IST 621:
INFORMATION MANAGEMENT & TECHNOLOGY

Modules 1, 2, 3 - Portfolio Assignment

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Introduction to Change Management

In today's fast-paced, technology-driven environment, strategic change management planning become an essential focus. As organizations increasingly face constant change through digital transformation, economic pressures, or market competition, the ability to effectively manage change determines not only their survival but their success. Where innovation and technological evolution are rapid in Information Technology (IT), change management forces companies to implement new systems, adapt to modern tools, and align their workforce with the ongoing demands of the digital age. Change management, at its core, requires planning, implementing, feedback and reinforcing new business strategies and processes. Relying heavily on leadership, employee engagement, and strategic communication from top to bottom to navigate both expected and unforeseen challenges, making it a key factor in the success of any transformation initiative.

My portfolio explores these concepts in change management, particularly within the IT sector, focusing on digital transformation, organizational strategy alignment, stakeholder analysis, and the critical role of change agents. Emphasizing the important role of change agents, individuals responsible for driving change, and how they combat resistance, influencing stakeholder engagement, and ensuring the successful execution of organizational objectives. By examining these elements, the portfolio offers a comprehensive understanding of the multifaceted nature of change management. I identify several key areas and strategies for continuing to improve both my change management skills and the portfolio itself. For example, the continuous application of change management models such as Kotter's 8-Step Model and Lewin's Change Management Model in real-world scenarios. By incorporating more detailed reflections on how these frameworks play out in various situations, especially those that involve resistance to change or unexpected challenges, I can gain deeper insights into managing complex organizational shifts. Additionally, improving my data-driven approach to tracking the success of change initiatives and using more advanced metrics will help in making informed decisions that guide future change efforts.

Throughout my portfolio, my personal experiences at Square are used to contextualize these theories, offering real-world insights into the complexities of managing continuous change. At Square, constant reorganizations, technological shifts, and the drive for innovation present challenges that require not only strategic vision but also effective change leadership. In this case, the change management process becomes even more vital, as rapid changes in code development, testing processes, and workforce management impact the organization's overall performance and morale. By integrating both theory and practical application, this portfolio aims to provide information managers with the tools needed to navigate the intricacies of organizational change. The ultimate goal is creating environments of continuous learning and adaptability, empowering leaders and employees alike to embrace and successfully manage change within their organizations.

Module 1:
IT - Enabled Digital Transformation, Strategy, and Change

1.1 Digital Transformation

- ### What is digital transformation? Why is it important? What is transforming?

Digital transformation involves adapting, integrating, and advancing digital technology within the private and public sector to ease workloads, speed up production, enhance productivity, minimize human error, and improve connections with its users. If successful, digital transformations can streamline operations, automate tasks like invoices and timesheets, and create more flexibility and collaboration between employees, such as enabling remote work through instant messaging and video chat. This important technological progression can improve customer care and purchase options in addition to enhancing overall efficiency and operational flexibility for employees.

Driven mainly by the need for competitive change and customer expectations, businesses feel pressured to be faster and more efficient by aggressively adopting and integrating digital technologies. When implemented correctly, this can be beneficial for all users both inside and out of the business; however, it can also be costly if mistakes need fixing. As a digital immigrant, I understand how both digital natives and analog natives can struggle to adjust to change while working together. Digital natives, having grown up with technology, may quickly adapt to new digital tools but sometimes overlook the importance of foundational knowledge and patience with less tech-savvy colleagues. Analog natives, on the other hand, bring valuable experience and a deep understanding of traditional processes but may find it challenging to keep pace with rapid technological advancements. Bridging this culture gap requires fostering an environment of mutual respect, continuous learning, and open communication. It involves recognizing the strengths each group brings to the table and encouraging collaboration that leverages diverse perspectives and skills. This approach helps create a cohesive and adaptable workforce capable of navigating the complexities of digital transformation together.

Make it real!

At my current company, Square, we are currently navigating another round of digital transformations with Network IT integration[1], attempting to balance documentation across three platforms: Notion, Google Docs, email and Jira's Confluence. This fragmentation often results in lost, stale, or outdated information, with rare instances of people linking old documents to new ones. Missing information means risking the loss of important code, workflows, hardware specifications, and crucial lessons from past mistakes (assuming they were documented correctly in the first place). A lack of a single source of truth can lead to unnecessary reinvention of the wheel and an employee's valuable time spent looking for information that could have been improving their current responsibilities.

The shift to being 100% remote has added layers of complexity while collaborating with coworkers. To compensate, we rely heavily on technology to communicate. Email, once the mainstay, now feels delayed and outdated waiting on coworkers to shift through threads looking for a mention of their name. Slack has been introduced for instant messaging, but it has become yet another documentation platform, forcing employees to search through four or five different platforms for answers and information. To address this, Square developed an all-in-one internal search tool at our company, however, it often feels like we should have focused on creating our own customizable documentation platform instead.

One positive aspect is that this documentation issue is common across many companies, leading to the development of more plugins and tools for better integration. As a QA engineer, I've learned that digital transformations are never truly complete, like the Confucian/Taoist theory of change leadership[2]. After launching something internally, patches, upgrades, and changes—often driven by new employee needs or a CEO's sudden decision—require constant adaptation, regardless of whether these changes seem logical or functional. AMPS technologies can be very costly requiring learning new skills and often large capital expenditures.[3] Sometimes, you have no choice but to pivot to new technology, which means not only learning it yourself but also teaching your

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[1] McAfee, A. (2006, November 1). Mastering the Three Worlds of Information Technology. Harvard Business Review. https://hbr.org/2006/11/mastering-the-three-worlds-of-information-technology
[2] Palmer, I., Dunford, R., & Buchanan, D. A. (2016). Managing organizational change: A multiple perspectives approach (3rd ed., p. 45). McGraw-Hill Education.
[3] Marchand, D. A., & Wade, M. (2014). Digital business transformation (No. 41). PfM, IMD Faculty.

company how to use it. This continuous cycle of adaptation and learning is a fundamental part of digital transformation.

1.2. Digital Transformation and Strategy

- What drives digital transformation? IT or strategy? (Provide an argument for both positions.)

Strategy and digital transformation have always been intertwined, with each dependent on the other as Information Technology (IT) often drives what strategies are achievable, and in return, strategies can drive IT change, creating innovative products and services. It can be argued that IT is the primary driver of digital transformation because it provides the systems to coordinate information, the platforms necessary to implement changes, and the tools to drive innovation. As an enabler of transformation, IT infrastructure can streamline operations internally and externally within a company, improve customer experiences, and provide data-driven insights crucial for staying competitive in the digital age.

Nicholas Carr, in 2003, argued that “what gives it the capacity to be the basis for a sustained competitive advantage—is not ubiquity but scarcity.”[4] Carr took an outside-in approach, believing IT doesn’t have strategic value because it has become available and affordable to all. However, this perspective overlooks the critical role that strategy plays in harnessing the potential of IT.

A clear strategy outlines the goals, priorities, and roadmap for leveraging technology to achieve business objectives. Strategy ensures that digital initiatives align with the overall mission and values of the company, focusing on creating value for customers, optimizing processes, and exploring new business models. Without a strategic framework, even the most advanced IT solutions can fail to deliver meaningful results. Strategy defines the direction and scope of transformation, ensuring that technology investments are purposeful and aligned with long-term goals.

In conclusion, while IT provides the capabilities and tools necessary for digital transformation, it is the strategic vision that directs these capabilities toward meaningful and impactful changes within an organization. Both IT and strategy are interdependent, and their alignment is essential for successful digital transformation.

- How do you go about sensing digital transformation, seizing opportunity, and transforming an organization?

[4] Carr, N. (2003, May). IT Doesn’t Matter. Harvard Business Review. https://hbr.org/2003/05/it-doesnt-matter

To effectively sense digital transformation, seize opportunities, and transform an organization, it is crucial to engage in continuous monitoring, foster a culture of creative design, and actively engage with customers. Sensing begins with understanding your current and target market's needs by tracking trends, identifying changes in relevant markets, and customer behaviors using advanced analytics tools to gather real-time data and insights. Creating channels for open communication and collaboration fosters a culture of innovation, encouraging employees and customers at all levels to share insights, ideas, and feedback. Hack weeks and innovation labs with small cross-functional teams dedicated to exploring new technologies and business models can dismantle silos that often result in strategic stagnation, leading to more integrated and groundbreaking solutions.

Environmental scanning and market analysis to sense and shape opportunities and threats is also essential to organizations. Contacting customers, conducting competitive analysis, and engaging in beta testing are practical steps. Identifying change without taking advantage of it means missing out on value-capturing principles. Therefore, building the capacity to sense and seize these opportunities is vital. Managers must be adept at sensing changes in the environment and the ecosystems they operate in to identify and capitalize on emerging opportunities effectively. Seizing opportunities involves capitalizing on identified leads, where organizations must consider new customer segments, target markets, and the value propositions needed to address these potential avenues. This capability requires strategic resource allocation, mobilizing resources, and making investments to develop new products, services, or business models.

Transforming an organization involves turning ideas generated during the sensing phase into business realities by adopting new innovations, embracing trial and error through intelligent failures, and taking proactive steps to address market changes and leverage emerging trends. This approach ensures that organizations remain dynamic, competitive, and capable of capturing and creating value from new opportunities. To be successful, an organization needs to be flexible in adapting to changes and ensure employees are aligned with new strategic directions, allowing the company to pivot swiftly in response to evolving conditions. Embracing a culture of continuous learning and improvement, regularly updating skills, technologies, and processes is essential. The ability to continuously renew and realign operations and business models is crucial for maintaining competitiveness in a rapidly changing environment.

In summary, effectively sensing digital transformation, seizing opportunities, and transforming an organization requires flexibility, continuous learning, and proactive adaptation to maintain competitiveness and capture new value in a rapidly changing environment.

Make it real!

- Based on the readings, how could you do a better job sensing, seizing opportunities, and transforming your organization?

Square provides payment processing hardware and services as crucial components of its business model. The strategic value of the business is heavily reliant on cloud-based payment processing services creating its partnership for value while designing stylish portable point of sale systems. In the beginning, Square was innovative by creating small portable payment processors in a world transitioning away from cash to more digital payments. A similar lesson was learned by Mastercard taking on cash when their adaptive ecosystem partnered with Transport for London (TfL), creating an innovative contactless payment solution, enhancing the convenience and efficiency of digital payments.

Focusing on more sophisticated data analytics tools to gather and analyze real-time data from our users would give a better sense of the transitioning digital payment market. Customer feedback is often limited to a vocal minority, creating gaps in user knowledge. Utilizing extensive data collection similar to social media algorithms would help identify the most and least used features of our products. Employing AI to create user stories based on this data would save time and generate Ideal Customer Profiles (ICP), providing detailed descriptions of the types of customers that sales and marketing efforts should target. Additionally, identifying gaps in markets that need quicker transaction solutions due to cash-only payments could inform new strategies.

To seize opportunities, I would advocate for a return to Square's startup roots, fostering a culture of innovation and agility. Implementing more agile "tiger teams," hosting additional hack weeks, and conducting aggressive A/B and beta testing with customers would leverage market feedback loops to adjust and enhance products before full funding and launching. Seeking out startups with technological advancements that address customer needs would also be beneficial if development time is a constraint. Using key performance indicators (KPIs) to measure progress, including progression and kill rates and projected revenues, would help determine which products are achieving significant market impact.

Fostering employee development at Square by offering training programs to upskill in emerging technologies such as AI and data mining is crucial. Encouraging employees to dedicate 10% of their time each week to free experimental projects will stimulate creativity and break up the mundane and repetitive tasks that often bore employees. This approach allows individuals to explore new ideas and innovations, injecting fresh energy and enthusiasm into their work. By allocating time for experimentation, Square can create an environment where employees feel empowered to think outside the box and pursue passion projects, ultimately leading to increased job satisfaction and a more dynamic workplace.

Hosting regular Ask Me Anything (AMA) forums with Block wide executive teams will empower staff by fostering open communication and transparency. These forums provide employees with direct access to leadership, allowing them to ask questions, voice concerns, and gain insights into the company's strategic direction. This level of engagement helps to break down hierarchical barriers, making employees feel valued and heard. The isolation caused by remote work has underscored the need for in-person "meet weeks," which can foster better trust and a positive social climate at work. In addition to AMAs, in these gatherings at Square can help rebuild connections, enhance teamwork and allow for more collaboration.

Based on these strategies, Square can enhance its ability to sense market shifts, seize new opportunities, and transform its organization to maintain a competitive edge in the digital payments industry. By fostering a culture of continuous innovation, open communication, and employee empowerment, Square will be well-positioned to adapt to emerging trends and drive long-term success.

1.3. Types of Change

Build your own framework. For instance:

1. Start with Lewin's simple stage model (unfreezing → moving → refreezing).
2. Flesh out those three steps by drawing on the other readings (e.g., Kotter, Marchand).
3. What does Orlikowski's improvisational perspective add?

- Apply your change model to analyze your own change experience or one of the cases.

Organizational changes driven by internal and external forces—including developmental, transitional, transformational, strategic, technological, and cultural shifts—are crucial for digital transformation as they enable the company to adapt, innovate, and remain competitive in an ever-evolving digital landscape. These changes ensure that the organization can effectively leverage new technologies and strategies, fostering a culture of continuous improvement and agility.

Building my own change framework I would use Lewin's simple stage model (unfreezing → moving → refreezing)[5] to provide structure. Needing a solid strategy with vision creation, urgency and coalition building, I would borrow from Kotter's Eight-Step Model[6] integrated with Marchand's[7] focus on continuous learning and information management. Orlikowski's improvisational perspective reminds us how to be adaptable to adjustments and to expect unforeseen challenges.

When Square downsized to 12,000 employees[8] to begin its transitioning to one point of sale app, it faced significant challenges. Applying my change model, which combines Lewin's stage model (unfreezing → moving → refreezing), Kotter's Eight-Step Model, Marchand's focus on continuous learning and information management, and Orlikowski's improvisational perspective, provides a comprehensive analysis of these

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[5] Orlikowski, W. J., & Hofman, J. D. (1997). An improvisational model of change management: The case of groupware technologies. Sloan Management Review, Winter 1997. Massachusetts Institute of Technology, Sloan School of Management. http://ccs.mit.edu/papers/CCSWP191/CCSWP191.html

[6] Kotter, J. (1995). Leading change: Why transformation efforts fail. Harvard Business Review. https://hbr.org/1995/05/leading-change-why-transformation-efforts-fail-2

[7] Marchand, D. A., & Wade, M. (2014). Digital business transformation (No. 41). PfM, IMD Faculty.

[8] Heater, B. (2024, January 30). Block becomes the latest fintech to lay off workers. TechCrunch. https://techcrunch.com/2024/01/30/block-becomes-the-latest-fintech-to-lay-off-workers/

challenges. In the Plan phase (unfreezing), the lack of a clear strategy created fear and morale issues among employees. To improve, Square could have leveraged Kotter's steps of creating urgency and building a coalition, establishing a clear vision early on to reduce fear and uncertainty instead of announcing 6 months earlier a half-baked reorganization plan. During the Execution phase (moving), the CEO's premature product announcement of "a single app for all sellers" caused additional internal chaos, urgency and misalignment. Effective communication of a strategic vision would have ensured coordinated efforts. The Review phase, which should emphasize continuous learning and adaptation, was hindered by ongoing reorganization and employee departures. Fostering an environment of continuous learning, as emphasized by Marchand and Orlikowski, would have allowed for timely adjustments. In the Adaptation phase (refreezing), thorough testing and refinement were impacted by premature announcements and reorganization. Adopting Kotter's steps of generating short-term wins and consolidating gains, and ensuring full comprehensive testing with code complete products before public commitments, would have solidified new practices. Overall, Square's experience underscores the importance of a structured change model that incorporates clear planning, execution, review, and testing phases, with a focus on communication, continuous learning, and adaptability.

1.4. Change and IT

- What role does IT play in digital transformations? Is IT change different from general business change? As you outline your position you may want to cover both:
    1. The general role of IT in digital transformation
    2. What parts of the change process does IT play a role?

IT plays a pivotal role in various aspects of digital transformation by aligning technology with comprehensive organizational growth strategies, driving innovation, and enhancing customer experience, which can propel business growth as a whole. IT change primarily focuses on the integration of advanced technologies within an organization, optimizing operations by streamlining processes for increased production[9] and improving the decision-making processes. General business change focuses on the people and organizational processes. Both types of changes can work together to achieve successful transformational outcomes.

Marchand highlighted that digital transformation is a continuous journey rather than a one-time event, emphasizing that there is a "gap is caused by organizational behavior barriers—not simply because change is painful but also because companies struggle to implement digital technologies in a way that materially improves performance."[10] This underscores the importance of addressing organizational culture and behavior to effectively integrate and leverage new technologies for substantial improvements.

The only predictable aspect of a business is constant change, which necessitates agile and adaptable employees who can embrace and drive these transformations. Digital transformation, in particular, is a continuous journey that extends beyond mere technological upgrades, requiring a strategic alignment of IT with organizational goals and processes. Success in this dynamic environment depends on fostering a culture of adaptability, continuous learning, and collaboration.

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[9] Markus, M. L. (2004). Technochange management: Using IT to drive organizational change. Journal of Information Technology

[10] Marchand, D. A., Wade, M., & Piskorski, M. J. (2015). Digital Business Disruption: Creating Opportunities, Defending Against Digital Disruption. IMD.

Make it real!

- Analyze your own or other cases drawing on Markus' technochange lifecycle models or Marchand's digital transformation framework.

When I first started at Square in 2016, our work environment was predominantly office-based. Slack was not widely used because in-person meetings and direct communication with coworkers were the norm. However, the onset of the COVID-19 pandemic necessitated a significant shift in how we collaborated. Recognizing the need for a robust communication platform, we initiated the integration of Slack to replace long email threads and facilitate better remote collaboration. This phase involved understanding the broader organizational context and how Slack, as part of the Advanced Modular Platforms (AMPS), could enhance our communication strategies. The pandemic created a critical requirement for commitment planning to foster better collaboration among remote teams. This phase involved securing the necessary resources, stakeholder buy-in, and establishing governance structures to support the transition to full-time remote work. We ensured that everyone was on board with the new tool and understood its potential to maintain productivity and connectivity.

Our IT team played a crucial role in ensuring the smooth rollout of Slack, troubleshooting issues, and adapting to the varying environments of our now-remote workforce. Training sessions were conducted to help employees get acquainted with Slack's features and functionalities, ensuring they could leverage the platform effectively for their daily tasks. As the world slowly started to spin again, so did our heads with adjusting to a new norm of a lack of personal boundaries.

As we transitioned to full-time remote work, continuous monitoring and feedback loops were essential. Slack proved to be a valuable tool, but it also blurred the boundaries between work and personal life, with instant communication being just a phone notification away at all hours of the day. To address this, we made several adjustments based on user feedback. For instance, we took advantage of the "working hours" feature to pause notifications, bookmark to come back to and required full names instead of nicknames to maintain professionalism as the company grew. We also implemented stronger oversight on private Slack channels to ensure proper usage and security with third party users.

Through continuous improvement and feedback, Slack evolved to better meet our needs. We integrated and automated notifications from other products like Jira and App Store reviews, and even enabled changing Google Docs permissions directly from Slack. These integrations streamlined workflows and enhanced productivity, allowing us to realize the full benefits of the platform. Today, Slack has become an integral part of our communication strategy, supporting our growth and enabling effective collaboration. The continuous improvement and integration efforts have allowed us to maintain a dynamic and responsive communication environment, crucial for our success in a post-pandemic world.

Module 2:
Diagnostics/Analysis/Contextual Knowledge

2.1 Modeling Organizations and Work + Critique 1

- How can models help our effort to sense, seize opportunities, and transformation organizations?
- Briefly outline two to five models covered in the readings. Steve Alter's work system framework should be one of them. Discuss their strengths and limitations. Support your argument with case examples from your own experiences or the readings.

The Six-Box Model and the 7-S Framework[11] are both crucial tools for understanding different aspects of organizational functioning, each offering unique strengths and limitations. These models help organizations understand how to adapt their strategies based on senses of environmental changes, seize opportunities, and transform by providing a structured path to identify and manage interdependencies, streamline processes, and set clear priorities with a strong strategy. They simplify complex situations by defining the big picture and simultaneously focusing on critical details. By analyzing the current state, forecasting potential changes, and planning strategic responses, models create guardrails for effective decision-making within an organization.

Marvin Weisbord's Six-Box Organizational Model examines six key areas—purposes, structure, rewards, helpful mechanisms, relationships, and leadership. This model is particularly useful for diagnosing internal organizational issues by highlighting leadership at the center and emphasizing the interconnectedness of these elements. Its strength lies in its straightforward approach and its ability to simplify complex organizational dynamics into manageable parts. However, its simplicity can also be a weakness, as it may not capture the full complexity of larger, more intricate organizations as well as external influences such as culture movements and market shifts.

[11] Palmer, I., Dunford, R., & Akin, G. (2017). Chapter 4. In Managing organizational change: A multiple perspectives approach (3rd ed.). McGraw-Hill Irwin.

In contrast, the 7-S Framework, created by Waterman, Peters, and Phillips, looks at seven elements—structure, strategy, systems, style, staff, skills, and superordinate goals (shared values). This model prioritizes shared values and underscores the interdependency of all organizational elements. The 7-S Framework is particularly effective in ensuring that every aspect of the organization aligns with its strategy, making it highly relevant for organizations where strategic alignment is crucial. However, its complexity can be a drawback, as the perfect alignment and interdependency of all elements are difficult to achieve and adapt to changes that arise. If one element is misaligned, it can disrupt the entire system.

Steve Alter's work system framework is a flexible tool that teaches us how to analyze, create, and improve processes within organizational systems. The Work System Method (WSM) focuses on the inner dynamics and synchronicity between people, processes, technology, and information.[12] The advantages of WSM include its detailed focus, flexibility, and adaptability, as well as its ability to bridge gaps in group collaboration while emphasizing the importance of clear definitions and scope. However, this model is best suited for addressing specific problems or opportunities that can be summarized on one page and may not fully address broader strategic boundaries or the roles of information and participants both internally and externally.

In my experience, models can be incredibly helpful when you are in an organization that 1) wants to change, and 2) has humble people willing to learn and adapt. Humans can be complex individuals with varying motivations, causing difficulties and differing ideas about what constitutes a good change. This complexity is often influenced by historical experience and environmental factors such as political, economic, social, technological, legal, and environmental issues, as highlighted in the PESTLE analysis.[13] These external factors can impact a business just as much as internal dynamics.

In smaller companies where I have worked, being built-to-change organizations—designed to be flexible and adaptable—has been crucial in dynamic environments. In these settings, a "one-pager" document can effectively guide adaptation. On the other hand, larger organizations, such as Intel, which just announced it is laying off 15,000 employees in August of 2024[14], face greater challenges in

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[12] Alter, S. (2015). Notes on Work System Concepts. Work System Press.

[13] Palmer, I., Dunford, R., & Akin, G. (2017). Chapter 4. In Managing organizational change: A multiple perspectives approach (3rd ed.). McGraw-Hill Irwin.

[14] Lunden, I. (2024, August 1). Intel to lay off 15,000 employees. TechCrunch. https://techcrunch.com/2024/08/01/intel-to-lay-off-15000-employees/?guccounter=1&guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2xlLmNvbS8&guce_referrer_sig=AQAAAKRZ-mZ7HOHNV6XuKaLI-PWLnD5rJ4fJB6RFiuFCQKmIvFv6_wHi_E8NeMsczJaYP1I8Mj5n7sPZUAkkVHAZ74VSx7pZnsDyfvT80fS-cwRwuB

implementing change swiftly due to their size and complexity. These larger entities often struggle with the inertia of established processes and the sheer scale of their operations, making agile transformations more difficult.

Models help simplify complex situations, highlight priorities, develop a common language, and address interdependencies. They provide a structured way to understand and react to digital transformations, ensuring alignment and effective communication within the organization. The importance of being adaptable cannot be overstated, as the end goal remains the same: successful outcomes for the organization. Often, more than one model can be blended to achieve the desired results, as there is no one-size-fits-all approach. Its clear that selecting the right model based on context is crucial to an organization's success both internally and externally. These models can be applied effectively in different sectors, ensuring that organizations can navigate and thrive amidst digital transformations. This approach ensures that businesses can remain agile, responsive to market changes, and capable of sustained growth.

2.2 Stakeholder Analysis and Resistance

- How do you go about analyzing resistance to change?
- What are some of the strategies you can apply when facing resistance?
- What does a stakeholder analysis involve? How can it help you deal with resistance to change at different phases of a change process?

To analyze resistance to change, begin by identifying stakeholders and understanding their influence and potential impact on the project. Gathering data through continuous feedback loops, such as Ask Me Anything (AMA) open forums, surveys, monitoring external sources like the Blind app, and interviews with team members at various levels, helps an organization understand the root causes of resistance. Once active resistance (e.g., open criticism, arguments) and passive resistance (e.g., procrastination, silence) are identified, a resistance map can be created to visualize the origins and intensity of the resistance. In an organization, rumors can spread quickly, so management must react promptly to any issues that arise. The key is to not let issues fester and to address concerns as soon as they come up.

Effective communication is a key strategy to address resistance, ensuring that all levels of the organization can express their opinions in a comfortable environment without fear of retaliation. While not every suggestion can be implemented, providing a platform for stakeholders to voice their concerns fosters respect and a sense of empowerment. This inclusive approach can also surface valuable ideas that may have been overlooked by management. Engaging stakeholders through workshops, collaborative planning, education, training, and pilot programs can further address resistance. Building coalitions among supportive stakeholders, offering incentives, having recurring meeting to check in, and addressing concerns directly can shift negative attitudes and strengthen support while remembering the pace of change must match the rate of acceptance.[15] Most everyone aspires to have influence, it's important to acknowledge that not everyone can realistically be a change architect.

A stakeholder analysis is a formal tool used to identify, evaluate, and manage the interests, influence, and concerns of all individuals affected by change within an organization. The goal is to understand each stakeholder's position and how they can influence the success of the change. By brainstorming and mapping stakeholders on a

[15] Ranganathan, C., Watson-Manheim, M. B., & Keeler, J. (2004). Bringing professionals on board: Lessons on executing IT-enabled organizational transformation. MIS Quarterly Executive, 3(3), 151-160. University of Minnesota.

grid based on their influence (low to high) and attitude (positive to negative), and regularly reassessing their positions, an organization can adjust its engagement strategies.[16] In the initial phase, this analysis helps identify concerns; in the middle phase, it facilitates communication and feedback; and in the long term, it addresses ongoing resistance during implementation and beyond. Continually reassessing and adapting strategies based on stakeholder feedback and resistance levels, organizations can foster a more inclusive and collaborative environment, ultimately driving the successful implementation and long-term sustainability of change within the organization.

Make it real!

- Perform a stakeholder analysis on a case.

In a project to merge several standalone apps into a single unified app at a company like Square, a stakeholder analysis would involve identifying key players such as developers, project managers, QA teams, merchants, and executives. By assessing their interests, influence, and attitudes, strategies can be developed to address concerns (like job security among redundant staff), keep everyone informed, and ensure that the project has the support it needs at every level to succeed.

Key Stakeholders:

1. **Executives/C-Suite**
    - **Role**: Make first and final decisions, communicate with shareholders and market.
    - **Fears**: Project failure affecting company reputation and stock price.
    - **Initial Position:** Mixed attitude, high influence.
    - **Ideal Position**: Positive attitude, high influence.
    - **Strategy**: Drive the strategy as change architect, high level update regularly on project milestones and risks. Need to be able to communicate changes to investors after change is complete.

2. **Project Managers**
    - **Role**: Monitor the project, ensure timelines and Key Performance Indicators (KPIs) deliverables are met.
    - **Fears**: Increased workload and potential job overlap.

[16] Hayes, J. (2008). The theory and practice of change management (3rd ed.). Palgrave Macmillan.

- **Initial Position**: Mixed attitude, medium influence.
- **Ideal Position**: Positive attitude, high influence.
- **Strategy**: Engage early, ensure clear communication, manage timelines, address risks proactively, foster collaboration, and provide regular updates to reduce resistance.

3. **Product Managers**
   - **Role**: Oversees the entire product lifecycle of the unified app, from ideation to launch and beyond. Responsible for defining the product vision and strategy, prioritizing features, coordinating cross-functional teams, managing the product roadmap, and ensuring a seamless user experience.
   - **Fears**: Scope creep, stakeholder misalignment, lack of user adoption, job security after consolidation, technical debt and bugs.
   - **Initial Position**: Mixed attitude, medium influence.
   - **Ideal Position**: Positive attitude, high influence.
   - **Strategy**: Engage stakeholders early, communicate transparently, provide training, use pilot programs, address concerns openly, build support through change champions, and offer recognition to reduce resistance.

4. **Developers**
   - **Role**: Code the new app, integrate existing functionalities.
   - **Fears**: Job security concerns due to potential redundancies after merging apps.
   - **Initial Position**: Mixed attitude, low influence.
   - **Ideal Position**: Positive attitude, high influence.
   - **Strategy**: Involve early in planning, provide necessary tools and training, ensure clear communication of goals, offer support during integration, and address concerns promptly to reduce resistance.

5. **QA (Quality Assurance)**
   - **Role**: Test the merged app for bugs, provide user feedback.
   - **Fears**: Potential job cuts and increased complexity of testing.
   - **Initial Position**: Mixed attitude, low influence.
   - **Ideal Position**: Positive attitude, high influence.
   - **Strategy:** Involve in early testing, provide training on new systems, encourage open feedback, integrate their input into development, and ensure clear communication of expectations to reduce resistance.

6. **Merchants**

- **Role**: End-users who buy and use the software.
- **Fears**: Disruption in service due to bugs, learning curve with new app.
- **Initial Position**: Mixed attitude, medium influence.
- **Ideal Position:** Positive attitude, high influence.
- **Strategy:** Communicate benefits clearly, provide demos and support, address usability concerns, gather and act on feedback, and ensure a smooth transition to reduce resistance.

By engaging stakeholders early, providing support and training, and maintaining open communication, we can address fears, reduce resistance, and foster a collaborative environment that supports the successful merging of standalone apps into a unified platform at Square.

2.3 Culture and Boundaries

- What is organizational culture?
- How can organizational culture facilitate and/or constrain digital transformation?

Make it real! Give examples of organizational cultures that affect change management from your own experiences or any of the cases.

Organizational culture can be defined as beliefs, shared values and assumptions that influence how people in an organization perceive and react to change. Myers et al. discusses organizational change from the perspective of culture, emphasizing the importance of understanding both formal and informal aspects of an organization, such as hierarchies and networks, and how they influence change processes[17]. Organizational culture plays a dual role in digital transformation, acting as both a facilitator and a constraint. Digital transformation can be accelerated by organizational culture that values innovation and change by fostering an environment where employees are open to adopting new technologies and processes. Nevertheless, a culture that is resistant to change, is inflexible and politically motivated, or rooted in traditional practices can severely hinder any digital transformation efforts.

Understanding organizational culture and boundaries is a multifaceted process that requires a strategic approach. To begin, engaging with leaders is essential to grasp the organization's vision and strategy. Once the strategy is clear, defining the current culture becomes crucial—identifying what exists, understanding why it exists, and then developing a plan to drive positive change. Change doesn’t happen overnight, so it’s important to reward small wins along the way, which helps maintain momentum and encourages continuous improvement. Effective stakeholder management is key, with a focus on defining long-term goals and key performance indicators (KPIs) that align with the organization’s objectives. It’s also important to embody the change you want to see; being proactive in your efforts shows commitment to helping the business thrive. Continuous learning is vital because life and business environments are always evolving, and staying adaptable ensures that you can drive change effectively. Finally,

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[17] Myers, K., McPhee, R. D., & Anderson, C. M. (2015). Change from the perspective of organizational culture. In Organizational change and its effects. Publisher.

fostering an environment where employees are supported in their efforts to help the business creates a culture of collaboration and continuous improvement.

As the Covid pandemic started, transitioning to a work-from-home model was a significant shift in my company's organizational culture. While the core values and beliefs of our organization remained the same, the shift to remote work altered many aspects of how those values and beliefs are expressed and enacted. For example, remote work changed communication styles, collaboration methods, and how teams maintain their cohesion and productivity. It also affected work-life balance removing commuter time, employee engagement, and the way leadership interacts with teams. No longer being in the office removes the daily familiarity that comes from in-person interactions, where small talk and casual encounters help build trust and rapport. Without these face-to-face moments, it becomes harder to get to know colleagues on a personal level, which can make establishing trust more challenging in a remote work environment.

This transition can lead to the development of new cultural norms, such as increased reliance on digital communication tools, more flexible work schedules, and a greater emphasis on individual accountability. As the pandemic slowed down and some companies returned to either a hybrid or full return, these new practices became ingrained in the organizations' way of working, and it refined the organizational culture. While the transition itself is a response to external circumstances, the way it is managed and integrated into daily operations can significantly impact and potentially reshape the organizational culture.

Module 3:
Change Agents

3.1 Types of Change Agents + Critique 2

- What characterizes different types of change agents?

Different types of change agents are characterized by their ability to manage and adapt to change within their organization[18]. Change agent roles can vary widely in their approach, ranging from more authoritarian to more collaborative or supportive styles. For instance, the Director role involves a top-down approach where the change agent exerts control over decision-making, setting clear directives, and ensuring that the organization adheres to a defined path aligned with stakeholder expectations. This role is often crucial when changes are large in scale, require regulatory compliance, or need to be implemented within a specific timeframe, as it provides strong leadership and direction.

Similarly, the Coach role also employs a top-down approach but focuses more on leveraging and developing the skills of individuals and teams as a whole. The Coach is essential when change requires a shift in behavior or mindset, helping to build the necessary capabilities within the organization through encouragement and support. While the Director enforces the change, the Coach guides and empowers the organization to embrace and sustain it.

More compassionate and less authoritarian roles are the Interpreter, Nurturer and Caretaker roles. The Interpreter role is more adaptive and understanding in its approach by focusing on culture, norms, and values by bridging the gaps between different stakeholders, ensuring that the change is aligned with the organization's identity and communicated effectively across different levels.

The Nurturer role is the most hands-off, cultivating an environment where change can emerge organically. Nurturers believe that change will naturally develop, and their responsibility is to help guide and develop conditions that foster positive outcomes in an organization. This role is more effective in complex environments requiring adaptability while navigating uncertainty. Finally, the Caretaker role recognizes change that is

[18] Palmer, I., Dunford, R., & Buchanan, D. (2021). Managing organizational change: A multiple perspectives approach (3rd ed.). McGraw-Hill Education. Chapter 2.

beyond their control usually driven by external environmental changes and organizational life cycles. By using a more passive approach, this role's main focus is maintaining stability during organizational change.

Similar to the diversity of stakeholders and the nature of changes, each change agent role comes with its own set of strengths and limitations. An effective change agent must be flexible, adapting to the organization's specific needs while learning from any missteps along the way. As our guest speaker Ray Estevez wisely noted, "Fail quick and learn fast." In certain situations, it may be necessary to alternate between different roles, combine them, or even abandon some altogether to successfully navigate the change process and ensure that employees are aligned with the organizational goals.

- In what change agent roles do you feel most comfortable? What are the strengths and limitations of the images that you have identified as most relevant to you?
- Are there areas of personal skills development that are needed for you to feel more comfortable in using other change-management images?

Change agent roles I identify most with are the nurturer and interpreter roles. These roles align well with my current position as a QA engineer, where I help engineers enhance their apps for the targeted audience and users. The nurturer role particularly resonates with me, as it involves fostering an environment where positive change can occur organically, even in chaotic or unpredictable situations. However, the limitation of these roles is that they may not always allow for assertive direction when necessary, which can be critical in high-stakes or rapidly evolving situations. Therefore, I recognize the need to build on my ability to take on more directive roles, such as the caretaker, where I may need to oversee processes influenced by external forces beyond my control.

Public speaking is a significant challenge for me; it induces anxiety and is an area where I have considerable room for growth. As a future librarian, the ability to effectively communicate with classes or other librarians will be crucial, making it essential for me to improve these skills. Additionally, I tend to take on too many tasks myself, which limits my effectiveness as a coach and I need to work on delegating responsibilities by training my direct reports to handle changes more independently.

Having worked in very small startups, often sitting directly across from CEOs, and having a father who is also a CEO, I've gained a unique and intimate perspective on those in Director roles. I've witnessed the human side of these executives—their vulnerabilities, imperfections, and even moments of imposter syndrome. This close proximity has instilled in me a confidence in communicating with them, a confidence that I've noticed others may lack, often feeling intimidated or awestruck by their presence. This experience has enhanced my ability to engage with executives without being overwhelmed by their status, a valuable skill and privilege that allows me to navigate and interpret different leadership styles effectively. It has equipped me to be a versatile change agent, capable of guiding change confidently across various contexts.

- How do you go about selecting the best change agent role for a particular change effort?

Selecting the best change agent role for a particular change effort begins with a thorough evaluation of the situation, including factors such as organizational culture, the scale of the change, the stakeholders involved, and potential challenges. My approach typically starts with analyzing the nature of the change—whether it's incremental or transformational—and determining whether it requires a high level of control or a more adaptive strategy. For example, in scenarios where change is driven by external forces and stability is crucial, I might adopt the caretaker role, focusing on overseeing processes and minimizing disruptions. If the change requires fostering new behaviors and attitudes within the team, I would lean towards the nurturer role, creating a supportive environment where positive change can develop organically.

It is important to also consider the team dynamics, potential resistance and organizational culture. In cases where resistance is high, combining the interpreter and coach roles can be effective using the interpreter role to understand underlying concerns and motivations, and the coach role to guide the team through the change process. The most important factor to remember is to remain flexible and adaptable, ready to shift roles as the situation evolves and new information emerges because change is constant. By staying attuned to the needs of stakeholders, I can strategically adjust my change agent role to ensure a successful outcome for everyone.

3.2 Motivating and Learning

- At the individual, social, and organizational levels, how can you both motivate people and increase their abilities/skills in the area of change?
- How can you as a change agent create an environment with a high degree of change readiness? Draw on the readings to articulate different strategies.
- Drawing on your own experiences or one of the cases, exemplify where these motivating and learning strategies might come in handy.

Motivating people across various levels requires a keen ability to listen, communicate effectively, recognize contributions, and adapt to both intentional and unintentional changes. To cultivate a culture where continuous learning and adaptability are ingrained, it's essential to address motivation and skill development at the individual, social, and organizational levels. Organizations should prioritize long-term investments in employee development, even when the immediate benefits aren't apparent. Implementing job rotations and cross-functional experiences can be powerful tools for fostering a more agile and capable workforce. And finally, consistently measuring progress and sustaining change are crucial to ensuring the success of learning and transformation efforts.

Motivating individuals for change involves understanding their personal desires, goals, and fears, and integrating these insights into their career objectives. Encouraging growth through training courses, rotating job responsibilities, and mentorship will drive employee confidence and self-worth while also aligning their personal aspirations with the organization's goals. By acknowledging and addressing the human side of change, you create a foundation of trust and support, which is essential for any successful transformation.

At the social (team) level, building strong alliances and coalitions is essential for nurturing a culture of supportive collaboration during periods of change. Creating an environment that promotes open, two-way communication across divisions that is free from the fear of retaliation will empower key stakeholders to effectively inspire employees to embrace new initiatives. By actively recognizing and celebrating successes, and rewarding positive behavior, teams can be motivated to rally around common goals, making the change process more unified and less daunting.

Additionally, establishing an integration team, similar to Pierre Frankel's approach[19], can drive coordination and ensure that changes are deeply embedded in the organization's operations, helping to break down silos and sustain long-term transformation.

With a clearly defined organizational strategy that recognizes change as a constant, it is crucial to embed a culture of continuous learning and adaptability both internally and externally to maintain motivation and resilience. By fostering an environment where continuous feedback is not only encouraged but integral to daily operations, organizations can ensure that learning and improvement are ongoing. Implementing a cycle that integrates regular feedback, data measurement, and subsequent adjustments based on findings enables the organization to remain agile and responsive to transformations. This approach not only supports the immediate adoption of change but also strengthens the organization’s capacity to navigate future challenges with confidence and adaptability.

An organization can't drive change effectively without recognizing and responding to the human elements involved. To create an environment with high change readiness, it’s essential to stay connected with the individuals around you, as their engagement and well-being are pivotal to the success of any change initiative. Grenny’s Six Sources of Influence emphasizes the importance of not only motivating people but also building their capabilities at every level while establishing robust social support systems[20]. The key to successful change lies in leveraging multiple sources of influence simultaneously, rather than depending on a single strategy. Organizations that seek a "quick-fix" approach are likely to encounter failure, as complex problems typically arise from a variety of interconnected causes. Therefore, addressing these challenges effectively requires a comprehensive, multifaceted approach that considers the diverse needs and motivations of the people involved. This ensures that change is not only implemented but also sustained over the long term.

In my experience with constant reorganizations and layoffs, motivating and learning how to adapt to new strategies is essential to navigating the uncertainty and maintaining employee morale. During these turbulent times, individuals often feel insecure about their roles and futures, making it crucial to address their personal goals and fears on an individual basis. By offering opportunities for growth through targeted training courses, rotating job responsibilities, and mentorship programs, organizations can help employees feel valued and increase their confidence. This not only enhances

[19] Kanter, R. M., & Bird, M. (2012). Pierre Frankel in Moscow (B): Plowing Ahead. Harvard Business School.
[20] Grenny, J., Maxfield, D., & Shimberg, A. (2008). How to Have Influence. MIT Sloan Management Review, 50(1), 47-52.

their skills but also aligns their personal objectives with the evolving needs of the company, turning potential fear into a sense of purpose and direction. On a team level, fostering strong alliances and a culture of collaboration is particularly important. During reorganizations, clear and transparent communication can alleviate anxiety and foster a sense of unity. Recognizing and rewarding team successes during these times, no matter how small, can further motivate employees to work together towards common goals, making the process of change less intimidating and more manageable in the organization as a whole.

3.3 Measure and Sustaining Change

- How do you sustain change?
- What are some of the pitfalls you should beware when striving to sustain change?
- How do you use measurement as a change management strategy?
- Reflecting on your experiences, what model(s) covered in class could you translate into effective measurements that would help you track change that you face or have faced in your career?

Sustaining change management requires continuous effort across the organization by regularly monitoring and adjusting strategic goals. A very effective way to measure the progress of change is by using data measurement as a strategy, which can provide clear objectives and goals to define success. For example, tracking the progress of implementation using KPIs such as adoption rates, employee engagement, and the stability of new processes helps to monitor how well the change has been integrated. It is also important to incorporate continuous feedback mechanisms that allow for adaptation to new developments or unexpected challenges, ensuring that the organization remains flexible in the face of continuous change.

An organization should not prematurely declare victory, which can lead to complacency, while still recognizing its failures and celebrating small victories along the way. Organizations must anticipate unanticipated outcomes and learn from failures to use them as opportunities for growth, rather than ignoring them. Recognizing productive failures and adjusting strategies accordingly are key to sustaining successful change.

Lewin’s Change Management Model offers a simple and structured approach regarding using measurement as a change management strategy. During the “Unfreeze” stage, measurements can gauge readiness for change through surveys and assessments, while the “Change” stage can involve tracking KPIs like training effectiveness and stakeholder engagement. In the “Refreeze” stage, measurements such as performance metrics and employee satisfaction surveys can assess how well the change has been integrated. Kotter’s 8-Step Change Model also emphasizes using measurement, particularly in tracking how well the vision is communicated, monitoring obstacles, and ensuring ongoing improvements.

During my experiences at Square, where constant change through layoffs and reorganizations have resulted in a cycle of unresolved problems, I believe that Kotter’s 8-Step Change Model and Lewin’s Change Management Model could have provided a more structured approach to addressing these issues. In Kotter’s model, for example, Step 4, "Communicate the Vision," could have helped align everyone around a clear strategy, avoiding the frequent layoffs that occur due to a lack of long-term planning. Step 5, "Empower Broad-Based Action," would have been especially useful in removing obstacles like overworked employees and lack of testing. Had employees been empowered to take more ownership of testing and quality control, we may have avoided the rush to push out fast code that often leads to bugs and further burnout. Step 7, "Consolidate Gains," could track the ongoing improvements in workplace morale and the effectiveness of strategic changes, helping ensure they are reinforced over time. Lewin’s Change Management Model could have also helped Square address its challenges. In the "Unfreeze" stage, conducting surveys to understand employee frustrations with rapid changes, overwork, morale, and the lack of extensive testing of our code would have been crucial in identifying core issues in the company. During the "Change" stage, tracking KPIs such as testing efficiency and employee workload would have provided clear metrics to ensure the issues were being addressed systematically. Finally, the "Refreeze" stage could focus on embedding the new processes and measuring employee satisfaction, ensuring that layoffs are not the go-to solution every six months, and that the workforce is stable and motivated. Square could have potentially avoided the recurring issues of poor morale, fast releases with insufficient testing, and frequent layoffs if their internal strategy structured around more communication, empowerment, and continuous measurement.

Conclusion

This portfolio serves as a reflection of the learnings throughout the course and highlights areas for continued development in change management. To evolve as a change manager, continuous learning is paramount, as is the ability to adapt strategies and roles based on my organization's needs. Building a robust professional network and staying current on emerging trends will support ongoing growth. By applying the tools and frameworks learned, such as stakeholder analysis, change agent roles, and digital transformation strategies, I aim to remain effective in leading change efforts, ensuring that both individuals and organizations can thrive in an ever-evolving digital landscape.

In order to be an effective change manager, I will need to stay adaptable and open to learning, continuously exploring new tools, strategies, and industry best practices. By expanding my knowledge in emerging technologies and digital transformation trends, I will be able to stay ahead in this rapidly changing environment. Drawing from my professional network will also be key by connecting with past and current colleagues and other industry experts will provide valuable perspectives and guidance as I continue refining my approach to change management. I plan to apply the lessons I have learned from this class to ongoing and future projects at Square, particularly in the areas of employee engagement and change readiness. This will enable me to grow into a more effective and confident change leader, capable of navigating the complexities of organizational transformation.

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