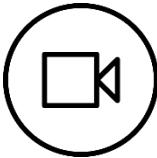




Change Management  
in  
the Digital Age  
Prof. Mateus C. Gerolamo



Digital transformation: are you ready for exponential change? Futurist Gerd Leonhard, TFAStudios VIDEO (4 min):

<https://www.youtube.com/watch?v=ystdF6jN7hc>

<https://www.youtube.com/watch?v=ystdF6jN7hc&sns=fb>



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São Carlos School of Engineering  
University of São Paulo



# Change Management in the digital age

**Prof. Mateus C.  
Gerolamo**

**USP ESALQ**      DATA SCIENCE  
**MBA**              & ANALYTICS



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# Introduction

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# Mateus C. Gerolamo

## Associated Professor

CHANGE AND INNOVATION MANAGEMENT RESEARCH GROUP  
DEPARTMENT OF PRODUCTION ENGINEERING  
SÃO CARLOS ENGINEERING SCHOOL  
UNIVERSITY OF SÃO PAULO



- ❖ Professor at University of São Paulo (USP).
- ❖ Area of operation includes Quality, Change, and Innovation Management.
- ❖ Associate Professor at
- ❖ USP and Post-doctorate at the Berlin Institute of Technology (TUB).
- ❖ Doctor and Master in Production Engineering by USP.
- ❖ More than 15 years of experience in research, teaching, and consulting projects with an emphasis on Change Management and Organizational Culture.
- ❖ Experiences in several sectors: food, automotive, civil construction, cosmetics, education, health, services, textile, among others, in small, medium, large, and third sector companies.
- ❖ Responsible for classes in undergraduate courses, *lato* and *stricto sensu* graduate courses, and MBA.
- ❖ Teaches MBA courses at USP and UFSCar (Change and Innovation Management, Leadership, *Balanced Scorecard*, Quality Management)
- ❖ Author of books, national and international articles, reviewer of international journals, including the *Journal of Organizational Change Management*.

LinkedIn: <https://www.linkedin.com/in/mateus-gerolamo-8026965/>

Curriculum Vitae Lattes: <http://lattes.cnpq.br/CT01201100000000>

Google Scholar: <https://scholar.google.com.br/citations?user=t5efBTUAAAAJ>

ORCID: <https://orcid.org/0000-0002-6535-0904>

Scopus: <https://www.scopus.com/authid/detail.uri?authorId=6504619454>

Research ID: <http://www.researcherid.com/rid/G-7182-2012>

Research Gate: [https://www.researchgate.net/profile/Mateus\\_Gerolamo](https://www.researchgate.net/profile/Mateus_Gerolamo)

❖ CTI12 Certificate (Cultural Transformation Tools) / Richard Barrett Centre.

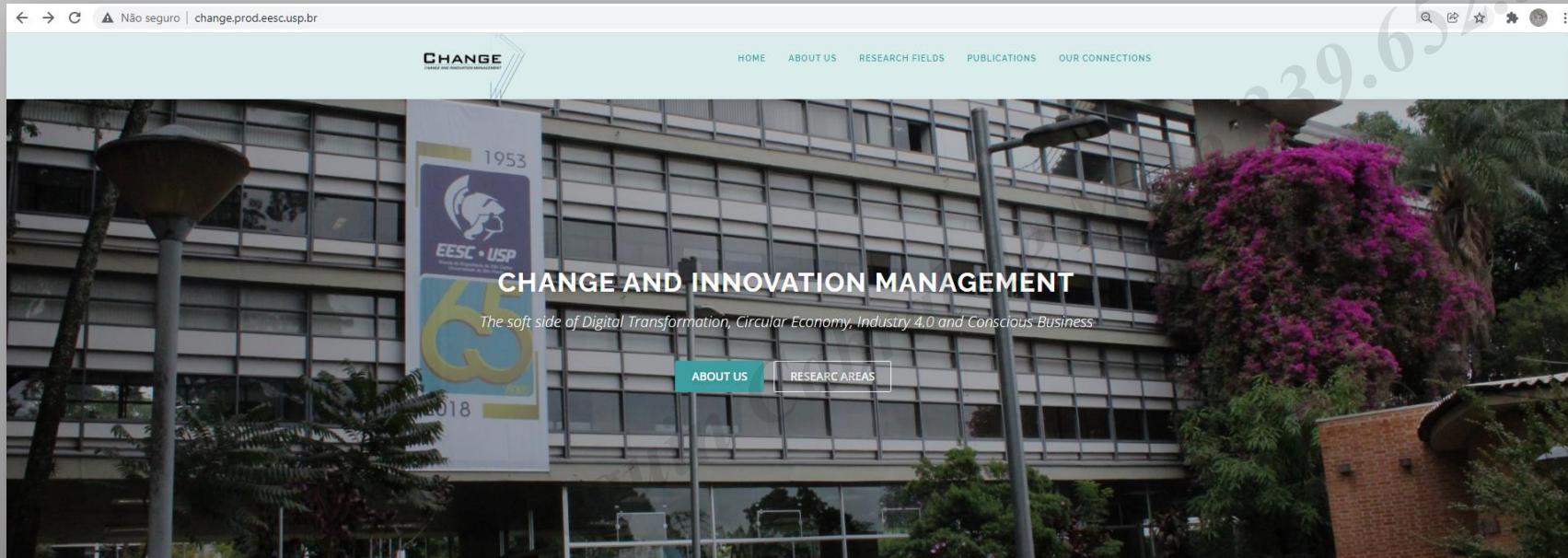
Facebook: <https://www.facebook.com/groups/gestaodamudanca>

Curriculum Lattes: <http://lattes.cnpq.br/3002611390279533>

EESC: <https://eesc.usp.br/>

USP: <https://www5.usp.br/>

# Research Group: <http://change.prod.eesc.usp.br>



## ABOUT US

We are a group of Professors, Ph.D., Master, and Undergraduate students working together in order to develop and adapt Change and Innovation Management theories, methods, and techniques aiming at delivering to the academy, enterprises, government, and society knowledge and practical tools to conduct transformation journeys towards the new business trends such as Innovation, Digital Transformation, Circular Economy, Industry 4.0 and Conscious Business.

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# Agenda / Content

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# General Content of the Course / Material

- Organizational context 4.0
- Capability to make changes
- Self-knowledge (individual and groups)
- Systemic view and organizational alignment
- Positive Organizations
- Change Management Tools / Techniques
- Exercises / cases

# Organizational Context

## Environment 4.0

# A world of constant evolution



ARE YOU  
OPEN TO  
CHANGE



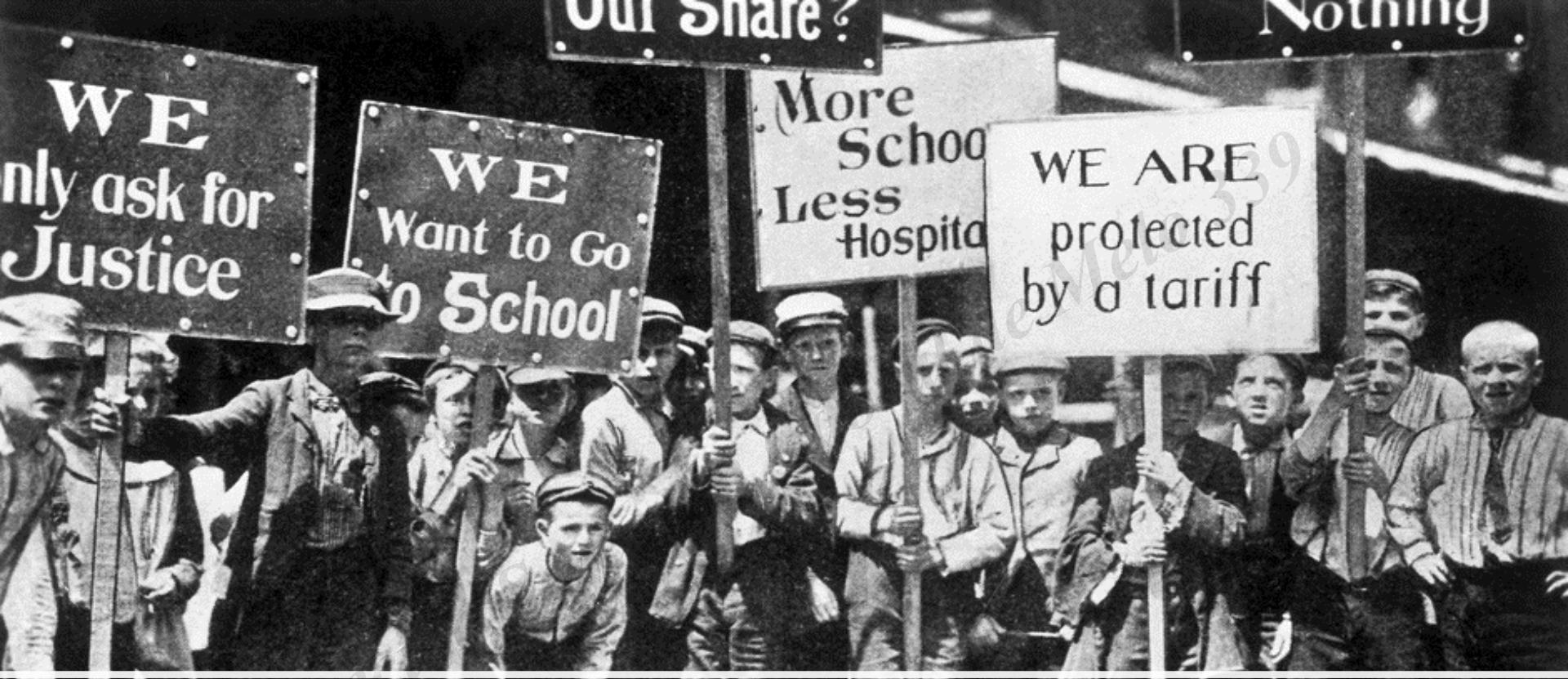
150 years ago, slavery as a workforce was accepted



100 years ago, the only male vote was accepted

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75 years ago, child work was accepted

# 60 years ago, homosexuality ...



...was a crime in the UK



# VOTING RIGHTS ACT

50 years ago, only white votes were accepted in **MBA USP ESALQ**

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35 years ago, Berlin wall was still standing!

10 years ago, China was considered as a “*copy & paste*” culture.



5 years ago, I didn't have idea of the meaning of GAFAM and BATX.



2 years  
ago



You are now in  
2050 !



Think  
30 years ago ...



What are the largest, best and most known companies in the world?

# What is the best airline in the world?

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# Pan Am

1927 - 1991



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# Polaroid

1937 - 2001



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# Camera company that is the most innovative in the world

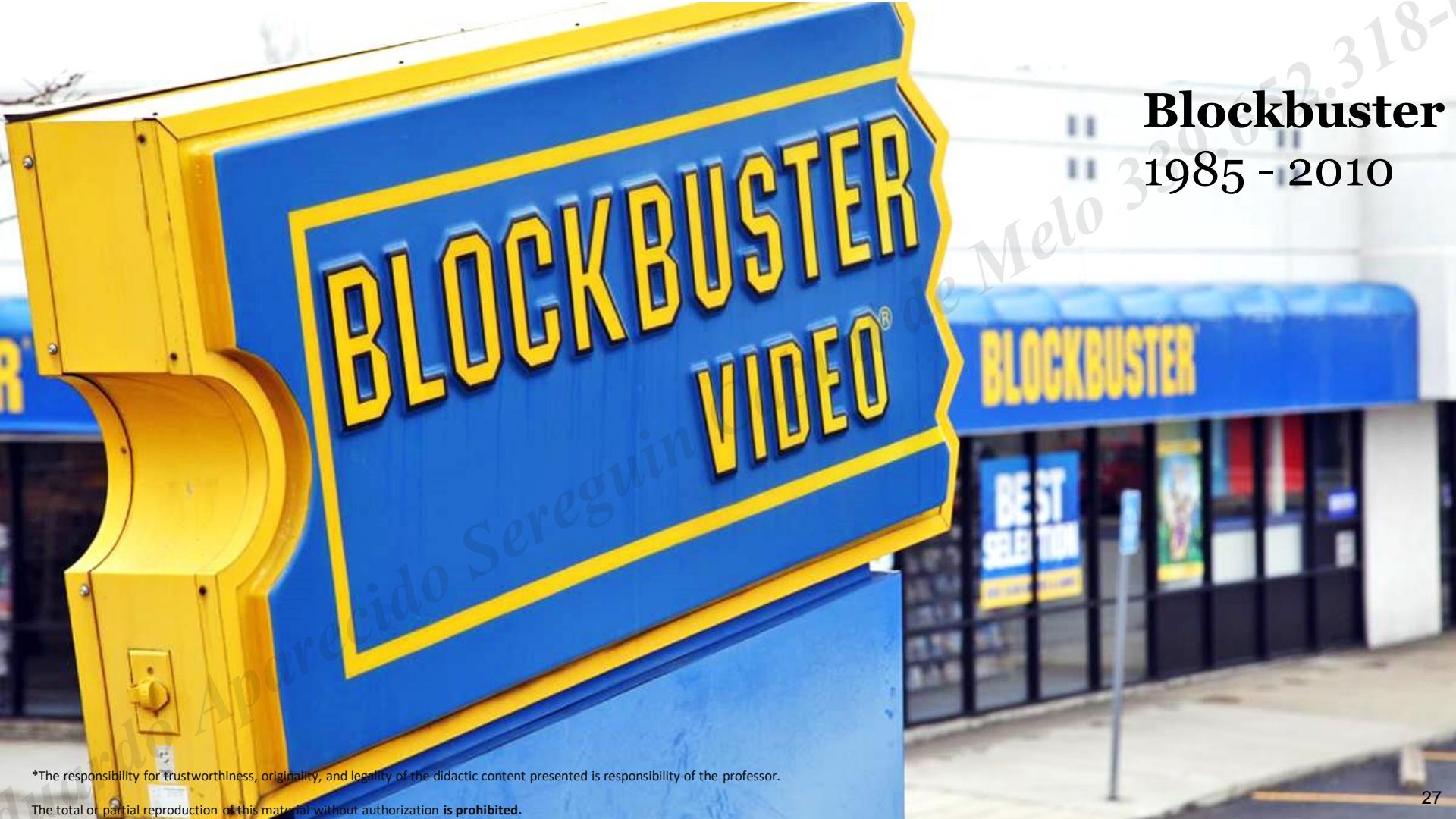
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Image: Samsung

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# What is the biggest movie distributor in the world?

**Blockbuster**  
1985 - 2010



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What will be the largest,  
best and most known  
companies in 30 years?

Chart 1: Average company lifespan on S&P 500 Index in years  
(rolling 7-year average)

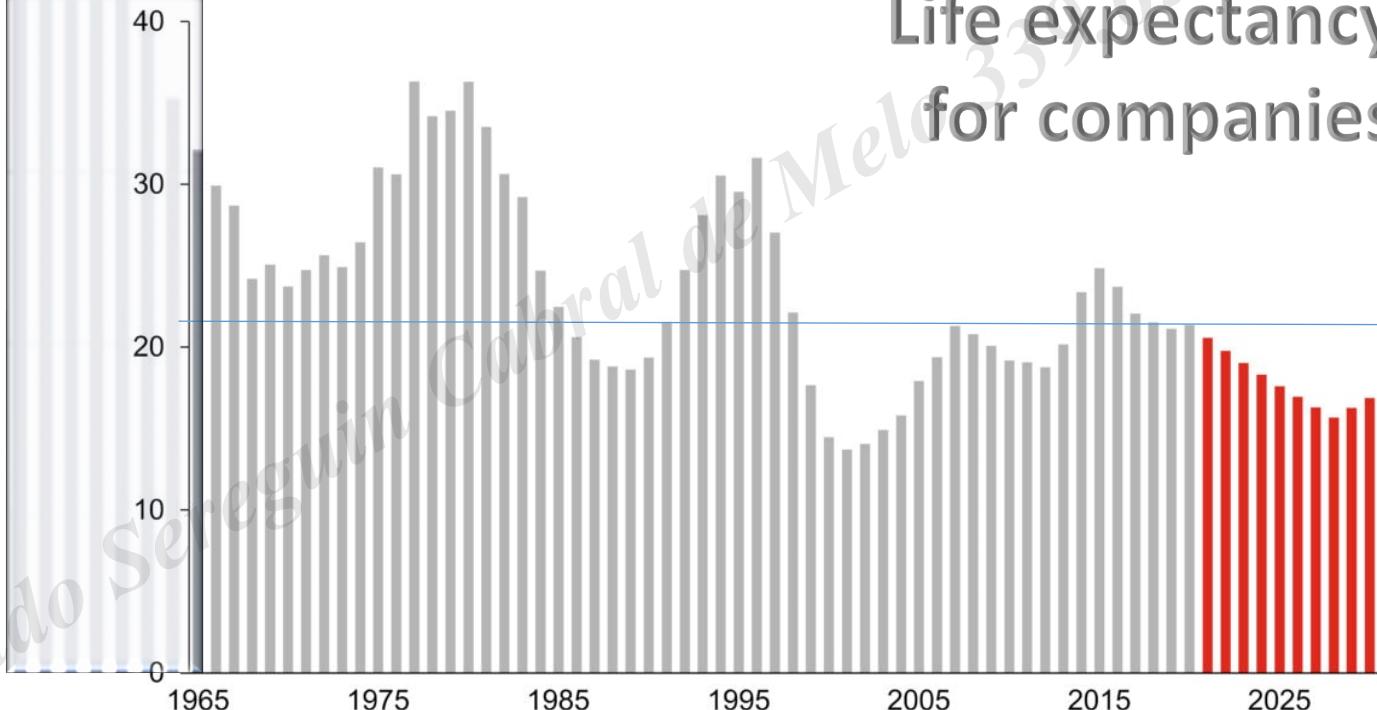
## Life expectancy for companies

Life expectancy in 1955:  
61 years

Life expectancy in 1965:  
32 years

Life expectancy in 1995:  
30 years

Life expectancy in 2020:  
21 years



Data: Standard & Poor's; Innosight analysis based on public S&P 500 data sources. See endnote on methodology.

Source: 2021 Corporate Longevity Forecast: As S&P 500 lifespans continue to decline, fast-shaping “hybrid industries” create new risks and opportunities.  
By The responsibility for trustworthiness, originality and legality of the didactic content presented is responsibility of the professor 2022.

You are now in  
2050 !



Think  
30 years ago ...

**What would society lose if your  
company didn't exist anymore?**

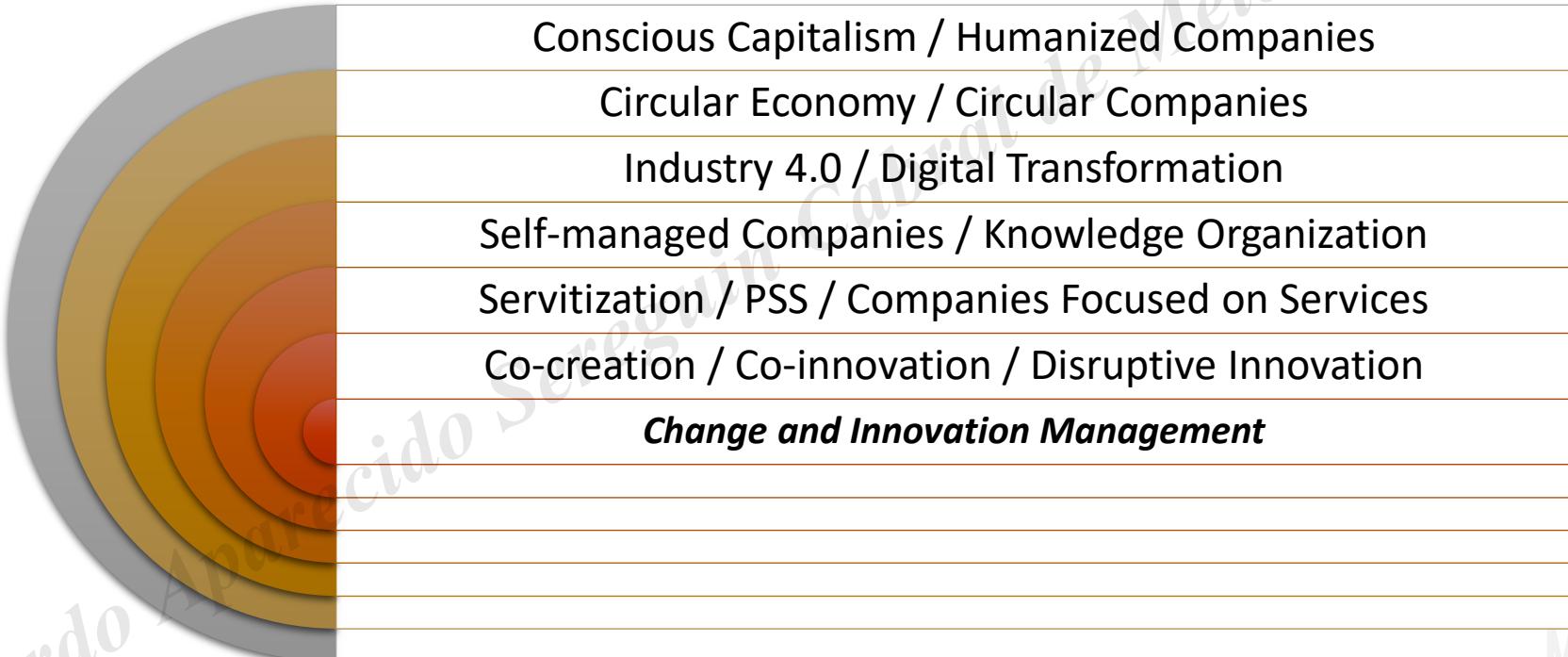
**Where does your company  
see itself in 30 years?**

**What will be your contribution to the  
company in 30 years?**



# Challenges

Understanding how current themes are integrated with the  
Change and Innovation Management:



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# Did you know that ...?

From each 100 people in an organization:

- 30 are engaged
- 20 are actively disengaged
- 50 are not engaged



Source: Gallup Institute (2013) – 25 million answers

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What does it  
take?

CHANGE

EVOLVE

REINVENTING

INNOVATE

# Reason for this class

There is a need to **formalize the subject of Change Management**

Change management is one of the **skills / abilities that can be considered among the most important** and necessary by organizations in the future

Change management is one of the skills considered as most important in the future, but **assessed between the most weak skills of current leaders**

Change Management, as an area of knowledge, is an **alternative to complement the training of professionals that aim to achieve leadership positions**

# Class Objectives

Present the fundamental concepts and principles for managing organizational change

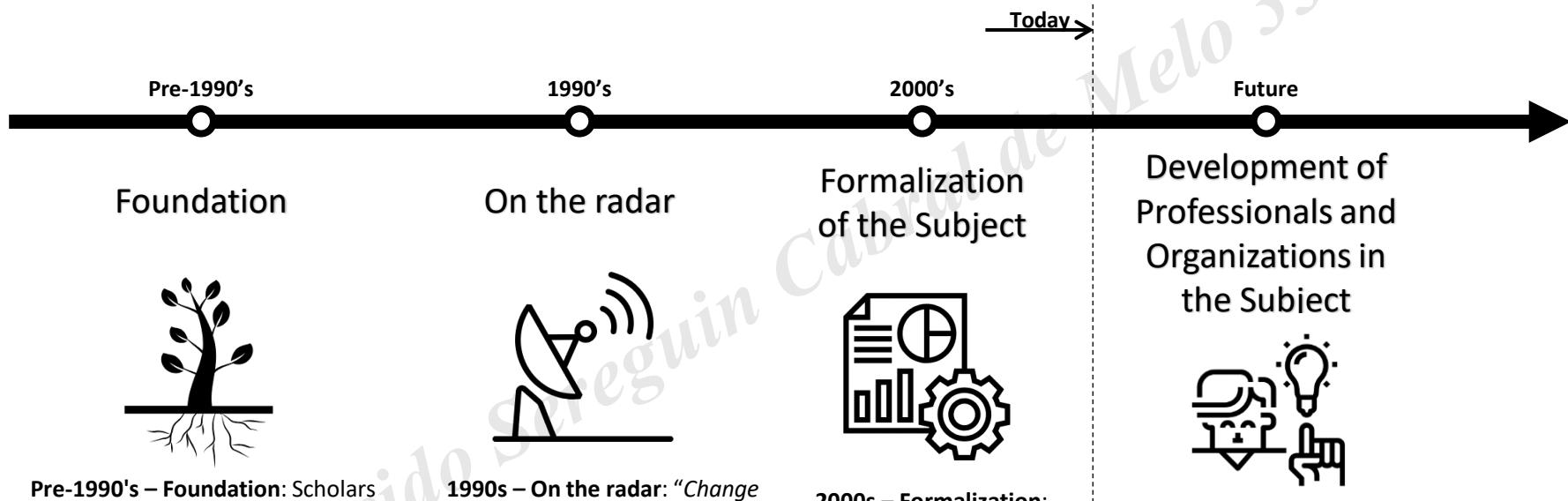
Develop leadership skills applied to the process of managing change, transformation, and organizational evolution in the context of Society 4.0

Contribute to the professional and social performance of the MBA student (digital business / strategic management / operations / projects / people / schools / data science / in-store retail)

# Context, Reason & Objective

# Change Management

# The Change Management Timeline



**Pre-1990's – Foundation:** Scholars begin to understand how people and human systems experience change

**1990s – On the radar:** “*Change Management*” enters the vernacular of the business world.

**2000s – Formalization:** Additional structure and more rigor codify Change Management as a Subject.

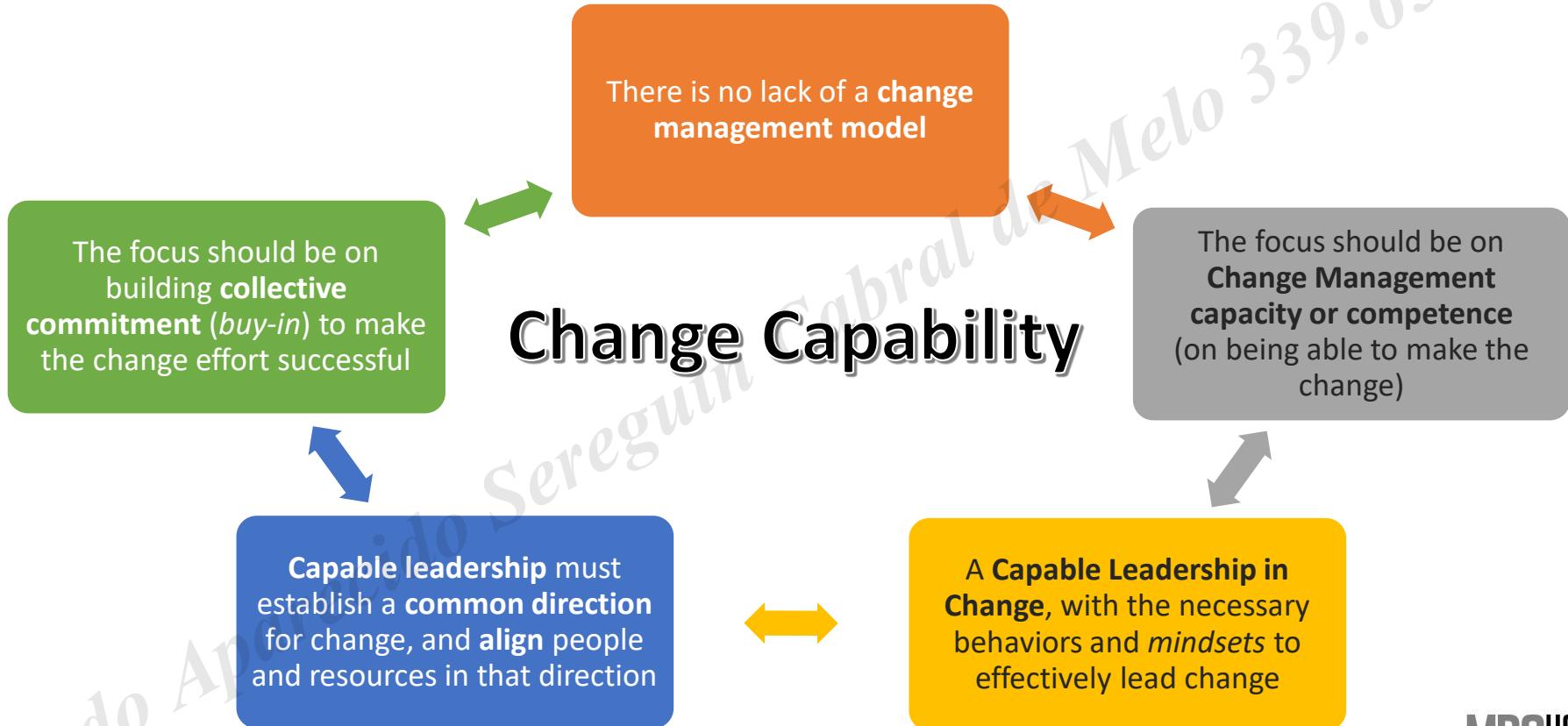
**Future:** Development of professionals and improvement of organizational maturity in the Change Management theme.

Source: Adapted from PROSCI. The History and Future of Change Management. Prosci: People, Change, Results, Thought Leadership Article, 2016.

Available in: <<https://www.prosci.com/resources/articles/change-management-history-and-future>>

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# Contextualization



Source: Bendixen et al. (2016).

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# Contextualization

**Change Capability** is the enduring skill that reflects a dynamic process of continuous learning and adjustments, allowing the organization to develop amidst ambiguity and uncertainty.

## Change Capability

It also reflects the ability to implement changes as needed.

# Contextualization

- Building a capacity for **organizational change** involves three main areas:



- Building that **capacity (or competence)** requires interventions that focus on the organization's membership, structure, and culture.

Source: Buono and Kerber (2010); Kerber and Buono (2005).

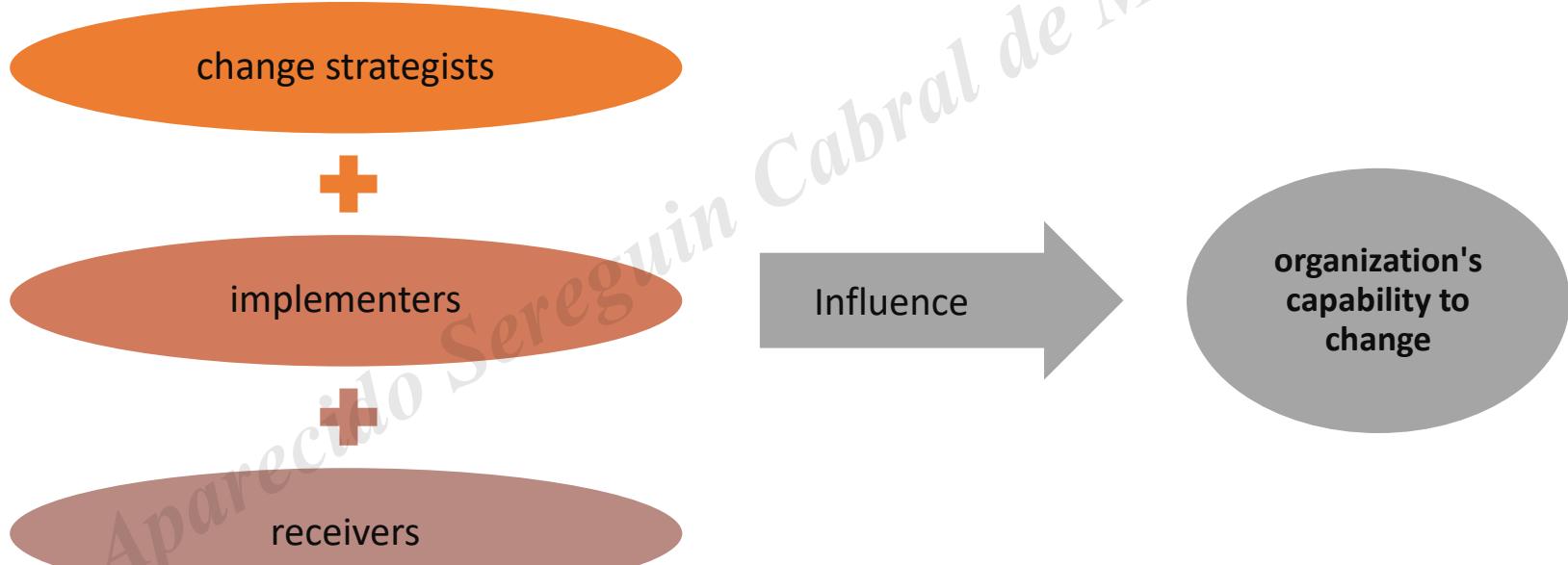
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# Contextualization

Who influences the **organization's capability to change?**

The *Stakeholders of Change*:

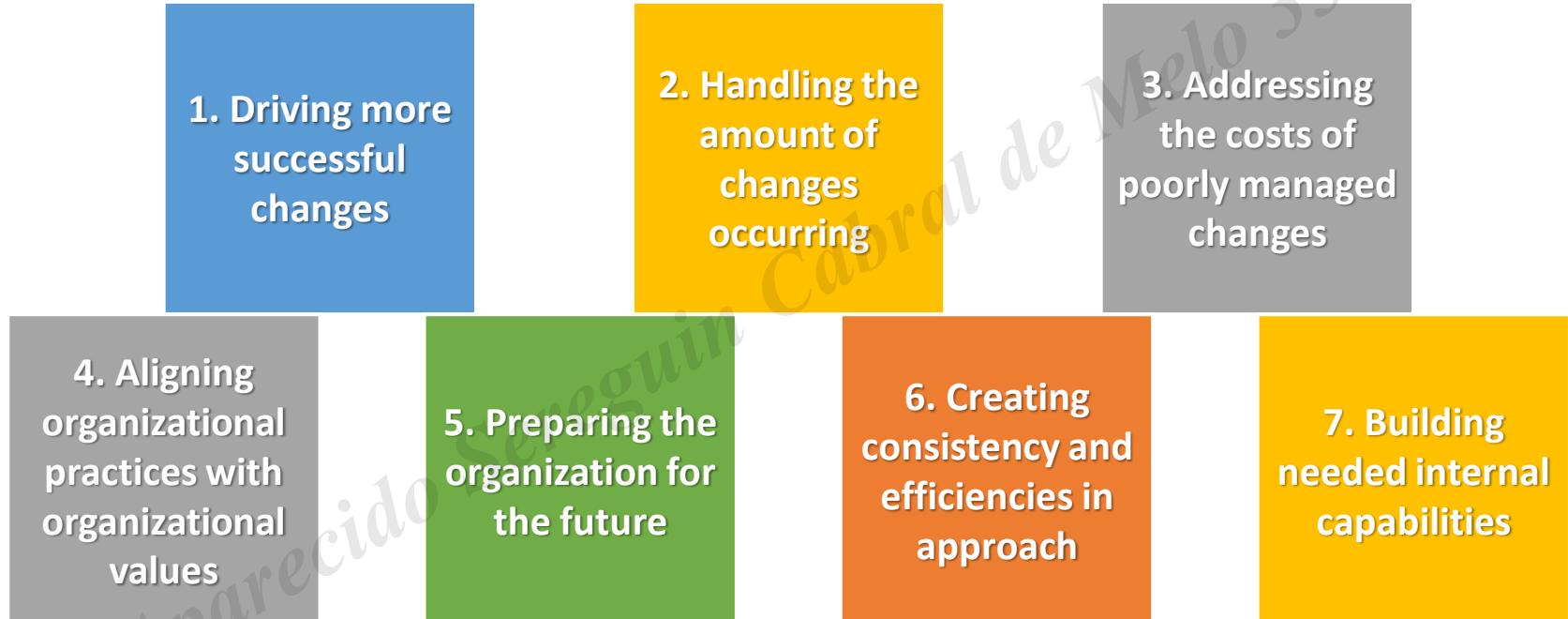


Source: Buono and Kerber (2010); Kerber and Buono (2005).

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# Seven Compeling Reasons for Change Management Deployment.

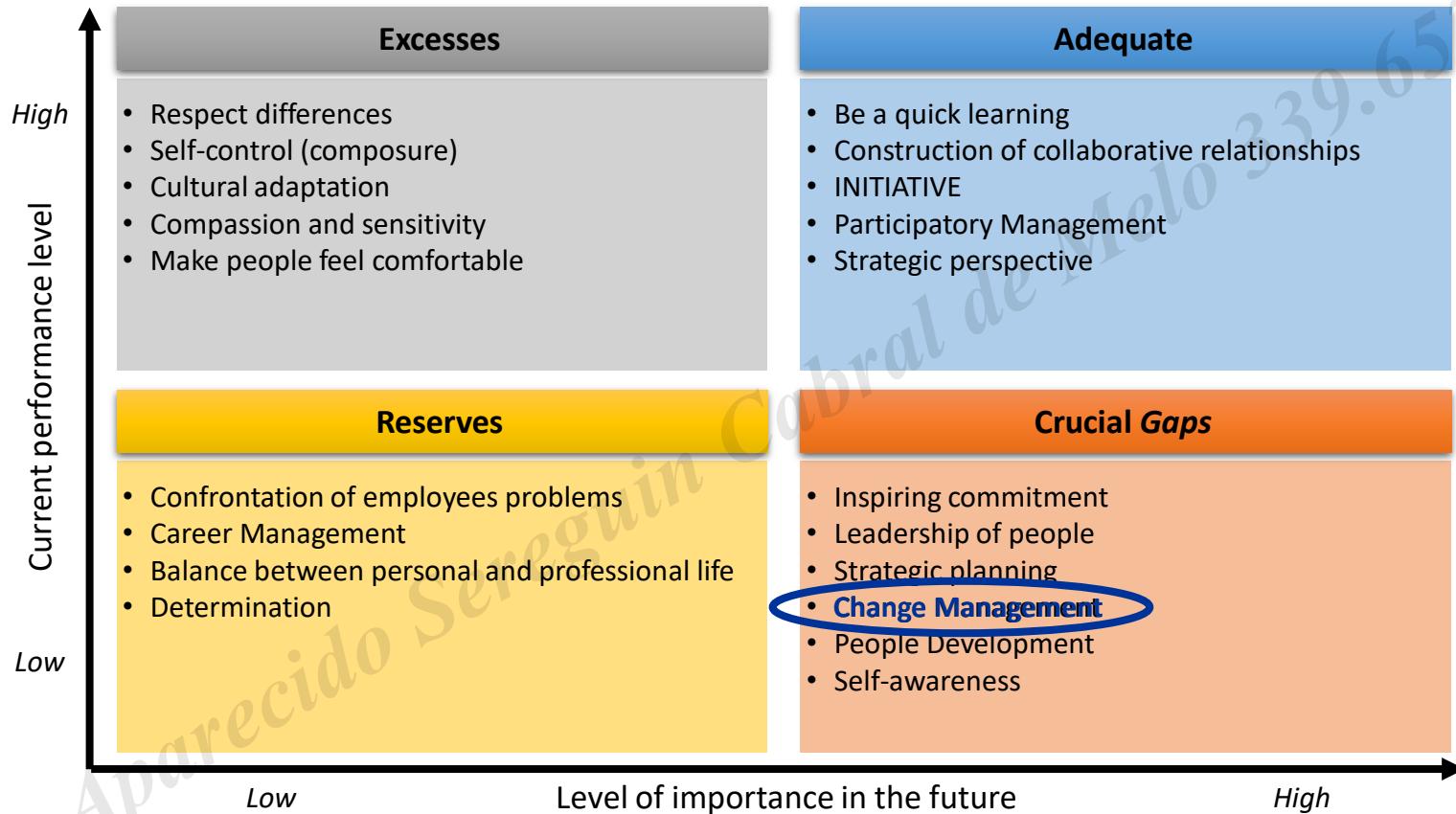


Source: Adapted from PROSCI. 7 Compeling Reasons for Change Management Deployment. Prosci: People, Change, Results, Thought Leadership Article, 2017.

Available in: <<https://www.prosci.com/resources/articles/7-reasons-for-change-management-deployment>>.

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# The Leadership Gap



Source: LESLIE, J., The Leadership Gap – what you need, and still don't have when it comes to leadership talent, Center for Creative Leadership, White Paper, 2015.

Available in: <<https://www.ccl.org/articles/white-papers/leadership-gap-what-you-still-need/>>, page 11.

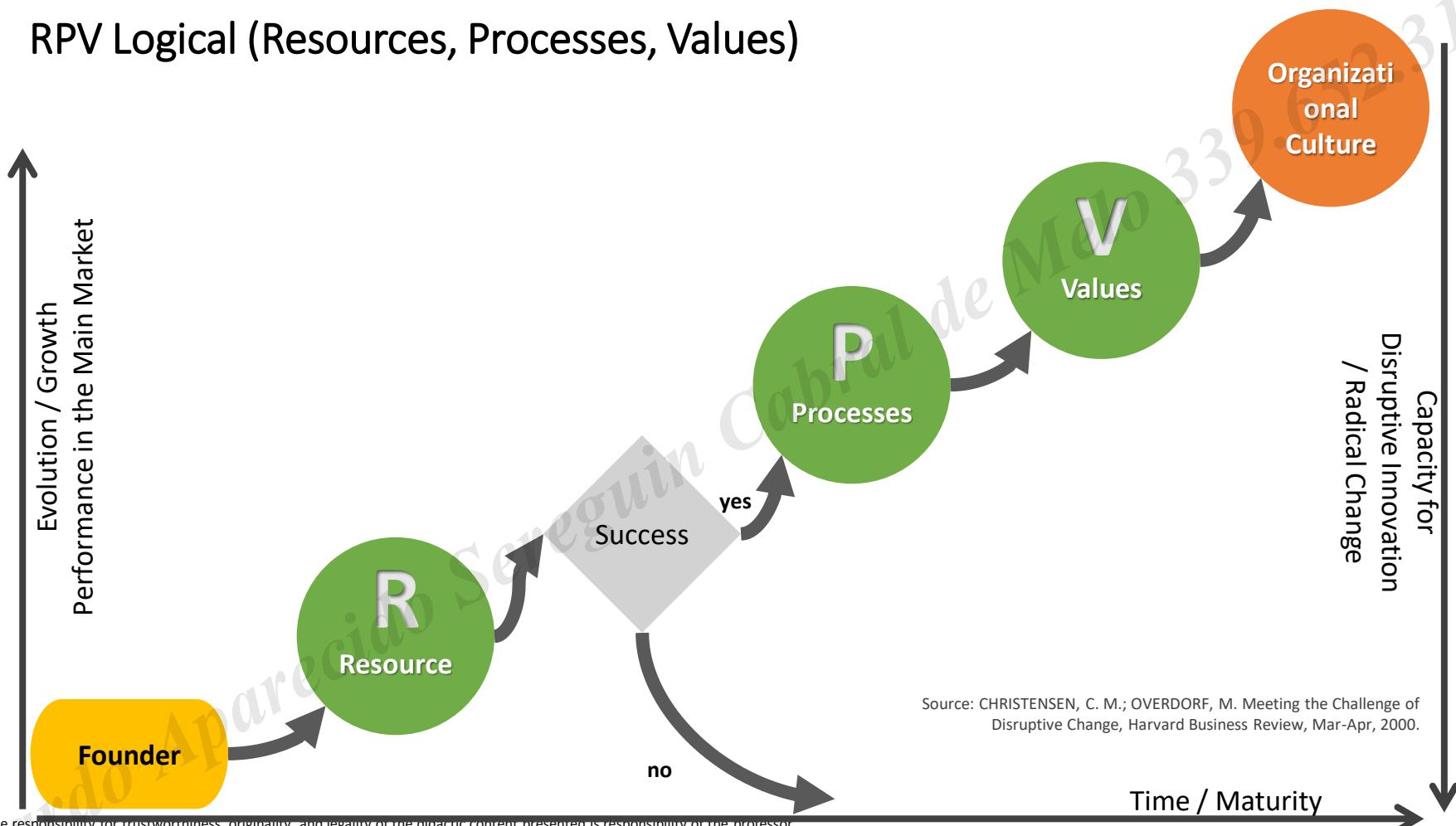
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# Why is it so hard to change, innovate, reinvent yourself?

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# RPV Logical (Resources, Processes, Values)

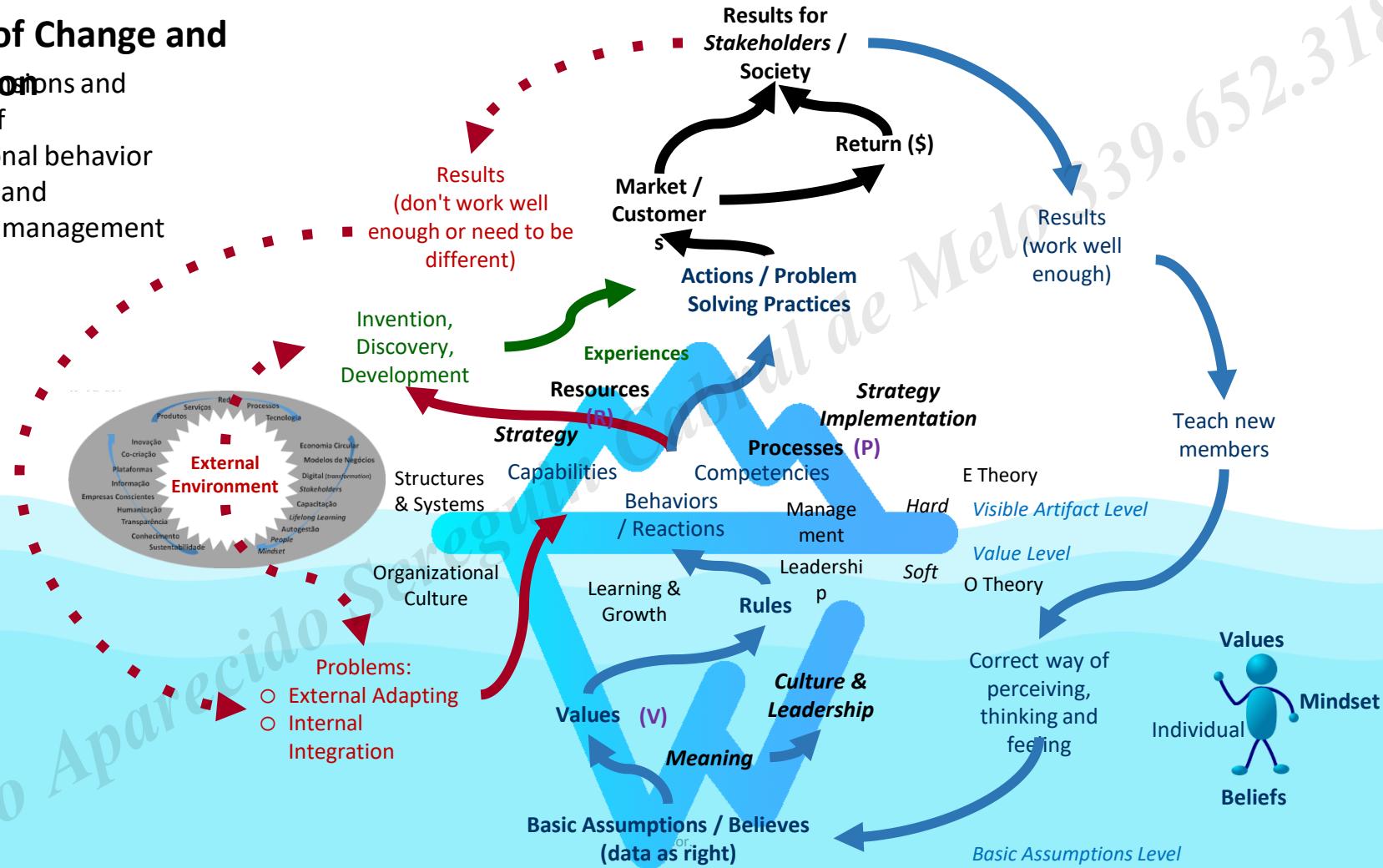


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# Iceberg of Change and Innovation

Variables and variables of organizational behavior for change and innovation management



# Concept

*Change Management*

Definition

# WHAT IS CHANGE MANAGEMENT?



## Change Management

- [1] The Change Management and development within a business or similar organization.
- [2] The identification and control implementation of necessary changes within an information system.

Oxford Living Dictionaries,  
[https://en.oxforddictionaries.com/definition/change\\_management](https://en.oxforddictionaries.com/definition/change_management)

## Change Management

- Planning and introducing new processes, working methods, etc. in a company or organization.

Cambridge Dictionary,  
<https://dictionary.cambridge.org/dictionary/english/change-management>

**Change Management** refers to “the processes, tools, and techniques for managing the people side of a change to achieve a necessary business outcome”.

Prosci,  
<https://www.prosci.com/change-management/thought-leadership-library/change-management-definition>

## Definition

“**Change management** is a collective term for all approaches to preparing and supporting individuals, teams, and organizations in making organizational change. It includes methods that redirect or redefine resource usage, business processes, budget allocations, or other modes of operation that significantly alter a business or organization. **Organizational Change Management** considers the entire organization and what needs to change<sup>[1]</sup>, while Change Management is used to refer to how people and teams are affected by this organizational transition. It deals with many different disciplines, from behavioral and social sciences to information technology and business solutions<sup>[2]</sup>.

In a project management context, the term '**change management**' can be used as an alternative to the change control process, in which changes to the scope of a project are formally introduced and approved<sup>[3]</sup> [4]."

Wikipedia, [https://en.wikipedia.org/wiki/Change\\_management](https://en.wikipedia.org/wiki/Change_management)

[1] "Home". International Organizational Change Management Institute. Retrieved 2015-12-08.

[2] <https://www.prosci.com/change-management/what-is-change-management>

[3] Filicetti, John (August 20, 2007). "Project Management Dictionary". PM Hut. Retrieved November 16, 2009.

[4] Levin, Ginger (2012). "Embrace and Exploit Change as a Program Manager: Guidelines for Success". Project Management Institute. Retrieved August 10, 2013.

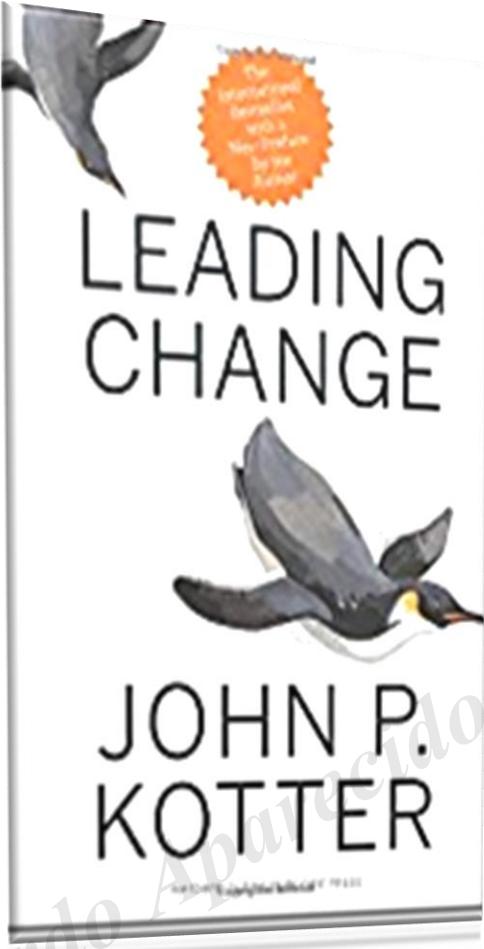
John P. Kotter



## THE HEART OF CHANGE IS IN THE EMOTIONS

JOHN P KOTTER

**“A set of tools and basic structures that seek to keep any change effort under control”**



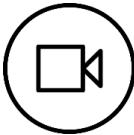
John P. Kotter

- Leading Change
- by John P. Kotter (Author)
- Hardcover: 197 pages
- Publisher: Harvard Business School Press; 1st edition (January 15, 1996)

Kotter, John P (1996). **Leading Change**, Harvard Business School Press, 1st Edition, p. 197.

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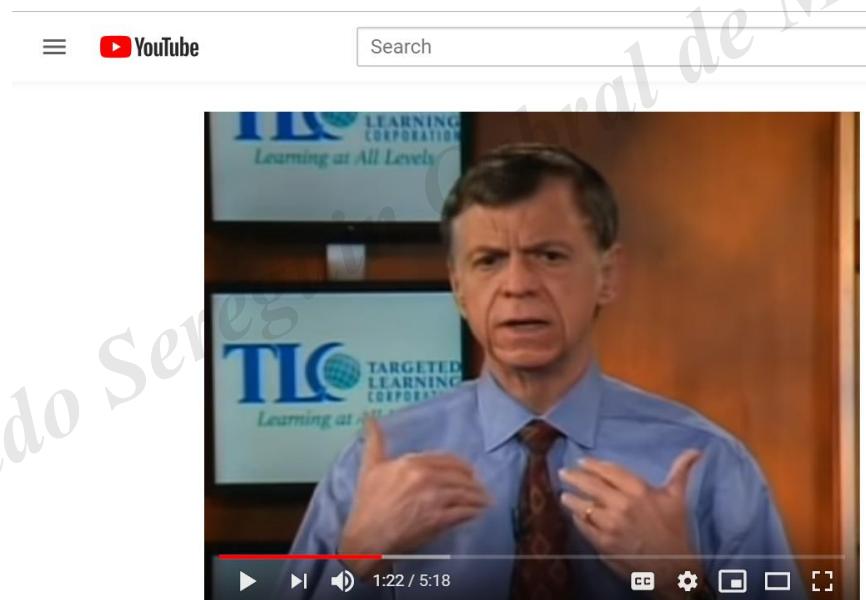
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## Video Tip

John Kotter - The Heart of Change VIDEO (5:18 min):

<https://www.youtube.com/watch?v=1NKti9MyAAw&app=desktop>



John Kotter - The Heart of Change

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# Concepts: Change Management Mistakes

## The 8 Mistakes of the Change Process (John P. Kotter)

- 1. Not establishing a sense of urgency**
- 2. Not creating a powerful enough guiding coalition**
- 3. Lacking a vision**
- 4. Under-communicating the vision**
- 5. Not removing obstacles to the new vision**
- 6. Not planning for and creating short-term wins**
- 7. Declaring victory too soon**
- 8. Not anchoring changes in the corporation's culture**

Source: Kotter (1995; 1996).

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# Concepts: The Steps of Change

## The 8 Steps of the Change Process (John P. Kotter)

- 1. Establishing a sense of urgency**
- 2. Forming a powerful guiding coalition**
- 3. Creating a vision**
- 4. Communicating the vision**
- 5. Empowering people to work on the new vision**
- 6. Planning and achieve short-term goals and objectives**
- 7. Consolidating improvements and produce more changes**
- 8. Anchoring changes in the corporation's culture**

Source: Kotter (1995; 1996).

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# Defining Change Management

## A broader definition of Change Management

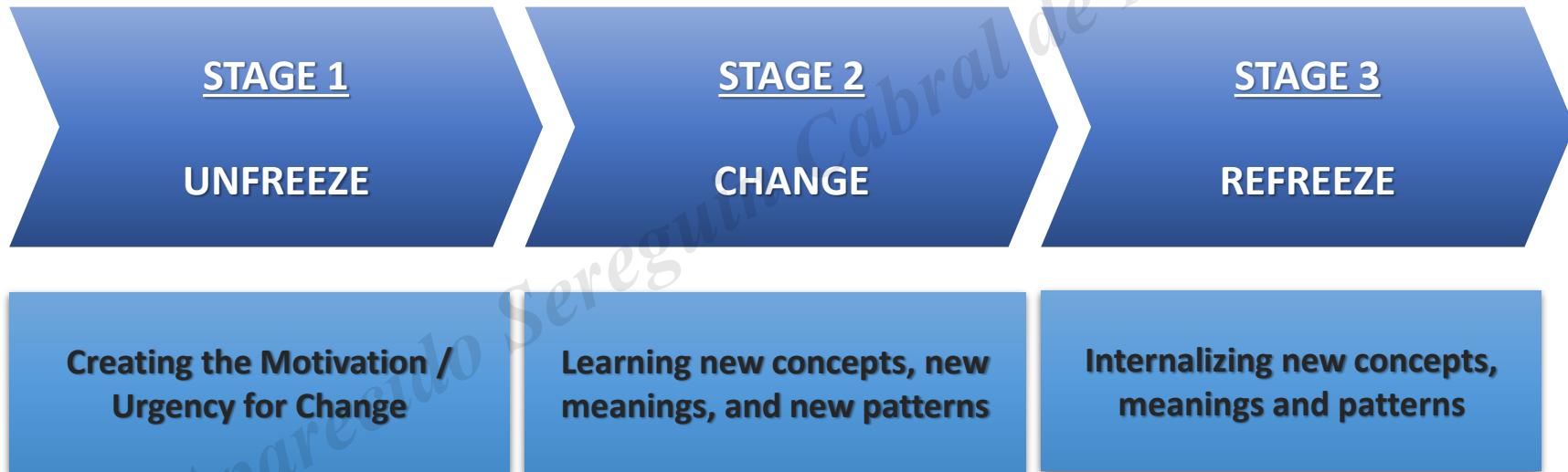
**Change Management** is "... a continuous process of learning, both individual and organizational, aimed at implementing temporary change efforts to achieve greater transformation, with a focus on results aligned with the evolutionary purpose of the organization, whose leadership must consider the organizational culture, to reduce the level of resistance and increase commitment, ensuring its longevity in a world in constant evolution".

\*Note: This definition is the result of teamwork developed by graduate students in the discipline SEP5835 - Change Management offered by professor Mateus C. Gerolamo, in the Change Management Concepts class, on March 23, 2018. The team members and the authors of the sentence are, in alphabetical order: Jeanne LM Michel, Júlio C. Natalense, Valter Yogui, Wellington J.R. dos Santos, and Willian Rossini. Revised and adapted by Mateus C. Gerolamo.

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# Change Stages

## Three Stages of the Change Process (Kurt Lewin)

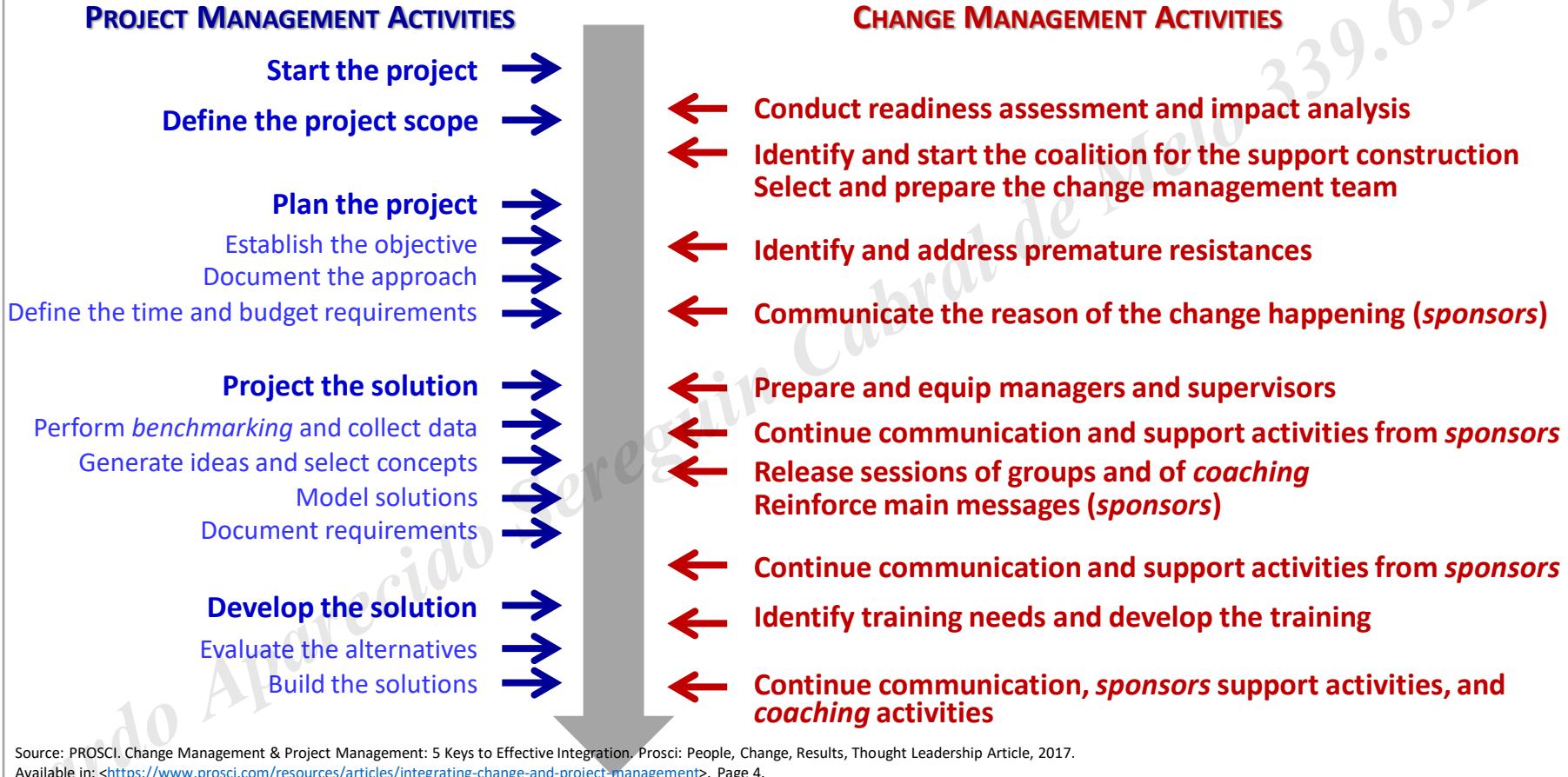


Source: Lewin (1952) mentioned by Schein (2002).

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# Project Management Activities versus Change Management Activities



# Organizational Alignment

Systemic Vision of Value Chain

# Importance of the Value Chain

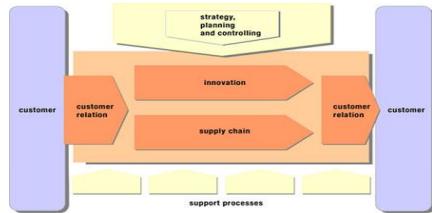
In addition to operating an organization, people are also responsible for innovations and their evolution;

It is necessary to maintain and always improve the business value;

For that, we need to see the value chain(s) of our organization!

# Importance of the Value Chain

## What is a value chain?



... a value chain is any combination of processes, functions, activities, relationships, and pathways along which products, services, information and financial transactions move internally and between companies. This includes any and all activities, starting with the extraction of raw materials and ending with final consumption, and everyone in the company is involved in making that happen.

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# Value Chains are Complex

Most companies contain  
hundreds of value chains

Many people have virtually no vision of these value chains. They can only see the traceable movement of products and/or the position of physical assets. Complexity makes the true value chain invisible.

# Value Chains are Complex

An unhealthy management concern with the use of infrastructure and assets is perceived, driven mainly by the obsessive desire to cut costs.

Cutting costs, reengineering, *benchmarking*, *lean*, and continuous improvement may all have their places in the corporate arsenal, but they're not the only answers to complexity in the value chain.

# How to maintain the coherence of your value chain(s) and obtain positive results for the different *stakeholders* of the business?

# Alignment

- **Alignment** is an idea that captures the concept of dynamism, or life, in the organization;
- Seeking alignment means treating the organization as a living being and not as a mechanical entity;
- This is all about the energy, achievement, and dynamism of people and movements.

# Alignment

- Successful **organizations** often have leaders who are clearly in close contact and who have empathy for their *stakeholders*.
- Empathetic **leaders** tend to formulate relevant strategies and shape the most appropriate cultural capabilities to ground and direct these strategies in the marketplace.
- All kinds of associations have one thing in common: **like people** and their **behavior**. Taking on a leadership position today is much more 'risky' than in the past, as there is little or no time to learn the role.

If we can understand and correctly apply an effective approach to managing the 'human factor'...

... we will discover a key resource for improving performance shortly.



# Observe your *Stakeholders* ...

Unless all of our energy and resources are focused on improving the '**alignment**' between our organization and all of its **stakeholders**, we are likely wasting everyone's time and weakening the organization in the process.

# How to search Alignment?

*Building more admired, trustworthy, positive, long-lasting and naturally more prosperous organizations*

*Ability to execute strategic initiatives, constantly striving for operational excellence to deliver value.*

## STRATEGIC EXECUTION (PROJECTS / OPERATION)

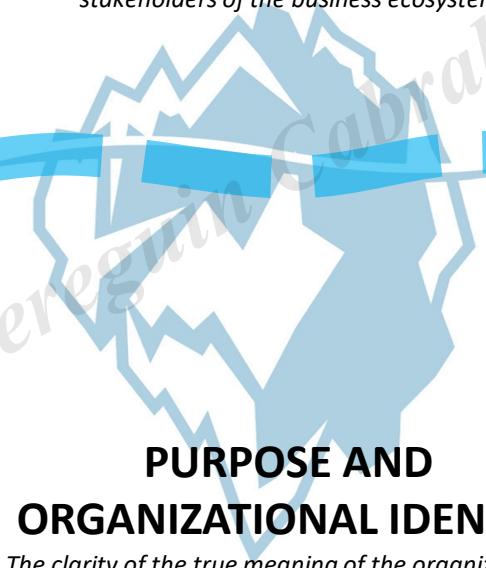


## LEADERSHIP DEVELOPMENT

*Development of the capacity of leaders to be guided by the organization's purpose, to learn, inspire and ensure cultural evolution.*

## RESULT FOR STAKEHOLDERS

*Mapping and delivery of results to promote balanced exchanges with the main stakeholders of the business ecosystem.*



**PURPOSE AND  
ORGANIZATIONAL IDENTITY**

*The clarity of the true meaning of the organization's existence (and its stakeholders) about its mission and purpose.*

*Understanding of business challenges and uncertainties, clear vision of the future, and alignment with the organization's Purpose, Mission, and Values.*

## BUSINESS STRATEGY



## ORGANIZATIONAL CULTURE

*Understanding the cultural patterns that shape the behavior of individuals, teams, and systems in an automated way.*

# Challenges for Leadership

- Align the organization,
- Align people,
- Align behaviors,
- Define a strategy,
- Execute the strategy, and
- Obtain the results.



# Change Monitoring

## D.I.C.E. Assessment Tool

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# The Hard Side of Change Management

Executivos podem combinar os quatro elementos em uma pontuação de projeto. Quando conduzimos uma análise de regressão do nosso banco de dados de esforços de mudança, descobrimos que a combinação que melhor se correlaciona com os resultados reais dobra o peso dado ao desempenho da equipe (I) e ao comprometimento de gerenciamento sênior (C<sub>1</sub>). Isso é traduzido na seguinte fórmula:

$$\text{Pontuação DICE} = D + (2 \times I) + (2 \times C_1) + C_2 + E$$

No sistema de pontuação de 1 a 4, a fórmula gera pontos gerais que variam de 7 a 28. As empresas podem comparar os pontos de um projeto com os de projetos anteriores e seus resultados para avaliar se o projeto está destinado ao sucesso ou ao fracasso. Nossos dados mostram uma distribuição clara de pontos:

**Pontos entre 7 e 14:** O projeto tem grande chance de ser bem-sucedido. Chamamos isto de "Zona Vencer".

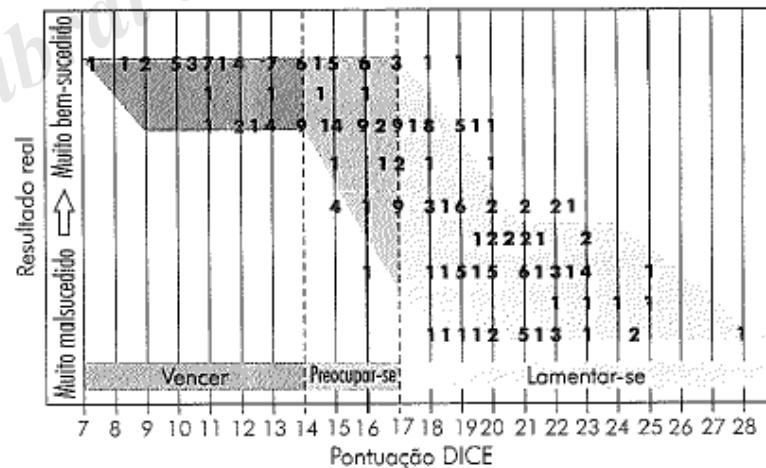
**Pontos acima de 14 e abaixo de 17:** Os riscos ao sucesso do projeto estão aumentando, especialmente quando a pontuação se aproxima de 17. Esta é a "Zona Preocupar-se".

**Pontos acima de 17:** O projeto é extremamente arriscado. Se um projeto tem pontuação acima de 17 e abaixo de 19, os riscos ao sucesso são muito altos. Acima de 19, o projeto tem poucas chances de ser bem-sucedido. É por isso que chamamos esta área de "Zona Lamentar-se".

Alteramos os limites das zonas com o tempo. Por exemplo, a "Zona Preocupar-se" primeiro estava entre 14 e 21 pontos, e a "Zona Lamentar-se" estava entre 21 e 28 pontos. Mas descobrimos que as empresas preferem ser alertadas sobre o problema assim que os resultados se tornam imprevisíveis (17 a 20 pontos). Portanto, compactamos a "Zona Preocupar-se" e expandimos a "Zona Lamentar-se".

## Pontuações DICE antecipam resultados do projeto

Quando identificamos as pontuações DICE de 225 iniciativas de gerenciamento de mudança no eixo horizontal, e os resultados destes projetos no eixo vertical, descobrimos três conjuntos de correlações. Os projetos com pontuações DICE entre 7 e 14 costumavam ser bem-sucedidos; aqueles com pontuações acima de 14 e abaixo de 17 eram imprevisíveis; e os projetos com pontuações acima de 17 costumavam ser mal-sucedidos. Atribuímos nomes às três zonas: "Vencer", "Preocupar-se" e "Lamentar-se", respectivamente (cada número identificado no gráfico representa o número de projetos, em um total de 225 projetos, e tem uma pontuação DICE específica.)



The Hard Side of Change Management, by [Harold L. Sirkin](#), [Perry Keenan](#) and [Alan Jackson](#), Harvard Business Review

From the October 2005 Issue, Available at: <https://hbr.org/2005/10/the-hard-hard-hard-side-of-change-management>

DICE® BCG: <https://www.bcg.com/en-br/capabilities/change-management/dice.aspx>

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# The Hard Side of Change Management

Executivos podem combinar os quatro elementos para uma pontuação de projeto. Quando conduzimos uma análise de regressão da probabilidade de sucesso de projetos de mudança, descobrimos que a combinação de medida de risco e de resultado real do projeto é mais eficaz do que a soma das partes individuais. Os resultados reais dobram o peso dado ao desejo de sucesso (D) e ao desempenho do gerenciamento de gerenciamento sênior ( $C_1$ ). Isso resulta em uma medida de projeto que é dividida na seguinte maneira:

$$\text{Pontuação DICE} = D + (2 \times 1) + (2 \times C_1) + E$$

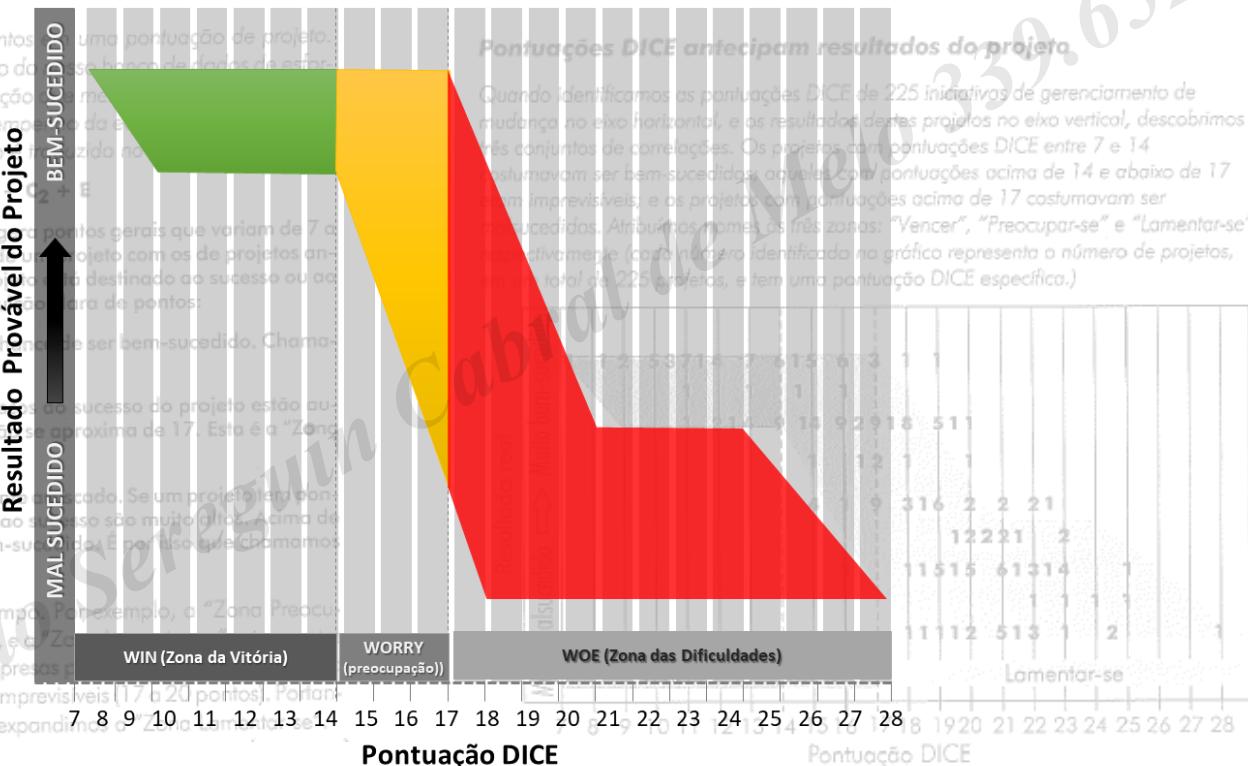
No sistema de pontuação de 1 a 4, a fórmula gera pontos gerais que variam de 7 a 28. As empresas podem comparar os pontos de um projeto com os de projetos anteriores e seus resultados para avaliar se o projeto está destinado ao sucesso ou ao fracasso. Nossos dados mostram uma distribuição clara de pontos:

**Pontos entre 7 e 14:** O projeto tem grande chance de ser bem-sucedido. Chamamos isto de "Zona Vencer".

**Pontos acima de 14 e abaixo de 17:** Os riscos de sucesso do projeto estão aumentando, especialmente quando a pontuação se aproxima de 17. Esta é a "Zona Preocupar-se".

**Pontos acima de 17:** O projeto é extremamente arriscado. Se um projeto tem uma pontuação acima de 17 e abaixo de 19, os riscos de sucesso são muito altos. Acima de 19, o projeto tem poucas chances de ser bem-sucedido. E por isso chamamos esta área de "Zona Lamentar-se".

Alteramos os limites das zonas com o tempo. Por exemplo, a "Zona Preocupar-se" primeiro estava entre 14 e 21 pontos, e a "Zona Lamentar-se" entre 21 e 28 pontos. Mas descobrimos que as empresas passavam por um problema assim que os resultados se tornam imprevisíveis (entre 17 e 20 pontos). Portanto, compactamos a "Zona Preocupar-se" e expandimos a "Zona Lamentar-se".



**The Hard Side of Change Management**, by [Harold L. Sirkin](#), [Perry Keenan](#) and [Alan Jackson](#), Harvard Business Review

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DICE® BCG: <https://www.bcg.com/en-br/capabilities/change-management/dice.aspx>

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# The Four Factors D.I.C.E. (Duration, Integrity, Commitment, Effort)

| DICE Factors  | DESCRIPTION   |
|---|---|
| <b>Duration (<i>Duration</i>)</b>                         | The ran time until the change is completed in the project in case of a short-time project, or the time gaps between the revisions of the project's marks.   |
| <b>Integrity (<i>Integrity</i>)<br/>(Team Competence)</b> | The integrity of the project team related to their performance, which is the team's ability to complete the activity in time. That depends on the team member's skills and characteristics related to the project requirements. |
| <b>Commitment</b>   | The commitment demonstrated regarding the change, both by the high administration ( $C_1$ ) and the other employees affected by the change ( $C_2$ ).   |
| <b>Effort (<i>Effort</i>)</b>                             | The effort level that must be undertaken besides the usual tasks of people that the change initiatives will demand from the participants, directly or indirectly involved with the project.                                     |

Source: SIRKIN, H. L.; KEENAN, P.; JACKSON, A. The Hard Side of Change Management, Harvard Business Review, October, 2005, pp. 108-114.  
\*The responsibility for trustworthiness, originality, and legality of the didactic content presented is responsibility of the professor.

# D.I.C.E. Score Calculation

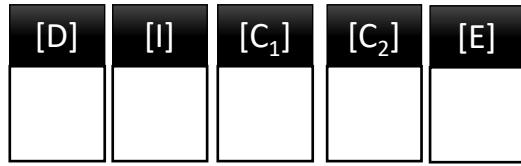
| DICE Factors         | Questions and Score   |
|----------------------|---|
| <b>D</b>             | <p>Do the formal project reviews occur regularly? For projects with more than 2 months, what is the average time between reviews?</p> <p>(Score: less than 2 months = 1; between 2 to 4 months = 2; between 4 to 8 months = 3; more than 8)</p>   |
| <b>I</b>             | <p>Is the team leader capable? How much are the members motivated and capable?<br/>Does the team have enough time to the initiative?</p> <p>(Score : 1 point for positive answers; 4 points for negative answers; 2 or 3 points for half-term)</p>  |
| <b>C<sub>1</sub></b> | <p>Do the executives often communicate the reason of the change and the importance of the success?<br/>Is the message consistent and compelling? Did the management direct enough resources for the change?</p> <p>(Score: 1 point for positive answers; for neutral executives = 2 or 3 points; if there is no support for the change = 4)</p> |
| <b>C<sub>2</sub></b> | <p>Do the employees affected by the change understand the reasons and believe in the need?<br/>Do they support? Are they motivated, or concerned and obstructive?</p> <p>(Score: anxious for the change = 1; accepting the change = 2; they are reluctant or very resistant = 3 or 4)</p>   |
| <b>E</b>             | <p>What is the percentage of the increase in the effort used with the change?<br/>Is the effort direct firstly to the change? Is there resistance on the increase of work demand?</p> <p>(Score: less than 10% = 1; 10% to 20% = 2; 20% to 40% = 3; above 40% = 4)</p>  |

Source: SIRKIN, H. L.; KEENAN, P.; JACKSON, A. The Hard Side of Change Management, Harvard Business Review, October, 2005, pp. 108-114, p. 109.

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# D.I.C.E.

Duration / Integrity / Commitment / Effort



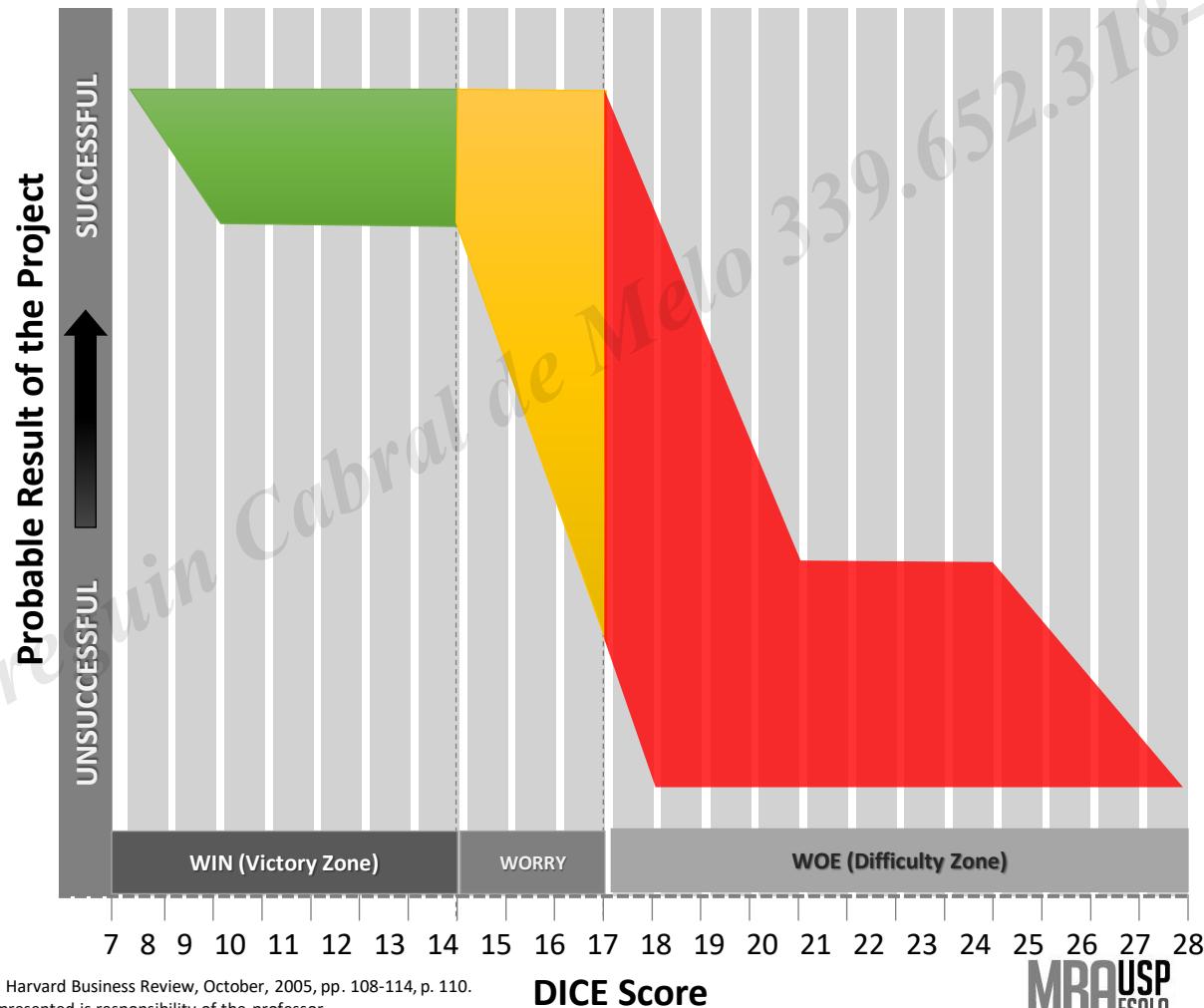
Calculate



$$\text{DICE SCORE} = D + 2*I + 2*C_1 + C_2 + E$$



Plotting →

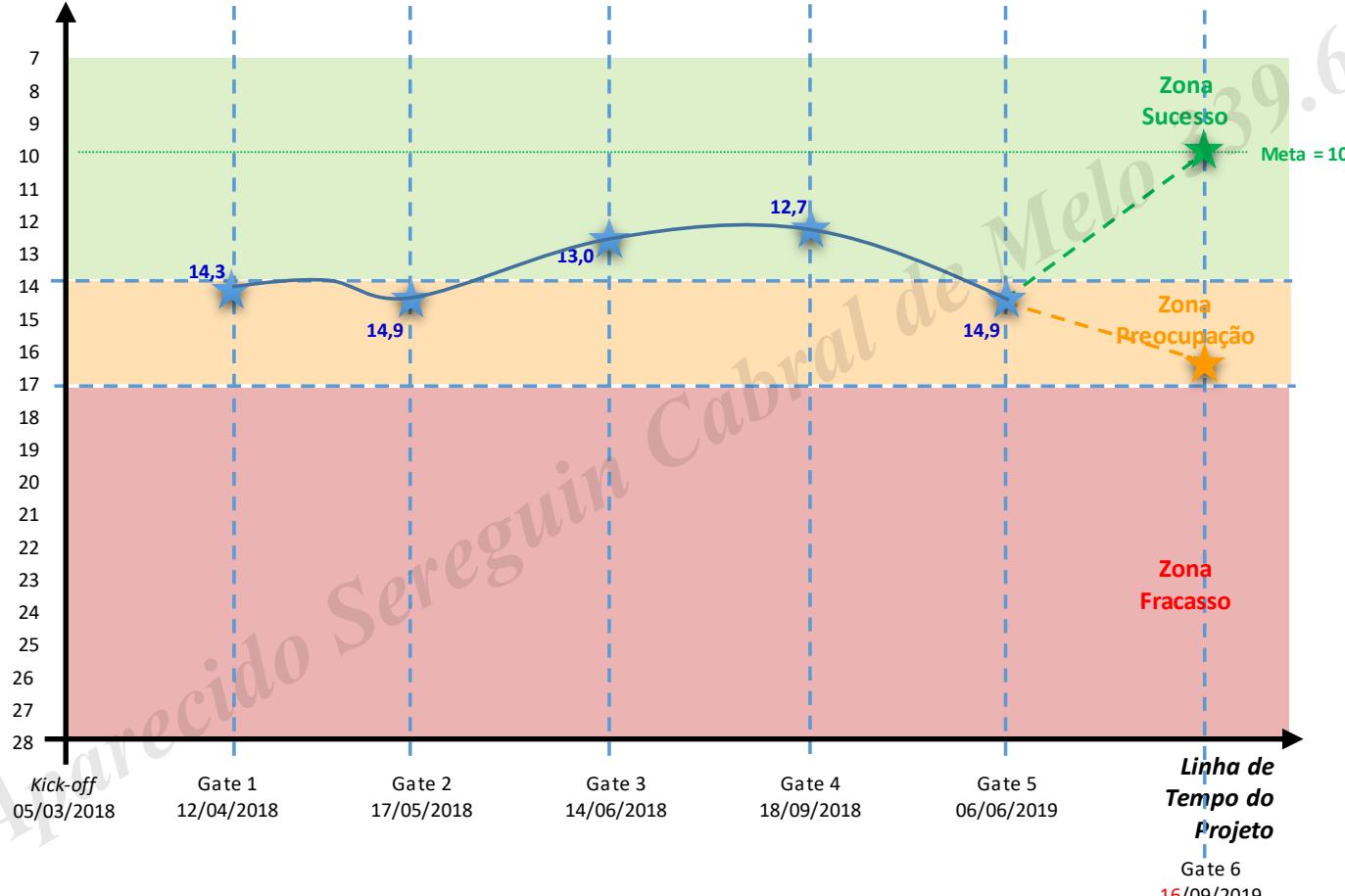


Source: SIRKIN, H. L.; KEENAN, P.; JACKSON, A. The Hard Side of Change Management, Harvard Business Review, October, 2005, pp. 108-114, p. 110.

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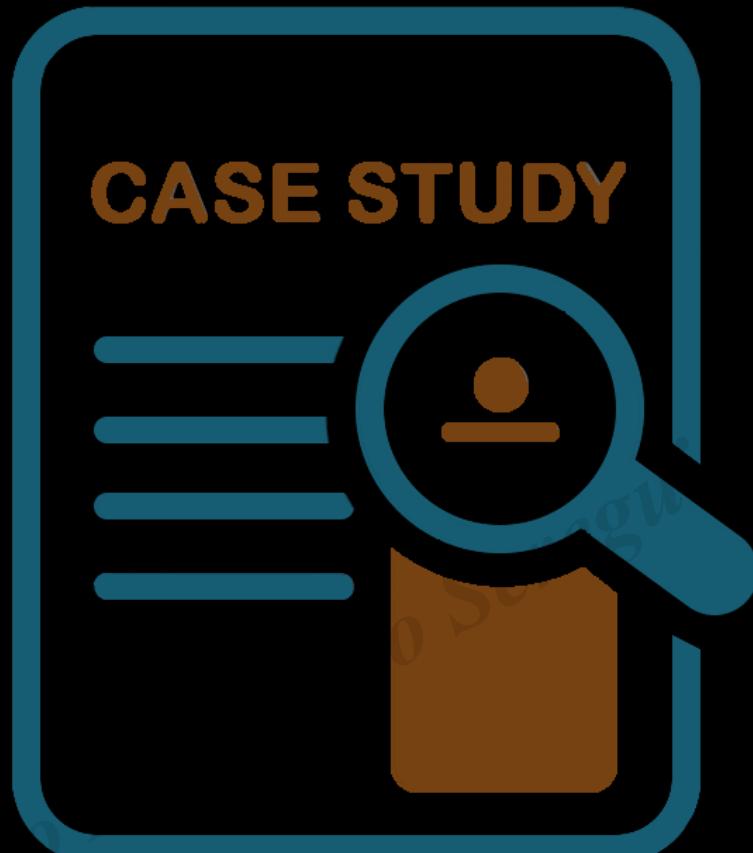
*Pontuação*  
**DICE**



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## CASE STUDY - CHANGE



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### Change Challenges in Business



# Cases

## Change Challenges in Business

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# Change Challenges in Business

## Case 1: A new initiative

As a corporate administrator leading a key functional area at an energy company, Olavo assessment was that processes were intensively bureaucratic, and employees were reactive to customer needs rather than proactive in seeking out new opportunities. He wanted to create a strategic environment, improve systems to leverage market knowledge. So he wanted to use that knowledge to work collaboratively with customers and anticipate their needs.

# Change Challenges in Business

## Case 2: An acquisition

As a president and executive director of a successful bank, the Solange organization acquired a financial services company with about 500 employees and 55 offices. It was a big strategic acquisition with a lot of opportunity and risk. The acquisition would position the bank to create an innovative business model that could change the industry. Solange wanted to integrate the two organizations by having senior management teams work together and bring out the best in each company's culture.

# Change Challenges in Business

**What do you think happened in these stories?**

Which change effort was a success and which was a failure?

Do you think the “new initiative” led to more efficiency and customers more satisfied?

And the acquisition process? Did it collapse when faced with the confrontation of two different cultures?

# *Framework of Organizational Tensions*

## The Importance of Values

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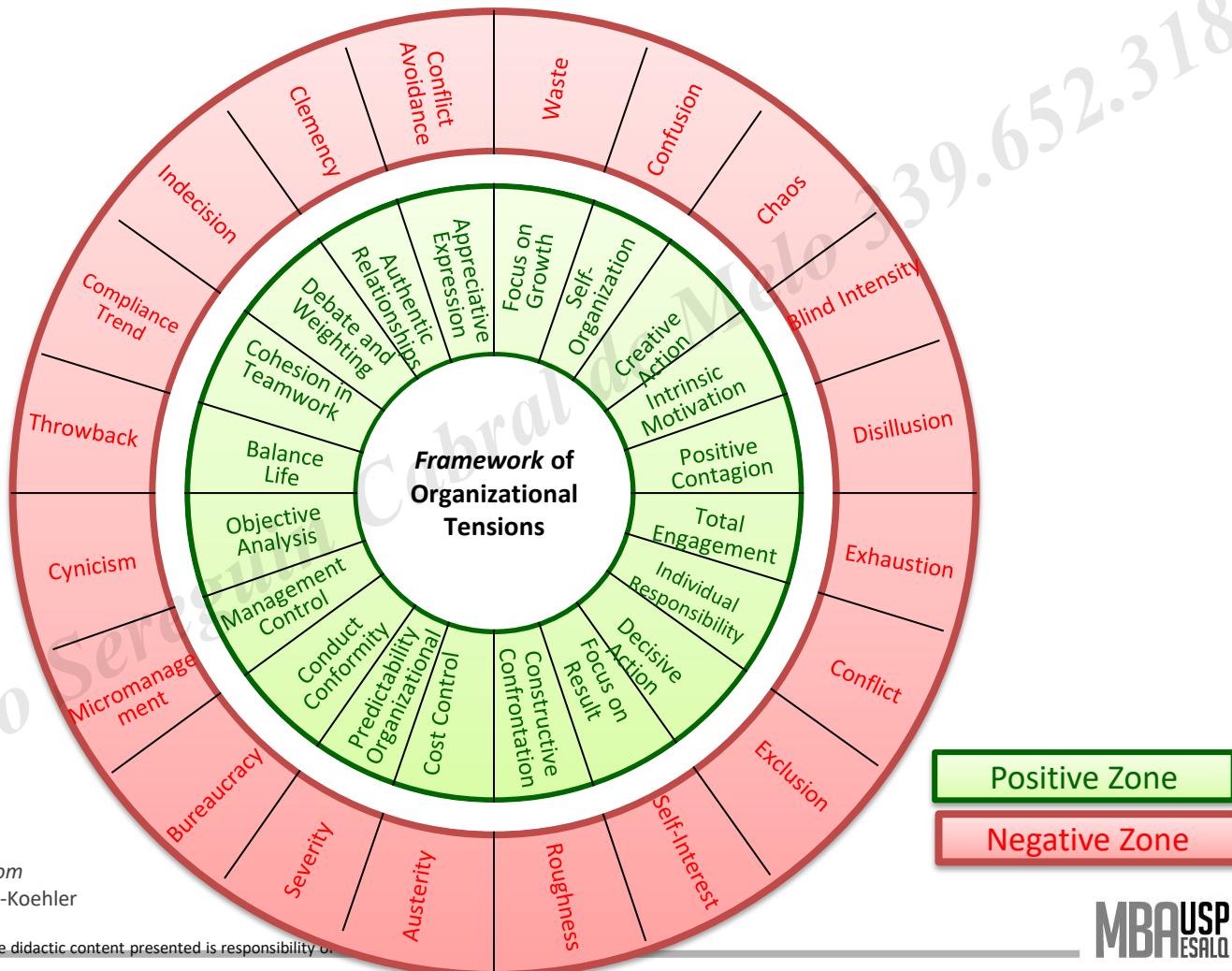
The Importance of Values

# **FRAMEWORK OF ORGANIZATIONAL TENSIONS**

Figure:  
**A Framework of  
 Organizational Tensions**

- Values
- Indicators
- Behavior

(positive and negative)



Source:

Quinn, R.E. *The Positive Organization: Breaking Free from Conventional Cultures, Constraints, and Beliefs*, Berrett-Koehler Publisher, Inc. 2015. Chapter 1, pages 11-17.

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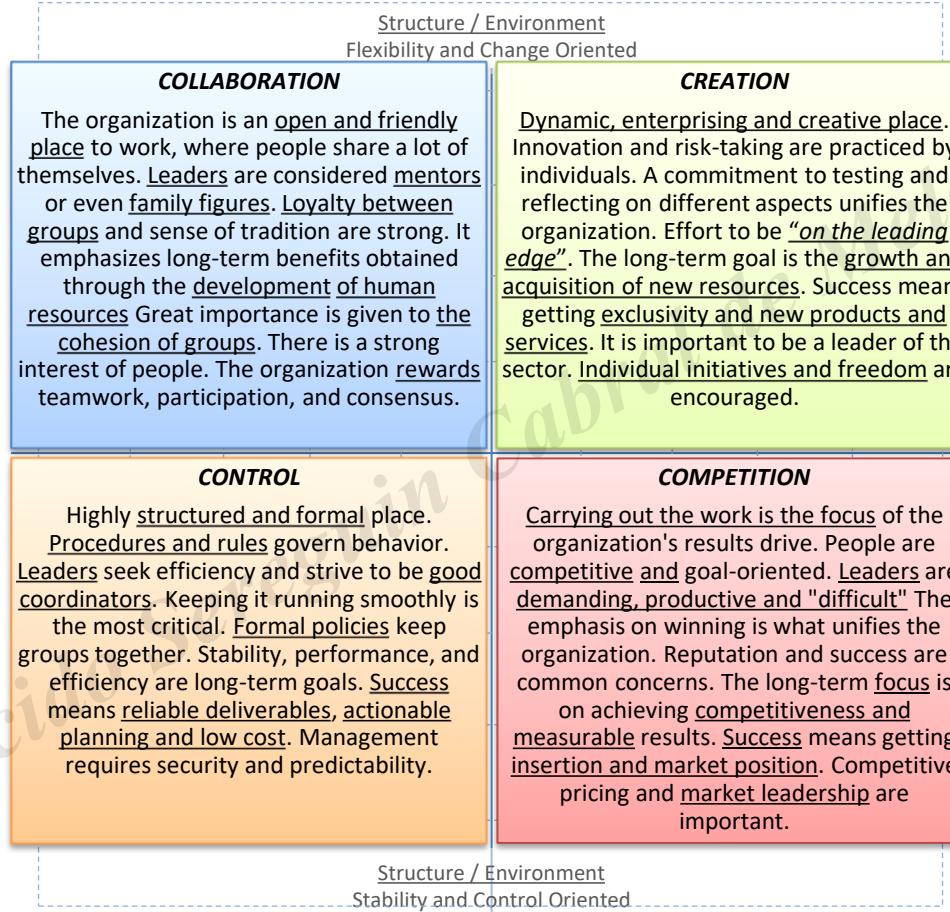
# Competing Values Framework (CVF)



- Model: Human Relationship
- Strategy: Cooperation / Relationship / Intimacy with customers
- Culture: Clan / Collaboration
- Leaders: Considered mentors
- Example: Harley-Davidson

Internal Focus  
People-Oriented

- Model: Internal Processes
- Strategy: Operational Excellence / Efficiency / Consolidation
- Culture: 'Hierarchy' / Structuring / Excellence / Control
- Leaders: Good coordinators
- Example: McDonalds



- Model: Open Systems
- Strategy: Innovation in Product-Service / Adapting / Differential
- Culture: Adhocracy / Creation / Development
- Leaders: Innovators, entrepreneurs
- Example: Apple

External Focus  
Organization-Oriented

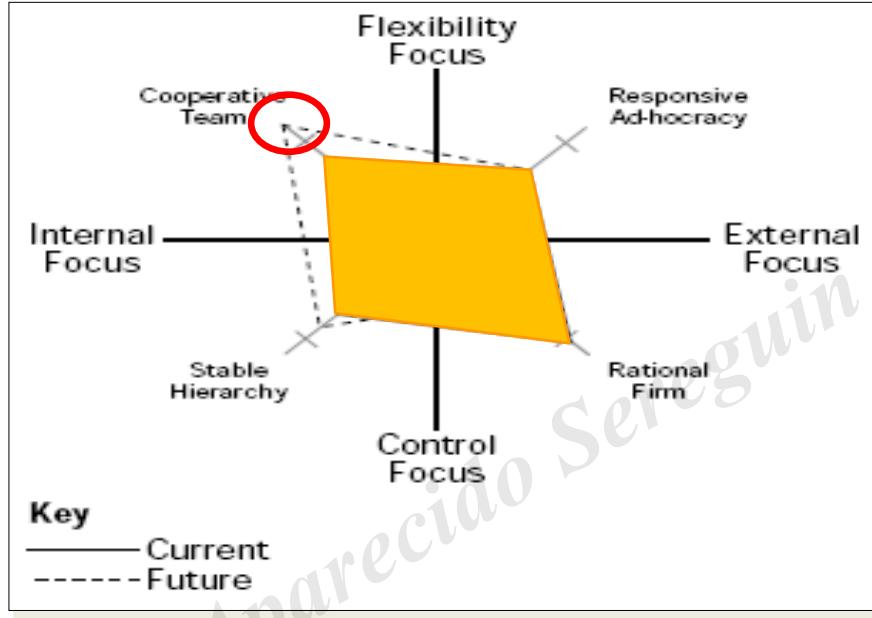
- Model: Rational Goals
- Strategy: Operational Excellence / Effectiveness / Growth and Maximum Results
- Culture: Market / Activity / Agility / Competition
- Leaders: Demanding, productive, and "difficult"
- Example: AMBEV



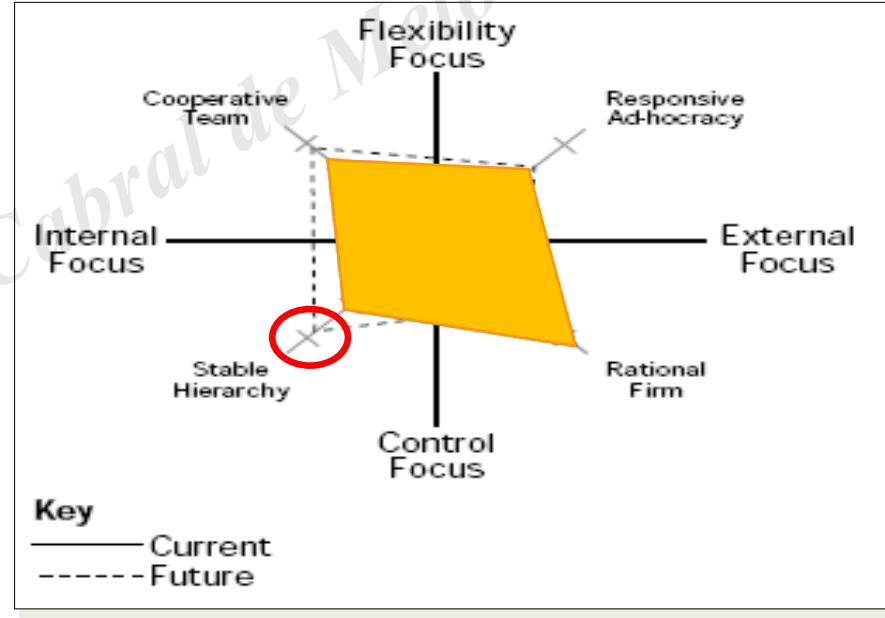
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# Example of Culture Mapping in an Organization

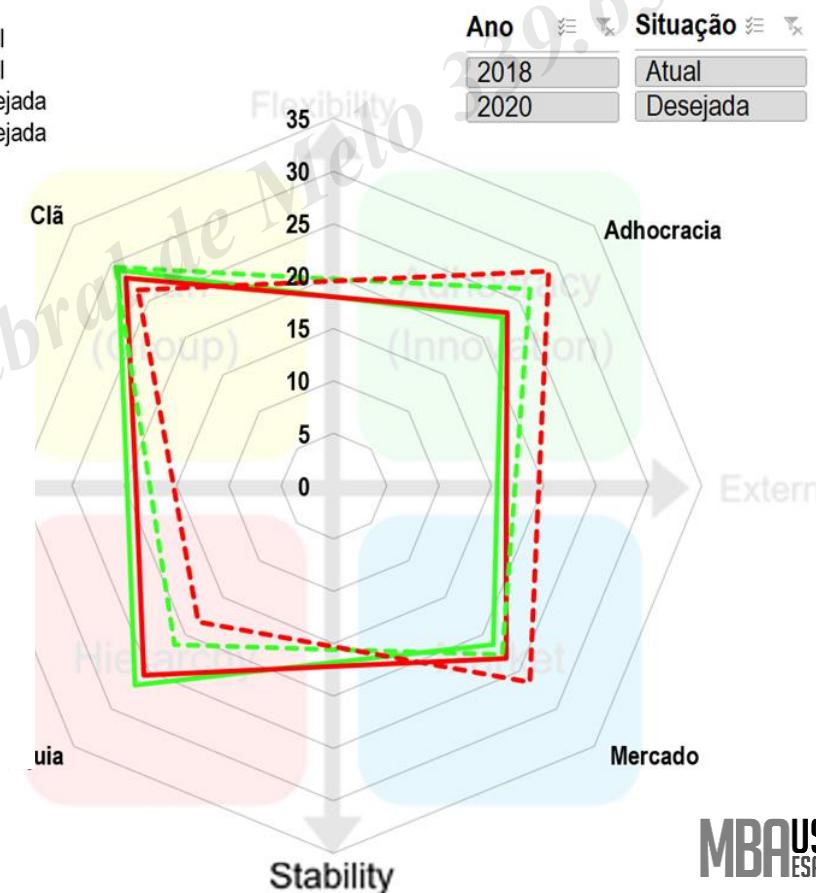
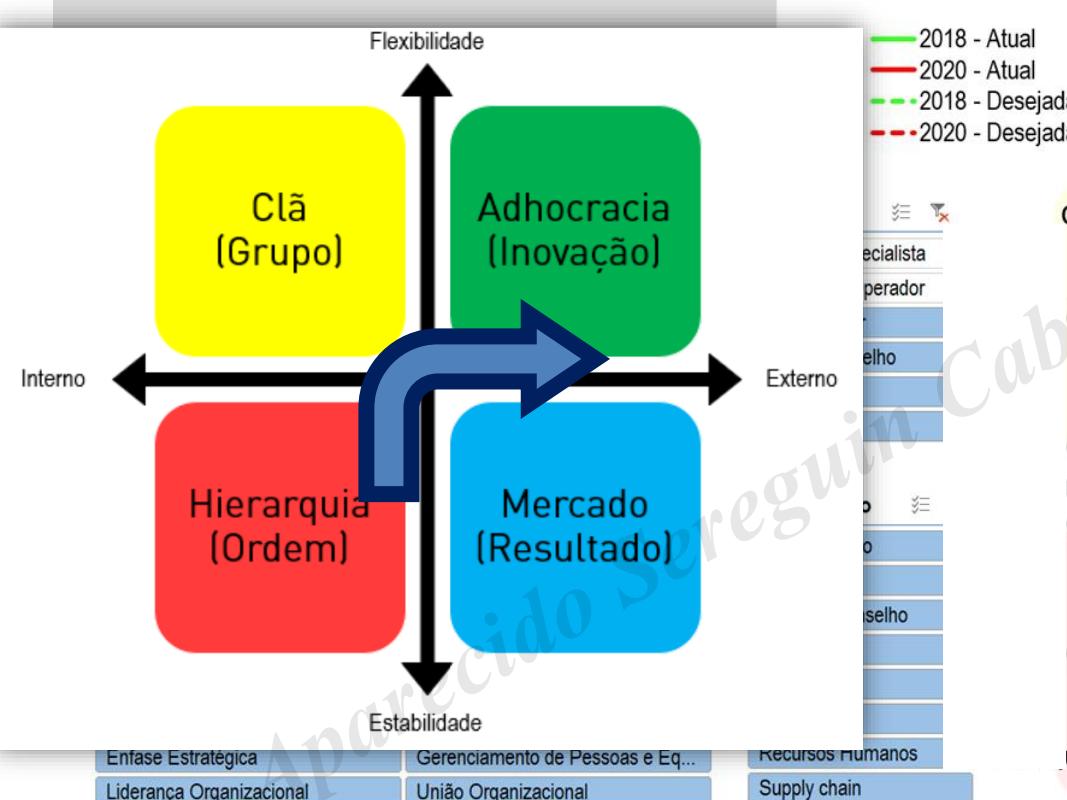
- Collaborators: current x desired



- Board Directorate: current x desired



# Case: Organizational Culture

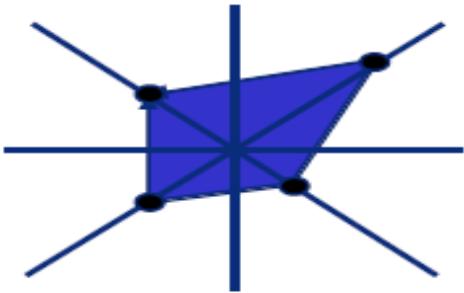


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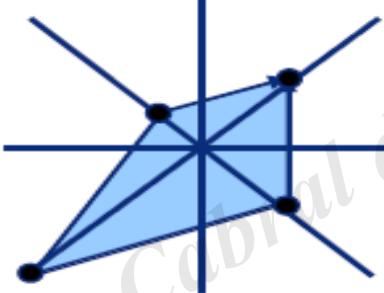
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# Example of Cultures in Industries

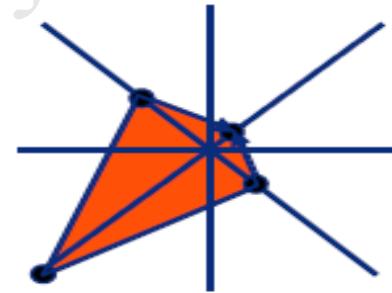
High-Tech Manufacturer



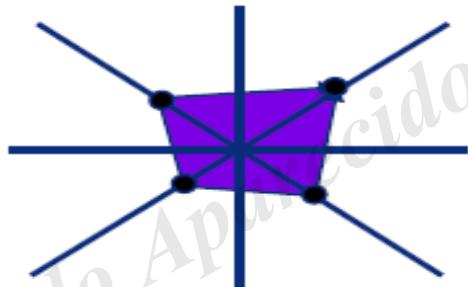
Standardized Parts Producer



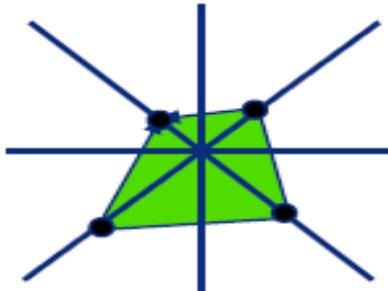
Government Agency



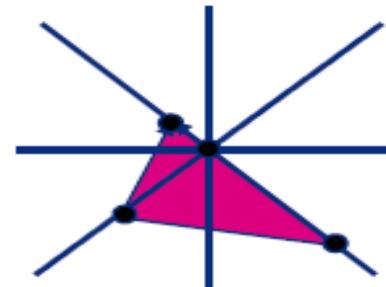
Fast-Growing Bancorp



Multinational Manufacturer



Data Systems Firm



# Where do we need to focus to improve our organization's culture for the new context?

# *The Positive Organization*



- By doing this, as result, leaders start to emphasize five principles to become a more positive organization.
- When a clear and significant purpose is given to united people, they are able to move in a more quickly way and persist even when the leaders are absent.
- Leaders must develop a special attention to speed, purpose, and unit.

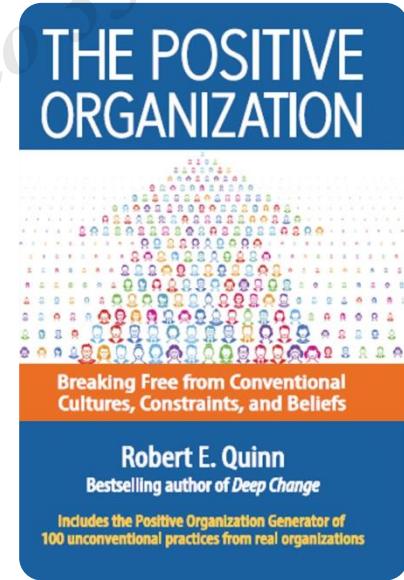
Source: Quinn (2015, p. 22-26).

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# *The Positive Organization*

- Robert E. Quinn, in his book “*The Positive Organization*” presents a set of 5 principles for the construction of a more positive organization.
- It is necessary to learn more about culture and how to create engagement It is necessary to consider the idea that it is possible to create a more positive organization.
- Some organizations grow and become successful due to the type of culture that they develop The positive ideology or culture is vitalized by the leadership. Leaders incorporate the purpose and values of these extraordinary companies.
- People are inspired by their search for purpose. People have a positive and creative orientation as they experiment, learn, and change. It is a continuous movement in search of collective purpose



Source: Quinn (2015, p. 22-26).

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# The Positive Organization

5 principles for the construction of a positive organization:

Creating a Sense  
of Purpose

View Possibilities

Trust the  
Emerging Process

Nurturing Authentic  
Dialogues

Embrace the  
Common Good

Organizations grow and become successful due to the type of culture that they develop

Positive ideology or culture is vitalized by the leadership, which incorporates the purpose and the values of these companies.

People have a positive and creative orientation as they experiment, learn, and change.

Source: Quinn (2015, p. 22-26).

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THE POSITIVE  
ORGANIZATION



Breaking Free from Conventional Cultures, Constraints, and Beliefs

Robert E. Quinn  
Bestselling author of *Deep Change*

Includes the Positive Organization Generator of 100 unconventional practices from real organizations

MBA USP  
ESALQ

# *The Positive Organization*

## 1. Create a Sense of Purpose:

- To obtain success and maintain inspiration, a company needs consistency, a set of values, and operational principles.
- Together, **purpose**, values and operational procedures become a very significant *framework*. Purpose is not a strategy, do not worry if it does not seem to be a strategy.



Creating a Sense  
of Purpose

Source: Quinn (2015, p. 22-26).

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# *The Positive Organization*

## 2. Stimulate Authentic Dialogues:

- Usually, the words are not responsible to make a company move, but people saying those words and the way these people say them.
- Without an **authentic leader** engaging with **authentic behavior**, words don't carry any power. When leaders talk about their company's purpose, they need to show passion.
- People can feel if the manifested passion is **authentic** or not. So they accept and act according to their words, and thus the company becomes more aligned.



Nurturing Authentic  
Dialogues

# *The Positive Organization*

## 3. View Possibilities:

- Learnings come with ideas that were not believed previously, but we have to trust this process.
- Leaders who visualize possibilities empower people to see and seek possibilities and support ideas that they did not believe previously.
- They are committed to help people to see and believe their own individual and collective possibilities When people learn how to do this, they start to help their leaders to see that it was possible.



View Possibilities

Source: Quinn (2015, p. 22-26).

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# *The Positive Organization*

## 4. Embrace the Common Good

- Purpose, authentic dialogues and visualization of possibilities allow people / employees to feel well with what they are doing.
- Positive feelings are a reflection of positive energy. Maintaining integrity and acting in **search of a greater good** is important because this elevates positive energy. This makes people proud of their companies.
- Thus, they do not abandon. They have a sense of direction and energy.



Embrace the  
Common Good

Source: Quinn (2015, p. 22-26).

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# *The Positive Organization*

## 5. Trust on the Emergent Process:

- It means something happens, appears, occurs, or materializes without a direction and *top-down* control.
- It is necessary to provide a purpose and trust the team.
- And when failures occur, they will not be the reasons for punishments, but will be treated as learning points.
- An organization emerges by the interaction of all people connected with the business, its purpose, values, operational principles, and leaders.
- This last principle, in particular, the notion of **trusting the emerging process**, is quite far from the conventional mental map existing in most companies. It can be considered one of the most difficult concepts for executives to understand, accept, and act accordingly.



Trust the  
Emerging Process

Source: Quinn (2015, p. 22-26).

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# In which Environment do we Operate?

---

Assessment of Predominant Mind Map in My Organization

# Organizational Mind Map

- Read the Instrument of Mind Map Assessment of the Organization.
- Answer each question based on your perception.
- Attributes a score from 01 to 10 for each question and calculate the final average (in percentage value).
- Position your organization on the matrix of Organizational Mind Maps.



## INSTRUMENTO DE AVALIAÇÃO – ORGANIZAÇÕES POSITIVAS<sup>1</sup>

(Adaptado de Robert E. Quinn, 2015)

Em uma escala de 1 (um) a 10 (dez) pontos, para cada questão a seguir, sendo 1 concordando mais com a frase da esquerda e 10 concordando mais com a frase da direita, posso dizer que, de acordo com minha percepção quanto ao local onde trabalho....

| questão | Nós não temos um senso de propósito compartilhado.       | Nós temos um senso de propósito compartilhado.                         |
|---------|--|--|
| 1       | 1 2 3 4 5 6 7 8 9 10                                     |  |
| questão | Nós apenas dizemos aquilo que é ‘politicamente correto’. | Nós costumamos dizer aquilo que realmente sentimos.                    |
| 2       | 1 2 3 4 5 6 7 8 9 10                                     |  |
| questão | Nós somos reativos.                                      | Nós somos proativos.   |
| 3       | 1 2 3 4 5 6 7 8 9 10                                     |  |
| questão | Nós focamos em nossas próprias necessidades pessoais.    | Nós focamos na ‘vitória’ para a organização como um todo.              |
| 4       | 1 2 3 4 5 6 7 8 9 10                                     |  |
| questão | Nós somos temerosos em tentar coisas novas.              | Nós temos autonomia e responsabilidade para experimentar coisas novas. |
| 5       | 1 2 3 4 5 6 7 8 9 10                                     |  |
| questão | Nós fazemos o que somos responsáveis por fazer.          | Nós amamos o que fazemos.  |
| 6       | 1 2 3 4 5 6 7 8 9 10                                     |  |

<sup>1</sup> Este instrumento visa realizar um diagnóstico do mapa mental predominante em uma organização. Pode ser respondido por um indivíduo por si só ou por um grupo de indivíduos de uma organização. Ele responde diretamente à discussão de cada dimensão de mapeamento. Foi desenvolvido com base nos trabalhos de Robert E. Quinn (Quinn, R. E. *Thrive Positive Organization: Breaking Free from Conventional Cultures, Constraints, and Beliefs*. Berrett-Koehler Publisher, Inc. 2015). Caso queira saber mais sobre o instrumento de avaliação e como utilizá-lo de forma completa em sua organização, entre em contato com [geral@med.eesc.usp.br](mailto:geral@med.eesc.usp.br).

Instrumento Rápido para Avaliação do Nível de Positividade de uma Organização, Gerônimo, versão Novembro / 2017

# Organizational Mind Map

## Count of points per Analysis Dimension:

| Dimension A      | Question 1 | Question 6 | Question 11 | Sum A | Average A |
|------------------|------------|------------|-------------|-------|-----------|
| Sense of Purpose |            |            |             |       |           |

| Dimension B         | Question 2 | Question 7 | Question 12 | Sum B | Average B |
|---------------------|------------|------------|-------------|-------|-----------|
| Authentic Dialogues |            |            |             |       |           |

| Dimension C        | Question 3 | Question 8 | Question 13 | Sum C | Average C |
|--------------------|------------|------------|-------------|-------|-----------|
| View Possibilities |            |            |             |       |           |

| Dimension D | Question 4 | Question 9 | Question 14 | Sum D | Average D |
|-------------|------------|------------|-------------|-------|-----------|
| Common Good |            |            |             |       |           |

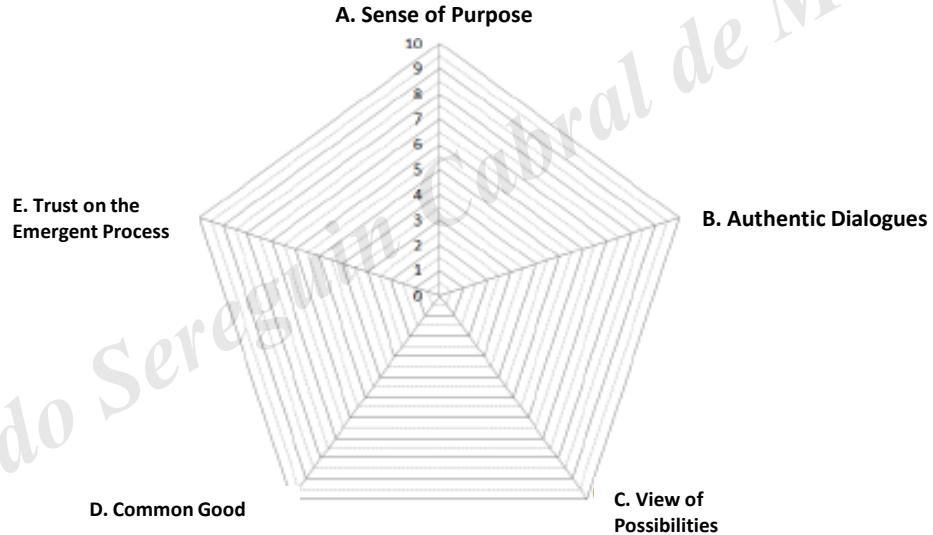
| Dimension E                   | Question 5 | Question 10 | Question 15 | Sum E | Average E |
|-------------------------------|------------|-------------|-------------|-------|-----------|
| Trust on the Emergent Process |            |             |             |       |           |

$$\text{Total Average} = \frac{\text{Average A} + \text{Average B} + \text{Average C} + \text{Average D} + \text{Average E}}{5} = \underline{\hspace{2cm}}$$

# Organizational Mind Map

Fill the graphic below using the results from the obtained averages for each dimension of the previous analysis

**Positivity Radar of My Organization**



*Based on the radar above, what would be the main point to be faced?*

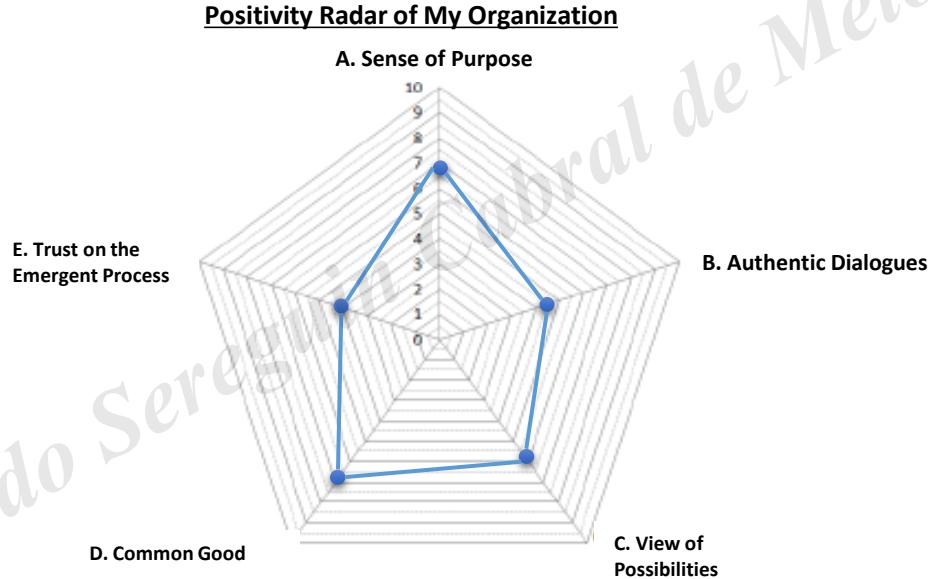
*Declare your challenge:*

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# Organizational Mind Map

Fill the graphic below using the results from the obtained averages for each dimension of the previous analysis



*Based on the radar above, what would be the main point to be faced?*

*Declare your challenge:*

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# Organizational Mind Map

After answering the previous questions and compiling the results on the radar chart, reflect on the results and answer the following questions:

*What new features would I like my organization to have a year from now?*

*What ideas do I already have to make my organization more positive?*



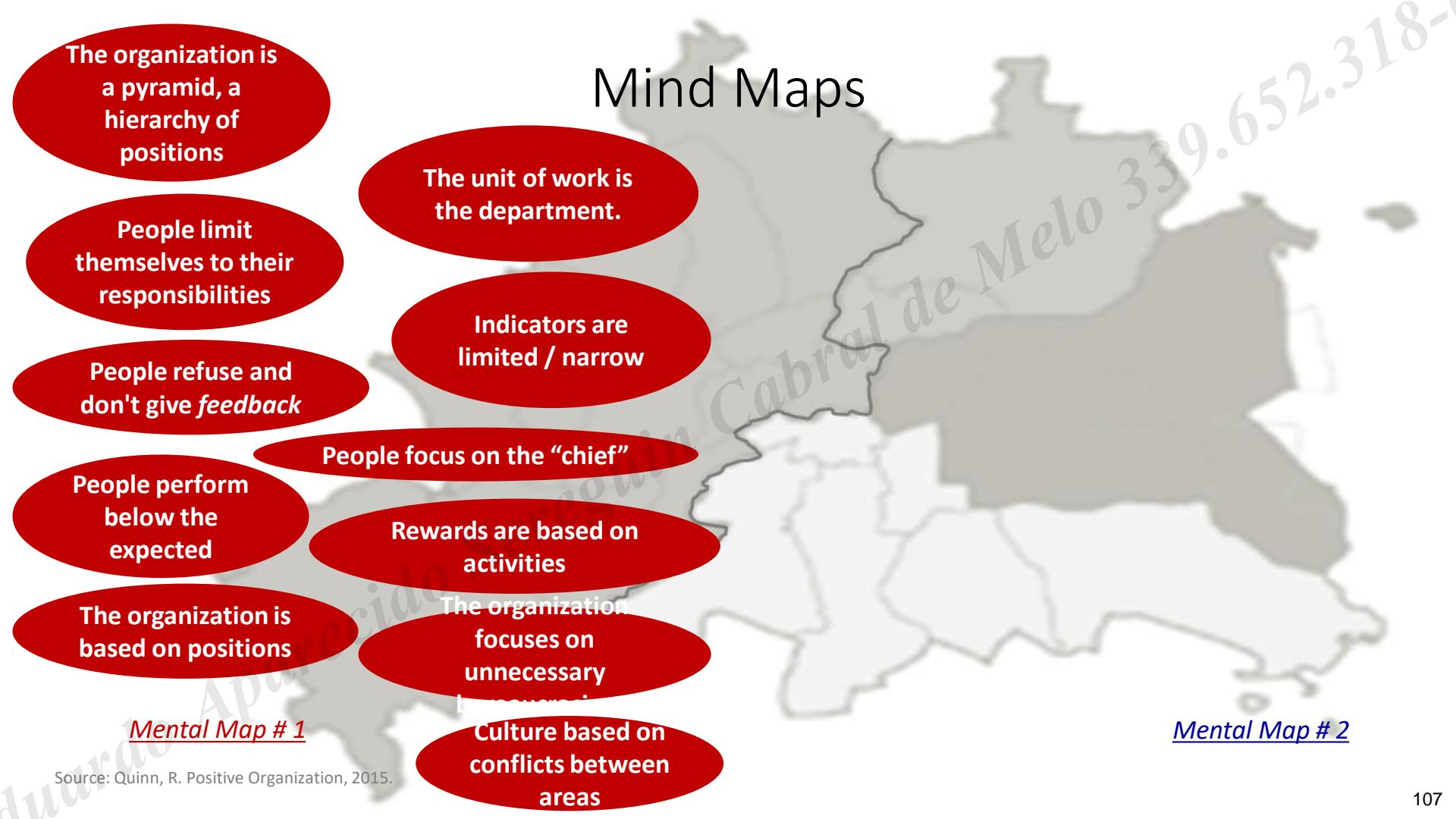
# *Mindset Changes for Organizational Transformation*

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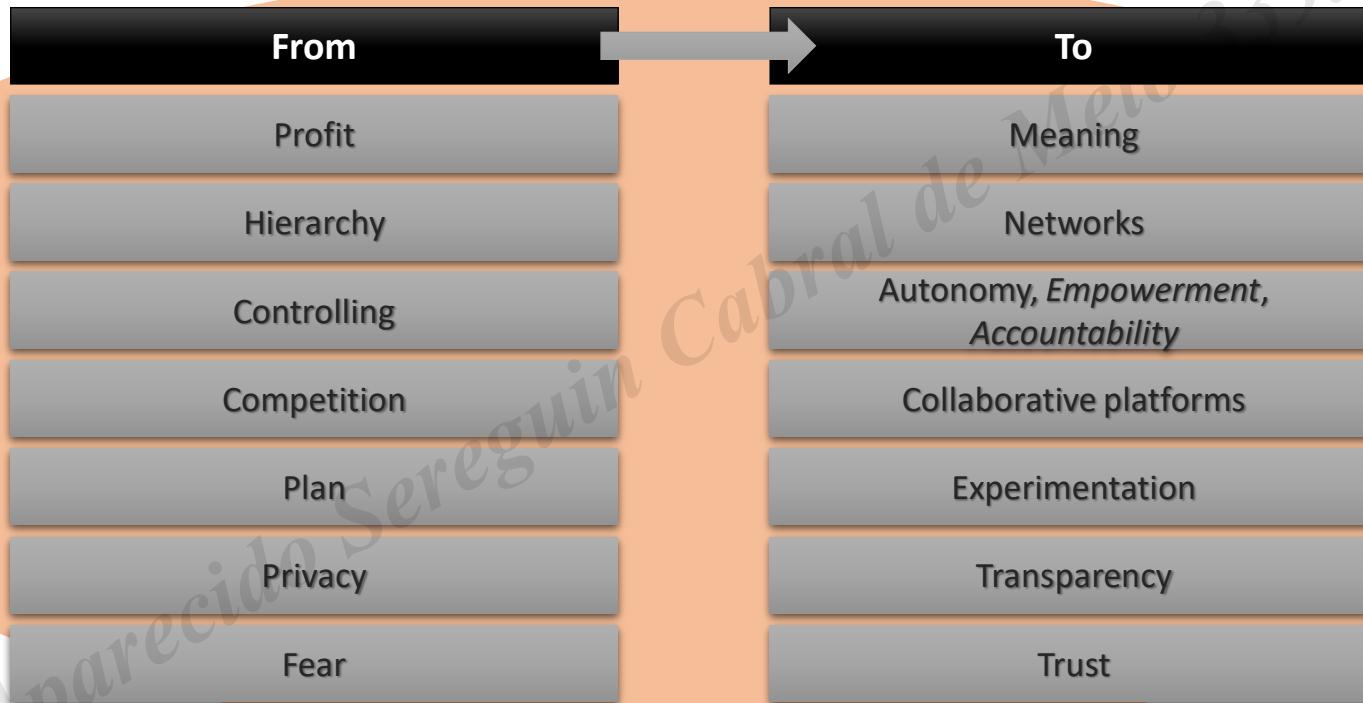
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# Mind Maps



# Mindset Changes for Organizational Transformation



Source: Andrew Chakhoyan, Is the era of management over?, World Economic Forum, 07 Dec 2017

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Available in: <https://www.weforum.org/agenda/2017/is-management-era-over/>

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# Mind Maps

The organization is a pyramid, a hierarchy of positions

People limit themselves to their responsibilities

People refuse and don't give *feedback*

People perform below the expected

The organization is based on positions

Mental Map # 1

The unit of work is the department.

Indicators are limited / narrow

People focus on the "chief"

Rewards are based on activities

The organization focuses on unnecessary bureaucracy

Culture based on conflicts between areas

The unit of work is the department.

Indicators are *cross / end-to-end*

People focus on the "customer"

Rewards are based on results

The organization has agility to act and decide

Collaborative Culture

The organization is a network of relationships

People expand their roles

People accept and give *feedback*

People overcome expectations

The organization is based on processes

Mental Map # 2



# *Mindset Changes for Personal Transformation*

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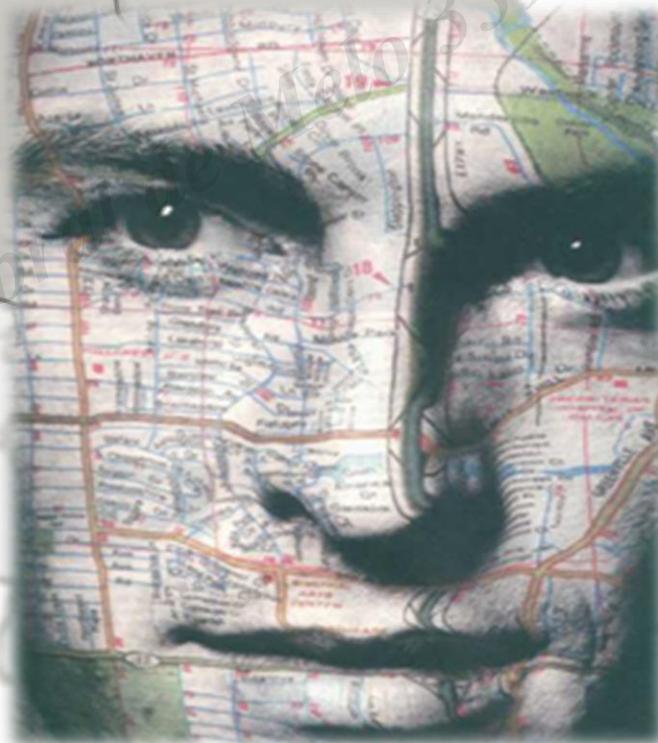
# Mindset Shifts for Personal Transformation A Focus for the Professional of the Future



# Mind Maps

If leaders don't expand their individual mind maps, they can't change the people of the fate follow, nor the paths that take them there!

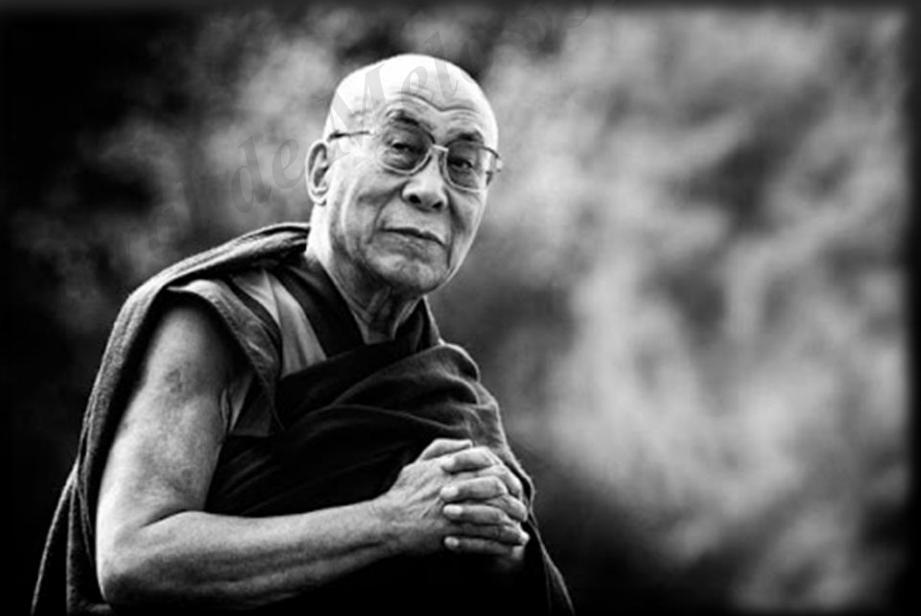
(Source adapted from Black and Gregersen, 2003, Leading Strategic Change, apud Robert Quinn)



Source: greggfetter.blogspot.com

Source: Quinn, R. Positive Organizations, 2015.

*“A genuine change must first come from within the individual, only then can he or she attempt to make a significant contribution to humanity.”*



Dalai Lama

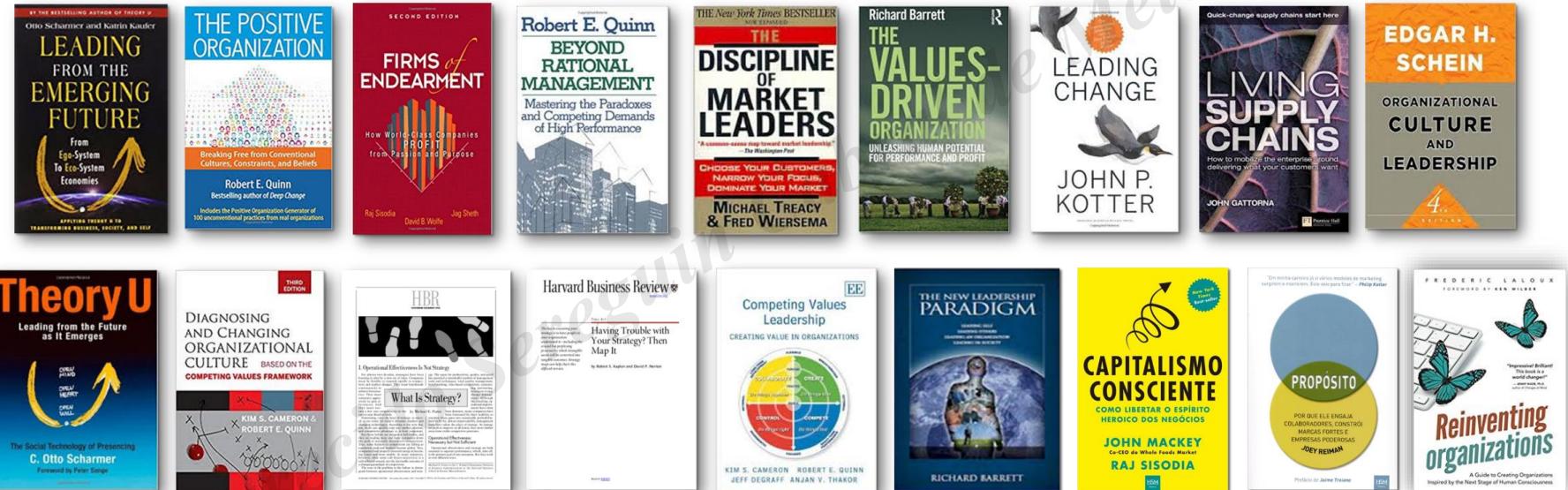
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# Main sources of Inspiration for Research, Application and Teaching



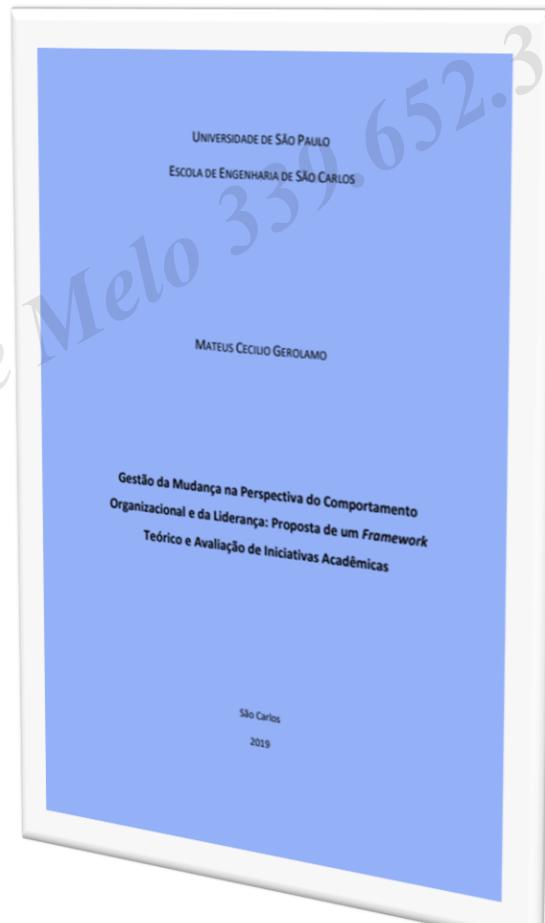
Mateus C. Gerolamo, Production Engineering, School of Engineering of São Carlos (EESC), University of São Paulo (USP), Change Management

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# Academic Result

- Change management from the perspective of organizational behavior and leadership: proposal of a theoretical framework and evaluation of academic initiatives
- Tese de Livre Docência (2019)
- Publication Date : March 11, 2020
- Author: **Mateus Cecilio Gerolamo**
- <https://doi.org/10.11606/T.18.2020.tde-10032020-143539>



GEROLAMO, Mateus Cecilio. **Change management from the perspective of organizational behavior and leadership: proposal of a theoretical framework and evaluation of academic initiatives.** 2019. Thesis (Associate Professor in Quality Management and Organizational Change) - School of Engineering of São Carlos, University of São Paulo, São Paulo, 2019. doi:10.11606/T.18.2020.tde-10020-143539. Access in: 2020-06-07.  
\*The responsibility for trustworthiness, originality, and legality of the didactic content presented is responsibility of the professor.

*“In a time of drastic change it is the learners who inherit the future. The learned usually find themselves equipped to live in a world that no longer exists.”*

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*Eric Hoffer (July 15, 1902 – May 21, 1983)  
was an American moral and social  
philosopher*

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# Change Management

Prof. Mateus C. Gerolamo



Thank you!