

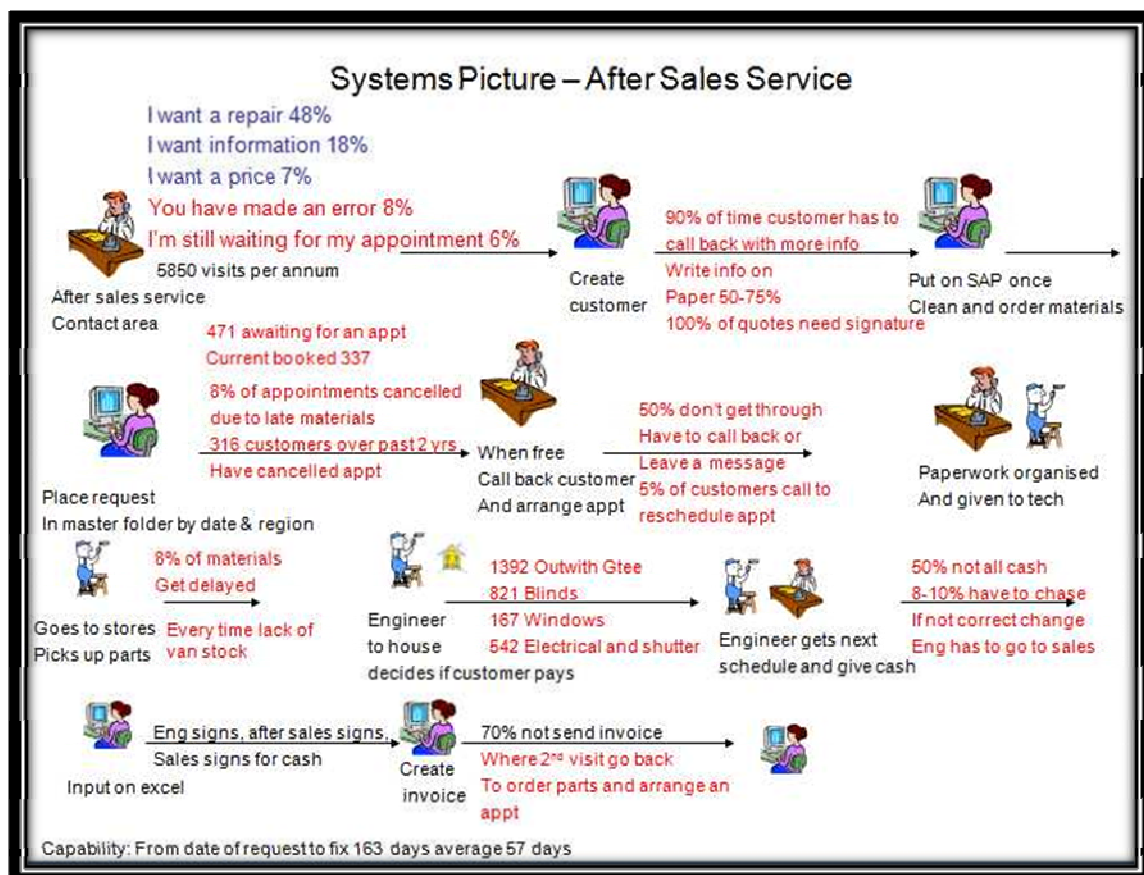
# Chapter Five

## Presenting and designing the case for change

Having gathered all the data, how do you bring it all together and present the case for change? The first idea is to build a 'systems picture'.

In order to make the data you have gathered meaningful it has to be presented in a way that shows how the whole system works together. The best way to do this is to build a picture of the system.

It should include the type and frequency of demand coming into the system, the system's capability, the core process(es) and waste within the process flows. See figure 10 below.



**Figure 10**  
System picture of an After Sales Service System

## Seeing is believing



The purpose of a systems picture is to help the leader see how the system performs as a whole and therefore how demand and capability are symptomatic of the problems in the flow. It must also show how the processes are caused by policy making and management thinking.

For example, Figure 10 above presents a high-level breakdown of the performance of the Service system (installation, maintenance and repairs) of one of our clients in 2005. The picture was drawn up after carrying out CHECK and if you look at the bottom of the picture you will see the capability i.e. the time taken from request to work completed. Within the main body of the picture you can see the main steps in the flow and beside each of these the type and frequency of problems at each step in the process.

However, the picture doesn't show the relationship between how the system performs and the thinking behind the design and management of the system. The consultant's role here is to help the leader see that, in every case, if they want to change their system they first have to change their thinking. This is done by taking each piece of waste and asking why the problem occurs.

## Let's follow this train of thought for an actual problem:

*"In the early part of the Service system, some calls are transferred to other teams without the customer's request being dealt with."*

*"Why?"*

*"Because staff will only deal with calls that are for their area"*

*"Why?"*

*"Because they have targets to do so"*

*"Why?"*

*"Because managers believe that functionalisation and targets are needed to get people to do the right amount of work"*

Following this line of questioning shows that there is clearly a connection between how managers think and the performance of the system. You can see in figure 11 examples of some of the relationships in this system.

THINKING	SYSTEM	PERFORMANCE
Add functional teams to the system	Don't deal with calls for other teams	60% of calls are passed to other teams and the abandoned call rate is high
Productivity is everything, people need targets	The volume of calls handled is more important than the outcome of each call	High levels of complaints and rework
We must have a way of recording that someone has requested a service visit	Send the customer a form to sign and return before a service request is raised	Complaints about the length of time to get a service visit

**Figure 11**  
Thinking-System-Performance

The consultant's role is therefore, to help the leader to see what would need to be done differently in order to get a significant change in the system. If the consultant only shows the leader what's going on in the process flows and does not make the link to thinking and policy, then the leader is likely to view the problem as simply being process related. They will most probably kick it downstairs to their operations managers who will unfortunately soon realise that the problems are outside their control.

By this time it will be too late to re-engage the leader and change will stop.

**Given that we now understand the purpose and format of the systems picture, who should present it and how should it be presented?**

The picture should be presented by front line staff, after all they are the ones who gathered the data. Happily, in my experience, leaders want to hear from their staff. Given that by now the team should have gone through a significant

change in their perspective and attitude, the leader will see first hand the best way to change attitudes and self confidence by changing the work.

During our recent work in Germany for Mercedes, the thing that most impressed the leader was that his front line, assembly and processing staff were able to articulate to the highest level what was wrong with the system. They did it, he says, with a '**passion**' he had never seen before.

But don't assume that just because the front line staff have been involved in the data gathering they will be able to articulate the problems they have found. Again, the consultant's role is to ensure staff are properly prepared for the presentation, this is done by using a simple acronym, **PEP**.

**P = The point here is...**

**E = The evidence to support my point is shown...**

**P = The problem that gives us is...**

The first **P** is to make sure that the team is clear on the point they want to make. For example, in the Criminal Justice System picture, the team's point is: "When the accused person leaves the custody suite the process doesn't work very well."

The **E** stands for evidence to back up the point. For instance, the system picture shows, 'when the accused leaves the station they do not know when they will be attending court.'

The last **P** is to make sure the leader understands the problem with the data they've been given. This is really important, again if we don't help the leader see the significance of the problems in the system at best they will say "let my operations manager know about this" and at worst they will simply say "so what!"

Ensure that for every point the team are clear on the **implications** of what they have found. If you don't, you may find you get put back in the process re-engineering box as opposed to being seen as a partner to help with strategic change.

## Therefore, before you present:

1. Make a list of all the points you want to make about the data gathered.
2. Make sure everyone knows what evidence they will use to back up their points.
3. Build the implications of the points.

You are now ready to **conduct the leader's review!** Ok, not quite... there are some **RULES** to follow before you conduct the meeting.

### A. Only the leader can attend.

If you fill the room with managers you will get into a fight about the data. After all you are likely to be highlighting the problem with policies and practices most probably created by the managers.

### B. The purpose of the meeting is to make a decision based on the question 'do we leave it or change it?'

Given that you should have presented all the data to the leader showing exactly what needs to be changed, you should not have the leader requesting time to think.

### C. The meeting should be short, ideally no more than 45 minutes.

If you really understand the root causes of problems in a system, you should be able to articulate those in a short period of time.

### D. The leader's job is to be supportive.

This means they don't ask things like "who gave you this data?" or as one leader said recently, "You try to convince me that I should change and I will try to pick holes in your argument."

In summary, preparing for a leader's review is a critical part of the change management process. Data is not neutral and the consultant's job is to help the leader see exactly what the data is saying. The team should present the data and should be properly prepared to do so. Remember that the purpose of the meeting is to get a decision that leads to the next stage, **Redesign**.

You only get one chance to present the case for change so you need to get it right. If you feel you'd like some coaching you can [Get Expert Advice](#) from us here.

**In the next chapter we will look at a step-by-step guide to redesigning a system.**

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<sup>i</sup> Herzberg, Frederick (2003) *One more time: how do you motivate employees?* Harvard business review article, Harvard Business Review

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