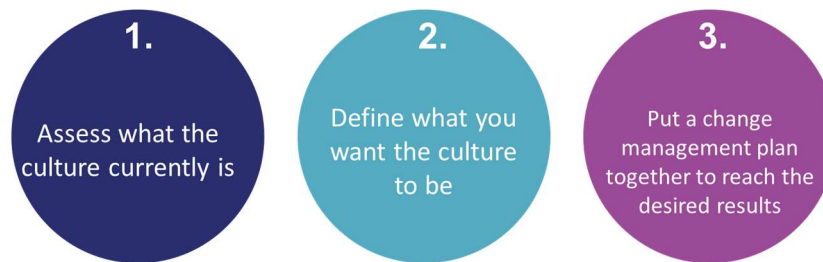## SIX MONTH CONSULTING CASE STUDY - CHANGE CATALYST

The following is a 6 month case study of CPS Consulting as Change Catalyst – designing and leading (facilitation, coaching and consulting) an integrated process of Corporate Culture Change at Oman Sail in the Sultanate of Oman, strengthening organisational/HR capability and building business performance through staff engagement.

The focus of the desired culture change at Oman Sail was on having a clear vision, values and behaviours – essentially establishing, communicating and aligning all staff with a clear 'WHY' and 'HOW', neither of which existed at the start of the culture change process that CPS designed, facilitated, coached, consulted and managed all levels of leadership through over a six month process.

1.
Assess what the culture currently is

2.
Define what you want the culture to be

3.
Put a change management plan together to reach the desired results

All elements can be reapplied in any context and any organisation. This was conducted with CPS Consultant, Mike Pola, contracted to Oman Sail, in full time capacity, most of the time virtually, during the Covid 19 pandemic from May-October 2020.   Oman Sail is a government organisation with over 200 Omani employees and 20 expats.   Their annual budget is over A\$20 million dollars per year.

DEFINING CULTURE CHANGE

Culture is our values, beliefs, assumptions, and unwritten rules. These shape our behaviours and mindset as well as our performance. Individuals within an organization co-create the culture through conversations and by following behavioural norms. In addition to the overarching culture of an organization, individual subcultures often exist. CPS seek to understand and take these into consideration for your particular initiative to determine how to best approach the change for your organisation.

The Organization's Culture comprises of:

Sets of Goals

Roles

Processes

Values

Communication Practices

Attitudes

Assumptions
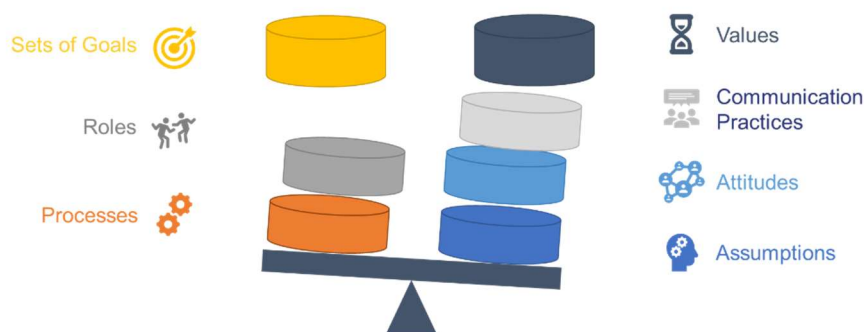
CPS define **CULTURE CHANGE** as closing any gap in any area from where your organisation currently is to where you want and need to be (ensuring all people, processes and systems are aligned to the organisational vision (WHY) and values and behaviours (HOW) and strategy/jobs (WHAT)).   Culture change takes years, but significant momentum can be gained in 3-6 months intentional consulting, coaching and facilitation (as per the following case study). Please contact CPS if you want to have a conversastion about how CPS could help you get started!

WHAT?
HOW?
WHY?
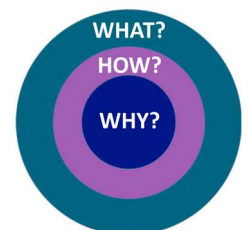
1. ASSESSING THE CURRENT CULTURE

1.1 Consulting to identify the issues

Stage 1 of the change process focused on seeking to assess and understand the current culture. Following CEO approval, CPS conducted in depth, 60 minute, confidential 1:1 'expert panel' interviews with every member of the Management Team and 80% of Managers at Oman Sail (29 interviews). This high level of engagement was reflected in the interview comments – most managers recognized the current situation was not sustainable and recognized the need to see some sort of change.   Of the 29 interviewees, over 70% were Omani and the average tenure at Oman Sail was approximately 5 years (with a range between 10 years and 3 months).

Each Interview went for 30-45 minutes and had a threefold purpose:

1. Assess the current Oman Sail Culture (both positive and negative aspects)
2. Deepen understanding of what excellence looks like at Oman Sail (behaviours)
3. Invite input on what is most important at Oman Sail (values)

All comments were provided in a report to the Management Team as direct quotations made by interviewees. Confidentiality was promised to all interviewees.   All comments were categorized into themes under the broader areas of Analysis of the Current Oman Sail Culture - positives and negatives. A complete report was provided to the Management Team along with a presentation of insights and findings.

In addition to the open-ended questions to analyse the Oman Sail Culture, each Manager was also asked to evaluate the current culture at Oman Sail (by scoring from 1-10) using the 5 key elements of healthy teams.   This affirmed the insights gained from the interviews. Given that these scores were from those who knew best what was really happening in Oman Sail, it highlighted that much culture change was needed to ensure that each of these elements can be significantly improved.


With these findings presented to the CEO and Management team by the end of May 2020, it was agreed that a full process of **CULTURE CHANGE needed to happen at Oman Sail.** Reporting to the Finance and HR Director, the CPS Consultant was entrusted with the responsibility to both design and lead delivery of the process to see the change through.

2. DEFINING THE DESIRED CULTURE

2.1 Facilitation to identify their 'WHY' (Vision & Mission)

Stage 2 of the change process focused on seeking to help both the staff and the Management Team define the DESIRED CULTURE. Assessing the key missing elements was a clear, unified 'WHY' and 'HOW' CPS focused on seeking to define a clear vision, values and behaviours.

The Oman Sail Management Team had invested months of effort into seeking to finalise their five year strategy (their 'WHAT'), but CPS consulted them on the significant danger in developing their strategic or tactical plans if the vision ('their WHY') was not yet crystal clear and the culture ('their HOW') that the Leadership of Oman Sail wanted to foster (and change) was not clearly defined with input from all the key stakeholders (Board & Management Team) .
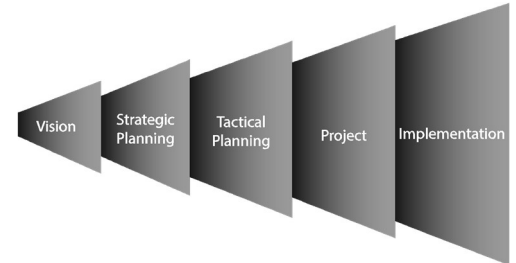
They paused the process of strategy development and CPS designed and facilitated 2 x ½ day workshops with the Management Team, with a deep process of clarifying the Oman Sail 'WHY' by affirming the mission and identifying a clearer and more inspiring shared vision.

2.2 Consulting to identify their 'HOW' (Values & Behaviours)

The values and behaviours that Oman Sail needed to pursue were identified from a 45 question online survey that CPS designed and administered (in Arabic and English) with staff online. The CPS Consultants recommendation was that it was important that identifying values and behaviours were not top down but a bottom up approach with an opportunity for all staff to input. 100 employees responded to the survey (from all levels of staff). This represented approximately 55% response rate from all staff. The survey sought to identify what behaviours staff felt were needed to demonstrate excellence (ie the DESIRED culture). The questions were designed based off 38 behavioural competencies from the Korn Ferry Leadership Architect Legacy Competency Mapping, along with 7 Values to enable further analysis.

In the earlier 1:1 interviews with Managers they were asked to identify what they felt were the TOP 10 behaviours they thought would define EXCELLENCE at Oman Sail and what the top 5 Values they felt were most important at Oman Sail. These responses were then analysed against the Staff responses. A detailed visual analysis of Staff responses to the survey and Manager responses in the interview was provided in a report (an example can be provided upon request).
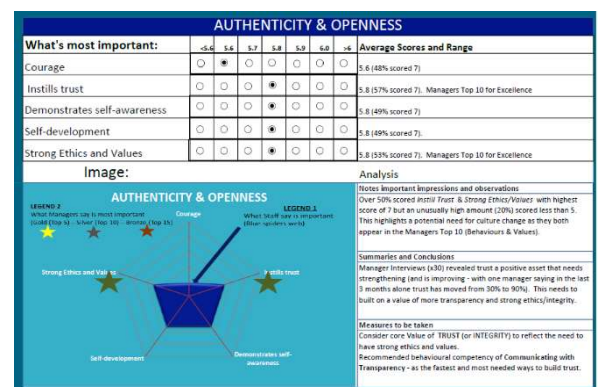
Based on this analysis and recommendations the Management team agreed on the 4 core values and 8 key behaviours (the 'HOW' of Oman Sail). This led to the mission, vision, values and behaviours being presented to and approved by the Board. CPS then briefed the Oman Sail internal marketing and design team to create value logos and a visual summary of the new 'WHY and HOW' to be communicated to all staff (as on the following page).

CPS CONSULTING SOLUTIONS

غمان للإبحار
OMAN SAIL

روح الفريق
TEAM SPIRIT

Teamwork
Plans & Aligns

Customer Focus
Communicates Effectively

الثقة
TRUST

WHAT? (our strategic priorities/jobs)

HOW? (our values & behaviours)

WHY?

OUR MISSION:
To deliver the Royal assigned mission to rekindle Oman's maritime eminence, promote the Sultanate of Oman around the world through sailing and provide long-term learning opportunities for the youth.

OUR VISION:
To create monumental experiences powered by the sea, so that together we inspire excellence and contribute to the sustainable prosperity of the nation.

التميّز
EXCELLENCE

Strategic Mindset
Develops Talent

Being Resilient
Responsibility & Accountability

الإلتزام
COMMITMENT

الثقة
TRUST

الإلتزام
COMMITMENT

روح الفريق
TEAM SPIRIT

التميّز
EXCELLENCE

نسعى لتحقيق ما نعد به
We deliver what we promise

نعمل بفخر وعزيمة
We serve with pride

نعمل كفريق واحد
We are one

معا لحصد المنجزات
We go for Gold

#WEAREOMANSAIL   الحن . عمان . للإبحار   OMAN SAIL

#WEAREOMANSAIL   الحن . عمان . للإبحار   OMAN SAIL

#WEAREOMANSAIL   الحن . عمان . للإبحار   OMAN SAIL

#WEAREOMANSAIL   الحن . عمان . للإبحار   OMAN SAIL

3.1 MANAGING THE CHANGE PROCESS (Consulting, Facilitating and Coaching)

3.1 Change Management Consulting

Now with the WHY (vision, mission) & HOW (values and behaviours) clearly defined, we had the desired picture of culture change. The urgency for change came from the gap in assessing where the organisation as and the desired future picture where it needs to go. CPS consulted the Management Team understood that Culture Change would mean we needed to ensure all systems, processes and people work together to deliver the purpose and results. Any gap in the systems, processes and people (including organisational structure) that did not relate to or contribute to the desired purpose and results needed to be addressed. This was the **process of culture change** which would ultimately lead to a unified leadership and management philosophy at all levels of the organisation.
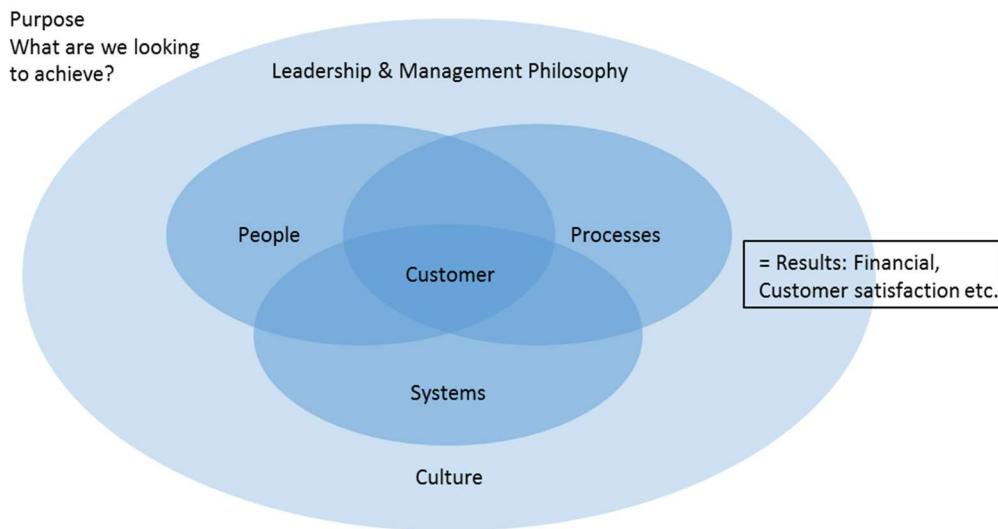
Recognising that for change to be successful, it takes 75% of a company's management to 'buy into' the change, CPS consulted the CEO & Directors to spend significant time and energy building urgency before moving onto the next steps and risk further short term losses. Once the urgency of the culture change had been well established, CPS consulted the leadership of Oman Sail on how to form a powerful coalition to oversee the Change Process.

The CPS Consultant initiated the formation of a separate Change Management Committee, comprising of the HR Director and Heads of HR, Communications and Marketing, along with their assistants. The CPS Consultant chaired weekly meetings with this committee and consulted them through a process of selecting Change Navigators (Champions) who would be:


☐ **Positive influencers** (do not be limited by following the traditional company hierarchy)
☐ **Change leaders** – who will be the biggest advocates for the change
☐ **Great communicators** who can help convey both the reason for the change & how it will be implemented
☐ **Diverse** (50% male / 50% female & max 20% expat & from a range of job titles, status, expertise)
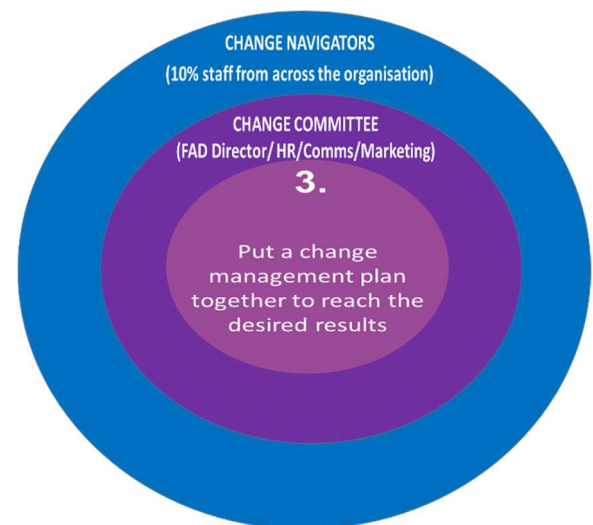
This process ensured a wider, more **powerful coalition** of over 30 **– 'champions for change'** (Culture Change Committee + Change Navigators)**.** Together, their role was to convince people that change is necessary. My role was to resource, equip, coach and train this 'change coalition' to work as a team, and to build urgency and momentum around the need for change, recognising that change would *not happen in a matter of weeks or months, but years.*

Since there are many complexities involved in executing any change initiative, CPS focused on integrating two complimentary yet different disciplines of change management and project management to ensure the process was managing successfully, utilizing formal processes, tools, and techniques to plan for the change, manage the change, and sustain the change.

Change Management focused on ensuring the support of the key leaders through the change management process. CPS systematically consulted the Change Committee and Change Navigator through each stage of the 8 step process of leading change, ensuring that no step was skipped.[1] Correlating to each step of the Change Management Process, CPS designed a toolkit to equip each member of the Change Coalition to have the resources to see the change through:
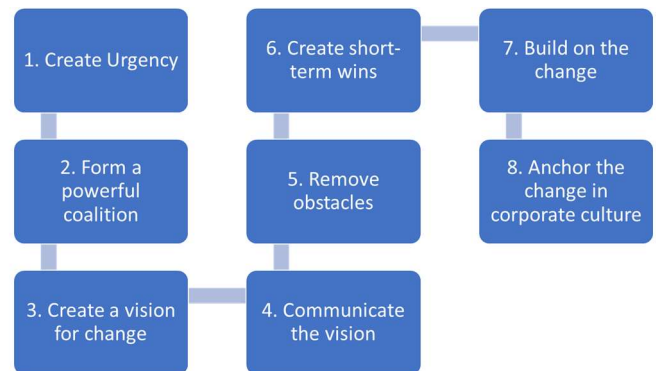
1. *CREATE URGENCY - THE CASE FOR CHANGE*
1.1 Toolkit – Beginning with the end in mind
1.2 Toolkit - Case for Change
1.3 Toolkit – Stakeholder analysis

2. *FORM A POWERFUL CHANGE COALITION*
2.1 Toolkit – Forming your Change Leaders Coalition/Team

3. *CREATE A VISION FOR CHANGE*
3.1 Toolkit – Compelling Vision Interview

4. *COMMUNICATE THE VISION*
4.1 Toolkit – Change Communication Plan
4.2 Toolkit - Change Communication Brief Template
4.3 Toolkit - Team Communication Plan

5. *MANAGE BARRIERS & REMOVE OBSTACLES*
5.1 Toolkit – Change Readiness Assessment

6. *MANAGE RESISTANCE & BEHAVIOUR CHANGE*
6.1 Toolkit – Behavioural Change Plan
6.2 Toolkit – Manage Personal Transitions (resistance)

7. *SHOW PROGRESS & CREATE SHORT-TERM WINS*
7.1 Toolkit – Success metrics
7.2 Toolkit – Feedback Strategy Overview and Options

8. *REINFORCE, BUILD AND ANCHOR CHANGES IN CORPORATE CULTURE*
8.1 Toolkit – Monitor Metrics for Continuous Improvement
8.2 Toolkit – Integrated Training Plan for Change Management

[1] https://www.kotterinc.com/8-steps-process-for-leading-change/

Project Management focused on the work tasks to be executed.   As chair of the Change Committee, CPS developed and managed a big picture project management plan which kept the Change Coalition systematically focused on following the 8 stages of the Change Process.   CPS coached the Communication Team developed a more detail Comms plan to ensure every message to employees aligned with the stage of Change Management.

OMAN SAIL CHANGE MANAGEMENT PLAN May-Nov 2020	MAY	JUNE	JULY	AUG	
1. CREATE URGENCY - THE CASE FOR CHANGE					
Staff Survey & Expert Panel (Manager Interviews)	X				
1.1 Toolkit – Beginning with the end in mind – Vision-Values-Behaviours		X X			
1.2 Toolkit - Case for Change – Identifying Desired Culture		X			
1.3 Toolkit – Stakeholder analysis			X		
2. FORM A CHANGE COALITION & A VISION FOR CHANGE					
2.1 Toolkit – Forming & Informing Change Team (Committee + Navigators)			X X X		
3. CREATE A VISION FOR CHANGE					
Mgmt Team + Managers Resourcing/ Workshop 1- Inspiring a Shared Vision	X	X			
4. COMMUNICATE THE VISION/ CULTURE CHANGE					
3.1 /3.2 Toolkit – Change Management Communication Plan		X			
Mgmt Team + Managers Resourcing / Workshop 2 – Model the Way			XX		
CEO Launch Vision-Values-Behaviours (Virtual)			X		
Monthly Change Champions Briefing and Mobilising -			X X	X	
3.3 Toolkit – Team Communication Plan (Comms + Dept Change Champions)				X	
Department/Team Values/Behaviours ½ day workshops (Mike)			XXX		
Oman Sail Birthday Celebration (reinforce the Culture Change) - **9th Aug**				X	
5. MANAGE BARRIERS & REMOVE OBSTACLES					
Mgmt Team + Managers Resourcing / Workshop 3– Challenge the Process				X X	
4.1 Toolkit – Change Readiness Assessment				X	
Road Test Appraisals/ Competency Framework with Change Navigators				X X	
Start review of processes/systems/performance mgmt. to align with the change		X			
Start review policies and procedures to align with the change				X	
Start review organisational structure aligns with the change				X	
Start review design of roles/ KPIs to ensure align with the change				X	
6. MANAGE RESISTANCE & BEHAVIOUR CHANGE					
Workshop 4– Enable Others to Act (Mgmt Team + Managers/Change Nav)					X
5.1 Toolkit – Behavioural Change Plan					
5.2 Toolkit – Manage Personal Transitions (resistance)					
7. SHOW PROGRESS & CREATE SHORT-TERM WINS					
Mgmt Team + Managers Resourcing / Workshop 5 – Encourage the Heart					
6.1 Toolkit – Success metrics (Quarterly Personal-Team Satisfaction Survey)			X		
6.2 Toolkit – Feedback Strategy Overview and Options					
8. REINFORCE, BUILD & ANCHOR CHANGES IN CULTURE					
7.1 Toolkit – Monitor Metrics for Continuous Improvement			X		
7.2 Toolkit – Integrated Training & Coaching Plan for Change Management				X	

Coupled together, proactive change management and project management led to the immediate actualization of the benefits of the change initiative.

3.2 Coaching Change Leaders

Over a period of 6 months, CPS ran bi-weekly coaching sessions with two key members of the Management Team and two leaders of the Change Committee (Head of HR and Head of Communications) to ensure they had the full support to grow in the four critical pillars to achieve successful culture change – *Leadership, Capability, Communication and Accountability.* The CPS Consultants priority was to ensure that all four of these pillars were continually engaged and strengthened through the change management process and modelled from the top.

Leadership
The leadership must constantly support the change.

Communication
Constant communication from the organization to the employees about the change.

Capability
The people need to be capable of making the change.

Accountability
People need to be held accountable on their change.

The demands on the Oman Sail leadership were very difficult, isolating and overwhelming especially in the complex world of uncertainty and rapid change accelerated by Covid 19. These bi-weekly coaching sessions spoke into each managers unique context and helped them navigate their business and personal pressures as well as ensure they kept themselves and their team engaged and empowered in the culture change process.

"Coaching is partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. It is a process that supports the client in reaching deeper levels of fulfilment and success quicker and with more ease"
International Coach Federation (ICF)

Coaching always works best when there is a significant gap between what you have and what you want. Since each of the coachees had leadership responsibility for ushering in the culture change was a perfect context for coaching – these leaders really felt the gap of where their teams were and where they wanted.

The CPS Consultant also offered 'Manager as Coach' workshops to resource Change Navigators shift from being managers (who tell & direct) to coaches (who ask & empower) . The key to success of culture change was coaching, motivating and equipping this team of Change Navigators who could help their teams understand, apply and align the vision, values and behaviours.

3.3 Designing and Facilitating Workshops to Support the Change

3.3.1 Leadership Workshops to Equip for Change
To achieve culture change requires developing and demonstrating exemplary leadership at all levels of the organisation. To ensure the process of culture change would be managed confidently and competently across the organisation, CPS offered the Management Team, Managers and Change Navigators 5 x monthly 'hour of power' workshops with resources leading to a personal leadership and team action plan. These leadership workshops aimed to help the change leaders continue to develop the key practices of exemplary leadership that are the key foundation to culture change and necessary pillars to get extraordinary things done in organisations[2].

This initiative aimed to start to immediately address one of the key elements of culture change that was highlighted in the interview – intentional staff development. As a key action step, participants in these workshops were encouraged to immediately apply what they discover with all of their teams.

3.3.2 Team engagement workshops on Vision-Values-Behaviours
CPS then designed and delivered a 3 hour experiential learning workshop (delivered virtually on zoom due to Covid) to every team in the organisation (15 different team workshops and total of 160 employees trained).   The purpose of this 'virtual teambuilding' was for every employee to really understand, engage with and apply the Oman Sail vision, values and behaviours.

3.4 Team Consulting
During the team building session, each employee also completed a 'PERSONAL and TEAM SATISFACTION SURVEY'.[3] CPS designed this survey based on:
Personal Satisfaction - 12 questions (q12) based on global best practice of the Gallup Survey for Employee Engagement.[4]
Team Satisfaction - 14 questions specific to Oman Sail (OS14):
* Measuring how well they are living by our VALUES (x4)
* Measuring how well they are demonstrating our BEHAVIOURS (x8)
* Measuring Current vs Desired Team Performance (2)

Most powerful Questions
1. Do I know what is expected of me at work?
2. Do I have the materials & equipment I need to do my work right?
3. At work, do I have the opportunity to do what I do best every day?
4. In the last 7 days, have I received recognition or praise for good work?
5. Does my supervisor or someone at work seem to care about me as a person?
6. Is there someone at work who encourages my development?
7. At work, do my opinions seem to count?
8. Does the purpose of my company make me feel like my work is important?
9. Are my co-workers committed to doing quality work?
10. Do I have a best friend at work?
11. In the last six months, have I talked with someone about my progress?
12. At work, have I had opportunities to learn and grow?

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[2] Kouzes & Posner (2007) **The Leadership Challenge** – *Chapter 1 – The Five Practices of Exemplary Leadership* (Jossey-Bass, California, USA)
[3] An example of this survey can be reviewed here: https://omansail.typeform.com/to/uTAuYPZK
[4] https://q12.gallup.com/public/en-us/Features

Change Navigators were given their Team Analysis benchmarked against every other team in the organisation. They were given responsibility to lead their team to 'close the gap' of where they are and where they want to be, CPS repeated this survey 3 months later to measure progress by team and across the organisation.

The Team Workshop then merged into a Team Coaching session to provide the momentum for the Change Navigators and team to identify how they could 'close the gap' from where they are to where they want to be, by identifying and <u>focusing on a few critical shifts in behaviour to better align with the vision, values and behaviours</u>.

3.5 Team Coaching

For the second part of the Team workshop, CPS conducted a Team Coaching Session. The outcome was every team developed a clear action plan that your whole team inputs and commits to the values and behaviours they really wanted to focus on strengthening both individually and as a team.

Based on the Personal and Team Satisfaction survey, teams identified the behavioural strengths and development areas prevalent in the team now, and were encouraged to imagine how people would act if their team were at its best, especially if their behaviour supported their business objectives. Each team were coached to develop a specific START/STOP/CONTIUNE team action plan of what behaviours they felt should change – as a team. CPS also provided a safe space for team members to give each other feedback of one or two key behaviours each individual could strengthen that would make the greatest difference to the team.

A final feedback session was held with all the Change Navigators and the CEO for them to share specific recommendations of what can be done to strengthen the two key organisational development areas (Communication and Taking Responsibility & Accountability). The Change Process was now well underway!