

# Three journeys: A narrative approach to successful organisational change

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## INTRODUCTION

Early on in Anecdote, we did a training-needs assessment for part of the Australian Defence Force. Our discovery phase involved two teams; one team adopted a structured interview technique and the other used anecdote circles to collect stories.

After our first day in the field we met with the structured interview guys to compare notes. "On first blush," they said, "it seems like most things are in order. They are adhering to OH&S processes. Sure, there are some areas for improvement but generally things are OK." As they were providing this assessment, those of us on the anecdotes team just looked at each other in astonishment and replied, "So, you didn't hear about the soldiers who are showering in their own urine because their recycling system is broken or hear about the workshop where everyone wears protective footwear because some poor fellow lost his toes in an accident but no one wears protective eyewear because they have never had an eye accident?". We had heard story upon story of major transgressions that weren't picked up in the structured interview approach.

This experience confirmed our assessment that a narrative approach is great for yielding new, and otherwise hidden, insights. A number of years and many clients later, we have seen that there is something even more important narrative techniques provide: a resolve among people to do something about the situation and a frame for mapping how to do so. Stories provide people with a keener awareness of their current situation, a clearer vision for their desired state, and

a palpable sense for why and how to close that gap. As a result, a narrative approach to change and continuous improvement enables organisations to better prepare themselves for dealing with today's complex challenges and opportunities.

## OVERVIEW OF PAPER

This paper describes the approach we take with clients to successfully foster change in their organisations. It is based on our deep knowledge of both complexity and narratives, and it reflects our holistic approach in working at both systemic and personal levels to help organisations and their people move forward. Coaching is integral to our process at each step of the way and to our clients' success in reaching their change and improvement goals. Our approach helps leaders and organisations embrace the need for change, approach it openly, prepare for it fully, and achieve the critical outcomes—whether it be a new technology, a turnaround, a new strategy or some other cause.

I'm excited to be writing this paper with Dr David Drake, a renowned expert on narrative approaches to coaching in support of leadership development and cultural change in organisations. In this paper, we offer a narrative- and coaching-based process framed as *three journeys* based on our experience that the best solutions are those that are developed and owned by the people in the organisation and can be embedded in their day-to-day activities. The process is also based on an analysis of a historical journey of change as well as our appreciation for the contemporary challenges inherent in dealing with the complexities of change.

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**A LEGENDARY STORY AS A FRAME FOR SUCCESSFUL CHANGE**

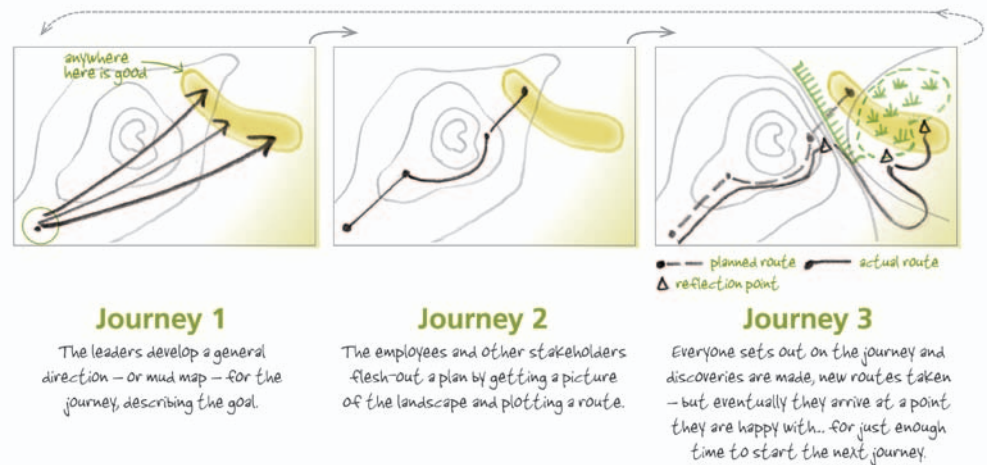
Our approach to change was inspired by the story of Lewis and Clark, the intrepid explorers who made the first crossing to the American West, who forged a trail that would lead to the formation of what we now know as the United States. Thomas Jefferson, the third President, knew that opening up the west coast was critical in the short-term to understand the nature of what he had just bought (the Louisiana Purchase) and in the long-term for his trade and political ambitions in fulfilling his vision for the country. Jefferson and Meriwether Lewis pored over maps and journals to form in their minds how the journey might unfold, what resources might be required, what success would look and feel like, and how they might get the support from Congress to embark on this adventure. This was the *first journey*—as it was conceived in the minds of the two leaders.

Once they got their funding, Lewis and his co-leader, William Clark, selected and trained their expedition members in St Louis, Missouri—at that point the westernmost outpost of the fledgling nation. While there, they gathered the resources and practised the skills they imagined would be needed to make the trip.

This time of preparation, based on their initial knowledge, was the *second journey*. Since much of their journey would take them into the unknown, their plans relied on partial information and an earned trust in their leadership skills. In moving from concept to plan, Lewis and Clark engaged the people who would be involved in and affected by what actually happened. It was a time for engaging them in the vision, preparing for what they may encounter, and getting what we now call their 'buy in'.

Then, they embarked on the actual trip, the *third journey* for which they had been preparing. The further they travelled up the Missouri River, the sparser the available information became. One of their biggest surprises was the scale of the Rocky Mountains, a range of peaks unlike any they had seen before. However, for every unexpected turn of events or what seemed like an impassable barrier, the expedition adapted and remained resilient. They eventually discovered a path through these mountains and on to the Columbia River—though it was not the all-water passage to the west coast they had hoped to find. The first two journeys not only helped them plan and prepare for this expedition, but also helped them refocus, regroup and reorient in the face of hardships, errors in judgment, boredom and fatigue, and the like.

Figure 1: Translating the three journeys to a business context



The story of the Lewis and Clark expedition offers lessons in how organisations can approach their journeys to bring about change. Like Lewis and Clark, astute leaders today embark on change with only a general picture of where they're going and the knowledge that they will encounter unimagined difficulties and opportunities along the way. As a result, the fate of the change effort often rests on how well they prepared themselves and others. While modern organisations have better resources with which to work, they too must juggle the needs of multiple stakeholders, the vicissitudes of human nature, the capriciousness of fate, the limitations of partial maps, the need for high-stakes decisions, and more.

In our work with clients on the first journey, we gather stories to help the leaders understand the current situation and needs, as well as help them to craft stories that capture the principles and characteristics of the future state they desire. These stories help them clarify: (1) Who are we? (2) What seems true to us? (3) What matters to us? (4) What are we seeking? We use coaching to draw out people and help them be open and candid in their assessment, communication and agreements.

The focus is on building awareness and harnessing the ambition. The goals at this stage are to (1) ensure that all of the stories get told such that the organisation has a clear sense of what is true at the present; (2) articulate the new story the organisation wants to tell about itself; and (3) declare what they want as a result and how this path will enable them to be successful. This stage is about clarifying the purpose for the actual adventure.

**EXAMPLE:** In a client project for a large professional services firm, David worked with the business and human capital leaders to recognise the centrality of better support for their staff in achieving both the culture and the results they desired. He did interviews with forty key stakeholders to get all the stories out about what was happening in the culture in terms of current coaching practices. The themes from these stories were presented to the leadership team. They were asked to articulate what a new culture would look like and what people would be doing differently if they achieved that vision. David worked with the team to manage the internal politics in order to position the project for success. The result of this journey was the envisioning of a map, based on the best available data, of how the firm could achieve the shifts in culture and performance they were seeking.



### THE FIRST JOURNEY

In this first stage, leaders in an organisation develop a vision of what they would like to achieve and define this end-state in broad terms. It involves setting the destination, the crusade, and mapping out how to get there based on the available information —while recognising that detailed plans are unlikely to be achieved at this stage (the world is too unpredictable for a simple, linear view). It is critical to clearly articulate the mission, the criteria for success, and the leadership parameters in order to create a solid framework for thinking about the venture.

#### LESSONS FROM LEWIS & CLARK:

- It is important to be clear on sharing the rewards before there are any
- Travelling requires both authority and freedom/permission
- Change requires an organisation to venture into unknown territory; it is as much about discovery as it is about design
- Every change process has its 'St. Louis' —a jumping off point into the unknown, a hub for action, and a platform to which one can return
- Often the landscape changes merely as a result of setting out on the journey.

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The focus is on making plans and becoming prepared.

## THE SECOND JOURNEY

In this stage, the rest of the organisation (or a representative subset) plans how they will get to the desired state, determines what may impede their progress, and prepares themselves for what they need to do. This journey involves understanding the current capacity, culture and business environment based on stories collected, and developing the best possible map based on current information and resources available to guide them on the trip. This journey builds both extra capacity and distinct skills so as to build an adaptive and resilient organisation. Identifying clear decision-making processes and roles/responsibilities are essential.

### LESSONS FROM LEWIS & CLARK:

- The success of the mission often comes down to the level of development and cohesion of the team
- The story for change must be told, at least initially, in the language of those most affected by it, if leaders want their engagement
- It is critical that those who are asked to lead the way have what they need in order to be successful
- Preparation in complex environments requires testing assumptions and balancing the needs for adaptation and execution
- It is dangerous to take an old paradigm and old ways of living into a new land.

In our work with clients on the second journey, we help clients work with the narrative material in terms of making sense and meaning of it as the basis for interpretation, envisioning and planning.

These stories help them clarify: (1) What is the whole story? What are we missing? (2) What will we need to be successful in our search? (3) What is likely to challenge us? What will be our response? (4) What is the story we are telling ourselves about this venture? We use coaching to bring out parts of the stories that have been discounted or avoided, to increase the sense of agency among people, and challenging their interpretations to make room for new ones as needed to achieve their goals.

The focus is on making plans and becoming prepared. The goals at this stage are to identify and bring together key stakeholders who can (1) gather stories of past successes they can draw on to aid them in this new journey; (2) create an iterative design for reaching the vision; (3) establish the necessary roles; and (4) develop the key skills and resources that will be useful for this journey. This stage is about developing the people and making the initial plans for the actual journey.

EXAMPLE: Initial decisions were made in the client project to move beyond their traditional approaches to change and development based on lessons learned and input from the interviewees and others. We were able to co-develop an innovative design we felt would be more suitable for the path to change we would undertake in the firm. As part of this design, coaching champions representing all of the service teams were chosen and partnered with their business unit/service team leaders and human capital liaisons. Each of the three groups received extensive training on a coaching curriculum designed explicitly for this organisation and its aims. The teams would then be sent out, almost like scouting and advance parties, to explore how they could bring coaching to their groups. Knowing that much of this would be new for all those involved, we developed their role as shadow coaches to guide others.



The focus is on taking action and effectively adapting.

### THE THIRD JOURNEY

In this stage, the organisation embarks on the actual venture, implementing the planned (and unplanned) activities over a defined horizon. Through a combination of small initiatives and larger projects, new behaviours are encouraged and new opportunities are engaged in moving toward the vision. In the process, many changes are made along the way in how things are done in response to new circumstances and/or knowledge. The third journey enables staff to sense and respond to change, persist and innovate as needed, and keep their eye on the desired goal. This is a time when the motivation is sustained through clarity around the characteristics and benefits of the new place. There is a balance between learning, reflecting, innovating, adapting, and course correcting AND being able to execute on the plan, retain cohesion, be disciplined, and make hard choices.

#### LESSONS FROM LEWIS & CLARK:

- Knowing where you are is as important as knowing where you are *going*. Having markers on the journey is important
- Vital insights, information and life-giving resources often come from people on the 'fringes'; ventures fail when they go unacknowledged. Leaders also need people to ask the 'dumb' questions that point to easy solutions that are often overlooked
- Prudent leaders are clear on the mission, but humble and flexible enough to amend their assumptions and routes in light of their actual experience on the trip. Change leaders must balance between making progress and tending to the people
- Some decisions are more important than others on big trips. The challenge is that sometimes you don't always know which ones are which until after the fact
- When people are fully prepared for and deeply engaged in a mission, they are intensely alert and alive.

In our work with clients on the third journey, we gather and work with the stories that are emerging as people are on the change journey. These stories help them clarify: (1) To what do we need to pay attention? (2) What are our non-negotiables? (3) What else is possible now? (4) What will success look like? We use coaching to help them increase their awareness and observational skills, ask the hard questions, design new strategies, and make progress toward their goal.

The focus is on taking action and effectively adapting. The goals at this stage are to move beyond imagination and preparation to implementation in putting the plan into action through (1) providing ongoing coaching of the project leaders; (2) supporting learning, reflection and course correction; (3) making process and systems improvements to adapt to new circumstances and expedite the journey; and (4) celebrating the arrival at the vision. This stage is about courageously moving forward and making progress on the plan in order to fulfil the original purpose.

EXAMPLE: In the client project, each triad (service team leader, coaching champion and human capital staff person) is scouting out and engaging in opportunities to employ their new coaching skills as part of small initiatives designed to make an impact on how they do business. They are linked to compare notes about how to use these experiences to increase their understanding of the terrain, and how to move forward in creating the desired new culture. The security of being part of this larger group and the freedom to move where they have passion and traction (within the vector of the larger vision) is yielding the kind of progress they have not seen using traditional change methods. They are addressing the obstacles that impede the firm's progress and rolling the successes from the small initiatives into broader projects to interject coaching in all aspects of selection, retention, promotion, evaluation and development, as well as in business development and client services.

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It is important to tend to the consequences—intended and unintended—of efforts to change an organisation. There is often a lot of hard work on the backside of the three journeys to implement and integrate the gains that have been made. We can think of this stage as a *fourth journey* (you weren't expecting that, were you?). It is one we take seriously in helping clients sustain the new ways of being and working, and the new results that have emerged. Some additional lessons from Lewis & Clark can be useful in making the fourth journey:

- The leader of the change effort must manage the impact and narrative of the trip on behalf of sponsors and allies 'back home' while attending to the needs of the trip and fulfilling its mission
- Everybody integral to the venture (even those who may oppose it) must have a place in the story that meets enough of their needs. It is better to get the story out on a successful trip than it is to wait for the 'whole book' to be written
- A key to change is to figure out how to create growth from a base that is in motion. It is easier to direct the inevitable flow of energy that is unleashed in the face of opportunity than it is to stop it or even control it at times
- People who do well with big change often find it hard to return to the 'normal' life that comes with implementation—choose their roles carefully
- Each adventure sets the stage for others like it to follow, by placing them in the context of a bigger and broader narrative. However, throughout history, leaders of change generally fail to account for the people who are displaced by change—and all that is lost as a result. This is neither ethical nor sustainable.

## CONCLUSION

Things that are complex only make sense in hindsight. They're messy. Knowledge, innovation, collaboration, culture, in fact most things involving people, are complex, where there could be a hundred things that an organisation could set out to do without knowing what to expect in return. But to make progress we don't try to boil the ocean; instead we help the organisation identify areas that really matter to the business and then focus, in the full knowledge that unexpected things might happen. We then help the business foster the good things and disrupt and discourage the bad. It's an ongoing process.

A key frame we use in supporting organisations to conceptualise and orchestrate change is through the use of the *three journeys* model. We have found it useful in helping clients integrate narrative work, coaching and an understanding of complexity to design effective change and improvement projects with our clients. The stories within an organisation can be used as a tool for assessment, development and movement in helping organisations know where they are at any point in time, and where they want to be in the near future. Coaching helps them build the awareness, confidence, maturity and abilities in order to be successful in their quest.

Where would you like to take your organisation?

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