Ask Andi: Change Management Step 1

Welcome to On the Brink, A Fresh Lens to Take You and Your Business to New Heights. Thanks for joining us today. I'm Andi Simon and I'm your host, and today we're going to do an Ask Andi.

I've been invited to give a talk on change mapping or change management strategy, and I thought I would use our On The Brink podcast to go over the key concepts of this unique approach to business challenges. The seminar itself will be recorded and posted on http://www.simonassociates.net so you can see it there or on YouTube.

Change management is a very important topic today because the times are changing extremely fast. And humans hate to change. So even if they know that autonomous vehicles are already delivering refrigerators in California, they are in denial that change may ever happen to them. Or even if they think artificial intelligence might one day come to their business (as lawyers or accountants), it is already there.

So what's the challenge and how do we address it? How do you actually have a change management strategy that can get you where you need to go and get those who work with you or for you to do that as well? That's what I want to talk to you about today.

There are three things I want to help you understand. First is the pain of change. I want you to begin to think about building blocks that are needed to help people change. I love this quote: "People don't object to change. They just hate being changed themselves."

So part of this is helping people see, feel and think differently, because for the human brain to change the story, it has *to see it*. It's the visual part of it that is so important. Then it has *to feel it* because the heart is really connected to the brain. Between the eyes and the heart, you're going to have a really interesting thing going on in your head, which is: where am I going to think about why I have to do this, and then how do I do it?

This is ultimately very important to the essence of a person, much less a group of them. And this concept really does dig down into people's culture, both their corporate culture as well as the culture in which they're embedded outside of the organization.

To address this, I created a ChangeMap™ process when I launched my company in 2002 (Simon Associates Management Consultants). Think of it as a Google Map. If you can visualize where you're going to go, it's much easier to backward plan how you'll get there.

So, perhaps as you're driving to work today, I want you to think about how you feel when you're managing change, what makes you glad. What makes you sad, maybe something that

you really are reluctant to embrace in some way? Then what makes you plain old angry? And the anger or mad part shouldn't be underestimated because that helps you adjust to whether or not this is safe or dangerous. It's okay to find something uncomfortable, ambiguous and dangerous and fly away from it. But when you write those things down after you've driven to work, think again about whether it makes you glad or sad to see things change.

Then I'd like you to do something else. Take a short survey on CultureTalk.com. I interview Cynthia Forstmann for our On The Brink podcast and it will be coming out later this summer. Cynthia's company, CultureTalk.com, has a simple survey that you can take to assess your own archetype. This is extremely important because how you feel—sad, mad or glad—is in some way a reflection of who you are.

There are 12 archetypes which Carl Jung developed and defined, and they symbolize basic human motivations. They also reflect our desires and our goals—the things that drive us. They resonate with us so much. They're so real, in fact, that for over a hundred years we've created characters in books, novels, plays, movies and television shows using these archetypes.

There are 12 big ones (illustrated below) that you should take a look at and understand, because when you're starting a change process, you are going to be a particular kind of person, with particular personality traits. And you may have to think about that when you're thinking about others (like your employees) and how they are either resisting the changes you're trying to make or helping you get there.
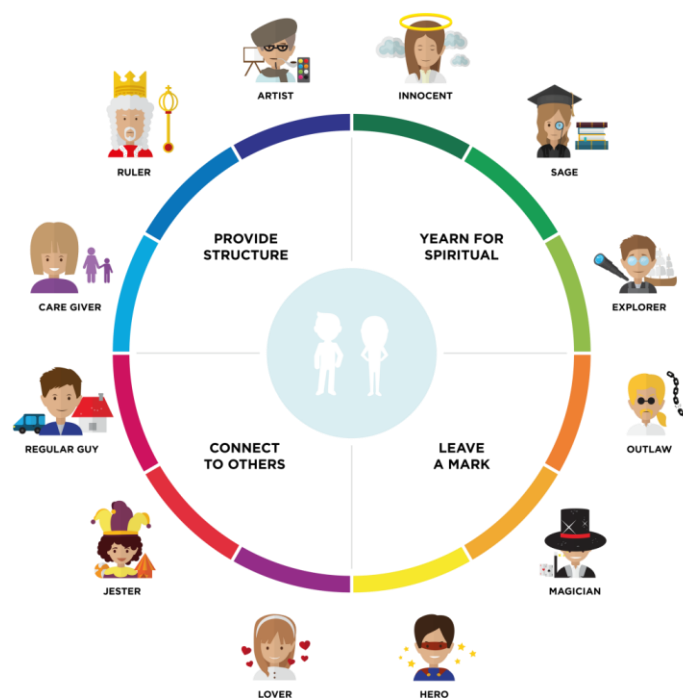
So let's talk about the 12 archetypes. The first is Innocent. **Innocent** archetypes are sometimes criticized for being overly naïve. They are interesting people. And the reason

they're so interesting is that in their naïveté, they are very, very positive. They're very happy-go-lucky personalities. They uplift others. Innocents always try to see the good in the world. And they look for the silver lining in every situation. They're very spiritual.

Then there's the **Everyman**. The Everyman is actually a very important archetype. It represents those who are dependable, down to earth and realistic. Some people might describe them as a little negative at times. They're always searching for belonging in the world, and they may join many groups and communities to find a place where they fit in. Their goal is to belong, and their fear is to be left out or stand out from the crowd. So if you have a bunch of Everymen or Everywomen as part of your team, change is going to be an interesting process because they are very open and honest, pragmatic and realistic, and they are not exactly ready to go change.

The third one is **Hero**. Now the Hero is extremely important in the mix of people that you will be dealing with because they thrive on being strong and standing up for others. They almost feel like they have a destiny that they must accomplish. That is very different from the Everyman who wants to simply belong. Heroes are courageous in their quest for justice and equality. They'll stand up even to the most powerful forces if they think those forces are wrong. Their real goal is to help others and protect the weak.

Then there's the **Caregiver**. Think of Caregivers as very empathetic and compassionate. They pay attention to looking after themselves and learning to say no to others, and often, in helping others. They fear being considered selfish. They don't want to be exploited by others and made to feel put upon. But they have lots of compassion and generosity. And I have a hunch that you know somebody who is very much a Caregiver, maybe even your mother or best friend.

The fifth one is the **Explorer**. I'm an Explorer. Explorers are never happy unless they are experiencing new things. Man, is that me! We enjoy visiting different countries, we are happy learning about new ideas and philosophies. We find it hard to settle down in one job or relationship. Well, I've married for 50 years so that's not completely true. But I really do love being a consultant because of the variety it brings me. So we're true to our desires and our sense of wonder, and we fear getting trapped.

Next is the **Rebel**. When the Rebel sees something in the world that isn't working, he or she looks to change it. So they have a very important role to play in change. They like to do things differently. Sometimes Rebels can abandon perfectly good traditions just because they have a desire for reform. They can be charismatic, easily encouraging others to follow them in the pursuit of rebellion. They want to overturn what isn't working. They fear being powerless. Sometimes they take rebellion too far and they become obsessed by it, they lose perspective.

The **Lover** is the seventh archetype. Lovers seek harmony in everything they do. They find it hard to deal with conflict. They may find it hard to stand up for their own ideas. They often are in a relationship with people, work, an environment that they love. They fear

being unwanted or unloved. You can begin to hear how each of these is motivated by different values, different feelings. The person who is the Lover really wants to please others, often at times of losing their own identity.

Next is the **Creator**. The Creator is born to bring something into being that doesn't yet exist. They hate to be passive consumers of anything. They much prefer to make their own entertainment. Creators are often artists or musicians, but they can actually be in all kinds of areas. They want to create things of enduring value. They don't just want to change things, they really want to build something.

The **Jester**, oh, we love the Jester. Jesters love to liven up a party with humor and tricks, but they have a deep soul. They want to make others happy and they can often use humor to change people's perceptions. Sometimes, however, the Jester uses humor to cover his or her own pain.

Then there's the **Sage** who values ideas above all else. However, they can sometimes become frustrated in not being able to know everything about the things they want to know about. Sages are good listeners and often have the ability to make complicated ideas easy for others to understand. They're often in teaching roles.

Next is the **Magician**. Very charismatic, they are true believers in their ideas and desire to share them with others. They're often able to see things in a completely different way.

And the twelfth one is the **Ruler**. I have a client who studied this chart and he was clearly the leader or the ruler. He loves to be in control. They have a clear vision of what will work and they believe they know what's best.

So these 12 archetypes are extremely important for you to know as you start to change an organization because there are organizations that have these archetypes as their brands. Haagen-Dazs is a Lover. M&M's are Jesters. IKEA is Everyman. You get the idea. Your Jeep reflects the Explorer. Harley-Davidson is the Rebel. Nike is the Hero. Lynx is the Magician. They really do embrace a particular archetype and their stories recur over and over to reinforce them.

Now that all sounds good, except the times, they are a-changing. The changes that are coming are extremely important. Demography is destiny. And often, we talk about the different generations but there's not as much homogeneity in them as you might think. But there's enough for us to begin to see major differences in what people value, what they believe, what they embrace, and how they act based upon when they were born, how they were raised and the world in which they developed.

So there are 75 million Boomers, 50-70 years old and growing older. The generations are extremely important because they are all bundled together now in our communities, in our work, in our churches, in our organizations and they just do things differently.

Every time we get a client who's struggling with the changes that are happening, first, we begin to try to understand their archetype and then we try to understand the archetype of the people whom they are dealing with.

Now, the Boomers did some wonderful things. They built the society in which we are in today and they, by and large, loved to do things by doing them. And they were pedestrians. They went into stores, into malls. They bought jewelry in jewelry stores. They are often the doctors you're going to, who took calls at night (some even made house calls). And they have very strong values about when is work time and when is after hours time that's theirs. And they're looking to retire, some of them. But some even at age 50 are starting their own businesses because they're beginning to peak out in their current jobs.

Boomers are very different than the Gen Xers, the 30- to 49-year-olds who are beginning to move into that next stage themselves. They've been rising in their careers. They're taking on very significant roles. Often, they're replacing the Boomers in their leadership roles, and they see things almost as a bridge between the Boomers and the Gen Ys or the Millennials.

Now the Millennials are beginning to move past the 33-year-old stage, but there are 83 million Gen Ys. They were 18 to 33. Now they're moving up a little further. They're not getting married. They're not buying homes. They're often living together and sometimes they're living in rentals with three or four at a time to share the cost. Many of them have significant debt from college and many of them are living at home. Many of them tell you that they want to be entrepreneurs, but not as many are doing it as you might imagine.

They are moving jobs every three years, sometimes more often because there's such a shortage of talent that they can, increasing their salaries 30% at a pop, but not providing loyalty or continuity. And they often are startups in this fashion. They love to work at [WeWork](). They really do things with great energy. But as one logistics gentlemen told us from his company in Texas, he had to buy ping-pong tables for his Millennial employees and didn't understand why they were going to play games at work. Interesting generation.

An anesthesiologist whom we work is having a hard time because Boomers all will take call but the Gen Ys never want to work past 5:00. Different values. And they've grown up digital. I've even been working with one company's Millennials to help them interact better with clients because facial expressions don't come through when you're playing video games.

Then there's the Gen Zs, ages 11 to 18. They are just moving into college now. There are 60 million of them. They have truly grown up digital, and they see the world through different eyes, different relationships. They spend three or four hours a day on computers for non-school work. But they interact very nicely on video games and e-games, really. And they play soccer.

So that's what's coming. But the changes are coming faster and faster today. In Thomas Friedman's book, "*[Thank You for Being Late](),*" he has a wonderful expression that today's society is a great accelerator. And starting probably in 2007 or so, the accelerator has been

accelerating. In the world that we knew before, there was Blockbuster and Blackberrys and Sears, and Nokia made cellphones, and there was Motorola, and the world was pretty stable. New ideas came out and there were lots of people who embraced them and they hung around.

The Kodak Brownie camera is a perfect example. It came out in 1907 and lasted until 1970. Kodak didn't see that digital was going to replace it, and it completely did. It didn't see what was right there in front of it. Why? Because there is a very big resistor in our brain to *see things as they are, not the way we want them to be*.

What is happening now is something we used to call fads. There are lots of things emerging, surging, and then often purging. GoPro is one of my favorites. People weren't sure what to do with it.

So we have many things to think about. First, the archetypes: "Who are you?" Then we have the demographics to deal with. They're changing. And now we have a world of technology coming faster and faster, where PWC has an assurance or compliance technology that will do things automatically for you. And Watson and H&R Block are doing taxes without an accountant. What else is coming near you?

So the times are changing and you're going to have to change with them. And you're probably saying to yourself, "Okay, I get it. I'm going to have to do this. For my business and myself to survive, I'm going to have to evolve." And for us to evolve we have to make changes. How do we do that? Because who you are is going to influence how you see the future.

Let me tell you, the Magician and the Ruler don't see it in the same way. The Explorer and the Rebel don't see it in the same way. And if you're a Lover, you certainly don't see it the same way as the Everyman. So without a change management model, the success of those changes is up to nothing more than hope and dumb luck. So we need this change management strategy. You're going to have to try something new.

So what is change management strategy? By analyzing the changes you want to make and seeing how the rest of your company is affected, you can prepare your teams in advance and guide them through the transition until the new methods become routine.

You're taking something undesirable and making it highly desirable. How do you do that? With lots of great effort. But more importantly, you're going to have to develop skills, and you're going to have to change structure, and everything's going to be affected. This is scary. You're going to have to take a step into the unknown and that's the most dangerous place for people because they don't like it all. So the times are indeed changing.

Why is this so difficult? Well, first, we don't see things as they are, we see things as *we are*. Second, we have the comfort of the herd. It's our culture. Birds of a feather flock together, and we're most happy when we're with others who think like us, act like us, and do things

together like us. Now, the third problem is that after we make our habits, your habits make you. By and large, we love to think that we're full of free will, but we really are a product of well-honed habits. It's the most efficient way for the brain to work.

Next, the brain hates to change and change creates literally pain in the prefrontal cortex of your brain. It's creating chemistry that says, "Stop, this hurts." How can you change? How will you see this as something good? The basics of your existence are at risk here. Your herd is going to say, "Hmm, what are you thinking?" And your brain is saying, "Please stop, I don't want to learn something new."

So what we've learned from the neurosciences and behavioral sciences is that I might agree to change my mind and my behaviors but first, I'm a mimic. I'm a monkey. I'll change if I see my leaders, colleagues and staff behaving differently. We mirror each other unconsciously, and we bond. And we bond by mimicking. We really are monkeys. So if I don't see my leaders, colleagues and staff behaving differently, I don't want to either.

Next, I'll change my mind and my behaviors if I understand what's being asked of me, and it makes sense. Remember, in your brain, you have a story and by and large, you sort reality to conform to this story. If it doesn't make sense in your story, you need either a new story or new facts.

Next, people seek congruence between what they believe and what they have to change. And they want to know why. Why matters a lot.

Third, yes you can teach old dogs new tricks. But I will only change my mind and my behaviors if you develop my talent and my skills, and I can learn new ways to do things. So if you want me to change, invest in me. Don't expect me to just do it.

We do a lot of work in healthcare and I am always impressed by how people will promote a nurse to nurse manager but not give them any skill training. So they were a nurse at a higher salary, with a new title, but no more skills at how to be a manager than they had before. Don't do that.

And last, I will change my mind and my behaviors if I see you changing the organization's structures to reflect the new. If we always do things the same way we always have, why should I change? The rewards and recognition?

Are you still rewarding the same things of the past or are you beginning to change them? And the way you celebrate achievements—you must be very intentional as you think about your organization. Are the same teams going to meet or you going to have cross-functional teams? Are they going to have the same deadlines? Maybe no deadlines. Are you going to hold them accountable to delivering things every two weeks? Think about what you're trying to change and how you're going to get them to do it.

Now, why is this so challenging? Because you're challenging the essence of who that person is every day. Their culture isn't something they wear to work. It's who they are. It's not a

task to perform, it goes much deeper. It's embedded in their being. So with that in mind, I'm going to stop our podcast for today so that you can begin to think about all of this.

My next Change Management podcast (Step 2) will be a follow-up that talks about corporate culture—what you should know about it and how it's going to help you as you start to change. Stay tuned, and come back again for Step 2 and then Step 3. Bye now.