

## Facilitation in Culture Change

“Why is it so difficult for managers to transfer what they have learnt at leadership development programmes back to the workplace?” Managers went to an off-site to develop change management skills before leading a major transformation. There was a lack of noticeable change in behaviour, creating frustration.

The insurance company Carina worked for was facing massive change. Digitalisation is the name given to a range of technology solutions that change the way an organisation functions. These include innovations such as artificial intelligence (AI), advanced analytics and voice recognition. Incorporating these into the company’s web-based application was the plan. This digitalisation had already made a huge impact in how the employees interacted with clients. Carina remained convinced there was more to come.

Sending all managers off-site on the Leading Change programme seemed relevant at the time. But they struggled in leading change and transformation when they got back. They became lost in the urgency of day to day demands.

“We should send all employees on this programme together with their managers,” Carina said. “In that way, they would develop together. And most of the challenges in the transformation we face could get fixed in an atmosphere of mutual learning. Whereas now we have leaders coming back and planning and executing change without their teams’ input, in a unilateral way. Yes, let’s do it! We’ll create a learning environment where we all go through change together. We’ll learn and develop at the same time. We need to work out how this will affect an organisation the size of ours, that’s 3,000 people!”

Most organisations spend a lot of time developing capabilities in change for managers and project leaders. Often sending them on programmes “away” from their daily work. And away from the people they will later (hopefully) involve in change. We started to ask ourselves: Would it not be better to develop leadership skills for facilitating change with co-workers in the same room, so the time from learning about facilitating change to changing things becomes much shorter and easier? In other words, training leaders to be facilitators with their own teams in bringing about change in the workplace.

We have tried this approach in many different organisations, and for many, it is a revolutionary way of thinking and working. To have the employees present in the room where leadership development and change planning is happening. The idea of a team having a rich dialogue without the notion of ‘boss’ and ‘subordinate’ is a high impact way of working. ‘Medarbetarskap’ is the name given to this in Sweden. The literal meaning is ‘work-with-ship’ as opposed to leadership...everyone develops.

This example comes from a large insurance company. The company had defined four important areas for leaders and employees to develop skills and capabilities - to be able to handle the change and transformation they as individuals and company were facing:

1. Leading myself. How to be accountable in my daily job. What would I do if this was my own business, with special focus on handling ambiguity in change.

2. Leading and working in teams. How to collaborate with others when delivering results, even if team constellations might change.
  3. Leading the business. How to focus on clients and business needs. An entrepreneurial mindset even if we go through internal change.
  4. Developing the business. How to find new and better ways of working and improving.
- For each area we created a dialogue guide. With exercises and tools aimed at challenging the current ways of being. Exploring and working on new and better ways. These would help people reflect on how they were being both as a team and as individuals, including the leader of course. The leaders experienced training in:
- How to use a facilitative leadership style;
  - How to use different tools and methods;
  - How to be able to facilitate dialogues in their teams;
  - How to inspire action;
  - Exploring what ‘resistance’ to change really is and how to overcome it;
  - How to create a safe environment for sharing and learning in the team; and,
  - How to use each of the five dialogue guides.

At the workplace, they arranged a series of dialogue meetings. At least four took place, one for each area. Each meeting took approximately two hours. Many teams worked much more with the dialogue guides, using the exercises several times.

It was inspiring to see how both leaders and team members enjoyed having the time to sit down together and discuss how they could develop. Both as the leader of the team, and as team members in the team. They were using the tools to plan and prepare for change in their teams and also, as reflective methods during the more challenging parts of change. For example, when were shifting from one IT system to another, which caused a lot of frustration in teams. The tools were also used when it became known that some jobs were going to disappear when people retired.

The dialogue guides have the same design as a cookery book, with many different dishes to choose from within each area. Take for example the dialogue guide for the ‘Leading Myself’ session. Here we used transparency exercises to build trust and understanding for each individual in the team. An example of a specific exercise is the “Line of Life”. The teams discussed what had made them the people they are today. Sharing things like values, important role- models, ambitions they had and ambitions they have for the future.

Other tools included more typical facilitation methods. For example, Force-field Analysis to figure out the current versus the ideal way of working in the future, and to determine driving and hindering forces in change. Also, the Ease and Impact Grid to prioritise activities and actions ahead; De Bono’s 6 Thinking Hats to reflect on learnings; as well as Icebreakers and Energizers to inject energy into the teams when needed.

One important element of each guide is a checklist provided to the leaders and/or facilitators. This ensured they got the most from each session. This kind of preparation gives many important messages to those participating. For example, “This is important. Your participation is vital. I, the leader, care .... this matters!”

The beauty of this way of working is that the managers develop into facilitative leaders. They learn how to lead change together with their team members in a mutual learning context. The guidelines showing how to use the tools were very extensive. As a result, the leaders and/or facilitators felt safe and competent when applying different methods. The co-workers enjoyed the facilitated sessions.

One employee said, “It helped me go through this transformation. I’m not sure I would have coped without these sessions. It was hard going to work some days, especially when we knew we were going to get negative messages around outsourcing and similar things. Yet knowing that we were all in this together and we got the sessions available to structure as well as debrief the change, helped me. I got a much better manager after the sessions, and I became a much better, co-creating employee afterwards”.

Carina was particularly delighted as it meant the changes became embedded in the daily work patterns. Regular, short scheduled meetings replaced costly and complex off-site interventions.

To use facilitation to change a culture is not a quick fix. It needs a lot of interventions over time, which requires patience and persistence. The leadership team needs to sponsor the facilitation. It’s also important to move beyond facilitation being the domain of external consultants. Instead, facilitation becomes used all the time in every day meetings run by the team leadership or the meeting leader.

But what about staying neutral, you might think. And what about staying focused on the process more than the content? Of course, there were some managers who were uncomfortable at first. But with a light touch from an internal or external facilitator at the first meeting, most leaders wanted to take the rest themselves.

One question that often emerges in this kind of setting is: Can managers stay neutral and step out of a “normal” decision-making role? We make a clear distinction between the facilitator, who is multi-partial (on everybody’s side), and the leader using facilitative skills. The latter has a dual role. First, in ensuring a good process and second, engaging in the content somewhat. In our experience, leaders are usually very good at stepping in and out of roles. And when the co-workers/employees become comfortable with facilitation, they also help with role clarification. “Are you in a manager role now? Or are you facilitating this discussion? What process will we use for decision-making in this meeting?”

These questions we often hear from team members who have experienced good facilitation. They know the difference clear and concise communication can make. This approach creates arenas for mutual learning. Arenas where inclusiveness and collaboration are in play for real.

This is where we see the huge impact facilitation has in organisations, with both leaders and co-workers alike. This is so much better than training leaders to be in unilateral control of change.

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