
THE 6 BIG IDEAS OF ADAPTIVE ORGANIZATIONS

From Frameworks to Sense-making

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Chapter One

KEN'S STORY

IN 2019, AFTER OVER A DECADE OF COACHING TEAMS AND organizations through their Agile journey, I had a profound realization. My coaching had become too rigid and focused on pushing frameworks as the ultimate solution. It felt like I was going through the motions, and worse, it seemed like I wasn't alone in this struggle.

Looking around the Agile community, I noticed a trend. Many of us had fallen into the trap of believing that coaching meant simply implementing a set framework, forgetting the essence of Agile: adaptability and continuous improvement. It was ironic—we all craved the characteristics of agility, yet we approached Agile from our current ways of thinking.

I'll admit, it was a big problem for me. I spent most of my time telling teams and managers how to estimate, how long their daily meetings should be, and arguing with people over whether it was called a ceremony or an event. I didn't want to do this anymore.

I'll never forget a time when I walked into the CIO's office at a company I was working for to chat about Agile. I wanted to point out

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that Agile wasn't being done correctly here. At some point, I said, "We're doing Agile, not being Agile." He laughed me right out of his office. Although I didn't realize it then, this might have been the moment that would much later lead to my ah-ha moment of wanting to change.

Despite spending years helping others upgrade their processes and teams, I'd neglected my own growth. It was time for a change. I didn't want to be just another coach pushing frameworks; I wanted to inspire true adaptability in everything we do.

So, feeling a mix of inadequacy and determination, I set out on a journey of self-discovery. I knew I needed to evolve if I wanted to make a real impact as a coach. And though I didn't have all the answers, I was ready to embrace the challenge head-on.

In late 2020, I finally decided to take a Lean Change Management course. Something I had passed over before because it had 'Management' in the name. If I knew anything from studying Complexity Theory the year before, it was that you can't manage (or control) change in a complex system. Nonetheless, the course was exactly what I needed to realize Agile is really about changing, not the dogma of frameworks I had become trapped within.

I'm such a visual learner that each day after class, I would extrapolate what I had learned that day into visuals that fit my own context and challenges, even as rudimentary as my understanding was at the time. My instructor, the amazing Sarika Kharbanda, mentioned that I should meet Jason Little, the creator of Lean Change. The rest is history - 11 years of being lost in the commodified Agile wilderness and 5 years of concentrated unraveling and learning have led to this book.

"Every time I try to go where I really want to be, it's already where I am, cause I'm already there" - Serj Tankian, System of a Down

My journey to reinvent myself reminds me of these song lyrics. Is it a surprise that I like music by a band called "System of a Down," probably not to those that know me... I'm a rebel at heart. The point of sharing this quote here is that I didn't intend for my path to happen this way; I only set out to change myself. My natural curiosity took me to places where I could learn. I was always where I needed to be at the right moment, no matter how much I wanted to be somewhere else.

And there's still plenty to learn and more experience to gain. Even 5 years into this new journey, I've only just begun.

Having someone like Jason as a mentor has been invaluable. He's open, curious, and patient. Given my inherent discovery-based nature, these are all things I need around me to succeed. His mentorship has inspired me to place a greater focus on mentoring others. I now spend much of my time helping people learn about complexity, beliefs, behaviors, relationships, and change - the tenets of great leadership and coaching.

I was also lucky enough to rub shoulders with Michael Spayd and Michael Hamman for about a year while completing my ICAgile ICE-EC accreditation. It was a thorough and challenging year of my life that accelerated my growth and experience. The more people to learn from, the better, I say.

I owe so much of who I've become and am still becoming to these three gracious gentlemen. A huge thank you to all of them for what they've instilled in me so far.

Because I rediscovered my curiosity as a coach, I've grown my perspective, raised my awareness, and adjusted my beliefs, behavior, and attitude to see beyond the frameworks that mentally held me back. It's been like a shot of adrenaline into my consciousness. The things that were once out of reach are now in the palm of my hand, waiting for me to learn what to do next.

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This book sheds some light on my journey - what I've learned and designed to help me unravel myself and others along the way. I hope it sparks a journey of your own toward a more profound sense of self and success.

Chapter Two

JASON'S STORY

IT WAS NEW YEARS EVE DAY SOMEWHERE IN THE MID-2000S, AND I WAS sitting at my desk at a client site wondering why the hell nothing about the change I was working on was working.

I was hired to help a department of about 600 *do an agile adoption*, as it was called back then. It seemed like everything I tried was met with some form of resistance or another. Perhaps the most disturbing was when the 'senior' coach wouldn't even listen to my thoughts about approaching the transition to agile in an agile way.

A couple of months before that lonely New Years Eve day, I had attended AYE, Amplify Your Effectiveness. It was a week-long, small, experiential workshop hosted by Don Gray, Esther Derby, Jerry Weinberg, Johanna Rothman, and Steve Smith. I wrote about the first session in my other book, Lean Change Management but that experience sat rattling around in my head for a few months before I found myself mostly alone in that warehouse-sized client site writing a blog post that would change my life forever.

How's that for dramatic?

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At AYE, I had a one-on-one with Esther and I was so jazzed by all of the ideas I wanted her to tell me how I could go back to my company and inflict what I had learned on them.

Esther calmly said, "Jason, it isn't about you."

The combination of that comment and the fact I felt like I had been pushing water uphill with a stick for 8 months, was the proverbial frying-pan-to-the-head moment where I realized "Agile" had nothing to do with agile and everything to do with change.

Since then I've spent the vast majority of my time figuring out how to pillage the best ideas from Lean Startup, Agile, Lean, Designing Thinking, and now, AI, to help organizations change.

When Lean Startup was born in 2012 and after my team won the first Lean Startup Machine contest in Toronto, that cemented the fact that context is king and my assumptions as a change agent are just that. Assumptions.

I spent most of 2014 to the time when we weren't allowed to go outside traveling the world in search of what was separating companies who were kicking ass at change from those that royally sucked at it.

Then I met Balki, er, I mean Ken. There's so much clutter and easy-answer-BS floating around in books, and blogs, and especially on LinkedIn, it was mind-blowing, and refreshing, to see Ken's take on the complexity of organizational change. The number of times his ideas made me think, "ooh, I never thought about it that way before" was a sign that this book needed to become reality.

Hopefully this book can serve as a proverbial frying-pan-to-the-head moment for you because when I had mine, it completely changed how I see change, my approach to change, and reinvigorated my love for helping organizations solve problems.

Chapter Three

WHY RELEASE THIS NOW?

AT SOME POINT THIS SEEMED LIKE A GOOD IDEA:

460 SEARS 3PCBKM

Auto Strap for front-seat tots

\$1.88

Guards your child as you're busy driving through traffic. Lets him sit, stand, kneel or sleep without disturbing driver. Prevents spills from sudden stops. Heavy web harness attaches to safety strap that snaps to car seat frame. Removes easily. Also use as walking harness. For 1 to 10-year olds. Fits any car. Shpg. wt. 9 oz.

49 G 7945.....\$1.88

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That was in Sears' 1961 catalog and let's just say car safety for toddlers has improved over the years. Imagine for a minute that someone was still using that today, what would you think?

That's what we think when people cling to change frameworks that were designed before the internet existed*. The world has changed, but how we approach change in our organizations has not.

It seems like we've been on the transformation treadmill for a couple of decades now, clinging to overly-simplified and outdated models and ideas. We've been cycling through the usual transformation trope that outlines how to successfully transformation your organization:

- Create a strategy and vision,
- Make a plan,
- Execute the plan
- Blame people for resisting it.

When it doesn't work, we get bombarded with more useless, easy-answer bullshit:

- Tell people the 'why'!
- Get leadership support!
- Get buy-in!
- Use the right change framework!
- Get everyone involved!
- Communicate clearly!

Jason's Take: I was at Agile 2011 and met a fellow named Benjamin. I can't remember his last name. At the time I had worked on 4 or 5 *agile adoptions*, as they were called at the time. I remember we were chatting about adoption vs transformation

* Yes, we know it was created in the 1960s, but it didn't really affect businesses until the mid-to-late 90s.

and he said something to the effect of “*organizations will succeed with transformation when they learn how to think in their own context*”

Speaking of context, we’re working on a bigger book that is proving difficult to finish because we’re essentially trying to extract our thought processes and how we work into a book. That means we keep adding stuff and think we need to explain every nuance. That said, we do have about 30-40 beta readers helping us make it awesome, but we have more people telling us, “FOR THE LOVE OF THE UNIVERSE, WHERE CAN I FIND OUT MORE ABOUT THESE 6 BIG IDEAS?!?!! GIMME GIMME GIMME!!!!”

Cripes, people chill.

So that’s the reason we decided to release this short-ish guide now. Without you, these ideas are just ideas. We’re more interested in seeing how you interpret and use them because we use them in our work. In the Extra Goodies chapter you’ll find online references where you can learn more and join the conversation.

These 6 Big Ideas are designed to help you and your organization think in your own context.

Now, please don’t be insulated by the statement “*learn how to think in your context*”. It might imply stupidity, but to be fair, one time Jason thought it would be a good idea to create a backlog of ‘change users stories’ with ‘acceptance criteria’.

That didn’t work out so well.

This guide is for people who find themselves thinking, or saying, things like:

- Holy shit that’s cool, I’m going to try that out!
- I wonder what would happen if...
- How could I help this organization make sense of...

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It's also for people who like some typos. Yes, we checked it a million time, yes, so did grammarly, and yes, so did AI. So if your biggest concern is a missing comma, well, we don't know what to tell you.

These ideas are awesome, and we use them, but they're incomplete. They are intentionally incomplete because it is impossible to do justice to every possible variable that factors into whether or not a transformation is going to be successful or not.

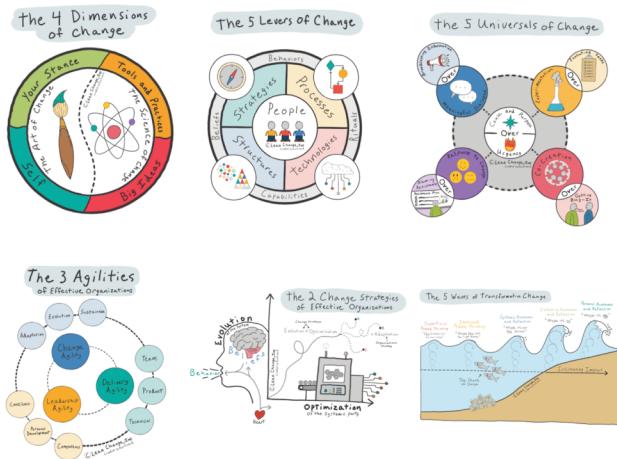
We're also not huge fans of distilling complex organizational transformation in binary success or failure outcomes. Our experience has shown us that organizations experience thousands of micro-successes throughout formal and informal transformations but those are erased whenever a new problem arises. Humans have short memories, just look at social media.

We're excited to share these ideas, and we're more excited to see how all y'all use them. As mentioned earlier, the Extra Goodies chapter will point you to some online references and other things that may prove useful for you.

Alright, strap in, things are about to get interesting.

Chapter Four

THE 6 BIG IDEAS



THE 6 BIG IDEAS ARE SENSE-MAKING MODELS. THEY'VE BEEN DESIGNED to help you diagnose what the problem *might* be, and what you *might* want to try to turn that problem into a bunch of smaller, more digestible problems.

Side note: Yes, we're going to use the word *might* a lot because we have zero interest in selling you certainty. What might work in one organization, might fail miserably in another.

Other side note: Yes, whenever you interact with a problem in your organization, your goal might be to solve it, but most of the time you just unintentionally, or intentionally, create other problems. Hopefully those new problems are smaller. By the way, we stole that from Are Your Lights On by Jerry Weinberg.*

The business world has fooled us into thinking organizational transformation is a linear, step-or-phased-based process with overly simplified, and outdated ideas. We think that's because it's easier to sell certainty than reality. If it's certainty you're after, it might be time for a career change.

These 6 Big Ideas challenge us to think about transformation differently. We're sci-fi nerds so we think of organizational transformation like setting out to explore the universe. It's fraught with peril, black holes, meteors, and most likely aliens.

Shit happens in space, much like shit happens in our organizations. These 6 Big Ideas have been crafted to help you make sense of your context so your organization can decide what's the *most-right* thing to do next in order to move the transformation forward.

DIFFERENCE FROM TRADITIONAL CHANGE MANAGEMENT

Traditional thinking dumbs down transformation in order to give people the illusion of certainty. That's why most (all?) change and transformation models follow similar patterns:

* Are Your Lights On - Jerry Weinberg.

- Analyze, plan, execute, close out.
- Unfreeze, transition, re-freeze.
- Capture the current state, paint a picture of the future state, and transition to it.

Don't take our word for it, google 'change management models' and you'll find thousands of loopy diagrams that follow those same steps, albeit some will use slightly different language.

Blech.

Other than looking nice in a graphic or presentation, the stodgy change management trope isn't relevant anymore. Maybe it never was.

These 6 Big Ideas are different because they accept the fact that transformation is a messy, non-linear process. To preface that, time is linear, change is not. Chew on that for a bit.

There isn't a logical starting point and most of time, at least from our experience, you get tossed into the middle of constantly changing reality so while *you* might think it makes sense to do a change readiness assessment so *you* can understand what's going on, the organization might have already moved on.

But that type of thinking hurts our brains, so we want a model that has more structure, and steps. The last thing we'll say is there could be a million reasons why your transformation is going the way you hoped it would. It could be everything from mis-aligned priorities to the fact that maybe some stakeholders just don't like you and are undermining your efforts behind your back. A nice looking set of steps in a linear change model can't account for stuff like that.

WHAT ARE THE 6 BIG IDEAS?

The 2 Change Strategies of Effective Organizations: Organizations need to know the difference between "*optimization*", and "*evolution*".

Optimization involves making current systems more effective without fundamentally changing the underlying beliefs and behaviors, and "*evolution*", which entails a transformative approach that alters the organization's foundational beliefs and behaviors to achieve more profound, systemic change.

The 5 Universals of Change: This model highlights the importance of moving away from traditional urgency-driven change management. Instead, it focuses on aligning people around a common purpose, fostering meaningful dialogue, co-creation of change, experimentation over mere task execution, and viewing resistance as valuable feedback rather than a hindrance.

The 5 Levers of Change: This model include People, Strategies, Structures, Processes, and Technologies. This model shows that focusing on just one lever, like process improvements, yields limited results without addressing the other four levers, which together foster a holistic approach to organizational change.

The 3 Agilities of Effective Organizations: This model includes 3 levels of agility: Leadership agility, change agility, and delivery agility. These are essential for organizations to adapt effectively to disruption. Each agility focuses on different aspects of an organization's ability to change, from leadership's ability to enable a system capable of changing easily to those within the system being able to deliver easily.

The 5 Waves of Transformative Change: This model describes the gradual deepening of change within an organization over time, starting from superficial changes in early waves to more profound systemic changes in later waves. It emphasizes the evolution of understanding and participation across the organization.

The 4 Dimensions of Change: This model underscores the interplay between the art and science of change. It explores four dimensions: Self, Your Stance, Big Ideas, and Tools and Practices. These dimensions stress the importance of individual and collective atti-

tudes and behaviors in the effectiveness of organizational change initiatives.

HOW YOU MIGHT USE THEM

There's that word again. Might. In the bigger book we're working on, which might even be out if you're reading this after the fall of 2024, we go into detail about how we view transformation. For this preview, we'll simply drop-in a few statements for the 'ya, butters'.

'Ya butters'? You know, people who say, "*yeah, but how do I apply these ideas to get buy-in for change?*" To us, that's an incongruent statement because the last time we checked, we weren't selling used cars. We think co-creation is more important than getting buy-in, but that's as far down the rabbit hole as we want to go right now.

In the following chapters, we'll take each of the 6 Big Ideas and give you ideas for how you can use them for sense-making in these 5 main focus areas of traditional change management.

1. Assessment of current state
2. Understanding organizational readiness
3. Evaluation of change impact
4. Alignment with strategic goals
5. Measuring success and adaptability

It hurt to write those 5 things, because as soon as you see them, your eyes tell your brain that those are steps to be followed, which is precisely the opposite of the intention of these 6 Big Ideas.

We're going to call those things *5 focus areas*. They're not steps but they are important things to pay attention to.

- You're always assessing your current state.
- You're always trying to time changes so people are ready for them.

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- You're always evaluating and re-evaluating impact.
- You're always checking to see if what you're doing is aligned to your strategic goals.
- You're always measuring and exploring feedback...and you're always, or at least should be, evolving your measurements over time.

Even Winston Royce, the creator of the dreaded waterfall project management process didn't believe in linear steps:

I believe in this concept, but the implementation described above is risky and invites failure. - Winston Royce

But we can see how that worked out.

WHY CHANGE FAILS

In addition to those *5 focus areas*, it's important we relate the 6 Big Ideas to the most commonly cited reasons for why change fails.

By now, it shouldn't surprise you we don't believe in binary outcomes so we don't think in terms of *success and failure*, and we definitely don't think simplistic statements that describe symptoms we see matter a whole lot.

That said, we do think it would be useful to relate these common reasons to the 6 Big Ideas in the hopes you'll grok how they can help. While there are variations on the language, these are the most cited reasons we've found:

- Lack of Employee Engagement and buy-in
- Poor communication
- Inadequate leadership support

Sometimes these are phrased a little differently, but if you look at any ‘state of whatever’ report, you can boil away the noise and you’re left with variations of those three things. These 6 Big Ideas are designed to help with those problems. We can’t tell you exactly how as those are broad categories, but one great example would be using The 5 Universals of Change which you’ll learn about in Chapter 6.

If you focus on meaningful dialogue versus broadcasting information at people, you’ve changed your stance around what change communications means.

If you’re at all interested in how these 6 Big Ideas can solve these problems for you, have a notepad handy and jot down some ideas.

CHEFS, NOT COOKS

This should also be obvious by now. This isn’t a recipe book and as a reminder, these 6 Big Ideas are incomplete. They are incomplete because they aren’t aware of your context. Maybe one day they’ll evolve to become Skynet, but not today.

The 6 Big Ideas are models designed to help you make sense of your context, and to help explain to leaders in your organization that organizational change is a complex, fluid and dynamic process.

You still need to make the decisions and to focus on the models that will help you get your change unstuck.

A QUICK AND DIRTY EXAMPLE

Imagine you’ve just finished an 18 month transformation project. It didn’t go well. You fire the consulting firm and hire another one. Most likely, they are going to start at the beginning. That means they’ll probably do the same things that the previous consulting firm did. Just ask any of the banks up where Jason lives. He likes to pick on them because they’ve been continually running transformation

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programs for about 15 years now. And he still has to walk into the bank to do a wire transfer.

The 5 Waves of Transformative Change can help avoid this, because you will have a conversation about what's been done, what's been tried, how the energy fell and rose over time, and how you might approach the next wave differently.

You might also use the 5 Levers of Change, and have a conversation around how the first wave was simply installing a new process because you only gave 1 of the 5 levers any attention. Even if that wasn't the intention, and it usually isn't, that might be how it worked out. Odds are you might end up doing the same thing in the second wave, but at least this model will help you frame the conversation differently in the hopes it'll help you avoid that.

You might have tried to create urgency by telling people why the change was important, or worse, with coercive tactics. Then you could use the 5 Universals of Change to shift your stance towards helping people align towards a common purpose.

You might also want to use the 2 Change Strategies model to have a conversation around whether or not you want *evolution*, or *optimization*. It's possible the first Wave of Change didn't work out because you were using *transformation* language, but behaving in a way that showed people you were only interested in process improvement. By the way, there's nothing wrong with running a process improvement project. No, agile people, there isn't. Just be congruent about it.

That's about as prescriptive as we want to be right now. In the Extra Goodies chapter we'll show you how we've used these ideas in our work. The following chapters will describe each of the 6 Big Ideas in more detail. These ideas will hopefully help you untangle the hairball that is organizational change so you can make better decisions about what to do, sooner.

EXPLORATION AND ACTION



We mentioned in the opening that The Big Book will have more details about how we view transformation, but we thought it would be important to tease this concept. Explore/Act is one of the Elements of Change that'll we'll go into more details in The Big Book. Briefly, it's like a periodic table of 50+ change elements that help you move from sense making using these 6 Big Ideas into tangible actions.

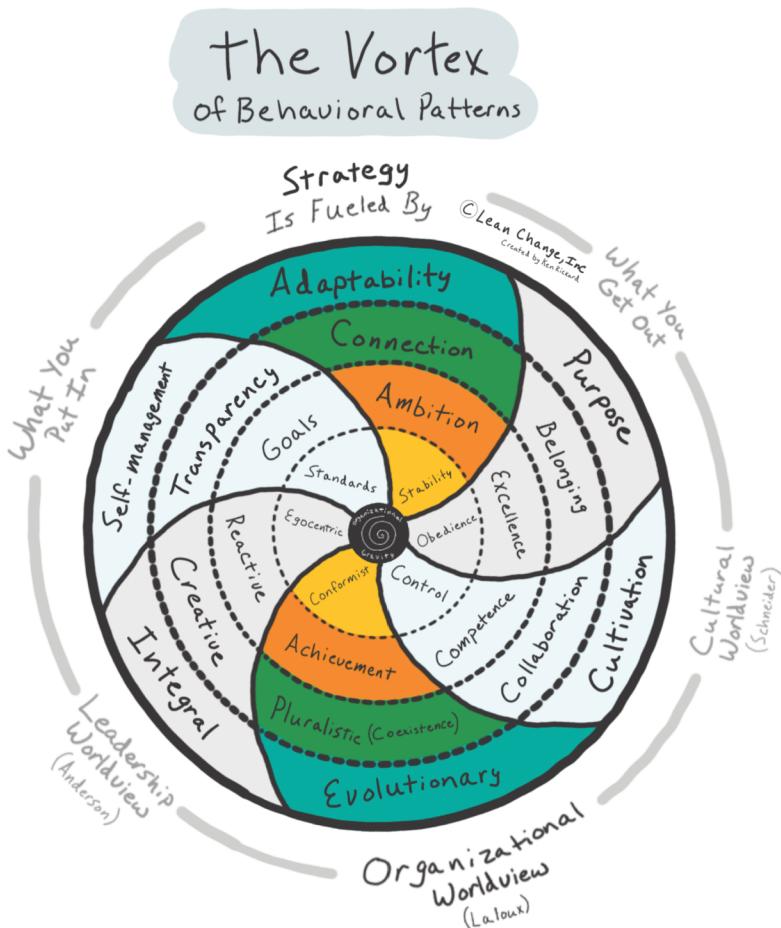
We see transformation as a beautiful, and sometimes awkward, dance between exploration and action.

Sometimes you're on Dancing with Stars, and sometimes you're a gangly, awkward pair of grade 8's twirling around a gym. Either way, you're always poking the system to make sense of it (exploration), and sometimes you're deliberately kicking the hornet's nest (action).

Don't worry if that's a hard concept to follow. We desperately want change to be linear, because time is linear. You might think you can't execute the change before you plan it, ***but every interaction with the system changes it.*** While we don't want to get into the mess that time travel movies have put themselves in, we do need to say that *phases* don't make sense. The act of planning is taking action, and that action changes the system.

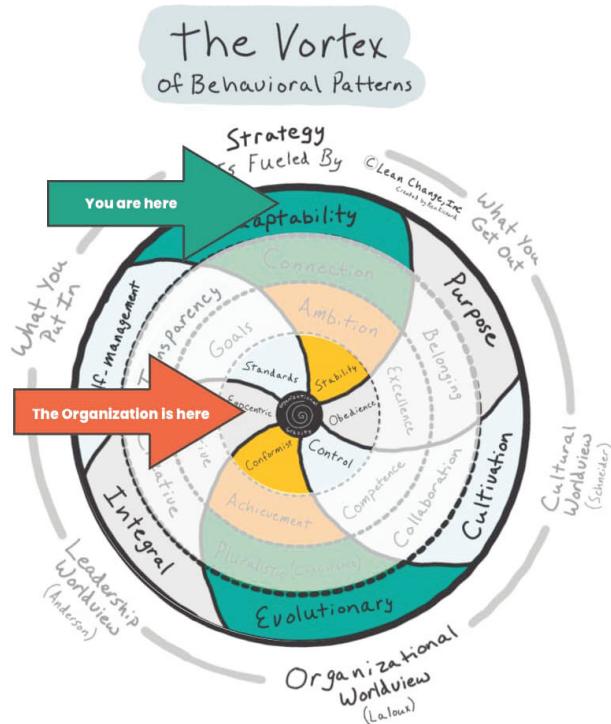
THE VORTEX OF BEHAVIORAL PATTERNS

We would be remiss if we didn't close out this introduction with The Vortex of Behavioral Patterns because it looks and sounds pretty damn cool to us.



How many times have you heard people utter the phrase, "sounds great change person, but you don't know how things work around here".

Instead of spouting off the usual, *thou shalt change the culture and mindset*, we'll quickly describe how the Vortex can help and how it relates to the 6 Big Ideas.



Organizations can't jump to the outer ring from the inner ring.

In the inner-most circle of the Vortex is what you might call a command-and-control organization.

- It's fuelled by *stability*, and even sometimes the illusion of *stability*.
- It believes *stability* comes from the implementation of *standards*.
- A possible unintended consequence might be *obedience*. That is, people follow orders because that's how the reward systems work.

- That leads to a control-based culture.
- That leads to the desire to have people conform and not rock the boat.
- That gets reinforced by egocentric leadership.

When we try to transform an organization with those characteristics, we're subject to the gravity of that inner-most circle. That means if we start using *adaptability*, *transformation*, *mindset* and other similar language, that most likely won't work even if that's what the leaders are asking for.

Jason's Take: Back in the mid-2000s, the best the agile community could do in situations like this was to say "BUT THAT'S NOT AGILE!!!" Or "YOU CAN'T DO AGILE, YOU HAVE TO BE AGILE". We in the biz called this hitting people on the head with the agile stick. Shockingly, that tactic didn't work. Somewhere along the way the phrase *command and control* just meant "I don't like the way you run your organization". I don't believe one culture is better than another. Each has weaknesses and strengths, and in some situations a little control might be a good thing.

Again, because we're sci-fi nerds, trying to leave orbit of that inner circle is much like launching a rocket into space. There is a ton of energy needed to create *escape velocity*. The earth's gravitation pull is going to do its best to make sure that rocket doesn't leave orbit, but if the rocket has used a step-by-step, linear and best practice model, it'll escape.

By the way, that was a joke. Seriously though, in this fictitious example, a shift towards focusing on *goals* instead of *standards* might be something worthwhile to try. But jumping to *self-management* is a huge risk, and probably won't work.

Here's how the 6 Big Ideas can help you figure out what to do in this situation.

The 2 Change Strategies can help you have a conversation if this organization wants optimization instead of transformation.

The 5 Universals of Change might help you have a conversation around how the organization sees change.

The 5 Levers of Change might help you have a conversation around the possible consequences of only pulling the process and technology levers.

The 3 Agilities will lead you to a conversation around how the transformation isn't limited to delivery and why that's important.

The 5 Waves of Transformative Change will help you look at what's been done so far. If this organization already tried transforming and it ended up being an exercise in process improvement, what should you change about the next wave?

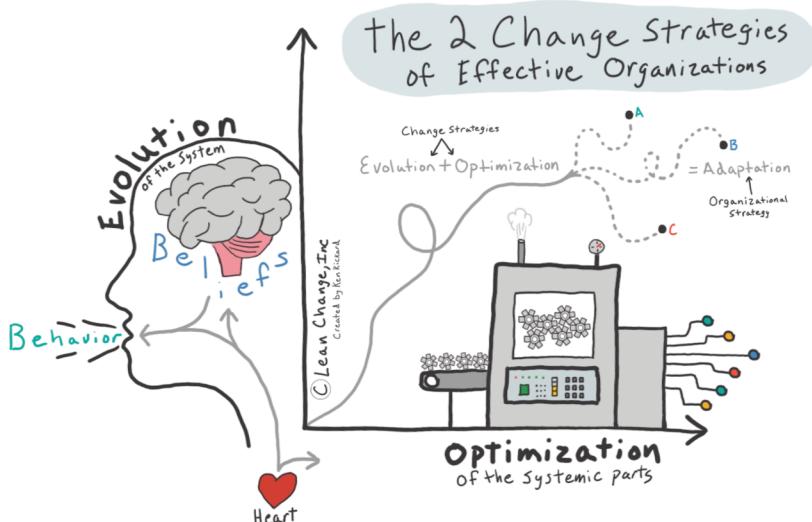
The 4 Dimensions of Change will help you figure out what your stance should be, and what tools and ideas might work better. If the 2 Change Strategies conversation brought you to a place of agreeing that the organization wants transformation, you might be best served to act like a coach. If they just want optimization, you might need to be a mentor or trainer, or worse, process consultant.

Hopefully it's becoming more clear why writing The Big Book is really hard. We spent months trying to organize the ideas in a logical way, but we kept coming back to "well, what if the organization needs to..." or "what if the reader doesn't know anything about complexity?" Or "hey, I had an idea!!!".

At that rate, we'd never get it done, so now we'll toss you into the details of each of the 6 Big Ideas. Enjoy!

Chapter Five

THE 2 CHANGE STRATEGIES OF EFFECTIVE ORGANIZATIONS



WE'RE NOT BIG FANS OF THE WORD TRANSFORMATION. UNDERSTANDING the two strategies of effective organizations is key to understanding why we get heartburn over how the word "transformation" is used.

The way we see it, an organization can improve itself in two ways.

THE FIRST WAY: OPTIMIZATION

It can *optimize* itself to become more efficient and effective, doing so by staying within its current beliefs and mental models. We refer to this as **horizontal** improvement because the organization operates within its current ways of thinking and doing. It stays in the same vertical plane of existence as it optimizes the parts of its organizational system to become better, faster, or cheaper.

For example, many organizations consider moving to the cloud a competitive advantage or a 'must-do' nowadays to remain competitive. They move their data structures, applications, and operations to this new technology. Once moved, they often consider themselves digitally transformed. However, considering they've only addressed one lever of change (technology) in their organizational system, we might say they have only optimized their technology capabilities.

Remember, complex systems cannot be solved by addressing the isolated parts. We can look at the definition of optimization for greater clarity.

Optimize: to make as perfect, effective, or functional as possible.

As organizations focus on isolation and problem-solving, they often fail to see the bigger issue in their systems because:

- They lack the ability to make effective decisions, which requires addressing leadership agility across all 5 levers of change.
- They aren't good at adapting their system to complex situations, which requires addressing change agility across all 5 levers of change.

So instead they focus on optimizing delivery via new technology and processes because "it's easier", and those 2 levers, process and technology, are visible. They can see a process diagram in a presentation and feel good. They can see the invoice for the over-priced cloud solution

and feel maybe not as good, but good that some progress has been made.

THE SECOND WAY: EVOLUTION

It can *evolve* to become more efficient and effective by going outside its current beliefs and mental models. We refer to this as **vertical growth** as the organization operates outside its current ways of thinking and doing. It elevates itself to another level of consciousness, understanding, and capabilities as it transcends its current organizational rituals and rises into the next form of existence.

For example, some organizations have recognized that their path to becoming more adaptable lies through the evolution of inflexible constructs such as hierarchies, matrices, dedicated management roles, and top-down decision-making. And they're succeeding in new ways because of it.

We can look to widely available examples of companies such as Patagonia (clothing - USA), Morning Star (farming - USA), Nucor (manufacturing - USA), Haier (manufacturing - China), Buurtzorg (healthcare - The Netherlands), Irizar (manufacturing - global), and Sun Hydraulics (manufacturing - global) as a few examples of organizations that have chosen to evolve themselves.

The big difference between *optimizing* and *evolving* can be seen in the definition of transformation below. Transformation is about changing how an organization operates (systemic evolution) and who we are as agents (people evolution) of the organizational system.

Transform: to change in composition or structure; to change the outward form or appearance of; to change in character or condition.

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Organizations tend to confuse optimization and transformation (or evolution) because they have become accustomed to their hierarchical and matrixed organizational structures. This design segments and divides an organization into decision-making levels (horizontally) and functional parts (vertically), making it easier to isolate and solve impediments by navigating the conformed hierarchical and functional segmentation. Yet, these legacy structures and the behavioral patterns they foster often keep organizations in a state of dysfunction, rendering them incapable of effectively responding to a dynamically changing business landscape.

Transformation requires an organization to consider how it will evolve and optimize. It's the result of both actions that produce adaptability as an organizational strategy. This is why we've created this equation: **Evolution + Optimization = Adaptation** to express how we think about transformative change.

TIPS FOR USING THE 2 STRATEGIES

As a reminder, and we won't mention this again, for each of the 6 Big Ideas, we'll give you tips and a few questions about how you can start trying them out in your context. We'll relate them to the 5 focus areas we mentioned in Chapter 4.

Assessment of Current State:

- What are the primary goals of our current change initiative?
Are we looking to improve what already works, or are we trying to fundamentally change the way we operate?
- What aspects of our current operations could benefit from optimization? Are there processes, tools, or systems that are not performing at their best but fundamentally fit our needs?
- What messaging are people used to? Transformation language?

Understanding Organizational Readiness:

- How prepared is our organization to undertake a significant evolutionary change? Do we have the necessary support, and does our leadership understand what they're getting the organization into?
- What are the potential barriers to implementing an evolutionary change in our organization? How can we address these barriers? (Ex: are there too many critical projects happening now that will consume everyone's time, leaving no time for this change?)
- Are people used to a process improvement approach? Maybe using *transformational* language is the wrong approach.

Evaluating the Impact of Change:

- What would be the short-term and long-term impacts of optimizing our current systems and processes? How would these changes affect our day-to-day operations and strategic objectives?
- If we choose to evolve, how might our organizational culture, employee engagement, and market position change? Are we ready for the potential disruptions that might come with such changes?
- Are we willing to 'go slower now', to 'go faster later'? That might mean a potential hit in revenue, lower productivity, and maybe even some angry employees.

Alignment with Strategic Goals:

- How well do the potential changes (whether optimization or evolution) align with our overall strategic goals and vision for the future?
- Does our current strategy support a more evolutionary approach to change, or is it more aligned with optimizing, given their current thinking?

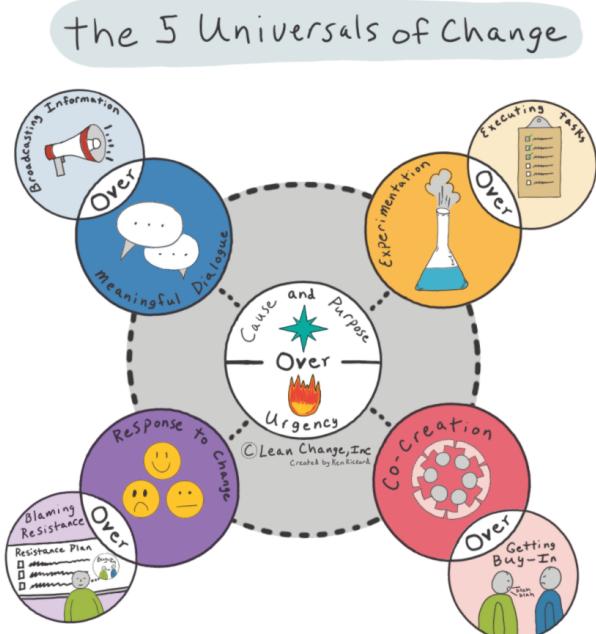
Measuring Success and Adaptability:

- How will we measure the success of the changes we implement? What leading and lagging indicators will best reflect the effectiveness of optimization or evolution strategies?
- How adaptable is our strategy? If we start with optimization and find that it's not enough to meet our goals, how quickly and effectively can we shift toward more transformative changes?
- What diagnostics can we use to know we're even headed in the right direction?

For the rest of the 6 Big Ideas, we'll follow the same format as this chapter. In the Extra Goodies chapter, we'll tie in a few common transformational challenges based on our experiences.

Chapter Six

THE 5 UNIVERSALS OF CHANGE



WE NEED TO CREATE URGENCY. WE NEED TO GET BUY-IN. WE NEED TO overcome those pesky resisters. We need to create a burning platform.

These are the four statements we're beaten over the head with ad nauseam. On the surface, they make sense, except for the burning platform. That one is just stupid and needs to die in fire.

The 5 Universals were born when Jason spent the majority of his time traveling from 2014 to when we weren't allowed to go outside and play anymore*. He worked in, visited, and ran workshops in 11 countries with thousands of change agents in search of what separated organizations who were good at change, versus those that were not so good at change. Organizations that seemed better at change seemed to follow these 5 patterns.

- **Cause & Purpose over Urgency:** Urgency is a matter of perspective. Urgency for the organization might be staying relevant or "in business." Urgency for the leaders might be getting their stock options payout. How does that help a tester on a team? What's their urgency? Organizations that could coalesce people around a common purpose seemed to generate more meaningful change versus those who instilled fear in people.
- **Meaningful Dialogue over Broadcasting Information:** It's never a bad idea to share information, but what has been labeled change comms is more or less like broadcasting on a UHF station to which nobody is subscribed. Organizations that used *dialogue provoking* tools like Lean Coffee and unscripted town halls charged ahead with change despite the uncertainty versus covering it with fancy newsletters and bullshit.
- **Co-creation over Getting Buy-in:** What's it going to take to get you into this change today? Free rust-proofing? Floor mats? We're not used car salespeople. If we build the change

* Yes, COVID. Just in case you're reading this in the year 2254, there was a global pandemic in 2020 and the entire earth was essentially locked down. Of course, if it is 2254, you're probably living a much worse, dystopian society, unless of course movies and TV have lied to us.

with the people instead of at them, we're more likely to facilitate the right change, in the right way, at the right time. Then there's nothing to sell.

- **Experimentation over Executing Tasks:** The status report is green! We spent the budget exactly down to the penny! Too bad nothing is different. There are always tasks to manage, but that shouldn't stop us from valuing experimentation. Filling out the status report is a task. Running an experiment that proves no one is reading it is a way to challenge the status quo.
- **Response to Change over Blaming Resistance:** I don't know why the change didn't work, but it's everyone else's fault, except mine. Amateurs blame resistance. Exceptional change agents know resistance is a surface response. It's the reaction to the change and it's data that tells us what we should try next.

Now you may be wondering about how 'being good at change' was measured. That's the problem with change. We want binary, repeatable measurements but that's impossible.

Organizations that seemed to be doing well and making progress with change had these characteristics:

- The change people weren't hiding information from stakeholders, even when the news was bad.
- Sponsoring executives were amenable to strategy changes based on employee feedback.
- Sponsoring executives actually went on the floor to talk to people on the front lines.
- Town halls weren't scripted, they were facilitated and hard questions were allowed.
- They had golden retrievers. Huh? That means, they had at least one change agent who was like a golden retriever. Everyone loved them, they had no agenda, they loved people

and making things better. People were naturally drawn to wanting to be around them, and working with them for the greater good.

- They weren't trying to please people and expected people to quit as a result of the changes they were making.
- They had difficult conversations respectfully. It was always about the best option to move forward, not the best option for their egos.
- They understood a final "success or failure" outcome on a scorecard didn't make any sense and expected to learn from both.

The 5 Universals of Change is one of the elements that belongs to the Art of Change which you'll learn about in the 4 Dimensions of Change chapter. Specifically, it's about your stance and the lenses you're peeking through while studying your world. Think about what would be different if you tried on a different set of lenses.

This might make it more clear. Have you ever had a new neighbour? New Co-Worker? Did you google "best practice framework for ensuring maximum ROI with new neighbour"?

Hopefully not.

If you're in Canada, you knock on their door with a basket of beer, donuts, and back-bacon. Then you say, "*how's it goin' eh? We live in the igloo next door. Don't mind the moose, he won't bother you. Anywho, welcome and feel free to pop over anytime once you get settled.*"

That is a universal thing everyone understands. Well, the idea that everyone knows how to act like a human. If you're not in Canada you'll have a slightly different greeting. You don't need a framework, or playbook, or a list of principles. That's why these 5 things are called *universals*, and not *principles*.

We can't give you a list of principles to follow because those are personal attributes.

HOW YOU MIGHT USE THE 5 UNIVERSALS

Assessment of Current State:

- How does our organization currently approach the concept of urgency in change initiatives? Are we relying on creating a sense of crisis to motivate change?
- In what ways are we currently facilitating meaningful dialogue among stakeholders about change? Are these methods effective?
- Are we worried about getting the right plan upfront, or are we able to experiment our way through the change?

Understanding Organizational Readiness:

- If we typically employ scare tactics and coercive methods to get people to change, what's the possible effect of switching to purpose-driven change?
- What existing communication channels can we morph into dialogue sessions, or what new channels need to be developed, to enhance dialogue and co-creation in our change processes?
- Do people expect to be included in the design of the change? If they're used to change being dropped onto their heads, will a different approach work?
- When people react to the change, can we get curious instead of furious and use that reaction into re-designing the change or changing our strategy.

Evaluating the Impact of Change:

- What might be the immediate impacts of shifting from a focus on urgency to fostering a shared purpose? How might this shift affect employee motivation and engagement?
- How would enhancing co-creation and dialogue influence our organizational culture and change outcomes?

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- Is our standard operating procedure to coerce people into change through performance management? What'll happen if we don't do that this time?
- Will people be more confused if we deviate too far away from the approach their used to?

Alignment with Strategic Goals:

- How do The 5 Universals of Change align with our organizational values and the strategic goals of the change initiative?
- Does our current strategic plan support a culture of experimentation and using the symptom of resistance as valuable data, or are adjustments needed to better align with these principles?

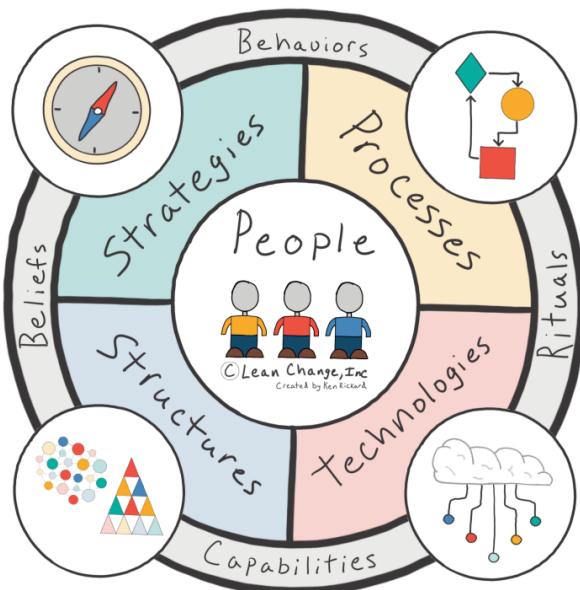
Measuring Success and Adaptability:

- What measurements and diagnostics can we establish to know if we're headed in the right direction? How will we use this to course correct, and how safe is it to course correct?
- How will we know if our efforts to promote co-creation and response to change are successful? What feedback mechanisms will be necessary to assess and adapt our strategies based on this feedback?

Chapter Seven

THE 5 LEVERS OF CHANGE

The 5 Levers of Change



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YOU'VE PROBABLY HEARD SOMEONE SAY, "PEOPLE, PROCESS, AND Technology," regarding the three things businesses are concerned with. Management expert Harold Leavitt created the phrase in the 1960s to represent the three things he believed organizations needed to address if change was to be successful. If one component of the triangle shifted, the other two were impacted. It would take another 30 years (1990s) for a computer security specialist, Bruce Schneier, to come along and popularize that phrase into a ubiquitous business term.

Today, another 30+ years later, "People, Processes, and Technology" is probably a little short-sighted as it leaves out two critical 21st-century organizational components - Strategy and Structure. We assume these components went unrecognized because organizations weren't concerned with these things at the height of manufacturing in the 60s and 70s, before the malleability of software supercharged organizational disruption. Few people within an organization set the strategy and structure, and it was more "set it and forget it" in those times of slower change and greater predictability.

Combining Leavitt's "People, Process, and Technology" with Strategies and Structures gives us five levers that 21st-century organizations should consider as they build their organizations to become more adaptable.

The 5 Levers of Change are defined to be systemically holistic, covering all aspects of a modern organization:

- **People:** consciousness (beliefs) of individual/organization, competence (actions) of individual/organization. People sit at the center of all change efforts.
- **Strategies:** systemic design of organizational leadership, organizational learning capabilities, ability to change/adapt and optimize/evolve, and approach to how the organization shows up in the markets/industries they operate within.

- **Structures:** organizational design (reporting lines and team construction), policies, decision-making, and information-sharing constructs.
- **Processes:** processes to deliver work, govern work, and make work decisions.
- **Technologies:** software to create and test software, to govern and collaborate, and the software and hardware to support software.

COMBINING LEVERS FOR A DEEPER PERSPECTIVE

- **Beliefs** (people/strategies/structures): People's beliefs create affinities for certain constructs and methods of succeeding, often shaping the fundamental direction of the organization. For instance, people who believe success is achieved via control tend to deploy structures and strategies that retain power in the few rather than the collective. Conversely, people who believe they succeed through collaboration tend to build community-based structures and strategies to succeed.
- **Behaviors** (people/strategies/processes): People's behaviors reside in the strategies (e.g., conservation vs disruption) and processes (e.g., predictive-based vs discovery-based) that provide the constructs of our organizational structures. Often governed by process, behavior becomes a key indicator of how strategies are translated into day-to-day actions.
- **Rituals** (people/process/technologies): The rituals or repeated behavioral patterns people exhibit within an organizational system contribute to both the climate (the immediately observable mood) and culture (the deeper shared values, beliefs, behaviors) of an organization. Oftentimes, rituals are localized in pockets of an organization. For instance, a team meeting where the manager does all the talking and

encourages no dialogue, when repeated weekly becomes a ritual that the team probably hates.

- **Capabilities** (people/structures/technologies): The integration point of people's beliefs, behaviors, and rituals lies in how an organization is structured (e.g., hierarchical pyramid vs network of informed agents of change) and how technology is used in the digital age as a multiplier of effectiveness. People are a core aspect of how the organization cohesively aligns its structures and uses technologies to enhance or replace human interaction. For instance, some organizations use tools like Jira to replace human connection and dialogue instead of enhancing it.

Hopefully, the 5 Levers of Change won't take 30 to 60 years to catch on. Where are the Bruce Schneiers of the world when they're needed?

HOW YOU MIGHT USE THIS

- What are the current capabilities and limitations of our organization across the five levers: People, Processes, Technology, Strategy, and Structure?
- How well integrated are these levers in supporting our current change initiatives? Are there evident gaps or misalignments that could hinder effective change implementation?

UNDERSTANDING ORGANIZATIONAL READINESS:

- How prepared is our organization to make changes across these five levers? Do we have the necessary resources and capabilities in place?
- What is the current level of alignment and cooperation between the departments or teams responsible for People, Processes, Technology, Strategy, and Structure?

Evaluating the Impact of Change:

- If we adjust one lever, such as Technology, what are the anticipated impacts on the other four levers? How can we ensure that changes in one area will not negatively affect the others?
- What are the potential benefits and risks of making simultaneous changes across multiple levers? How can we optimize these changes to achieve a balanced and effective transformation?
- What's the consequences of ignoring one or more of the levers?

Alignment with Strategic Goals:

- How do the proposed changes across the five levers align with our long-term strategic objectives? Are there any inconsistencies that need to be addressed?
- How can adjustments to our Strategy and Structure support a more effective integration of new Processes, People interactions, and Technology?

Measuring Success and Adaptability:

- What specific diagnostics and measurements can we establish to observe the effectiveness of changes made in each of the five levers? How will these metrics inform our understanding of the overall success of the change initiative?
- How flexible are our change strategies across these levers? Are we prepared to adapt or recalibrate our approach based on feedback and performance data?

Chapter Eight

THE 3 AGILITIES OF EFFECTIVE ORGANIZATIONS



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WHILE THE AGILE MANIFESTO FOR SOFTWARE DEVELOPMENT WAS crafted in 2001, ChatGPT says the word *agility* was first used in 16th-century English. Merriam-Webster defines it as the quality or state of being agile: possessing a readiness, capable of moving quickly and gracefully, and having a resourceful and adaptable character.

Given this definition, we could say organizations must be ready for *change* and have adaptable *leaders* who enable quick and graceful *delivery*.

While Jason has already written a book about change agility*, it is not the only agility we believe organizations should possess to successfully adapt to the rapidly changing landscape of the 21st century.

- **Change Agility** - A characteristic of people who make up an organization capable of adapting (short-term change) and evolving (long-term change) themselves to thrive in dynamically shifting, complex environments.
- **Leadership Agility** - The ability of people (regardless of position or function) to develop themselves, both consciously (elevated awareness) and competently (ability to perform), in ways that make information widely available and distribute decision-making appropriately across a dynamically shifting change environment.
- **Delivery Agility** - The result an organization gains by enabling its people, teams, and products to adapt (i.e., lead and change) their strategies, structures, processes, and technologies to address a dynamically shifting change environment.

Unfortunately, we've seen too many organizations start and stop their "transformation" within IT development and only address changing their process (to Scrum) and technologies (to Jira). Because of the ubiquity of these behaviors, many short-handed terms have arisen to

* <https://changeagility.org>

help describe this poor behavior - Fragile, ScrumFall, Wagile, Zombie Scrum, Mechanical Agile, Dark Agile, Agile Theater... we could keep going.

The 3 Agilities work together to maximize the organization's ability to adapt to internal and external disruption. Suppose an organization only addresses delivery agility and ignores leadership agility (which is about distributed leadership) and change agility (which is about being amazing at changing). In that case, it risks artificially limiting its ability to respond effectively to dynamically changing situations as it has ignored the vital interconnectedness of its systemic organization.

HOW YOU MIGHT USE THIS

Assessment of Current State:

- How nimble are our current leadership practices? Are leaders equipped to adapt quickly to changing circumstances?
- In terms of change agility, how quickly and effectively can our organization respond to unexpected challenges or opportunities?
- For delivery agility, are our teams currently able to adjust their workflows and outputs to meet shifting customer demands or market conditions?

Understanding Organizational Readiness:

- What is the level of awareness and acceptance among leaders and staff regarding the need for enhanced agility in leadership, change management, and delivery?
- What resources (training, coaching, tools, support systems) are currently available to improve agility, and what additional resources are needed?

Evaluating the Impact of Change:

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- What impacts can we expect from enhancing each type of agility on our organizational performance and culture?
- How might increased agility affect our relationships with stakeholders, including customers, employees, and partners?

Alignment with Strategic Goals:

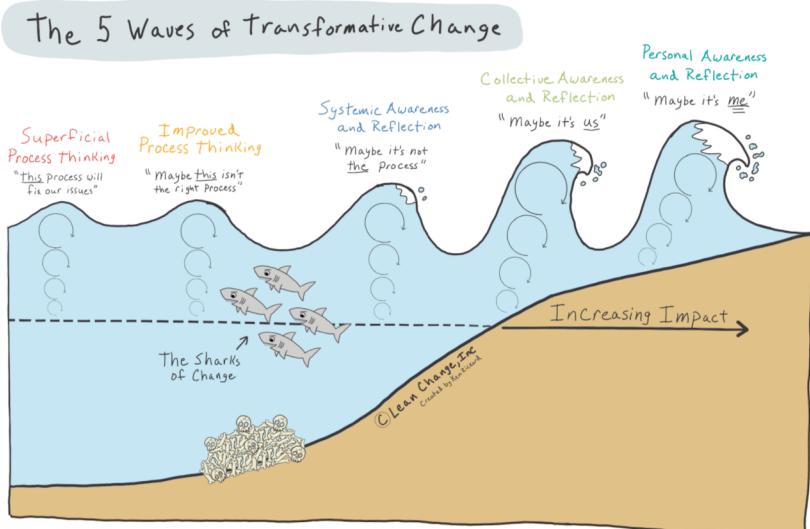
- How do the goals for enhancing each type of agility align with our broader organizational objectives?
- How will improvements in leadership, change, and delivery agility help us achieve our strategic vision and competitive advantage?
- What's the consequences of ignoring one of the three agilities?

Measuring Success and Adaptability:

- What specific indicators will we use to measure improvements in leadership, change, and delivery agility? How will these metrics guide our ongoing strategy?
- How will we ensure that our approach to agility remains flexible and adaptable to future changes in our industry or operational environment?

Chapter Nine

THE 5 WAVES OF TRANSFORMATIVE CHANGE



WE ALREADY MENTIONED HOW DESPERATE OUR BRAINS ARE TO MAKE change a repeatable process based on science. We also want it to be a linear process.

All change follows the laws of social change. At some point, someone gets upset with the status quo and takes action.

Jason Thoughts: "Never be the first change agent." Me and my colleagues used to joke that we were the consulting clean-up crew when working on large agile transformations. We knew exactly which Big Corp Inc. preceded us by the language people used. It seemed easier to bring about change after an organization already had a few kicks of the can at it.

People can be confused, upset, happy, sad, frustrated, and more early on. Some will get it right away, and others will struggle, but either way, the change will go through a period of emergence while people try to figure out what it means.

Side Note: In that situation, this is the worst time to create a long-term plan and carved-in-stone metrics.

As time goes on, the need for more structure emerges. A few experiments might have been tried, and people might have learned what the actual change should be. That might be the same or different from the original intention.

As time passes, the desire for structure can be taken too far. It might be institutionalized, following the same culture and attitude as the 'old way of doing things.' This is a critical point in the change. Do we want to change the same way we always do, using the same values and beliefs as the old state? Or do we want to transform using the espoused values and beliefs?

Finally, the energy fades, some of the changes work, some don't, and others are somewhere between the two.

After some time, someone gets upset with the status quo and intervenes in the system again. In transformational change, this sometimes manifests in the firing of the VP of <Whatever> or the replacing the consulting firm with another one. Fresh brains, eyes and ears then proceed to go through the next Wave of Transformative Change.

And things are little better this time. Hopefully.

Navigating complex adaptive systems such as an organization is difficult. It requires that we try something, see if it works, and then try again if it doesn't. Complex systems are hard to read in this way because they are frequently changing. We have to find new, more intricate, and sophisticated ways of thinking and doing that help us address the shifting complexities.

As the organization rides the Waves of Transformative Change, every system intervention kickstarts our heart...uh, kickstarts the next wave we mean, as the change initially works and then begins not to work until it seems like it will never work.

WAVE 1: SUPERFICIAL THINKING

"Let's do Scrum."

People often start with believing a simple change is all we need. Change is never simple in a complex system. But we need to experience the feeling of superficial thinking not working before we're ready to move on.

You've probably seen content all over the internet related to statements like, "here's 5 steps to avoid the most common traps in organization change". You've also probably experienced people in the organization saying things like, "You know, we probably should do

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this..." - and that was something you hounded them to do months ago.

They have to go through superficial thinking and behaving to understand why it doesn't work. They need to feel it, not be told it.

WAVE 2: IMPROVED SUPERFICIAL THINKING

"Crap, that didn't work. Maybe we should be using Kanban instead."

Still stuck in our simplified thinking bubble, we assume what we tried already should have worked, but it didn't. Better try a similar process; it will surely work, we have more experience now.

Jumping the Change Sharks: Just offshore is where the change sharks live. They keep people and organizations from moving beyond superficial change. Our experience has shown it takes reflection and personal development to get beyond superficial thinking patterns. Organizations fall victim to the change sharks when they aren't willing to look beyond the simplified thinking that keeps them limited to superficial thinking. Jumping the sharks of change requires evolving the organization vertically, allowing people to become effective agents of change, ones capable of helping the organization transcend the superficial waves of change.

WAVE 3: SYSTEMIC AWARENESS/REFLECTION

"Ok, our delivery processes can't work because of how our organization works. The organization is an impediment."

It's not difficult for people to recognize the system is broken, especially the people toward the bottom of the hierarchy. The hard part is doing something about it. The people who need to become more systemically aware often can't see the problems from their lofty hierarchical positions. Getting to and through this wave will require a greater sense of systemic awareness.

Ken Thoughts: A long time ago, I worked for a well-known corporation. The CEO flew in their helicopter daily to the office, landed on the roof, and then walked down a flight of stairs directly into their office. They reversed that process to leave each day. They never saw any workers, middle management, or anyone beyond the executives who reported to them. I always wondered how aware of the system they were. Could they have had a pulse on the organization, given this behavior?

Like some kind of Wizard of Oz behind the curtain, I always imagined the CEO keeping strict control of the system through the image people spread of them through the rumor mill. I wondered if this was the impression of themselves or the organizational system experience they wanted for their company. I also wondered what needed change was artificially being hidden by people because of the fear this behavior instilled in the organization.

WAVE 4: COLLECTIVE AWARENESS/REFLECTION

"Ok, we're addressing organizational impediments, but things aren't improving."

In previous waves, the challenges to change were seen as being of the technology or process variety. Then, the system (i.e., the organization) became more aware of the problem. To advance beyond system awareness, collective self-awareness must begin to spread within the organization beyond the initial people focusing on helping the system change. This wave creates a movement for change.

WAVE 5: PERSONAL AWARENESS/REFLECTION

"Maybe it's not everyone else or the system... Maybe it's me."

It takes time for humans to accept their own shortcomings and learn to become self-aware and introspective. The more individuals that can advance to this state of being, the better off your transformation toward adaptability will be. Conversely, the more people that stay in the superficial waves, the more your transformation will feel like change theater. People transform, not processes or technologies.

While these waves are defined linearly and are rooted in logical thinking, reality says this isn't exactly how everything works. Use the definition of these waves to reflect on your situations and experiences. You'll likely find things happening in parallel and moving backward and then forward over time.

HOW YOU MIGHT USE THIS

Assessing the Current State

- Which wave of transformational change is our organization currently experiencing? Are we in the early stages of superficial changes, or are we advancing towards deeper systemic changes?

- How have previous waves of change impacted our organization's performance, culture, and employee engagement?

Understanding Organizational Readiness:

- How prepared is our organization to move to the next wave of transformative change? What strengths can we leverage, and what obstacles might we face?
- Do we have the necessary leadership commitment, resources, and infrastructure to support deeper and more systemic changes as we progress through the waves?

Evaluating the Impact of Change:

- What are the expected benefits and potential risks of advancing to the next wave of transformative change? How might these impacts vary across different parts of the organization?
- How will moving through successive waves of change help us address current challenges and exploit new opportunities?

Alignment with Strategic Goals:

- How does progressing through the 5 Waves of Transformative Change align with our long-term strategic goals and vision?
- Are there specific waves that are particularly critical to our strategic objectives? How can we ensure that our approach to these waves maximizes their alignment with our goals?

Measuring Success and Adaptability:

- What metrics or indicators will we use to measure success and the effectiveness of changes in each wave? How will we know when it is time to transition from one wave to the next?

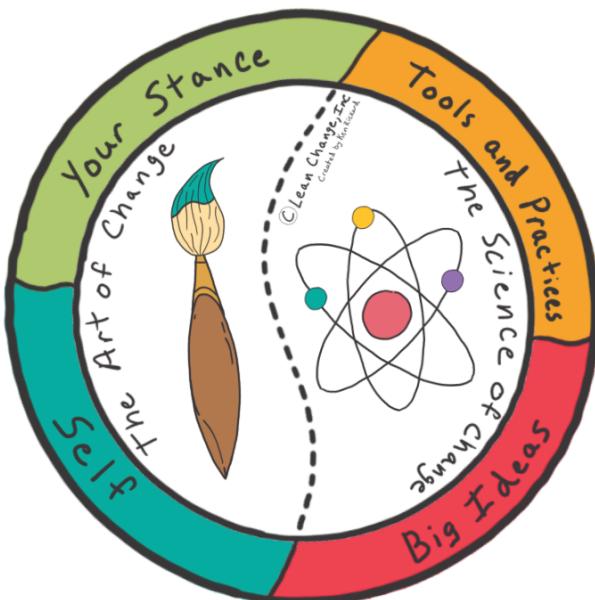
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- Given the iterative nature of transformative change, how will we adapt our strategies based on the outcomes and learnings from each wave?

Chapter Ten

THE 4 DIMENSIONS OF CHANGE

the 4 Dimensions
of Change



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OUR BRAINS DESPERATELY WANT CHANGE TO BE A REPEATABLE PROCESS based on science. But it's not. Change is as much art as it is science. You can use the same approach to a transformation in two different organizations and get two completely different results. Humans and organizational context are two ever-changing variables and no process can control that.

As mentioned in the 5 Universals chapter, throughout Jason's travels, he discovered that organizations that excelled at change knew how to balance the art and science of change. Some of the characteristics of these organizations are listed in The 5 Universals of Change chapter if you need a refresher.

Up until now, the 6 Big Ideas have been more about exploring the organizational system. The 4 Dimensions of Change is more about us, the change agents. It's about who we are as humans, the stance we take, and the tools and ideas we cling to.

THE ART OF CHANGE

Intuition matters. Have you experienced the phenomena where you just know it's the right time to intervene in the organizational system? That's art. Do you instinctively know when to ask powerful questions, when to give advice, and when to do nothing? That's art.

- **Self** - This is about who you are as a human. It's your beliefs and how you see and interpret your world. All of your experiences, successes, failures, and interactions with the world have helped shape you into the human you are today.
- **Your Stance** - This is about how you show up in your world. How you affect others and the effect that is produced by your contributions to the system.

Some people are naturally good at the art of change. But both sides are needed. In some cases, too much art can result in the change agent

leading from ego, or always taking a coaching stance when a mentor, or consulting stance might be more appropriate.

THE SCIENCE OF CHANGE

Ah, science. "Our framework is tried and true, backed by science." Blech. We all have our favorite mental models, ideas, and tools. Some work well in some contexts and fail miserably in others. Like a good chemist, we can combine different elements to do different things. That's science.

- **Big Ideas** - This is about the mental models we use to explore our world. Throughout this guide, we've shared our big ideas of change as we see it. These concepts help us describe complex change, so it'll be important to understand if we are to be effective agents of change.
- **Tools and Practices** - This is about the tools that help us facilitate change. That includes Change Canvases, Big Visible Walls, Perspective Maps and more.

The 6 Big Ideas fall into the Big Ideas bucket of the 4 Dimensions of Change. They're sense making ideas, and on their own they're just ideas. They come to life when you put your personal stamp on them. How you use them will probably be different from our intention.

That's the thing with ideas, they take on a life of their own once they navigate their way through your brain.

Jason Thoughts: For a little more context, here's a fun story. I attended a traditional change management conference in the early 2010's. I was invited to speak about 'using agile in change management'. The organizers wanted to start the conference with an innovative open space, as they called it.

So the conference host hopped up on stage, told the attendees what the topics were and where they would be talking about those topics. Each area had a moderator who directed the conversation.

For those paying attention, that's precisely the opposite of what an open space is. How could they get it so wrong?

Simple. They used the 'tool' but their self/stance prevented them from using it the way it was designed.

For those of you who need more structure, you're most likely going to add things to these 6 Big Ideas to fill in the holes that your brain needs. For those that need less structure, you'll probably dive in and draw them on the whiteboard during your next transformation update meeting to help others understand something that's happening in the current context.

Unlike frameworks, there's no wrong way to use these ideas, there is only consequence of action. Lastly, the 4 Dimensions is about balance because putting too much focus in one area can lead to problems:

- **Self:** Too much emphasis here can lead to leading by ego, grandstanding, and making the change about you and not the organization.
- **Stance:** If you're hired as a coach and keep acting like a coach, it may frustrate people who need a mentor at a particular point in time.
- **Tools:** If all you've got is a hammer, you'll just whack people over the head with that. You run the risk of confusing people when they are trying to understand the tool instead of the intention of the tool.
- **Big Ideas:** Too much emphasis here can result in confusing people with theoretical ideas and models.

To close off the 4 Dimensions, the challenges of focusing too much on one dimension extends to change teams. If you all think the same, it's harder to help an organization change. It's the diversity of thought that creates friction, and friction creates progress.

HOW YOU MIGHT USE THIS

Assessment of Current State

- How well does our organization currently understand and apply the four dimensions of change: Self, Stance, Big Ideas, and Tools?
- What are the strengths and weaknesses observed in how these dimensions are currently integrated and manifested in our change initiatives?
- Do we have a good mix of change agents that create a balanced team versus a team that acts like an echo chamber?

Understanding Organizational Readiness:

- What is the current level of readiness among our leaders and employees to explore and adapt to changes within these four dimensions?
- Are there specific areas within these dimensions where our organization feels particularly challenged or resistant to change?

Evaluating the Impact of Change:

- What are the potential impacts of enhancing our capabilities in each of the four dimensions on our overall change initiatives?
- How might improving our approach to each dimension affect our organization's culture, effectiveness, and ability to handle future changes?

Alignment with Strategic Goals:

- How do improvements in each of the four dimensions align with our broader organizational goals and strategic vision?
- Are there any specific dimensions that are critical to achieving key outcomes or objectives within our strategic plan?

Measuring Success and Adaptability:

- What specific indicators or metrics can we establish to measure the effectiveness of interventions and developments in each dimension?
- How will we ensure our strategies remain flexible and responsive as we gain new insights and face new challenges related to these four dimensions?

Chapter Eleven

GO FORTH AND TRANSFORM!

WELL, THAT SHOULD DO IT! YOU NOW HAVE A BIG LIST OF COOL looking models that will ensure successful transformation! Hopefully that's not the lesson you've learned from this because there's nothing that can ensure successful transformation.

Sorry, that wasn't meant to sound depressing.

So, what's next? How do we take these big ideas and not just walk away with a head full of concepts but actually make waves in our organizations? Here are a few paddles to help us steer:

- **Stay Curious** — Keep asking questions, keep challenging the status quo, and keep exploring new ways to bring about change. The path less traveled often leads to the most breathtaking views.
- **Be Adaptable** — The only constant is change, right? So let's get good at responding to it, not as a one-off but as a continuous dance.
- **Foster Collaboration** — Build bridges, tear down silos, and get everyone jamming together. The best music happens when everyone feels like they're part of the band.

- **Lead with Empathy** — Remember, change is hard. It's personal. It's emotional. Being empathetic leaders can make the journey less about the destination and more about the growth along the way.
- **Keep the Dialogue Open** — Communication isn't a bulletin board. It's a conversation. Keep those lines open and make every voice count.
- **Find Balance:** Don't just work with change agents who share your view and stance, find ones that challenge your beliefs and assumptions.
- **Be Gritty:** Stick to it, if you believe in what you're doing, you'll figure it out.
- **Be Congruent:** Your actions should follow your words. Value what you need, and what others need in any given context.
- **Work in the whitespace:** Don't worry about titles, roles, and process so much. Learn to pay attention to the social structures and work in the cracks of the org chart.

As promised, the next chapter has a bunch of extra goodies describing how we used these 6 Big Ideas in our work.

Chapter Twelve

EXTRA GOODIES

AS PROMISED, [HTTPS://SIXBIGIDEAS.ORG](https://sixbigideas.org) IS THE HOME OF THE 6 BIG Ideas. We're going to be dropping all future updates, stories, workshops, AI goodies, and more at that URL.

Now onto the goodies. As mentioned many times already, you know your context we don't. This book doesn't either. Here's a few problem areas that we've run up against in our careers along with which of the 6 Big Ideas we started with. Your mileage may vary.

We'll break these down into 5 buckets:

- **Delivery Problems:** Problems we run up against that are considered to be delivery problems. That might include buggy products, slow delivery, or blaming IT for not being agile enough.
- **Process Problems:** Problems we run up against that lead us to believe a new process is the solution.
- **Leadership Problems:** It's fun to blame leaders isn't it? Leadership is hard, and these problems are related to things that happened that we generally attribute to leadership failure.

- **Transformational Problems:** These are problems related to unsuccessful transformations.
- **Change Problems:** These are problems as a result of external disruption, or internal disruption.

For each, we'll provide a few lower level problems as well as which of the 6 Big Ideas we'd start with and why.

DELIVERY FOCUSED PROBLEMS

Problem A: People are struggling with a process (like Scrum) that someone forced across the organization.

Problem B: There's concerns the organization lacks the ability to adapt to a dynamically changing market.

Which Big Idea to Start With and Why:

3 Abilities of Effective Organizations - Start with this concept because it helps them make sense of why an organization needs holistic agility (leadership, change, and delivery) rather than only focusing on implementing a new delivery approach without changing the environment in which the new approach is being deployed.

The **3 Abilities** will help you frame a conversation around these topics:

- **Leadership Upskilling:** When people in positions of authority use that authority to push decisions onto people, it causes them to follow, even if unwillingly, and the expected results of the change are typically tough to acquire. The 3 agilities can give them a more holistic picture of agility.
- **Distributing Decision-making:** Where is information stored in your hierarchical structure? Do the people at the top make all the decisions and then drop change through the hole in the

hierarchy floor? When knowledge, information, and decision-making is stored at the same level where the challenges are, change is effective.

- **Sustainable Adaptability:** Delivery Agility is enabled by a system of improvement (established by leadership agility) and placing a primary focus on effective change (being really good at change agility). Only focusing on implementing a delivery process is like putting the cart before the horse.

Connecting to the other big ideas, pick the ones that make sense given your context:

- The **2 Change Strategies** will help people realize that doing the same things in a different way tends to get similar results. If the change is rooted in better, faster, or cheaper, it's optimization. Inherently, optimization is not transformative; only evolution is as it addresses elevating beliefs and behaviors.
- The **5 Waves** will help people realize that everything can't be fixed at once (Scrum everywhere!). There is no silver bullet. We'll need to make a change and see that it's not working before we're eventually comfortable accepting that we need to try something else, (like Kanban everywhere!) and fail at that too.
- The **5 Universals** will help people realize that forcing change on others will likely result in inaction or pushback. Instead, invite people to participate in defining the change.
- The **5 Levers** will help people realize that their interconnected organization is a system. It can't be changed in isolation and silos. Think beyond that—what do people need to change about themselves? How will our current strategies and structures hinder our ability to improve? Is technology changing? Of course it is, but it's always changing, so we should stop primarily focusing on it and instead build a system that is really good at changing. Then,

keeping pace with shifting technology will take care of itself.

- The **4 Dimensions** will help people realize that tools (like Jira) and processes (like Scrum) don't fix problems by themselves. Since every organization is made of people, every problem is a people problem.

PROCESS FOCUSED PROBLEMS

Problem A: The organization set out solve an organizational problem with OCM, yet the change was deemed a failure.

Problem B: Our linear plan-based and sequential execution approach to change is not working in our organization.

Which Big Idea to Start With and Why:

5 Universals of Change - Start with this concept because it helps them make sense of why people likely “resist” change when they’re not a part of defining the change or the change is mismatched with their purpose.

The **5 Universals** will help you frame a conversation around these topics:

- **Urgency as a Killer of Effective Change:** When we try to move quickly, we often sacrifice communication, collaboration, and knowledge sharing. This puts people without authority to define the change in positions that make them feel uneasy, afraid, and anxious. This is how the “rumor mill” starts to erode your culture. When the rumor mill starts, the change starts, and when the rumors start, leadership has already lost the control they so desperately wanted. The 5 universals of change will help leadership understand how to set the stage early with transparency, include people in defining the change, and create a purpose that matches people’s purpose for the change.

- **Substantially Reduce Resistance:** When an individual's purpose aligns with the organization's purpose for the change, and the organization's purpose is contextually effective, change becomes effortless. Any misalignment between these three key ingredients makes change difficult to various degrees. Resistance is an indication that you have a mismatch in purpose between those that are asking for the change and those impacted by it.
- **How to Discover the Best Change:** In a complex system (lots of organizational parts, changing quickly) we can't predict what will happen. If we accept this as fact, then we can discover the best change over time as we experiment with what change is needed. Resistance subsides as people see things can easily change if it's not working for their group.

Connecting to the other big ideas, pick the ones that make sense given your context:

- The **2 Change Strategies** will help people realize that we might be stuck in a cycle of optimization that causes us to fail after the system can no longer be effective with optimization alone. Focusing on evolution can help you get unstuck from this treadmill of ineffective change.
- The **5 Waves** will help people realize where they are on their journey of evolution. Have we learned to become more aware of how our system effectively changes, or are we still stuck on forcing the system to change in a conformed way, which generates resistance?
- The **3 Agilities** will help people realize that Agile frameworks and traditional approaches to change are not the solution if people are not empowered to change. Change fails and is exhausting for those impacted when authority and ability to change are not delegated to those impacted by the change.

- The **5 Levers** will help people realize that focusing on process and technology changes only covers the real problems within a system, which are often a lack of agility in the other levers (strategy, structure, and a lack of people evolution).
- The **4 Dimensions** will help people realize that the effectiveness of their organizational system is rooted in the characteristics of the people in the system. If people resist change, it's because those in charge of the system focus on the wrong dimensions to execute change. Change is not just about tools, practices, and strategies; changing effectively is likely more about understanding people's beliefs and behaviors.

LEADERSHIP FOCUSED PROBLEMS

Problem A: The organizational leadership goes to <insert popular entertainment destination> each year to plan the upcoming year's strategy and then comes back and drops change through the hole in the hierarchy floor.

Problem B: Leadership's expectations are that the transformation will be complete within the year.

Which Big Idea to Start With and Why:

4 Dimensions of Change - Start with this concept because it helps people make sense of why there can't be a reliable timeline associated with organizational transformation. Hint: it's not about tools and practices, it's about personal transformation, and that takes variable amounts of time depending on the person.

The **4 Dimensions** will help you frame a conversation around these topics:

- **Organizational Transformation is Personal**

Transformation: We've become so accustomed to thinking through the lens of solving problems with tools and practices a whole industry of digital transformation has been created.

What about the rest of the organization, especially the evolution of people dynamics? The 4 dimensions of change help people consider themselves, and not just approaches and strategies for change.

- **What You Believe Matters:** Who we are contributes to how we show up and how people experience us. These things weigh on our ability to influence and lead change as leaders.
- **It's Not Like Learning Another Coding Language:** Personal transformation is just that, personal. It often takes time to unravel oneself and rebuild new attitudes, behaviors, and beliefs. Each person's journey is different.

Connecting to the other big ideas, pick the ones that make sense given your context:

- The **2 Change Strategies** will help people realize that they've likely been focusing on thinking in ways that lead to optimization and not evolution.
- The **5 Waves** will help people realize that it's a journey. You can get stuck in the offshore waves or eaten by the change sharks before you find yourself closer to the shore making a high impact within your organization.
- The **3 Abilities** will help people realize that organizations are pre-conditioned to focus on the motions of delivery and ignore the evolution of leadership and change capabilities.
- The **5 Levers** will help people realize that effective change is human-centric. It's not mechanical or predictable.
- The **5 Universals** will help people realize that people's purpose is the primary driver of effective change. Meeting people where their purpose is and watch the magic happen.

TRANSFORMATION FOCUSED PROBLEMS

Problem A: We put up a "Transformation Accomplished" banner after our IT group changed to Scrum.

Problem B: There is stakeholder resistance fueled by uncertainty and lack of clarity about the transformation's goals.

Which Big Idea to Start With and Why:

Ok, we broke the rule on this one, there are 2 Big Ideas you might want to start with.

2 Change Strategies of Effective Organizations - Start with this concept because it helps people make sense of the goals of the transformation.

The 5 Waves of Transformative Change - It's important to know that if this is the 3rd or 4th attempt at transformation, your starting point for the next wave will be different.

The **2 Change Strategies** will help you frame a conversation around these topics:

- **Optimization vs. Evolution:** What good is a digital transformation if your organization still can't make effective decisions and is mediocre at best when it comes to change? Shiny new toys can make things worse. The 2 change strategies help people see when their optimization desires have put their organization in a rigidity trap.
- **Reaching True Adaptability:** Organizations are predisposed to seek faster, cheaper, and better results in the name of growth and competition. This urgency often means limiting decision-making to the few at the top of the organizational hierarchy. This creates long loops of decision-making and, therefore, learning as longer decision chains directly related to a lack of adaptability. The goal of adaptability is to place decision-making where the problems are.
- **Why Transformation is Not Just About Process or Tech:** Because adaptability requires decision-making to be aligned with where the problems are in the organization, this means knowledge, information, and purpose must be distributed

across the organization so people are capable and have the authority to make effective local decisions. The evolution of behavior and the beliefs on which those behaviors are built become more important to a transformation than process or technology.

Connecting to the other big ideas, pick the ones that make sense given your context:

- The **5 Waves** will help people realize that transformation is a journey with many steps forward, a few backward, and some bumps and buries along the way.
- The **4 Dimensions** will help people realize that placing a primary focus on unraveling the built-up barnacles people have about themselves is more important than installing a new process or piece of governance software.
- The **3 Agilities** will help people realize that the Agile industry has over-indexed on frameworks, technical excellence, and product-led development. These things are great when they come with or after people working on themselves, but don't place too much emphasis on a shiny new thing as the goal.
- The **5 Levers** will help people realize that transformation is a holistic adventure. It starts somewhere, but regardless, the whole system needs to be considered or else you'll just be causing more problems in other places of the organization without realizing it.
- The **5 Universals** will help people realize that transformation can't be dropped on unsuspecting people's heads. It needs to be purpose-driven, inclusive, and incremental.

CHANGE FOCUSED PROBLEMS

Problem A: We can't keep pace with new market competitors. They change quickly and keep taking our business.

Problem B: Our annual planning creates initiatives that take us the entire year to see if the change has worked.

Which Big Idea to Start With and Why:

5 Levers of Change - Start with this concept because it helps people make sense of why it's painful to change quickly. When change hurts, we're less likely to do it more often.

The **5 Levers** will help you frame a conversation around these topics:

- **People Change:** Unfortunately, “the people side of change” often refers to people impacted by process and technology changes, not personal development and growth. The 5 levers of change will help people act through the lens of putting people at the center of change.
- **Beliefs and Behaviors:** A tough subject in many organizations. People bring their behaviors and the beliefs they are formed from to work every day. Yet, many organizations think we’re not supposed to acknowledge these personal attributes. If we don’t, evolution can’t be achieved, and optimization will be the only way to improve.
- **Let’s be Ritual Busters:** How do people get stuck in a rut? They get comfortable. If we repeat the same conformed rituals repeatedly, things will settle across the entire organization. Let’s not lose our ability to be creative and innovate.

Connecting to the other big ideas, pick the ones that make sense given your context:

- The **2 Change Strategies** will help people realize that we can improve by optimizing, evolving, or doing both to become adaptable. Do what’s best for your contextual circumstances, and always be elastic.
- The **5 Waves** will help people realize that the competition can change quicker because they are built for adaptability, likely

smaller, and more innovative. They aren't stuck in a rut or a trap of rigidity.

- The **3 Agilities** will help people realize that agility is a description of your behaviors rather than a process or framework to install.
- The **5 Universals** will help people realize that your smaller competitor is likely collaborative in their strategies and decision-making. Artificial urgency to overcome this problem will only worsen things as the pressure to succeed reverts to unwanted behaviors.
- The **4 Dimensions** will help people realize that change is not as straightforward and predictable as we'd like. It takes just as much, if not more, art than science to change effectively.

THE ELEMENTS OF CHANGE

The Big Book is going to be filled with The Elements of Change, but this is a short teaser of the most useful ones. It's basically a periodic table of elements that will help you design a contextual approach to change.

Remember Grade 11 chemistry when you “accidentally” set the sink on fire? That may or may not be something that happened to Jason. Either way, it wasn't intentional, it just happened based on the compound he was trying to create.

Sometimes you might want to blow up your organization, metaphorically speaking, and sometimes you want to gently nudge it. Combine the elements however you'd like to suit your context.

The Elements of Change are elements within the 4 Dimensions of Change model. They help you convert your insights from sense making with the 6 Big Ideas into actions.

BIG/NEXT/NOW



The act of planning is useful, clinging to a bad plan is not. BIG/NEXT/NOW helps us focus on the right level of planning at the right time so we can focus on what matters without losing sight of our longer term strategy.

- Big: Our long term strategy. It'll change over time, but there is always something in the future we're chasing.
- Next: What we think we'll do next given what we know NOW. That'll change as we interact with the system.
- Now: What we're focused on this week to move the change one small step forward.

MOVERS/MOVABLES/IMMOVABLES



It's cute to answer this question:

What's the best way to ensure successful transformation?

With:

Get everyone involved!

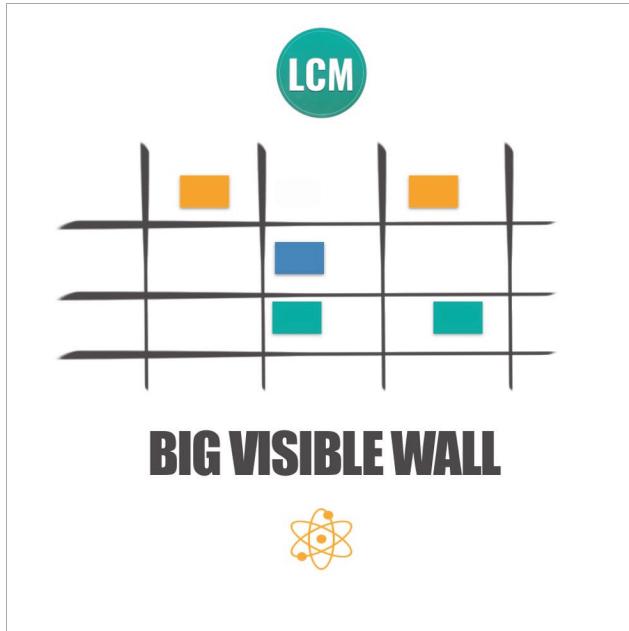
While it's going to get you a million likes on LinkedIn, it's useless, and more importantly wrong. It's impossible to get everyone to understand, accept, and act on the change in the same way at the same time.

- Movers: These are the innovators and early adopters. Their core beliefs align with the intent of the change and they simply run with it. They inspire others to come aboard.
- Movables: These are the folks that say things like: “*sounds great in theory, it'll never work here.*” They want social proof before they act.
- Immovables: These are those pesky resisters. But remember, we don't believe in resistance, we think it's a surface response and we can get valuable insights from these folks. Just don't waste all of your energy on them.

Movers, movables and immovables change over time. As you experiment through the change you can expect:

- Movers to get frustrated when the organizations natural pace of change can't keep up with theirs. Sometimes they might be the first people to leave the organization.
- Moveables to become movers once they see social proof, and also potentially become in moveables and say things like “*See?!?! I told you it wouldn't work!!!*” if it doesn't work.
- Immovables to leave right away, or stick around and become positive skeptics.

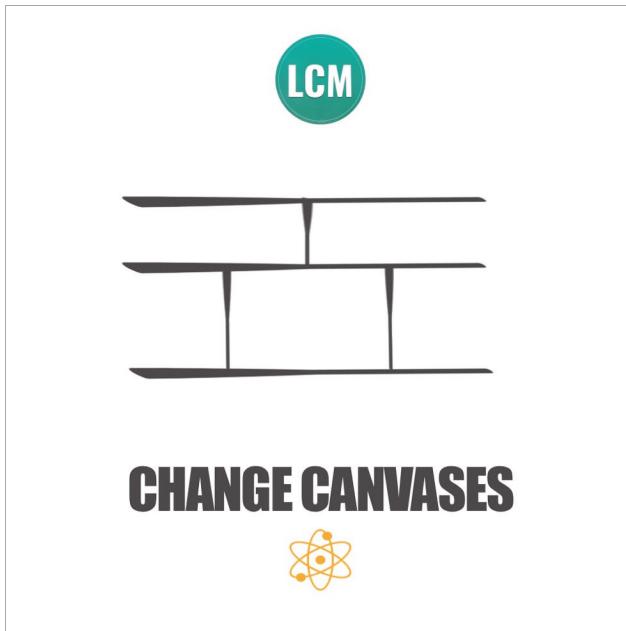
BIG VISIBLE WALLS



If you can't see the work, you can't manage it. This was easier when you could put sticky notes on the wall, and everyone was in the office, but it's still simple enough to do this with online tools.

- Single-source of truth: this doesn't replace detail tracking systems. It helps you see all of the moving parts of the change.
- Visualize your system: once you've explored the 6 Big Ideas, put them up in a wall or in an online tool and start adding sticky notes to it to capture your insights.

CHANGE CANVASES



Change canvases are placeholders. They capture the output of the conversation, they aren't templates to be filled out. Start with meaningful dialogue and capture the important bits on the canvas. There are plenty of canvases to choose from:

- **Strategic Change Canvas:** The highest level what, why and who for the change. You explore the why with people, you don't create it in isolation and then tell people.
- **Storytelling Canvas:** Everyone loves stories! This canvas helps you honour the past, accept the change and paint a picture of the future.
- **Renovation Canvas:** Sometimes you might be refacing the kitchen cabinets, sometimes you might be gutting the kitchen and knocking down walls. When it's the latter, you need temporary structures created to prevent the house from collapsing. This canvas helps you have a conversation around

what's changing, what's not, and to accept the fact there will be temporary processes and things to do that will eventually go away.

The questions matter more than the canvas. You can find more at <https://leanchange.org/canvases>

HOLE IN THE FLOOR



We stole this from Jerry Weinberg's phenomenal book, *Becoming a Change Artist**. It's a metaphor for how change happens in organizations. The thinkers, typically the top leaders, dream up a change and drop it through the hole on the floor.

It's important to understand the default mode of how your organization introduces change. If you remember from the 5 Universals of

* <https://leanpub.com/becomingachangeartist>

Change, we value creation over getting buy-in. If your organization has decades of history where they're dropping change onto peoples heads, it might be more difficult to start with co-creation.

THE LEAN CHANGE ENGINE



If you remember the Explore/Act element from Chapter 4, that's the macro-model describing how we see change. The Lean Change Engine is one level deeper. It's the tangible, concrete, *execution model* if you will.

Imagine you've used the 2 Strategies and 5 Waves to collect enough insights about the approach you want to take this time around.

Use this element to help you create options that you can turn into experiments. Then use the other Elements of Change to take deliberate action on the organizational system:

THE 6 BIG IDEAS OF ADAPTIVE ORGANIZATIONS

- Big/Next/Now: Focus on three (or any arbitrary number) of things to do NOW that will move the change forward. Leave other options sitting in your NEXT pile.
- Big Visible Wall: Make it all visible and meet, and make decisions in front of the big visible wall.
- Movers/Movables/Immovables: Make note of how people are reacting to the change. Who's a mover? How can you support them? What insights have you collected from Immovables? Remember, do not label people, this element is a metaphor for the people dynamics we typically see when doing change.

WHAT'S NEXT?

Every time we met to discuss how much to put in this guide, we kept coming back to, “well, we should put this concept in...and maybe tweak that...and maybe...”

We decided that it would be more important to see how people react to these ideas first because when you think about it, we’re trying to pour into a book how we see change, and how we interact with organizational systems.

Trying to write down all the possible combinations of how we sense make and act would be impossible.

We hope this incomplete guide spawns AHA! Moments for you and we really hope you’ll head over to <https://sixbigideas.org> to tell us what you think and to learn more.

To Be Continued...in The Big Book

Chapter Thirteen

HISTORICAL UPDATES

SEE, WE'VE ALREADY IMPROVED THIS BOOK!

May 11 - Added an updated Vortex of Behaviour image.

