A Design Thinking Approach to Transformation

A vision of success
before, during, and after change

Executive Summary

As transformation is a fairly new topic to the business world, many approaches are forming. By combining design thinking with business relationship management and change management practices, a product portfolio approach, and a touch of UX (User Experience) and Agile methodology thrown in, a strategic framework of transformation that inspires engagement and loyalty emerges.

Section One – **Before the Change** is my view of the applied leadership qualities to set up an environment ready for human-oriented transformation. It combines my unique transformation "call and response" – MARKO POLO – with timeless wisdom from respected business leaders.

Section Two – **During the Change** outlines three key components of transformation deployment and my experience with their success.

Section Three – **After the Change** is my vision of success that helps to foster trust, enthusiasm, and future transformations.

About the Author

I have a career that's been immersed in several major non-technical aspects of getting technology into the world – project management, product line change control, product ownership, product customization, product marketing, IT project implementation communications, and IT project methodology.

With strategic thinking in four of my top five CliftonStrengths themes, I gravitate toward improvement and aligning to the big picture. I have a natural, automatic process in my brain that quickly grasps workflow, which is why I say my North Star is **Professional Joy**. I love working in and leading efforts to help people do their work better!

I have always enjoyed personal development and underwent my own transformation after my personal economy crashed in the recession of 2009. I transformed my way through divorce recovery, job loss, income loss, and location changes; I wrote a book about finding my joy in 2018 and self-published it. It was through this journey and my passion for business process improvement that I discovered the Prosci model of change management. While I have not yet taken Prosci training, I am **certified in Change Management** from Acuity, which is an approved program by the Association of Change Management Professionals.

I am at the point of my career where my burning desire is to apply my natural leadership abilities with my background in delivering technology solutions, my passion for transformation, and managing the talent to carry out the vision. I wrote this white paper to pull all these dimensions together for those in transformation leadership in a context that reflects my leadership style, my experience, and my strategic vision.

The Harvard Business Review describes strategic thinking this way: "Strategic people create connections between ideas, plans, and people that others fail to see." (2014, "Strengthen your Strategic Muscles.") I am the staff member that serves leadership by connecting the dots to create alignment that is far-reaching and meaningful to the teams in your business. In other words, an approach that inspires connection and loyalty!

Enjoy!

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Introduction

Loyalty and engagement elements of transformation are designed with a human-centric approach, offer a framework for decision-making and priorities, and create an environment of change. Employee allies are the greatest assets in bringing transformation to fruition. Setting them up for success is first a leadership action before it is a project delivery action. Allies and enthusiasts are created and supported with information, decision participation, and responses to their stated needs.

This white paper has three sections that encompass these ideas by applying thought from business relationship management, organizational change management, product portfolio management, Agile development, and user experience/design thinking.

Engagement in transformation is established by leadership before the transformation begins. The first section, **Before the Change**, reviews leadership qualities needed to set up an environment ready for human-oriented transformation. This review combines my unique transformation "call and response" – MARKO POLO – with timeless wisdom from respected business leaders.

During transformation, it is key to understand stakeholders and foster relationships with them while designing and executing programs to meet their needs. The second section, **During the Change**, includes stakeholder management plus two other key components of transformation and my experience with their success.

Afterwards and ongoing is the time to reflect, improve, and continue efforts to institute a change environment. The third section, **After the Change**, is a personal vision of success that helps to foster trust, enthusiasm, and fuel future transformations.

One
Before the Change

The acronym *MARKO POLO* is a unique way to explore a leadership "call and a response" when it is decided to begin, formalize, or improve transformation efforts.

*M*indset. Most will think of change in terms of doing. The change-minded doers will embrace innovation, new ways to improve and will be open to it. Leaders can help more people get on board by framing what they're doing within business objectives and to the betterment of their jobs.

If your actions inspire others to dream more, learn more, do more, and become more, you are a leader. – Simon Sinek

*A*wareness of the change. Tell employees early and often. A rule of thumb for employee communications is to tell them seven times with a different way each time. Is your organization set up for mass communication like cascading in staff meetings, chat rooms and more? Transformation means continual improvement of these methods.

Clear is kind. Unclear is unkind. – Brené Brown

*R*esilience, whether individual or organizational resilience, is the ability to adapt to maintain or improve productivity. When employees are *not* being resilient, they will demonstrate frustration, criticism, and burnout. They are running on a lack or perceived lack of resources. Functional leaders help by emphasizing the available resources like the team's strengths, collective skill, a clear and motivating mission, and a shared vision. Balance moments of intensity with team fun time, extended non-work coffee breaks, and/or time away from work.

Leadership is not about being in charge. Leadership is about taking care of those in your charge. – Simon Sinek

*K*nowledge share. Give employees – of different receptivity levels and styles – ways to explore and make decisions about the transformation in the way they prefer. Share examples, leader vision, data, short bursts of information, maybe even some longer reads or videos. Having a common online portal will encourage research, linking, and sharing. Ask for input from all levels. Identify change agents who will share and/or request information with their teams and others they collaborate with.

I am personally convinced that one person can be a change catalyst, a 'transformer' in any situation, any organization. Such an individual is yeast that can leaven an entire loaf. It requires vision, initiative, patience, respect, persistence, courage, and faith to be a transforming leader. – Stephen Covey

*O*penness enables the flow of transformation. It is grounded in the "why" of what we do and who we do it for. It is starting and ending transactions with empathy for the professional heart and needs of those coworkers most impacted. When considering many possibilities, collaboration is a natural approach. Openness is the knowledge that what you're seeing isn't the only way.

Business opportunities are like buses, there's always another one coming. – Richard Branson

Transformation is initiated in this environment by a high level **why** – to remain competitive, to take action on new ways of working (like remote or hybrid), or to facilitate productivity or cost savings. The *POLO* part of transformation readiness is a plan for the response to who, what, where and how. The projects that are launched will detail **when** with timeframes and resources.

*P*ersona. The **who** of transformation is about knowing stakeholders, a lot like its cousins change management, product portfolio management, and business relationship management. Stakeholders are the people and/or groups of people who are the most impacted by and/or invested in a new way of working. In User Experience (UX) design the primary users/stakeholders are amalgamated into a persona profile with a name and specifics to help designers keep them top of mind. This seems like good practice in transformation, too.

Courage starts with showing up and letting ourself be seen. – Brené Brown

*O*pportunities are the **what** of transformation. What opportunities will the transformation provide for stakeholders? What improvements can be made as the transformation progresses? Are there opportunities to include additional objectives in each project? While offering stakeholders opportunities, it is also a good place to introduce constraints and manage scope. Balancing improvement with urgent daily needs is part of clearly defining problems in a scope and priority framework. Project managers will be grateful.

If there is any one secret of effectiveness, it is concentration. Effective executives do first things first and they do one thing at a time. – Peter Drucker

*L*eading others in a specific direction is the **where** of transformation and demonstrates the organization's commitment to it. What does "done" look like? Ensure that team members have the authority to be accountable for assignments, and that reasonable time and resources are available to support the clear direction.

Leadership requires two things: a vision of the world that does not yet exist and the ability to communicate it. – Simon Sinek

*O*bjectives. The **how** of transformation is covered by organizing around the objectives and values of stakeholders. They offer the prompts that feed priorities and measures.

If you can't measure it, you can't change it. – Peter Drucker

Two
During the Change

Team Formation

A crucial role in the project teams for the transformation efforts is a business strategist who understands stakeholder needs, impacts, and makes connections to business value, employee communications, and the environmental factors of change. These skills might be included in change managers, business relationship managers, or even business solutions analysts.

John Kotter's change model is about building enthusiasm. One of his steps is to build a volunteer army. But no matter which change management model is used, plans, timelines, and resources will include the effort and channels needed to give users of the processes and/or technology advance notice, education, and answers to their most pressing questions.

A project manager will provide focus on delivering according to the planned scope, timeline, budget, and resources.

My Experience

I was part of a small adoption team responsible for educating and onboarding 30,000+ users in 60 days on Zoom as the company transitioned from other online meeting tools from two merged organizations. We used Box (Notes) as our online portal, as there was no other common information platform. There we posted our training calendar, short videos, quick reference guides, tip sheets, and contact information.

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Our communications plan included my submittals to the all-employee newsletter. The informative articles referred users to the Box links while keeping them informed of next steps.

We led Zoom training sessions and weekly open forums to tackle common questions for new users. It was a successful program, with over 20,000 downloads and views of our content, and hundreds trained in live sessions. We identified some impacted stakeholder groups and provided them with customized training and informational resources above and beyond what the project team was doing. We also instituted a "Tip of the Week" offered over Zoom chat, which other teams are now using.

I also was involved in the Google Workspace implementation as a Guide. The Google team took learnings from the Zoom project and also engaged a Prosci-oriented vendor to lead adoption activities to onboard 140,000+ members of our workforce across the U.S. As a Guide, I attended information sessions about the scope and timeline of the implementation, as well as getting pro tips about using the new email, calendar, chat, and drive tools. I was a resource in an online support forum at the time of activation and for my team throughout the transition period.

The team used a Google Site similar to the Box site used by our Zoom team as a

central point of education, training, and information. They also formalized Stakeholder input sessions to understand their objectives and impacts of future removal of Microsoft products. These strategies were highly effective, and they continue to host "showcase" events where they share a practical application of the Google tools and the top requested tips and strategies of everyday use.

Without the adoption and change management aspect, both of these projects would have suffered. While in our methodology, project managers do go through an exercise of identifying stakeholders, it's the transformation management team members that are essential to understanding and engaging stakeholders for successful adoption.

Transformation Team Operations

Today's business agility focus facilitates collaboration, cross-team communication, flatter team organization and iterative development of new processes. In other words, the agile way of working business transformation is inspired by Agile software development teams' Agile methodology. Managing teams and tasks through a portfolio of Kanban boards can offer teams and leaders insights into workloads, priorities, and progress.

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My Experience

The Agile approach speaks to my nature as a strategic thinker. Having been a quality assurance member of an XP (eXtreme Programming) team in the early days of Agile, I was inspired by the collaborative nature of the team effort and communication.

While I have also worked in waterfall and startup worlds, I have always maintained the values of working collaboratively and lean – ensuring that most efforts are multipurpose and serve the big picture, including stakeholder needs.

Getting certified as a SAFe Scrum Master in 2021 exposed me to the tools and methods that materialize lean and collaborative ways of working.

My co-project manager and I used the Planview LeanKit Kanban tool for a project that is focused on streamlining our project/portfolio management tool, Planview Enterprise One. Our Project Management Office (PMO) team has just begun using the same Kanban board for visibility into everyone's workload.

To deliver an on-time project migrating PMO content from SharePoint to Google Sites, I used a checklist and daily virtual standup meeting to go over what was done, what each team member was doing next, and address any blocks. It helped tremendously in providing focus. The project was recently named as a first half-year accomplishment by the Senior VP. The quality and timeliness created visibility for the PMO Operations Team!

A Variety of Communication Methods and Skills

A continuous challenge is getting the right information in front of the stakeholder and/or user community at the right time. Not everyone will see each message in each channel. Some may read the newsletter, some may be tuned into chat channels. Some managers may do their own dissemination of critical information, while some prefer to point employees to mass communications.

As pointed out earlier, the preparation of change includes creating an environment where these channels exist and are utilized.

The skills needed to round out communications are user-centric writing, article writing, professional image design and usage, layout and design, and video creation. Someone who is skilled in information architecture can be helpful to design the website visitor's journey and contribute to the overall communication plan. If the User Experience or Customer Experience team can lend a hand, their expertise would also be valuable.

Some education and training may need to be customized for some stakeholders. The folks writing the educational content need to be flexible in requirements gathering and delivery.

My Experience

A key learning from my product marketing experience is to reach a target community in places where it already goes. The goal is to find the social channels, email cadence, and consumption style that matches them.

Using Google Chat Spaces has been helpful to the PMO in getting the word out to project managers. We still get people asking about things we've messaged several times, but also the whole project community helps offer tips, best practices, and even links to our PMO intranet site! Earlier this year, I surprised the manager and team with a virtual mascot to help us get attention in chat to important announcements and our tip of the week, which we call "Wednesday

Wonders," based on the idea of sharing thoughts on things the audience has been wondering about. As of this writing I don't have data on how Ruby, a Rubik's cube with the brand colors and googly eyes, is impacting the chat engagement.

In the Zoom project, my adoption teammate and I moved adeptly through identifying needs and quickly producing tip sheets (mostly done by me), video shorts (by teammate), and guides (by both of us). Once we had the structure of our mock website, we simply added sections by the roles and functions most asked about. The two us together have an ideal mix of CliftonStrengths themes of strategic thinking (four out of my top five), influence (both of us in our top five) and execution (top five for her, top 10 for me) to deliver with an agile approach.

Our Zoom communications plan included articles in the all-employee newsletter, the IT newsletter, and Zoom chat. We also pushed out slides to include in decks for various stakeholder groups and meetings. The Zoom team sponsors kept IT executives updated, and I helped get pertinent technical and user information to our regional IT executives. In addition to general training sessions, we also offered training to Executive Assistants, who became power users of the tool. Our training sessions and open forums prompted some users to reach out directly to us, and we were happy to lend support on usage questions.

"The goal is to find the social channels, email cadence, and consumption style that matches [the target community]."

Three
After the Transformation

I envision a transformation framework that closes the loop on end-to-end processes, celebrates major milestones with employees, and continues to share success stories of transformation.

Closing the Loop

Implementation and onboarding is not the whole picture of transformation. Are all processes in all functions updated with the new information/technology/process? Are there systems to help managers ensure it is being used, like performance goals or measures? Is the new way of working included in new employee orientation?

In addition to closing the loop for end-to-end process effectiveness, the transformation team can close the loop on learnings about stakeholder needs, the transformation environment, team roles, operations, and communications.

Celebrating

A key principle of change management is the celebration. Agile development teams know how important this is, even if it's a simple gathering over pizza. Transformation efforts are cemented with celebration and the reward of good feelings and camaraderie go a long way when preparing for the next change.

Sharing

Some members of the impacted community will be enthusiastic enough to share. It's a good idea to infect as many people with enthusiasm for the new way of working by showing how it's used on a daily basis.

My Vision of Transformation in Practice

In the big picture of transformation, I envision the flexibility and collective creativity to consider processes from end to end. Here's a few pro tips from my years of experience on closing the loop.

- Don't forget to engage legal counsel in closing the loop (or earlier). In selecting an internal name for a purchased cloud application, the legal team advised us not to use certain terms because it could get into copyright issues, even if only used internally. The resulting name was forgettable and impractically long. It completely messed up a fun little naming contest we were having. To emphasize this point, this reminds me of two other stories where I caught something with legal impact – don't forget legal!
- The manager of a sister team walked our two teams through all the Zoom settings to use as defaults. I found this to be an extremely helpful "closing the loop" activity. In the future I may recommend it as a standard practice for certain types of transformation.
- I scoured our policy database with the search terms of all the old technology replaced by Zoom and found two for updating.
- The IT orientation team also added the Zoom Box site to their list of resources for newcomers.

> "In the big picture of transformation, I envision the flexibility and collective creativity to consider processes from end to end."

I also envision built-in budgets and efforts for celebration of wins. When our mini-team finished the PMO's Google Site, I asked our manager for a gift card or other special treat for the two project team members, but there was no budget for that. Instead, I led a five-minute celebration by acknowledging them for the details of their great work and leading them in an online dance-in-place session. One of the team members prefers not to dance, so she shared an image of Snoopy (Peanuts cartoon character) doing a happy dance!

While I'm not involved in the ongoing Google activity, I am inspired by the commitment to continue sharing through a re-organized website, ongoing live training, and Showcase events. I found the tips they shared to be fun and helpful.

These activities are all part of the design for a human-centered transformation, and the fuel for starting the next one.

The importance of a human-centered transformation design is seen in the brilliance of the design of the products we use and love. To inspire the same loyalty and engagement, any progress that is made toward an environment that serves others is progress in transforming how we work collaboratively; foster connection; and maintain loyalty from our employees, partners, and customers.

I am excited about the future of business transformation as we collectively move toward what Brene Brown calls "Daring Leadership." Let's partner on this journey together!

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