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Defining Organizational Change

To improve is to change; to be perfect is to change often

Winston Churchill

Life is change. Growth is optional. Choose wisely

Unknown

Wisdom lies neither in fixity nor in change, but in the dialectic between the two

Octavio Paz, Mexican poet and essayist

As these opening quotations hint, change is often considered a sign of progress and improvement. Partly owing to a cultural value, organizations are under extreme pressure to constantly change. Zorn, Christensen, and Cheney (1999) make the case that "change for change's sake" (p. 4) has been glorified to an extent that it has become managerial fashion for stakeholders to constantly change their organizations. If it isn't new,

Organizational Change: Creating Change Through Strategic Communication, First Edition. Laurie K. Lewis.

it cannot be good. If we aren't changing, we must be stagnant. If we don't have the latest, we must be falling behind. If we aren't improving, we must be inadequate. These scholars go on to argue that the cultural and market pressures that demand constant change in competitive organizations can lead to disastrous outcomes including adoption of changes that are not suited to the goals of the organization; ill-considered timing of change; dysfunctional human resource management practices; exhaustion from repetitive cycles of change; and loss of benefits of stability and consistency. It appears that this faddish behavior, like becoming slaves to any fashion, can lead to poor decision-making and poor use of resources.

Communication plays a critical role in fostering the fad of change in organizations. We hear stakeholders in and around organizations making arguments that change is inherently good and that stability is necessarily bad. The continual use of language of change in terms considered positive – improvement, continuous improvement, progressive, innovative, "pushing the envelope," being "edgy" – is juxtaposed against language of stability in negative terms – stagnant, stale, old fashioned, "yesterday's news," "behind the times." The rhetorical force of labeling in this way pushes an agenda that contributes to the faddishness that Zorn *et al.* point out.

Pressure to change also derives from complex organizational environments that put many demands on organizations to adapt and innovate. For example the economic downturn beginning in 2008 has triggered a steady stream of changes in organizations worldwide. Layoffs, restructuring, mergers, store closings, sell-offs, product redevelopment and introduction of new strategies for marketing are increasingly viewed by decision-makers as necessary business survival strategies. Nonprofits also have been hit hard by the economic conditions and struggle for new ways to fund activities and services while dealing, in many cases, with increased needs from those individuals who are spiraling into poverty, homelessness, and financial crises. Governments at all levels struggle to balance budgets, continue to provide necessary services, and maintain staff on payrolls, resulting in some cases to state employee furloughs (where staff are compelled to take unpaid days off from work) and withholding of state income tax returns. Few, if any sectors of industry and society are left untouched by the recent major environmental jolts. And, oftentimes, the rationale that changing circumstances demand changing tactics, responses, and strategies makes it difficult for organizations to resist trying to do something new or at least appear they are doing something new.

Change can be triggered by many factors even in the most calm of financial times. Triggers for change include the need for organizations to stay in line with legal requirements (e.g., employment law, health and safety regulations, product regulation, environmental protection policies), changing customer and/ or client needs (e.g., changing demographics, fashions that spur desire for specific products and services, heightened problems or needs of clients served), newly created and/or outdated technologies, changes in availability of financial resources (e.g., changes in investment capital, funding agencies for nonprofits, administrative priorities for government agencies), and alterations of available labor pool (e.g., aging workforce, technological capabilities of workforce, immigration) among others.

In addition, some organizations self-initiate change and innovation. Change initiated within organizations can stem from many sources including the personal innovation of employees (individuals developing new ideas for products, practices, relationships), serendipity (stumbling across something that works and then catches on in an organization), and through arguments espousing specific directions that stakeholders in and around organizations think should be adopted or resisted. As stakeholders assert their own preferences for what organizations do and how they operate, their interactions produce both evaluations of current practice and visions for future practice that incite change initiatives.

Communication is key in triggering all change. In fact, we can easily argue that none of the other factors that trigger change are truly the direct cause for change until stakeholders recognize them, frame them in terms that suggest change is necessary, and convince resource-holding decision-makers to act on them by implementing change. That is, the necessity for change or the advantage of responding to changing circumstances is one that is created in the interaction among stakeholders. The process is much more subtle than we might assume at first glance. It isn't as simple as noticing that the environment is demanding change or is presenting opportunity for productive change. We actually need to piece together a construction of the environment that suggests this reality.

Karl Weick (1979) suggests "managers [and others] construct, rearrange, single out, and demolish many objective features of their surroundings" (p. 164). He calls this process **enactment**. In this process stakeholders "enact" or "construct" their environment through a process of social interaction and sensemaking. As we encounter our world we attempt to form coherent accounts of "what is going on." We do that by selecting evidence that supports one theory over the other

– like a detective might in solving a murder mystery. However, the process is far from perfectly rational or a lone act of individuals. We have biases about what we want to be the truth of the matter and we are influenced heavily by the enacted realities of those around us (Weick, 1995). Through communication we share our theories of "what is going on" and we purposefully or incidentally influence the process of enactment of others. As Weick (1979, 1995) argues, we simply forget some facts, reconstruct some to better fit the theory of reality we prefer, and look for supportive evidence to bolster our preferred case. He suggests that sensemaking is as much about "authoring" as interpretation.

In this way communication plays a central role in surfacing or suppressing triggers for change. For example, a theory that the economy is in a downturn can be supported and refuted through different ways of looking at evidence, different ways of framing evidence, and constructing evidence through managing meanings that others attach to their observations. An alternate theory can reconstitute observations, history and the narrative around these "facts" in ways that suggest not a downturn but a natural lull or a period of great opportunity. Perceptions that an organization is in a crisis; needs to be responsive to a particular stakeholder; is headed for greatness; exists in a time rich with opportunity; or any number of other characterizations are created through this process.

As discussed more in Chapter 8, communication among stakeholders is at the heart of change processes in organizations because of this highly social process of making sense of what is going on and "spinning" it into narratives and theories of the world around us.

Many attempts at organizational change have met with failure by the standards of stakeholders who served as implementers. Statistics on failures of implementation efforts are significant. Knodel (2004) suggests that 80% of implementation efforts fail to deliver their promised value, 28% are canceled before completion, and 43% are overextended or delivered late. Researchers estimate from data that approximately 75% of mergers and acquisitions fall short of their financial and strategic objectives (see Marks and Mirvis, 2001), as many as 95% of mergers fail (e.g., Boeh and Beamish, 2006), 60–75% of new information technology systems fail (Rizzuto and Reeves, 2007), and estimates of sales force automation failure are between 55 and 80% (Bush, Moore, and Rocco, 2005). A recent global survey of executives by McKinsey consultants revealed that only one-third of organizational change efforts were considered successful by their leaders (Meaney and Pung, 2008). These alarming statistics make one wonder if it is possible to do change well.

The consequences of failure are costly on many levels. Failure of organizational changes may have minor or major consequences for stakeholders associated with an organization and on the ultimate survival of an organization. The energy and resources necessary to undergo moderate to major change are often high. Costs include financial expenditures; lost productivity; lost time in training and retraining workers; confusion, fatigue, and resentment for workers, clients, customers, suppliers, and other key stakeholders; damage to brand; disruption in workflow; and loss of high value stakeholders including workers, supporters, clients/customers, among others. Those costs are not paid off if the change does not yield benefits and/or if it causes additional disruption as the organization retreats to previous practices or moves on to yet another change to replace a dysfunctional one. Change, while common in many organizations, is frequently troublesome and often fails to yield desired benefits.

Most of the failure statistics are generated through official accounts of how organizational leaders and managers judge outcomes. The judgments of failure and success made by non-implementer stakeholders is much more difficult to estimate. Anecdotal evidence in case studies suggest that stakeholders – primarily employees – often have a difficult time during change and that change takes a high toll on stress levels and feelings of commitment to the organization (I will return to this in Chapters 2 and 4). Negative outcomes of change processes in organizations are much more frequently documented than positive ones but rarely are non-implementers asked for their assessments of the results of change programs. Certainly, the ways stakeholders talk about changes that are occurring and have occurred – as failures or successes – impacts their sensemaking about the worthiness of any given initiative. The degree to which implementers and stakeholders agree in framing success and failure can have tremendous impacts on future change initiatives. I will discuss these issues more in Chapter 4.

What Is Organizational Change?

We should examine more closely exactly what this common and troublesome aspect of organizational life entails and what is meant by the concept of organizational change. Zorn *et al.* define change as referring "to any alteration or modification of organizational structures or processes" (1999, p. 10). This and other definitions of change often imply that there are periods of stability in organizations that are absent of change or that a normal state for organizations is marked by routine, consistency, and stability. Although stakeholders may experience organizations as more familiar and stable at some points and as more disrupted and in flux at other points, we can certainly observe that organizing activity is made up of processes and as such is always in motion and always changing. This book is concerned with planned change and periods in organizations where purposeful introductions of change are made in some bracketed moment in the flow of organizing activities. That is, managers and implementers attempt to disrupt what is normal and routine with something else.

The process of implementing change in organizations sometimes begins with processes of innovation and diffusion and nearly always involves a formal adoption process and implementation. **Innovation** is a creative process of generating ideas for practice. Organizational changes are sometimes generated through accidental or intentional innovation processes used by organizations to create new ways of doing or new things to do. However, organizations don't always choose to change based on a self-generated idea. Sometimes, as noted earlier, pressures from environment drive changes or changes are spread through a network (e.g., professional associates) or within a particular context (e.g., industry). **Diffusion** is the process involved in sharing new ideas with others to the point that they "catch on."

Organizational changes may be spread through a diffusion process where important organizational stakeholders or networked organizations select an idea and then others in the network become aware of the choice – typically through communication in social networks. **Adoption** is the term we use to describe the formal selection of the idea for incorporation into an organization. An illustration of the process of diffusion is provided in the stories of the "drive-thru window." As we are all accustomed to now, drive-thru windows are a modern convenience of fast-food restaurants, coffee shops, pharmacies, banks, some liquor stores, and even marriage chapels in Las Vegas! The drive-thru allows customers to do business without leaving their cars. Drive-thru restaurants (different from drive-ins where customers parked and receive service at their car) were invented by In-N-Out Burger in 1948 (In-N-Out Burger Home Page). By 1975 the fast-food giant McDonald's opened its first drive-thru in Sierra Vista, Arizona, followed ten years later by a drive-thru in Dublin, Ireland (Sickels, 2004). The success of drive-thrus in the high profile fast-food company doubtlessly encouraged the diffusion of the practice in other fast-food businesses. As smaller chains sought to mimic the successful practices of McDonalds they were more likely to adopt this practice to remain competitive.

Another pattern is shown in the use of drive-thru banks which, following the 1928 adoption by UMB Financial, increased steadily over several decades and spread internationally.[1] However, in recent years there has been a decline in drive-thru banking due to increased traffic and availability of automated teller machines, telephone, and Internet banking. As these new technologies became available, the drive-thru feature at banks has become less desirable or needed and so is disappearing. **Discontinuance** (Rogers, 1983), the gradual ending of a practice such as the drive-thru innovation, is brought about through the rise in other innovations that are being diffused throughout the banking industry. The convenience of automated teller machines in every mall, many stores, and scattered throughout any person's daily path, makes the convenience of the drive-thru comparatively less desirable. The observations of these changes in the environment as other innovations diffused more and more widely, has led many banks to decrease use of their own drive-thru.

In the story of adoption of drive-thrus by pharmacies we find that some current research indicates that dispensing of medications through drive-thru windows may increase the chance the pharmacist will become distracted, be less efficient, and make more errors.[2] Further, some pharmacists worry that replacing face-to-face interaction with a drive-thru experience will harm both the professional standing of pharmacists and the quality of exchanges between pharmacists and customers. In fact, the American Pharmacists Association put out a statement in 2008 discouraging the use of drive-thru pharmacies unless pharmaceutical care can be adequately delivered.[3] In this case, although the practice of drive-thru convenience is still common, a set of stakeholders from the professional field may eventually bring enough pressure to bear that the use of drive-thrus in this context will be discontinued. This example illustrates the power of communication in both spawning and stalling the spread of change in an environment. Owners of pharmacies will have to balance their observations of what successful competitors are doing, and the desires of customers, with pressures from professionals in their employ and agencies that regulate dispensing of medication. Balancing the demands of different stakeholders while keeping an eye on the diffusion and/or discontinuance of drive-thru pharmacy technology will play a key role in any given pharmacy's decision to maintain this innovation. The means by which organizations keep tabs on such trends is through their communication with stakeholders.

As these examples help illustrate, a key to diffusion is often the social pressure of what other successful organizations in the environment or context are doing and how success is defined. Social pressure is exerted through communicative relationships. For example, Andrew Flanagin (2000) found evidence that nonprofit organizations' self-perceptions of their status and leadership position in their field is positively correlated with adoption of websites. They ascribed this in part to felt pressures to stay on the leading edge. As more and more organizations in a local area or within an industry adopt a specific innovation, the pressure mounts for those who don't have that innovation to try it. However, as powerful stakeholders eschew an idea or find they desire other alternatives, pressure to drop a new idea may mount.

Some ideas provoke more attention as they become more popular (more diffused) in the context or environment in which an organization exists. For example, Total Quality programs became highly popular and started to catch on in the 1980s as a marker of excellence in companies around the world. Having a quality program in your organization became an important indicator that your products, services, and operations were well run, reliable, and continuously being improved (all markers of Total Quality).

Awards are given for organizations that are able to demonstrate evidence of quality programs. The Malcolm Baldridge award (see Highlight Box 1.1), named in honor of the Secretary of Commerce from 1981 until his death in 1987, is the most prominent example of this. The award is recognized internationally as a prominent marker of high quality. Another international standard used in quality management systems is called ISO 9000 and is maintained by the International Organization for Standardization located in Switzerland (see Highlight Box 1.2).

Thousands of companies in over 100 countries have already been certified as ISO organizations. ISO's standards are used to facilitate international trade by providing a single set of standards that people everywhere in the world can recognize and respect. The existence and popularity of these practices and standards create pressure to engage in change because important stakeholders such as major trading partners and customers value them. Accreditation and standards show up in nonprofit and governmental sectors too. For example, universities are accredited through regional accreditation organizations that review practices every few years. Non-accredited universities and colleges risk loss of federal approval and financial support such as aid to students for tuition. These losses would make it very difficult, if not impossible, to operate or to attract grant dollars or students. Independent watchdog

Highlight Box 1.1: The Malcolm Baldrige Award

What is the Malcolm Baldrige National Quality Award?

The Baldrige Award is given by the President of the United States to manufacturing and service businesses and to education, health care, and nonprofit organizations that apply and are judged to be outstanding in seven areas: leadership; strategic planning; customer and market focus; measurement, analysis, and knowledge management; workforce focus; process management; and results. Congress established the award program in 1987 to recognize US organizations for their achievements in quality and performance and to raise awareness about the importance of quality and performance excellence as a competitive edge.

Why was the award established?

In the early and mid-1980s, many industry and government leaders saw that a renewed emphasis on quality was no longer an option for American companies but a necessity for doing business in an ever expanding, and more demanding, competitive world market. But many American businesses either did not believe quality mattered for them or did not know where to begin. The Baldrige Award was envisioned as a standard of excellence that would help US organizations achieve world-class quality.

How is the Baldrige Award achieving its goals?

The criteria for the Baldrige Award have played a major role in achieving the goals established by Congress. They now are accepted widely, not only in the United States but also around the world, as the standard for performance excellence. The criteria are used by thousands of organizations of all kinds for self-assessment and training and as a tool to develop performance and business processes. Several million copies have been distributed since the first edition in 1988, and heavy reproduction and electronic access multiply that number many times.

For many organizations, using the criteria results in better employee relations, higher productivity, greater customer satisfaction, increased market share, and improved profitability. According to a report by the Conference Board, a business membership organization, "A majority of large US firms have used the criteria of the Malcolm Baldrige National Quality Award for self-improvement, and the evidence suggests a long-term link between use of the Baldrige criteria and improved business performance."

Which organizations have received the award in recent years?

2008 Cargill Corn Milling North America, Poudre Valley Health System, and Iredell-Statesville Schools.
2007 PRO-TEC Coating Co., Mercy Health Systems, Sharp HealthCare, City of Coral Springs, and US Army Research, Development and Engineering (ARDEC).

Source: Adapted from http://www.nist.gov/public_affairs/factsheet/baldfaqs.htm.

groups, nonprofit foundation associations, and professional associations that monitor standards of practice and ethical codes (e.g., standards for governance and operating practices) pass judgments on nonprofit organizations. The Independent Sector, a nonpartisan coalition focused on charitable organizations, provides an index to the various standards applied to nonprofits in different sectors (e.g., arts, education, environment, health, human services) and different places nationally and internationally.

In planned organizational change, once organizational leaders adopt an idea, their next task is to implement it. Tornatzky and Johnson (1982) define **implementation** as "the translation of any tool or technique, process, or method of doing, from knowledge to practice" (p. 193). Here again communication plays a tremendous role in that translation. In implementing a change implementers will see a need to convince stakeholders to alter practices, processes, procedures, work arrangements, and often beliefs and values as well. In the examples we just reviewed, implementation would follow the decision to adopt a drive-thru or a quality program. Knowledgeable experts would need to help install the necessary technology; train personnel; explain changes to clients and customers; and redesign work processes around these changes. In

Highlight Box 1.2: ISO Standards

ISO (International Organization for Standardization) is the world's **largest developer** and publisher of **International Standards**.

ISO is a **network** of the national standards institutes of **158 countries**, one member per country, with a Central Secretariat in Geneva, Switzerland, that coordinates the system.

ISO is a **non-governmental organization** that forms a bridge between the public and private sectors. On the one hand, many of its member institutes are part of the governmental structure of their countries, or are mandated by their government. On the other hand, other members have their roots uniquely in the private sector, having been set up by national partnerships of industry associations.

Therefore, ISO enables a **consensus** to be reached on solutions that meet both the requirements of business and **the broader needs of society**.

ISO standards:

- make the development, manufacturing and supply of products and services **more efficient, safer, and cleaner**
- **facilitate trade** between countries and make it **fairer**
- provide governments with a technical base for **health, safety and environmental legislation**, and conformity assessment
- **share** technological advances and good management practice
- disseminate **innovation**
- **safeguard consumers**, and users in general, of products and services
- make life simpler by providing **solutions** to common problems

Source: Adapted from http://www.iso.org/iso/home.htm.

change implementation, communication is a means by which stakeholders describe, persuade, define, instruct, support, resist, and evaluate the new and old practices.

Drive-thrus are a well-known idea that any employee would be familiar with now, but when they were first introduced the very concept must have seemed novel! Explaining to employees and managers how to manage communication tasks with customers at the drive-thru window, working with intercom systems, and coping with problems in the technology, must have presented some initial challenges and perhaps resistance. And, once the employees were trained then the customers had to be taught how to use drive-thru windows so they did not shout into the intercom or become confused about the script of order-taking that might otherwise involve overlapping talk. They needed to learn how to navigate the drive-thru lane, know which window to pay at and which one to pick up at. They had to be ready to give an order when it was asked for and they needed to have money ready at the pay window. Implementers of this change needed to plan for how to train both employees and customers. No doubt implementers in different organizations turned to one another for ideas about how best to accomplish implementation.

The relationship among the concepts raised here – innovation, diffusion, adoption, and implementation – have not always been clearly articulated nor used consistently in much of the scholarly literature on organizational change. For example, adoption sometimes has been used to describe the adoption decision, such as we are using it here, and at other times as an outcome of implementation – the completion of implementation such that the change/idea is part of ongoing normal practice in the organization. Further, the term innovation has been used both to describe the object/idea that is implemented in an organization as well as the process by which it is created.

These concepts have often been viewed and visually represented as a set of phases of the change process within a single organization. Rogers (1995) arrays them in the order of agenda-setting – matching – redefining/restructuring (reinvention) – clarifying – routinizing. The first two phases he considers as "initiation" stages where change ideas are compared against the perceived problems in the organization and the last three he considers part of "implementation" where the changes are brought into use and fit into the existing practices of the stakeholders. The decision to adopt is the dividing line between the first and second phase of the process.

Lewin's classic work (1951) suggests phases of unfreezing – changing – refreezing. These and other similar models and variations on these models share the assumptions that these phases of change are singular, proceed linearly, map the process *within* a given organization, and result in either routinization of use, some variant of use, or nonuse/discontinuance of use. This model grossly oversimplifies the complexity of change. First, it assumes "the change" is agreed upon by stakeholders and has a fixed set of qualities that are immutable. Second, it assumes that the change itself is static and unchanging during implementation and merely needs to be plunked down into ongoing activity in an organization – like placing a rock in a stream.

In fact, the change itself will constantly shift as it is negotiated by the stakeholders who engage about it and with it. For example, one could view the pharmacy drive-thru window as a means to de-emphasize the role of the pharmacist or to deprofessionalize that role. It could also be framed as a means to improve efficiency or as a method to increase speed of customer service without regard to the quality of that service. Different stakeholders will doubtlessly have different takes on what "it" is. They also will interact with one another and influence those perspectives over time, thus shaping and reshaping the conceptualizations of the change over time. This communicative process involved in framing a given change calls into question Lewin's language of freezing.

As we noted at the start of this section, one could make similar observations about the "frozen" state of organizations prior to periods of change. This language implies that organizations are at one moment stable and at another in flux. In fact, organizations are constantly in flux. Further, stakeholders have multiple versions of the organization in mind as they construct what the organization is and reconstitute those notions as they interact with other stakeholders who may view it differently. In the case of a pharmacy, for example, the pharmacists may see it as a medical dispensing organization staffed with professionals to guide patients in order to improve health practices, while the owners may view it as a store that sells things to customers with the aim of gaining a profit. These different constructions of the organization create a bias in interpreting any change that is introduced.

Typically, routinization is considered as successful incorporation of the innovation into regular routine practices in the organization in ways that align with the designers' intentions. More recent work, beginning with Rogers' notion of "reinvention," has acknowledged that variation in the use through adjustment by users after a period of experimentation has benefits and can be considered successful as well. In a later chapter we will consider other ways of conceptualizing outcomes of change. Here we point to the general relationships among these phases of organizational change to elaborate a different way of constructing them.

We can better represent the relationships of these concepts if we simultaneously consider the processes of environment change and an individual focal organization's change (see Figure 1.1). As is illustrated in the figure, change processes in organizations have a reciprocal impact with environmental diffusion and innovation processes. That is, a given organization's decision to adopt, its implementation process, and its

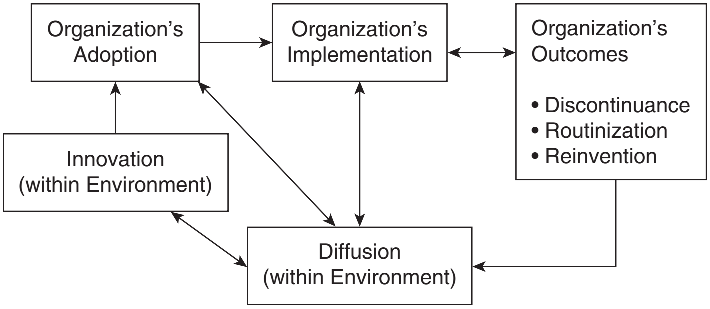

Figure 1.1 Relationships between innovation, diffusion, adoption, and implementation

"success" in implementing a change are related to diffusion of the change in the environment. A change that is more or less successful in any given organization may increase the chances of its diffusion further in the environment. So organizations that have success with an innovation are likely to be noticed by other organizations that then may base decisions to adopt and the manner of implementation, in part, on that observed experience. For example, the experience of In-N-Out Burger in implementing the drive-thru window was noticed by other organizations. Leaders of other organizations assessed the success and potential for future success with that innovation. Those observations and assessments were then useful as those leaders decided whether to incorporate the innovation into their own operations.

Further, the diffusion of a change in the environment will impact an individual organization's adoption decisions (e.g., more diffusion may make it more likely for an individual organization to adopt). So, as more and more fast-food companies added drive-thru windows, customers began to expect that option. It becomes harder to resist trends in service when competitors are all adopting the same practice.

Also, the pattern and pace of diffusion of the change within the environment may impact any given organization's manner of implementation. Other organizations' modifications to the change idea may affect the effort expended, direction of modifications, and focus of efforts in implementation within an organization. For example, if other large fast-food chains were using drive-thrus only in urban areas, but not in rural areas, that might suggest to other chains that they do likewise. However, a pattern of implementing drive-thrus across all locations would put pressure on competitors to do the same. So, the individual adoption strategies of a given organization contribute to diffusion in the environment as these are observed by other organizations. The result of this process of diffusion and the expectations that are created in organizational environments for organizations to obey is described as institutionalization. I will return to discuss this process more in Chapter 7.

This model and example illustrate a few important lessons about these key concepts related to organizational change. First, we cannot fully separate the experiences of other organizations in the environment from that of an individual organization. Where change efforts are not particular to an individual organization and there is some experience with similar change observable in the organization's environment, the ongoing diffusion and innovation related to the change elsewhere will interact with the internal change processes of any given organization. And, even if the change is original to a given organization (as in the experience of In-N-Out Burger), that change experience, once known in the environment, may well trigger sensemaking and action on the part of other organizations (e.g., drive-thru windows were copied by other restaurants when they looked like a success).

Thus, the relationships between an individual organization's process and those of other organizations as well as the environment at large are complex and ongoing. How organizational leaders make sense of and "enact" their environments (is a practice or idea "catching on" or "dying out"?), the organizations they use as important reference points (e.g., the largest organization; the longest standing leader; the trendiest organization), and the interactions that organizations have with one another and with other important stakeholders about particular experiences with changes or types of change (e.g., organizational decision makers discussions of trends in the industry; experts in various businesses processes comparison of data; market researchers sharing knowledge; advocacy organizations attempts to influence change) are critical in all these processes of innovation, diffusion, adoption, and implementation. As I argued at the beginning of this chapter, stakeholders, including leaders of organizations, influence one another's constructions of "what is really going on" in their world. The communication that occurs among them has a powerful influence on how they construct evidence for different theories of how a specific change is moving through an environment.

Second, the relationships among these processes are ongoing and often create reciprocal loops. Organizations' reaffirmation of adoption or discontinuance decisions are often considered in light of perceived outcomes. As stakeholders construct a specific organization's change as a failure to reap projected results, decision-makers may decide to reconsider an adoption decision. The same may be true if they come to the conclusion that a change isn't catching on in the environment. Thus, the adoption decision is not a single fixed point along a linear path of change. The same can be observed about implementation, in that it is an ongoing process of adjustment deriving data from observations about internal organizational outcomes; environmental diffusion; specific processes and outcomes of other organizations in the environment; and most importantly, the social interaction of decision-makers as they enact their environments and make sense of "what is going on."

We can further complicate this model if we consider that multiple change efforts will likely overlap in time with one another. As one change in a given organization is being initially adopted, another may be in a late stage of reinvention and refinement of implementation and yet another may be in a process of discontinuance due to lack of environmental diffusion. Our case study of Ingredients Inc. provides a good example of multiple change (see Case Box 1.1). As we will consider in a later chapter, these multiple change efforts have impact on one another on many levels. For now we can observe that both the reciprocality and nonlinearity among these processes as well as the interrelationship between environmental processes and organizational processes make change a highly complex dynamic.

Case Box 1.1: Ingredients Inc. Experiences Overlapping Changes

Ingredients Inc. experienced a vast array of change during a 12-month time frame: Merger, May 2006; Location or Condition changes, June 2006; Technology changes, October 2006; Responsibilities changes, October 2006; Restructuring, November 2006; Policy and Procedure changes, January 2007; new CEO, January 2007; the Acquisition, February 2007; and Pay and Bonus changes, May 2007. The lifespan of each of the changes was different, and additional changes within a change were also noted to occur (e.g., departments were restructured several times, new policies and procedures were continually released over several months).

Source: Adapted from Laster (2008).

Types of Organizational Change

There are many ways of describing types of organizational changes. Here we will review three ways to categorize and conceptualize different change types. First, we can describe change as planned or unplanned. Keeping in mind that organizing activity is constantly in flux, we can still isolate periods of discernible disruptions to patterned activity. **Planned changes** are those brought about through the purposeful efforts of organizational stakeholders who are accountable for the organization's operation. **Unplanned changes** are those brought into the organization due to environmental or uncontrollable forces (e.g., fire burns down plant, governmental shutdown of production) or emergent processes and interactions in the organization (e.g., drift in practices, erosion of skills). There is sometimes a fine distinction between planned change and planned responses to unplanned change. For example, the death of a founder CEO would count as an unplanned change but the processes involved in replacing that founder with a successor would be considered planned change. Major unplanned changes in the circumstances of organizations often require responses that are more than mere crisis intervention. In some cases lengthy and complex planned changes are necessary.

Another kind of unplanned change involves the slow evolution of organizational practice and/or structure over time. Some scholars (Hannan and Freeman, 1977, 1989) have focused their study of organizations at the level of whole communities or niches of organizations and have examined the ways in which these systems evolve over time. For some theorists, change is conceptualized as occurring gradually as an inherent part of organizing (Miller and Friesen, 1982, 1984). Life cycle theories specify standard stages of organizational development such as birth, growth, decline, and death. Others specify development of organizations as a sequence of alteration of organizational characteristics through variation, selection, retention, and variation within environments. As organizational decision-makers take note of key environmental shifts and/or alterations of the life stage of an organization, they may make planned changes to adapt to those circumstances. Often the difference between planned and unplanned change concerns the perspective from which one views the change and the triggering events for change that are relevant to the analysis.

A second way we can describe change is in terms of the *objects that are changed*. Typically, scholars refer to these objects in discrete categories of: technologies, programs, policies, processes, and personnel. Lewis and colleagues (Lewis, 2000; Lewis and Seibold, 1998) have noted that organizational changes usually have multiple components that are difficult to describe with a single term. For example, technological changes usually have implications for new policy and new procedures and specify new role relationships. Making a new technology available necessitates specifying the appropriate use and users of the technology; the schedule and manner of use; and the personnel who can use and approve use. Further, the purposes of technologies are often to improve processes or products. For these reasons, it may not be useful or very accurate to describe "change type" in terms of whether they are technologies, procedures, or policies. Such theorizing is likely to be unreliable since so many changes have multiple components.

Zorn *et al.* (1999) have made the distinction between material and discursive changes. "**Discursive change**" (p. 10) often involves relabeling of practices as something new in order to give the appearance of changed practice without really doing things differently. They give the example of embracing the term "team" for a work group as a way of discursively altering how the organization considers the work and workers without really changing the practices or process of the work. They contrast this with "**material change**" that alters operations, practices, relationships, decision-making, and the like. Although they underscore that discursive change is still consequential in organizations, it is often experienced differently from these other types of change.

I remember working in a fast-food restaurant as a high school student when the company came out with a new promotion. This was for discounted deals for a somewhat more modest version of a regularly priced meal and was very popular for a summer. In fact, the deals were so popular that they generated a flood of new customers – good for business, but not necessarily regarded positively by the minimum wage earners whose job it was to serve all those customers. Consequently, we nicknamed the new meal "bummers." When a customer ordered these meals, the front counter person would call back to the cooks and packaging folks "two bummers!" Once a secret shopper from the district came in to inspect and rate our performance and heard our new nickname for the product. She was not amused. This is a good example of how an unplanned discursive change (the relabeling of the new product) can occur in organizations.

A third way to describe types of changes concerns the *size and scope* of change. This is usually described in terms of first- and second-order change (Bartunek and Moch, 1987). **First-order changes** are small, incremental predictable interruptions in normal practice. **Second-order changes** are large transformational or radical changes that depart significantly from previous practice in ways that are somewhat frame-breaking. These changes call key organizational assumptions into question. **Third-order changes** involve the preparation for continuous change.

One problem with this means of assessing the magnitude of change is that stakeholders oftentimes view changes in different ways. A change may be viewed as relatively minor and as a somewhat predictable interruption in normal practice for some, but for others considered an expansive and significant change. Individuals' experiences and tolerances for change vary and thus their perceptions of size and scope of change will vary as well. So finding an objective standard to judge size and scope may be meaningless if it does not match what stakeholders perceive.

Our individual assessments of the size and scope of change are effected by how directly the change effects us; how profound the change to our own lives may be; what we value in our organizational lives; our own history with change in our personal and organizational life; and perhaps most profoundly, the interactions we have with others about the change. In the example of Allen, the line worker in the Introduction, we see evidence that the merger represents a highly emotionally charged change for him. His reaction to the shift supervisor meeting is a gut-wrenching feeling. This might be brought on by fears that the merger could result in layoffs and put his position at risk. It might be that the way of work in his unit might change dramatically and he might not be able to maintain an acceptable quality of work. For some of his co-workers, the rumored merger might bring excitement if they think this will bring greater job security, higher wages, and more opportunities. Some may think it doesn't really change anything important for them. Each of these workers will potentially assess the size and scope of the change differently. Doubtless, they will share those assessments with one another and that is likely to trigger further sensemaking about "what is going on."

For changes that are less well defined and less understood, the assessments of the size and scope will vary even more widely. The case of Allison (the professor in the Introduction) is a good example of this. Allison felt the briefing on the expected changes taking place in higher education was a waste of her time. From the perspective of those closer to the Department of Education hearings, this was a far-reaching change that might reshape higher education. However, to Allison it seemed like another bureaucratic annoyance. Until she is convinced otherwise by trusted colleagues or influential people in her network, she would be dismissive of the change as unimportant and irrelevant.

Another complication in estimating size and scope of change is that change is sometimes not one single thing. In fact, Nicole Laster (2008) argues that changes are rarely singular. That is, changes have parts and have consequences that are in themselves changes. In her conceptualization, **multifaceted** change occurs when more than one change occurs within the same time frame. She classifies multifaceted change as either "**multiple change**" – two or more independent changes occurring at the same time – or as "**multi-dimensional change**" where one or more changes have subsequent parts. Certainly either type of multi-faceted change, especially if a larger order of change, presents a greater burden on stakeholders experiencing the change than changes more singular and/or of a smaller order. In her study, the key difference in how individual employees made sense of the size and scope of the change was how implementers talked about it at the outset. This had a huge impact on what these employees were expecting at the outset of change and colored their experiences of change in terms of setting them up for surprises, additional stress, and disappointment.

Overall, the language we have reviewed here for describing types of change help us to estimate both the size of potential ripple effects of change in an organization and the degree to which change is likely to be expected or unexpected. This language also helps us to identify the range of potential stakeholders who will experience impact from a change or set of changes. The three major cases used in this book provide examples of the types of changes from planned (merger, communication technologies) to unplanned (alteration of policy and practices in shaping higher education institutions); material (merger, communication technologies, some aspects of higher education practice) and discursive (some aspects of higher education policies); and small (communication technologies) and large scope (merger, higher education policies and practices). The contexts for these implementation efforts span from an individually newly created organization, to a closely connected interorganizational network, to a geographically dispersed set of institutions. I will rely on examples from these cases to illustrate concepts throughout the book.

We can combine these three categories (planned/unplanned; small scope/large scope; material/discursive) that describe change to construct theory about how some kinds of changes may operate differently; present unique problems; require specific strategies; and/or have differ-

	Planned	Unplanned
Smaller Scope	**Material** new copy machine	**Material** reporting procedures altered by regulatory body
	Discursive start calling staff "associates"	**Discursive** employees nickname a product/process by unwanted term
Larger Scope	**Material** merger	**Material** major funding source is cut off
	Discursive institute language of "Quality" to describe processes	**Discursive** brand becomes damaged through negative association

Figure 1.2 Types of organizational change in combination

ent implications for relationships between process and outcome. Figure 1.2 provides an example of how these different descriptors of change type can be used in concert to help us make predictions about change. With empirical work we could easily compare the eight combination types of change. For example, we might hypothesize that large-scope, material planned changes are some of the most challenging changes to carry out involving high degrees of communicative and other resources. It also may be that unplanned discursive changes are harder to explain to stakeholders than are unplanned material changes and are also more likely to lead to subsequent planned changes. Further, assessment of intended and actual outcomes from discursive changes, especially when unplanned and large, may be more difficult than assessment of material change. These are only examples of the sort of hypothesis-testing and ultimate theory building that can arise from fuller descriptions of types of change. Examination and comparison of specific real-life cases of a variety of change types will also potentially yield important insights for both scholars and practitioners from the rich detail provided in such examples.

Complexity of Change Within Organizations

Changes in complex organizations have unique characteristics by virtue of the features of interdependence, organizational structures, and politics. *Interdependence* concerns the degree to which stakeholders impact the lives of other stakeholders as they engage change. Unlike individual adoption of ideas/changes in private life (e.g., switching to HD TV, choosing a new doctor), individuals' choices to cooperate in change in organizations nearly always will have implications for others who are asked to make the same adoption choice and for others who are impacted by the ripple effects of change. So, my decision to select a given doctor over my current one may not impact my neighbor's decision (except insofar that he wants to pay attention to my choice or is socially influenced by it). However, my decision not to cooperate in a new work process could completely forestall another unit or set of workers' abilities to participate in that process as well as impact the customers of the product I help to produce. That effect is due to our interdependence.

Sequential interdependence is a special type of interdependence wherein stakeholders affect each other in sequence. An assembly line is a good example of this. As a worker toward the start of the line gets behind in her work, other workers later in the line will have the pace of their work affected too. If the later worker cannot do his part until the earlier worker does hers, they are sequentially interdependent. **Reciprocal interdependence** (Thompson, 1967) concerns the situation where one stakeholder's inputs are another stakeholder's outputs and vice versa. In this situation the work of one person is necessitated by the work of another. Further, the products of the individual work provide input back to the original propagator of the work. A good example of reciprocal interdependence is joint authorship of a report or document. As one part is written, other parts may need to be adjusted to account for the new writing. As that rewrite is completed, the original work may be adjusted again. One author cannot adjust until he/she sees what the other author has done, and those changes are the cause of the additional changes.

Where workers or other stakeholders are sequentially or reciprocally interdependent, participation in change becomes highly social and creates greater demands for coordination. Because organizational goals are often premised on interdependence among the participants, organizational leaders are unlikely to utilize an individualized choice model in introducing change. More typically, organizational leaders make the choice on behalf of units or whole organizations and then use implementation strategies to cajole, persuade or force a predesigned form of participation from internal (and sometimes external) stakeholders.

Organizations cannot always benefit from a particular change unless all, or at least most, of the stakeholders are using/participating in the change in a coordinated manner. For example, if the accounting department decides to switch to a new system for automating payroll that will be faster and more accurate, they would likely require all department supervisors to report employee work hours in the same way by the same deadline. If they let each supervisor decide independently how to report the hours and everyone was doing it differently, the benefits of the new system might not be realized. Not all changes in organizations operate in this manner. Some changes might well be adopted individually and differently. We'll return to this idea in a later chapter. The point here is that when interdependence is high, change often requires cooperative and coordinated efforts on the part of stakeholders.

Organizational structure is another component that makes organizational change especially complex and different from individual change. Organizations are made up, in part, by structures (Giddens, 1984). **Structures** are rules and resources that create organizational practices. **Rules** include simple but powerful ideas like "majority wins" or "high performers are rewarded more than lesser performers." **Resources** include ways of doing, organizational beliefs, and important possessions in an organization that can be invoked in order to move along a new idea or to make a case for staying the course on an action. Status is a powerful example of a resource in an organization. Those with powerful positions have an important resource in influencing how actions are taken. One reason people have power in organizations is by virtue of their formal (position in the organizational chart) or informal status (close connection with someone with formal status; opinion leadership; expertise, long tenure) (Stevenson, Bartunek, and Borgatti, 2003). Information is another resource. As individuals or units increase their access and control over information, especially unique information, they become potentially more powerful. Information can be used, withheld, and shared in various ways that make some individuals or units able to manipulate the decisions made in organizations, shape knowledge claims that can be made, and/or impact the ways resources are allocated.

So, organizations are made up of many structures: decision-making patterns and processes, authority and role relationships, information-sharing norms, communication networks, and reward systems among others. As change is implemented in an organization it must survive all of the potential impacts of these structures. For example, if those who hold power in the organization (even those who are not within the group that approved adoption of the change) fail to support a change effort, it is much harder to sustain the effort. In another instance a change may face challenges because it creates too many ripples in how rules operate in the organization. In another example, moving from a traditional management structure to a team concept of management may necessitate abandoning rules of hierarchy (move from those with official power making most decisions to sharing decision making); information-sharing norms (move from hoarding information to widely sharing information); and rules of division of labor (move from strict job descriptions to loosening of roles and expanding job responsibilities).

Change may involve altering much about the organization's beliefs about work as well as practices. Because structures are highly embedded in organizations, they often are resistant to change. Stakeholders become accustomed to structures as they are and their mere continued existence over time may be reason enough to maintain them. From the way a group of boys picks teammates for a recess soccer game, to the way that a church group selects its leaders for important committees, to the way that organizations cooperating in an interagency collaboration decide how much money each organization must contribute to a project, structures are often highly fixed and determinant. Change that disrupts those structures often will be resisted or derailed to some extent. Of course such resistance might be healthy for an organization and/or may end up serving the interests and stakes of more or different groups of stakeholders.

Stephen Barley (1986, 1990) has investigated the effects of the introduction of change on structure. Barley writes about the introduction of new technologies into workplaces and the resultant effects on social structure. In his 1986 study of the implementation of CT scanners in a hospital he found that the introduction of this new technology had profound effects on the social structure, specifically role relationships, of radiologists and technologists. Technologists were more expert in reading the results of the new CT scanners and now held information and knowledge that violated the normative status relationship between technologists and radiologists. Barley describes this role reversal as generating considerable discomfort for both parties. To cope with the discomfort of dealing with situations in which technologists had to explain or teach radiologists, a clear violation of status norms, they created new patterns of interaction to avoid such encounters. Radiologists retreated from the CT area and the technologists took on more independent work. The discomfort of these structural ripple effects in this hospital made the implementation of the change much more complex.

In another example, Stevenson *et al.* (2003) studied the restructuring of networks in a school. A new position, academic director, was created in order to increase coordination (and thus more direct ties) among the different academic units at the school. Administrators in the school exercised "passive resistance" against the change over a year of attempted implementation. Much of the resistance centered around overlapping authority, decision-making power, and areas of responsibility of those involved in curriculum planning. Essentially, those with high structural autonomy (e.g., those who brokered the structural holes in the organization) were opposed to a change that would deflate their influence. Stevenson *et al.* show how the "backstage" changes in the informal communication networks of this organization had profound effects on the efforts to resist this change. As the implementation effort was trying to promote increasing ties among units, informal processes were at work in increasing separation among units. Clearly, the changes to structure were challenging to accomplish and the power of informal structure, operating underneath the radar of the implementers, was so difficult to detect that they concluded that nothing had changed in the year of introducing the change.

Politics is another component of organizations that can present challenges for change efforts (Buchanan, Claydon, and Doyle, 1999; Kumar and Thibodeaux, 1990). Drory and Romm (1990) define the elements of organizational political behavior as (1) a situation conditioned by uncertainty and conflict, (2) use of covert nonjob-related means to pursue concealed motives, and (3) self-serving outcomes that are opposed to organizational goals. From their perspective, politics results from the resolution of colliding interests among sets of stakeholder groups in and around organizations through institutional or personal power bases. As Boonstra and Gravenhorst (1998) argue concerning a theory of structural power during organizational change, "power use becomes visible when different interest groups negotiate about the direction of the change process" (p. 99). In politically sensitive change episodes where multiple parties have opposing interests and a balanced power relationship, "negotiations will be needed to come to an agreement about for instance the goals of the change, the way the change is going to be implemented, and the role of the different parties in the change process" (p. 106).

Implementation of change can compete for time, energy, attention, and resources that might otherwise be devoted to other things. The potential for this competition can give rise to politicization of change. Sponsors of a change can feel threatened by the redirection of resources towards other changes or other ongoing practices. Also, change programs that are risky or highly charged with potential for reward can give rise to competitive stakes in getting credit or blame for the outcomes. These dynamics can lead to sabotage, arguments rooted in self-interest, deal-making for mutual support and the like. Buchanan and Badham (1999) conclude from their review of literature and a set of case studies that "political behavior is an accepted and pervasive dimension of the change agent's role" (p. 624). In fact, some research has found that failures of change can sometimes be traced to failure of organizational coalitions supporting the change to marshal effective political strategies (Clegg, 1993; Perrow, 1983).

In Blazejewski and Dorow's (2003) account of a privatization of the Polish company that produced the Nivea brand of personal care products in Poland, they describe how internal political barriers against organizational change inhibited its effective adaptation to new complex environmental conditions. When the company was reacquired by its former parent company, it was dramatically restructured through a coercive non-participative model of change implementation. The authors suggest that resistance to this strategy was low because it was accompanied by the investment of a number of desirable resources including new pay and benefits; changing work conditions; changes to physical environment and office technology. The commitment perceived by the takeover company facilitated tolerance for the top-down style of management during the change. A micro-level political game played out where benefits outweighed the disadvantages of the method of change. This was possible because of the power base available to the implementers – namely, huge financial resources.

The Spellings case provides another example of how politics can play a role in change (US Department of Education, 2006; see Case Box 1.2). When one of the Commissioners, a leader in an influential higher education association, decided neither to endorse nor sign the Report it served as a powerful symbol that provided both supporters and critics of the Report as a reference to rally for their side of the issues. For some this was seen as a demonstration of power that thwarted attempts to make progress outlined in the Report; for others as a useful and high profile

Case Box 1.2: Spellings Commission Political Positions Play a Role

Each of the Spellings Commission members were asked to endorse the Report and all but one did. David Ward, the president of the American Council on Education, refused to sign. This was potentially a big problem since Ward represented the association with the most global and inclusive perspective on higher education. Ward explained his position in a statement that read in part:

> I didn't oppose the Report; I just simply said I couldn't sign it. There were significant areas that I supported. But in my case, I needed to be on the record in some formal way about those areas that gave me some disquiet. … I consider [my negative vote to suggest] a qualified support of a substantial part of it, but there were some significant, important areas that I just couldn't sign on to.

David Ward's refusal to sign and explanation stimulated much sense-making on the part of stakeholders. As one interviewee in our study said "I think it was probably, in the big scheme of things, helpful, because it did indicate that there were different points of view." Some others expressed the point of view that the withheld signature further contributed to defensiveness and a counterproductive framing that decreased possibilities of a constructive response or collaborative tone. A few felt that Ward's action had little impact since other higher education leaders did endorse the Report.

Source: Adapted from Ruben, Lewis, and Sandmeyer (2008).

means for those in higher education to stand up against the Commission's indictments against higher education. However his action was regarded by individual stakeholders, it is clear that this leader relied upon his status both in higher education and his visible role in the Commission as a means to make a symbolic statement that carried political weight with many stakeholders. The ways in which stakeholders made sense of that symbolic act influenced their own willingness to support the Report's conclusions.

The picture emerging of change in complex organizations portrays a dynamic, interdependent, power-oriented image. How stakeholders react to changes as they are introduced in organizations may certainly be based in part on assessments of costs and benefits of use/participation in the change as a stakeholder examines the features, ties, and likely consequences of the change itself. However, it is just as, if not more, likely that reactions to changes will be rooted in complex social systems, organizational structures, power relations, and other ongoing organizational dynamics. Further, as observed throughout this chapter, the sensemaking engaged in through interaction among stakeholders plays an incredibly important role in enacting the "reality" of "what is really going on" in change, environments, and organizations. Various stakes are played out in these sensemaking conversations that have tremendous implications for how interdependent stakeholders, connected through complex network relationships and power structures, come to grapple with change.

Conclusion

In summary, this chapter has introduced the concept of change and helped to define the ways we can describe change. We have noted that organizations of all types are pressured and pushed towards change for all sorts of cultural, environmental, and internal reasons, and that the ways in which stakeholders enact their environments through social interaction are highly influential in enabling change to be considered and implemented. Further, change efforts – especially large-scale changes – often are constructed by influential stakeholders as having failed. Changes come in many sizes and types. We can describe change in terms of being planned and unplanned; of different types; and of different sizes and scope. We also have much evidence to suggest that change in complex organizations is often more dynamic and potentially more problematic because of the interdependent relationships among stakeholders, the political context of change, and the nature of organizational structures. Communication plays tremendously important roles throughout change processes in serving as the means by which people construct what is happening, influence the constructions of others, and develop responses to what is being introduced to them as change. The next chapter will focus more on some of the specific ways that stakeholders communicate and the communicative roles they play during organizational change.

Notes

1. Source: http://en.wikipedia.org/wiki/Drive-through.
2. Source: http://www.pharmacy.ohio-state.edu/news/med_errors.cfm.
3. American Pharmacists Association Academy of Student Pharmacists Report of the 2008 AphA-ASP Resolutions Committee.

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