this by saying “the assumption is that the more we know all about the workings of each piece, the more we will learn about the whole.” However, systems are understood as whole systems, therefore, we must focus our attention towards the relationships that make the parts whole. Traditional change management processes operate on the basis of fragmentation and living systems do not always cooperate with such linear logic. This is why many high-spirited, well-intended, change efforts have been less than effective. One survey from the mid 1990’s found that two-thirds of all corporate restructuring efforts failed to produce the outcomes that they were designed to achieve, (National Productivity Review, summer, 1996, p.42).

During my own personal struggles with change management, I have identified two models that represent the primary limitations of traditional change management processes. The first is what I call the island effect, and the second I have entitled the trade-off dilemma.

### **The Island Effect**

As both a researcher and practitioner, I have frequently encountered the phenomena of the island effect— a symptom of isolated involvement within an organization. The island effect occurs when a few chosen people truly committed to the process of change; work in small groups to resolve a selected issue. It is represented by a few primary characteristics:

The first of these is *isolated involvement*. It has been proven time and again that participation generates ownership. Kurt Lewin’s core principle (Weisbord, 1987) was, “we are likely to modify our own behavior when we

participate in problem analysis and solution and likely to carry out decisions we have helped make.” Therefore, *isolated involvement* produces limited ownership, which makes organizational change quite difficult. Often times a small group, chartered with the task of generating system wide change, is viewed as a group of elitist. Therefore, creating division between themselves and the rest of the system members, which repels participation from others and limits the ownership of selected ideas and recommended actions. Limited ownership results in *contained commitment*, which produces external resistance. Often forcing those in control to drive the implementation process through compliance, which reaffirms everyone’s notion to resist change.

I first experienced these characteristics when working with an organization that was striving towards total quality management (TQM). While actively engaged in the process I recognized that a number of project teams were extraordinarily successful. However this level of success was not transferred to the larger organization. The small teams which were chartered by management and had control over analyzing, recommending, and implementing solutions within their own areas proved to be extremely effective in enhancing local performance. Yet, when the solutions were transferred elsewhere within the organization or to those who were not part of the team, they were met with a great deal of resentment and proved to be ineffective. In the worst-case scenarios, performance actually declined because those who were not actively involved simply allowed the new ideas to fail if they were imperfect. It has been my experience that sometimes the best-laid plans are worthless without the support of the implementers themselves.

This became even more apparent to me whenever we measured the success of this total quality management initiative. In isolation from the entire organization, the small team projects appeared to be quite successful, which created

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the façade that the initiative was successful. However, from an organizational perspective this conclusion was not validated. The impact of these small team projects appeared to be minimal to organizational performance. In fact, within the case organization the overall climate began to take a turn for the worst, even while the total quality management initiative appeared to be successful. This was demonstrated when I compared the results from an employee satisfaction survey, which had substantially declined beyond all previous levels, to the total quality management measures, which included project team climate indicators. While it was impossible to isolate a single cause for this decline in the organizational survey results it became apparent that those involved in the total quality management process were far less frustrated than those who were not. Unfortunately, those working in the isolated pockets of improvement became discouraged when the whole system wouldn't support the recommended changes and they slowly resigned from the process altogether.

Another major characteristic of the island effect is *limited span*. A small group's ability to affect the entire organization is limited to their span of control and knowledge base. No small group representing a much larger system has either the control or knowledge to effectively influence organizational wide change, therefore creating *ineffective solutions*. While traditional problem solving efforts are sometimes effective in implementing solution to isolated problems, the cause and effect of these actions is often too complex to understand. Solutions within a vacuum may prove to be quite beneficial, yet their unintended impact to the larger system is often unknown.

Looking back on my career, a number of successful problem solving initiatives stand out in my mind. Ironically enough, some of these initiatives would not have existed if it were not for the success of previous ones. Early in my career, I was asked to facilitate a small group of individuals who were chartered with the task

of reducing the product variation of a raw material process. After some time this project was dubbed a success. Specifically, we changed the composition mixture<sup>1</sup> of the product, which enabled the organization to save approximately \$900,000 per year in raw material cost. In hindsight however, the same project produced a negative side effect on a downstream process, which was not identified for at least six months. The downstream process was designed to function with the original composition. Those who worked on the initial project did not even consider the effects of their change since the modifications were so slight. The effects generated on the downstream process had an offsetting impact on the savings of the initial project. However, being unaware of the root causes of the downstream process at that point, I was also designated as the facilitator of a team chartered to improve the downstream process. After considerable time and effort, the causes were identified and a new solution was established that enabled the organization to reap some of the benefits from the initial project while also resolving the downstream problems. Maybe the most dangerous aspect of this illustration was that both teams were recognized and rewarded for their impact at the micro level with little consideration given to their macro impact. The project measures were isolated to the process of interest and did not consider the wider implications. The occurrence was not a result of negligence; the first group did solicit the opinions of others outside of their area prior to instituting the changes. However, they did not involve the right people or ask the right question. Therefore, the island effect limits an organization's ability to generate the most effective solutions, in addition to hampering the

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level of commitment to implementing these solutions.

### The Trade-off Dilemma

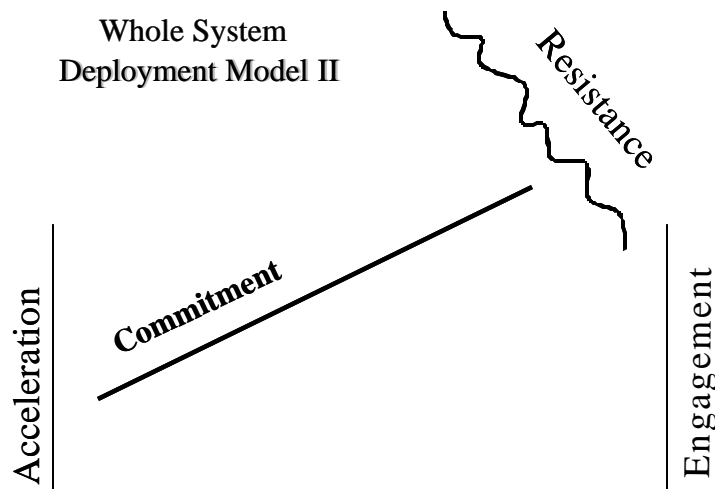
The basic assumption of traditional change approaches is simply inappropriate for today's world. That is, traditional change methodologies refuse to acknowledge the possibility of simultaneously engaging the critical mass of an organization, while also attempting to accelerate the pace in which a change is instituted. As an OD Practitioner and researcher I have continually been confronted with the concept that I have labeled the tradeoff dilemma. The tradeoff dilemma is the conscious decision that a change agent makes when considering the level of commitment necessary for a given change activity verses the amount of time available for designing and implementing that same change. In my view, the dilemma is the balance between *engagement* and *acceleration*.

*Engagement* is the total number of employees actively involved in the planning phase of a change, which increases the level of commitment. Commitment is generated through the process of participation and

involvement. Engagement enhances the level of enthusiasm for a given change initiative so that people become committed to the cause. While acceleration is the reduction of the total cycle time needed for a change initiative, it's accelerating the amount of time necessary for a given change initiative. This would include the analysis, design and implementation phases of a given change. My personal experience in managing change through the utilization of traditional approaches has demonstrated that emphasizing either *engagement* or *acceleration* limits the ability to affect the other. If *engagement* drives the level of commitment for a given change effort, then more people need to be involved. Which means that within the traditional context of change, the cycle time would increase or the degree of *acceleration* would decline as illustrated in the Whole System Deployment Model II (Figure 1).

While the opposite is true if *acceleration* is increased and time is reduced, fewer people can be involved. In many cases this would result in an autocratic dictate to drive the change through compliance which is illustrated with the Whole System Deployment Model I (Figure 2). Peter Senge (1999) describes the fundamental

Figure 1  
Whole System Deployment II (WSDII)



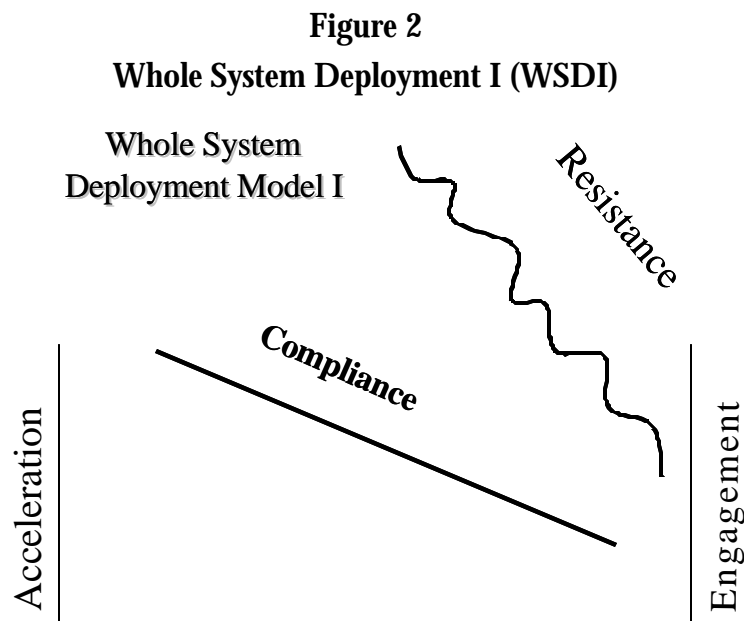
differences between compliance and commitment. He states “the word commitment has become fashionable because it is widely believed that high commitment work environments are more productive, and probably also because many managers feel uncomfortable telling people to comply with management directives.” But the simple fact is that most management-driven change efforts do not operate on commitment, but are instead built around compliance.

While the degree of *acceleration* and *engagement* can be altered from WSDI to WSDII, neither model adequately deals with the field of resistance. WSDII does repel the resistance plane, since the level of commitment is increased. However, the duration of time required in implementing a change often increases frustration and cynicism. Therefore, the level of resistance may initially be reduced, yet resurrected overtime. On the other hand, WSDI will actually enhance the degree of resistance present, causing the field to grow in magnitude and further reducing the likelihood of a successful change initiative. Jacobs (1994, p.17) says, when referring to resistance, that “the effectiveness of small-scale approaches

is inversely proportional to the number of people ultimately affected by any changes being made: the more people affected, the less useful these means are in affecting lasting change. “

I have experienced the various aspects of the *tradeoff dilemma* numerous times; one such example was as a facilitator of a traditional socio-technical redesign initiative of a maintenance department within a major Fortune 100 organization. During an initial planning conversation with the department director, he explained that if he didn’t establish a plan that significantly reduced department cost, while also improving service within the next six months, he would be forced to outsource many of the current activities. Therefore, a team of eight maintenance employees<sup>2</sup> embarked upon a journey to accomplish the following objectives, by creating a department that would:

- Enhance the level of service provided to internal customers.
- Develop an environment of shared ownership for the maintenance function.
- Improve the level of skills and technology across the department.



- Increase the level of internal operating efficiency.
- Improve internal communications.

So the design team rapidly maneuvered itself through the typical Socio-technical Systems processes of conducting operational data review, performing a variance analysis on the current design, benchmarking external maintenance departments, documenting the work order process and reviewing critical customer service data. The team also conducted a major work analysis and maintenance job design scan, which solicited the views of all maintenance employees through the use of surveys.

When a design was finally established, it directly addressed most of the issues from the maintenance job design scan. The new design also validated the objective analysis and reached all pre-establish objectives, with the potential of dramatically exceeding cost reduction targets. It was thought to be mutually beneficial to both hourly employees and management, by improving performance and empowering employees, and the design team visibly promoted it and was extremely enthusiastic about its possibilities. Yet, to our great surprise, the design was ridiculed and criticized during the introduction sessions when presented to employees. One individual from the audience actually stood up and said, "I like the design, but I refuse to be part of this new management façade that pretends to involve us." It seemed as if many employees believed that management persuaded the team towards their conclusions and called it involvement. Ironically enough, the management team asserted that people resisted the design because it forced them to think more. It also became obvious that there was a great deal of resentment as a result of limited involvement across the entire department. With a lack of commitment behind the plan and a growing field of resistance, only parts of it were actually implemented. Even these had to be forcefully mandated, which only

reaffirmed everyone's suspicions. In the end, the only thing that really changed was the level of cynicism and the number of outsourced activities. In their book *Large Group Interventions*, Barbara Bunker and Billie Alban (1997, p.13) claim that "the two major problems with top down change are the amount of resistance that it creates and the time it takes to put the change in place."

### Research Construct

If our machine like, fragmented tactics to changing organizations is flawed, then maybe we need to change the way we change? As a result of my unfulfilled experiences and the constant inquisition of reductionism change strategies, I have been pondering for quite some time about an alternative approach. Then I had the opportunity to sit through a Dannemiller and Tyson Whole Scale™ Change Simulation. It became immediately obvious to me that Whole Scale Change had the potential of offsetting traditional change model limitations. Dannemiller Tyson Associates, claim the processes within an event are designed to help organizations: clarify their current reality and change drivers, shape a vision for the organization they desire, develop action plans that move them toward that future and address information, processes, structures and relationship issues.

At the conclusion of the simulation, I introduced myself to Kathleen Dannemiller, the creator of Whole Scale™ Change, and asked her if anyone had ever conducted an objective study on the effectiveness of the methodology. She responded by saying "no, would you like

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to?” After an obvious response of yes on my behalf she asked, “What are you doing next week?”

I immediately began to outline what such a study would look like and crafted the central question of my research; does the Whole Scale™ Change methodology have the ability to overcome the problematic aspects of the island effect and negate the tradeoff dilemma? My intention was to select an organizational case study and track the success level of a Whole Scale™ experience based on the desired set of objectives. The first step in this process was to conduct an interview with Kathie in which she immediately told me “that won’t work”, referring to my research outline. Upon questioning why, she explained that the knowledge obtained during a Whole Scale™ Change event affects a group’s mindset about their actions—even after the action plans have been finalized. Kathie explained this scenario by saying, she often asks a client “how are things going?” A typical response is “nothing has changed. We haven’t met any of our objectives.” She then says, “So let’s stop the process”, in return the client responds, “no we have to continue with the events”. Her description of this scenario implies that the Whole Scale™ Change process changes the way people see the organization. Therefore success can’t be measured on event objectives alone.

During the drive away from my initial interview with Kathie Dannemiller, I remember thinking to myself this scenario was self-serving, since it proactively prevented the claims of failure. As a researcher, I knew that I had to remain objective and therefore had to be skeptical of such assertions. However, after much contemplation, the conversation did challenge me to reevaluate my initial construct. By limiting the study to an objective review of the desired outcomes I could potentially miss some critical data. In hindsight, this conversation proved to be pivotal to my study. Had I not broadened my research construct, I

would have lost much of the richness of the Whole Scale™ Change experience.

Ultimately, I chose a research construct that included both qualitative and quantitative data, with a balanced blend of data collection tools being used. The primary collection vehicles included event observations, participant interviews, non-participant interviews, structured surveys, internal surveys and objective performance evaluations. Over 150 people were interviewed either one on one or during one of the 20 focus group sessions. The utilization of multiple approaches was necessary so that the study would consider both the breadth and depth of a Whole Scale™ Change initiative. In order to evaluate the methodologies success, I considered (1) business performance (2) event objectives or action plans and (3) individual change.

By definition, this was a summative study that focused on the effectiveness of the Whole Scale™ Change methodology. Michael Patton (1990, p. 155) states, “Summative evaluations serve the purpose of rendering an overall judgment about the effectiveness of a program, policy, or product for the purpose of saying that the idea itself is or is not effective and therefore, has the potential of being generalizable to other situations.” Therefore, my intention wasn’t to definitively conclude the effectiveness of Whole Scale™ Change in specific situations, but to simply begin this exploration. For this reason, I designed a research construct that examined three organizational case studies. To enrich the findings of these cases and to enhance the potential for future generalizations, I applied a triangulation research design. With a limited number of case studies, the richness

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of the data becomes the essential component in determining validity and usefulness.

“Triangulation is a powerful solution to the problem of relying too much on any single data source or method, thereby undermining the validity and credibility of findings because of the weaknesses of any single method. Using triangulation is recognition that the researcher needs to be open to more than one way of looking at things” (Patton, 1990, p. 193).

While each of the three case studies was a unique study unto itself, the findings for each of the three cases did follow a similar format:

- Organizational context
- Event observation
- Post-event review

Organizational context focused on the primary aspects of the organization itself. It included such elements as the management style of leaders, the primary business, the total number of employees, the key departments or divisions and the general organizational structure. It also focused on the desired outcome of the event, such as the vision, values and objectives. There was not a great deal of emphasis placed on this component. It was simply used to lay the groundwork for each case. The event observation segment was a central component to all three case studies. The primary focus of this component was to collect some data on the event design, the dynamics of the experience and the review of evaluations. The single most critical component of the research was the post-event observations. Since this was a summative study, post-event observation was essential in determining the level of effectiveness of the Whole Scale™ Change process. This primarily included a review of event literature, key interviews, focus group sessions, survey results and objective performance reviews.

Each case was quite unique to itself. For example, case 1, which was a large state government organization, was actually a one-

year reunion session. The follow-up event included over 570 employees. As a typical state government agency, the case organization operated with a tradition top-down structure and individual divisions operated in isolation of one another. Big picture outlook was limited and most divisions focused on sub-optimization within their own businesses. There was a constant focus on improving unit operations without a clear understanding as to how the improvements connected with overall performance.

The second case was also a large state government organization with a total population of nearly 4,000 employees. The purpose of the Whole Scale Change™ process, in which 260 people participated, was to assist the organization in establishing a better understanding of environmental trends and employee needs so that the strategic plan could be renewed and organizational actions determined.

The third case study was a major publishing organization with an employee base of about 1,300 individuals. The intention for the Whole Scale™ Change process, which included over 1,100 employees, was to work together towards a unified purpose, demonstrate desired behaviors, encourage risk taking, delegate to others, listen to all ideas, and focus on both short-term success and long-term prosperity. There were three sessions that built upon one another. The focus for the first session was on determining the internal needs and creating the strategic plan, while the focus on the second session was more specific to external issues and refining the strategic plan. The third and final session focused less on the strategic plan itself and more on the actions necessary to achieve it.

### **Focused Findings**

There were two different dimensions of findings from this research, those findings that I set out to explore (the focused findings) and



those findings that were unintended, or the emerging aspects of my research. With respect to my central research question, does the Whole Scale™ Change methodology have the ability to overcome the problematic aspects of the island effect and negating the tradeoff dilemma, I have come to believe that the following change formula is accurate.

$$\text{Success} = (\text{Acceleration} \times \text{Engagement}) - \text{Resistance}$$

The change formula for success actually contradicts the tradeoff dilemma. That is, Whole Scale Change does create the necessary space to enable system members to share information, which creates the capacity for system wide change. Therefore, establishing the capacity to negate the tradeoff dilemma and island effect. In essence, this formula assumes that you can accelerate change while increasing engagement simultaneously. As represented in the illustration Whole System Model III (Figure 3), this is accomplished by relocating the fulcrum point of the engagement and acceleration tradeoff. Only then will the field of

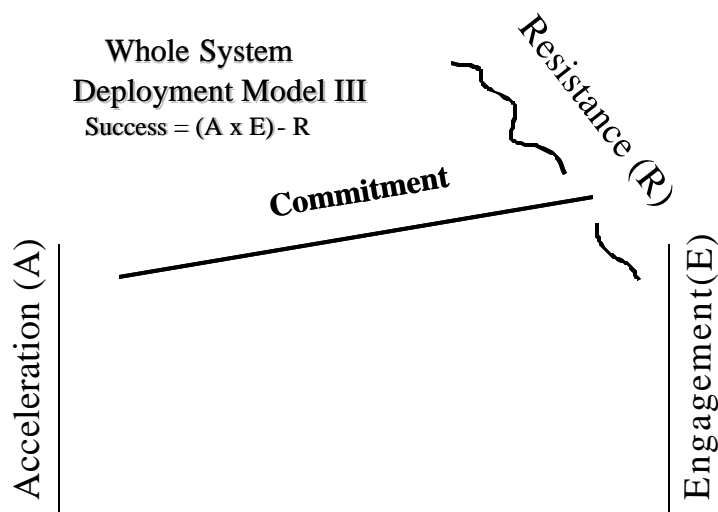
resistance be adequately penetrated.

The Whole Scale™ Change event enabled employees to be more involved than traditional change management approaches, therefore reducing resistance. One person said, “I have a personal stake in the strategic plan that I didn’t have before”. It generates a high degree of ownership, enthusiasm and energy; which creates the capacity to overcome the limitations of traditional change methodologies. Therefore, trading in the tradeoff dilemma. Or as one individual said, “it’s too big of a splash not to have a significant impact.”

### The Emerging Aspects

The emerging aspects of my research weren’t only a surprise to me; but they were also transparent to the case study organizations. That is, not even the studied organizations identified the findings. For example, the overwhelming response to the initial question (Please describe your experience with the Whole Scale™ process? What was it like? What has happened since?) was that the “conferences were very good, but nothing has changed.” The conversation would

**Figure 3**  
**Whole System Deployment III**



*The most frequently mentioned, and maybe the most significant impact of Whole Scale™ Change is its ability to shatter the traditional organizational boundaries.*

then turn into a venting session, beginning with why the momentum hadn't sustained itself and ending with debate on the topic of inadequate compensation. It was only after the participants were able to express their frustrations that I would actually begin to hear the exceptions to the "nothing has changed" generalization. This transition occurred more rapidly with some of the groups, but virtually every session began with some degree of venting that would slowly transition into a discussion about the actual

changes. People were often unaware of the changes that had occurred until they were reconnected with their peers. Stated a different way, people didn't know, what they didn't know. As the focus group conversations evolved, the successes became more apparent. A person would say something like cross-department teamwork has improved since the conference or communication has improved. At the

conclusion of one such conversation an individual responded by saying "I was pleasantly surprised upon reviewing the information as to what has really happened. There were improvements that were both directly and indirectly related to the conferences."

The direct benefits didn't appear to be the most substantial findings, that is, the indirect benefits demonstrated the greatest impact. As one person said, "The most substantial part was the experience itself and its impact on individuals, not the action plans or event objectives. The conference was an eye opening experience." While there was some anecdotal evidence that desired event outcomes had improved and some core measures showed positive trends, it was difficult to isolate these

changes to the Whole Scale™ Change process. Many of these improvements were minimal and could simply have been a result of chance. This connection was complicated by the fact that measures didn't directly align with the desired outcomes.

However, the correlation was significantly tighter with the emerging aspects from the research, which include:

**1. Across the Fence Talk** – The most frequently mentioned, and maybe the most significant impact of Whole Scale™ Change is its ability to shatter the traditional organizational boundaries. As these walls crumble, the space begins to open and individuals are enabled to truly share. That is individual-to-individual, workgroup-to-workgroup and division-to-division. One person said, "we are much more aware of the other departments struggles so we are more willing to help them."

Hearing from employees in different divisions and departments helped to expand previous perspectives, open the lines of communication and explore new opportunities for working together. One person said, "It has brought us together on a personal level and helped us to appreciate one another." The most frequently stated benefit from the evaluations was the events ability to create interaction between various levels and functions. This particular item was mentioned over 300 times (see Exhibit 4) during the content analysis of the cases. Another person said, "barriers are breaking down and people are working together." It created an understanding of what the others do and how they can better support one another. During one of the events, two frontline employees from different departments were able to resolve a contentious interdepartmental problem by simply talking it through. Many of those interviewed felt that the interactions that occurred during the events were critical. An example that was frequently cited during one case study was the concept of holding open houses. During the conference it became

## Exhibit 4 Greatest Benefits

Greatest Benefit?	
Interaction with other groups	303
Demonstrated leadership commitment	85
Opportunity to be heard	75
Learning about the organization	59
Clear understanding of direction	48
Created a hope and enthusiasm	39

apparent that employees of the newsroom department were perceived as arrogant by the rest of the organization. One employee reinforced this by saying, "I am not a reporter, and therefore, I must not exist." In response to these assertions, the newsroom decided to facilitate an open house, in which employees from other departments were invited into the newsroom to learn about the various activities that take place on a daily basis. Many employees viewed open houses as a vehicle to breaking down some of the perception barriers discovered during the conference and felt as if it was a great first step. Newsroom employees claimed that they were unaware of the significance of such perceptions and many of them claimed to be more conscious of their own behaviors when interfacing with other departments since the event.

**2. Emotional Change Precedes Performance** – The largest disappointment of this research may have been the lack of conclusive objective performance improvements. While there was evidence of measurable change, it was difficult to make a conclusive connection to the Whole Scale™ Change process. However, such a direct

connection could be established to emotional change. In each case, significant emotional changes were cited during the reviews. As one person stated it, "the 260 of us will never be the same again". Most claimed that it was a worthwhile experience in generating better working relationships with other departments and that communication barriers have broken down. Certainly people felt more involved and excited then prior to the events. During focus group sessions, individuals often pinpointed emotional change as the most significant outcome of the Whole Scale™ Change process. One person said, "it provided us with the burst of energy necessary to mobilize us."

One of the most beneficial aspects of the conference was its ability to include and connect the whole system. For example, one organization decided that they wanted to drive employee empowerment and customer focus, the conference acted as a tool to engage employees in the planning process. Therefore, the message was delivered from both employees and management. It was delivered not just on an intellectual level but also emotionally and a sense of pride and ownership seemed to resonate throughout the group. People were excited about being part of this experience. Individuals believed that this experience was truly unique, since it involved employees from various levels and divisions and encouraged open communication. At the conclusion of the session there was a very high degree of optimism about moving forward.

When provided with the appropriate amount of time, these emotional changes appeared to translate into objective performance improvements. Each case study generated

*During focus group sessions, individuals often pinpointed emotional change as the most significant outcome of the Whole Scale™ Change process.*

some measurable improvements since the conference, however the organization that conducted their first Whole Scale™ Change conference 25 months prior to my review showed some substantial improvements. Once again, as a researcher I could not assign causation to the event. However, many of those questioned viewed the event as a significant catalyst to these improvements and cited the emotional impact of the conference.

**3. Enhanced System Awareness** - A significant impact of the process is its ability to enhance the level of organizational awareness. That is, the awareness of the organizational strategy, other group's needs and struggles, the need for change, as well as each individual's role within the larger organization. People learned things they never knew about the broader organization. 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 pre-conference organization, he said, "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 one question that proved to be statistically significant on the pre and post surveys was "I have a clear understanding of the company's strategy" (Exhibit 5). Based on these results alone, it was clear that the system as a whole had enhanced its understanding of the organizational strategy.

### Exhibit 5

#### Two-Sample T-Test with alpha = .05

I have a clear understanding of the companies strategy

	N	Mean	StDev	SE Mean
1999	86	3.08	1.14	0.12
2000	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

**4. Creating Connections** – Almost everyone interviewed felt that the interactions that occurred during the events were critical. Some said that it brought employees together on a personal basis, creating ongoing relationships. While others believed that it acted as a platform for the creation of a shared purpose and was great start in building the foundation for future actions. As one individual stated it, "it's very positive to hear people from other groups saying the same things that I have been saying and thinking. I think this is an important first step." The shared purpose continued to act as a unifying force long after the event. People felt like it took on a life of its own and it brought employees together on a more personal basis, creating ongoing, productive relationships. Many said that it wasn't uncommon for an employee to speak out, as a result of the conference, when another employee would become entrenched on serving their own purpose. As one such story goes, a Hardware Analyst refused to help another employee with a specific problem, referring to the internal policy for requesting assistance. The employee in need responded by saying, "remember the conference" (referring to the need for employees to support one another in achieving the vision). Immediately the Hardware Analyst recognized

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the urgency of the situation and its importance to the greater vision, and therefore assisted with the problem. These events seem to create an invisible force that guided behavior and supported the shared purpose of the greater system. One person said, "after the conference, I was able to refer to it and then turn people loose. Having experienced it, they understood what they needed to do and how they could help others. It was as if the common purpose had come alive. It was invaluable in striving towards internal customer service." After establishing the shared purpose, it acted as a force that continued to bring people together long after it was over. People understood why they were doing what they were doing. Therefore, agreements came much more rapidly since it was connected to the shared purpose. People began to challenge themselves by shifting focus from what is typical, to what is meaningful.

**5. Enhanced Level of Courage** – The Whole Scale™ Change experience seemed to generate a much greater level of individual courage. Individuals were willing to take a stand, now that they had clarity around purpose. The risks associated with these stands seemed to be minimized. During the post event evaluations, I was told of a powerful illustration of this. An article, with what was perceived to be an offensive picture, was sent to press at the newspaper. The pressmen refused to run the picture in its current form. Saying that they found it to be offensive and therefore many subscribers would, as well. As a result to this disturbance, upper management got involved and the story was revised. One employee later wrote,

"before 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!"

While this may seem like a simple illustration, to literally "stop the press" took a great deal of courage from the pressmen. They faced scrutiny from management and placed the critical delivery deadline at risk. It isn't because things are difficult that we back down, it's because we back down that things are difficult. As a result of the event, individuals started to bring more than just problems to the table, they offered solutions. Or they took a stand for the common purpose.

**6. Multiple Deployment Approaches** – One of the specific issues I was interested in as a researcher was creating clarity around effective deployment approaches. However, just as there were varying degrees of success as a result of the Whole Scale™ Change process, there were also multiple approaches of deployment used. No one approach appeared to be more significant than any other. For example, one division utilized a traditional project team approach, while another relied on self-initiative with comparable levels of success. A few groups actually used elements from the Whole Scale™ Change methodology itself, as part of the deployment process. No one of these approaches proved to be immensely more beneficial than any other.

The one thing that was consistent across all three case studies was the level of frustration during the deployment process. It proved to be a great challenge to transfer the experience back to the daily work environment. One of the most significant obstacles was to translate the experience back to the non-participants. There did appear to be a limited carry over effect, but this proved to be a very difficult on-going challenge. This, along with an ill-defined follow

through process resulted in an increased level of frustration. In every case the level of energy dissipated to some degree across time. One person said, "it was like dressing each of us up to go to a party and then canceling it at the last moment."

While no one significant deployment approach stood out, there were three primary elements that appeared to be useful. They included: leadership modeling, progress reports and re-connection.

**Leadership modeling** – After the dramatic experience of the event people stepped back and waited for the morning after. They ask themselves what will be different and all heads turned to leadership. One person stated, "the leadership group has taken the risk of sticking their necks out on the line and now people are waiting to see if they will follow through." Leadership had to lead with the common purpose.

**Progress reports** – People want to see the changes occur; they want to know that this really was something different. This doesn't mean there has to be immediate results, just some actions of progress. Many employees were frustrated about not hearing about the broader initiatives, they were curious as to what was happening. Absent this information, they assumed the worst – nothing has changed. One person said, "you can create a great deal of enthusiasm, but if you don't follow through you will do more harm than good."

**Reconnection** – One of the most beneficial ways to dealing with this is through reconnecting on a periodic basis. These reunions can be large scale or small-scale events, it really didn't seem to matter. The key is that people reconnect to discuss what has happened. People don't know what they don't know and simple dialogue between representatives of the larger system generated a great deal of awareness around progress. Amazingly, during the focus group sessions, people would discover many things that they didn't realize had taken place.

In order to understand systems; we must focus our attention on the whole, versus the parts. Traditional change approaches are incapable of accommodating this need. However, based on the presented findings, I believe the methods incorporated within Whole Scale Change create a greater understanding of the whole system.

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- 1 The composition mixture was made up of various raw materials at multiple cost. By minimizing the amount of the most expensive material, the team was able to significantly reduce overall cost.
- 2 The team included 4 hourly and 4 salary employees.

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