

Mahua Ghosh

HRD 6305

Organizational Learning & Performance

University of Houston

OD MENTOR CHRONICLE

Introduction

Who is your OD mentor?

My OD mentor for HRD 6305 is Ms. Jessica Olson. Ms. Olson is an OD practitioner with 10+ years' experience. She has supported leaders and their teams from large corporations to small nonprofits, in aligning business strategies and strengthening individual and organizational effectiveness. Jessica Olson is also an alumnus of MS HRD program at University of Houston.

How when and where the interactions happened

All the conversations happened over phone as Ms. Olson is currently residing in Boston. I prepared and sent the interview [guide](#) to Ms. Olson so that she gets sufficient time to reflect and recollect her experiences. The conversations happened on 9th Sept, 7th Sept, 22nd Oct and 7th Nov.

What specific concepts you chose and why?

I had arranged my questions around three themes - (1) Consulting as a profession & the consultant as a person. (2) Sensing the organization (3) OD intervention techniques. As a student of HRD it is of prime importance to understand what it takes to be a successful OD consultant. Currently I work as an Instructional Designer in one of the oil and gas service organizations. One of the challenges in my profession is most of my clients (field engineers, operators) are in geographically diverse locations, with very little chance to interact directly. Dave Uhlrich mentioned, HR is about being "outside -in" which implies HR practitioners should know what their customers want and build their services around those demands (Ref:

<https://www.linkedin.com/pulse/what-most-important-contribution-hr-delivers-employees-dave-ulrich/>). In order to be valued as a competent HR partner I need to understand how to sense and diagnosing an organization. And finally, most of the times in my career I have contributed in a team level. This was a great opportunity to learn from a practitioner on how systematic changes are planned & implemented.

New Learning

Competencies required to be successful OD consultant:

- Basic consulting and facilitation: As a consultant, one has to continuously manage relationships. A consultant should able to build collaborative relationships, able to put ideas to work and give support to a project.
- Communication and coaching: At every phase of the project a consultant must be able to communicate the findings to all the stakeholders involved in the project. This would require good listening skills, strong written and oral communication skills. Often a consultant might also need to coach the client on solving organizational issues. A consultant should be able to create a safe environment where people can express their fears and concerns.
- Assessment & data analysis: A competent consultant should be able to use HR data analytics to make informed decisions. It is also important to define “what” needs to be measured. Additionally, one must be open and pay attention to qualitative data as well.

OD MENTOR CHRONICLE

A competent practitioner should have a strong understanding about Sociology, Industrial & Organizational Psychology, theories of learning and motivation. Above all, an OD consultant needs to be very intentional and never accept things just based on their face value.

Challenges faced by an OD Consultant:

Ms. Olson shared few of the challenges faced by an OD consultant:

- Definition of Organization Development is different across organizations, hence different clients perceive OD with different lens. Large organizations tend to be very matrix driven whereas smaller organizations are very fluid. A consultant must be able to adapt their work practices according to the needs of the organization.
- In some organizations OD consultant have to team up with HRs which might create a negative perception in people, where people perceive OD Consultants as “mandatory heavy hands”. In order to build credibility, a consultant needs to build relationships and gain trust from the people.
- In many organizations, OD initiatives are not prioritized, especially if the intervention is not directly connected to the balance sheet of the organization. Organizations where OD is often an “after thought”, efficiency and performance are often low.

Common organizational challenges:

1. Lack of alignment - Many organizations lack alignment in terms of their vision, leadership, goals & priorities, organizational culture. When the individual components of an organization are not fitting cohesively, the organization fails to perform to its fullest capacity.

2. Not truly understanding organization mission: Organization mission and vision statement acts as an anchor, they enable an organization to articulate its values, priorities and thus align everyone towards a common goal. In some cases, although people might know organizational mission, but they don't fully understand how in their daily work they contribute towards that mission.
3. Lack of cascading goals: Cascading objectives ensures that everyone is tied together to achieve a common goal. Without cascading objectives it will be very difficult to execute effectively.
4. Changing priorities: With each year the priorities of an organization may shift - example: depending upon the external market an organization might want to change their strategic priorities. If the employees are not aware of the priorities, they will fail to deliver.
5. Performance expectations: Poorly defined performance expectations (what is expected, how it is measured) often contributes to low engagement and at the end impacts business.
6. Right organizational structure: Organizations always needs to adapt to the changing market. A healthy organization should ensure that it has the right structure (people, technology, processes) to sustain in the long run.

Sensing an Organization:

An OD practitioner always needs to be fully aware about the organization health. The elements that drive an organization are: leadership style, clarity of vision, management practices, risk management programs, performance evaluation program, employee engagement etc. (Ref : <https://www.mckinsey.com/business-functions/organization/our-insights/organizational-health-a-fast-track-to-performance-improvement>). Sensing an organization can also help to discover under the surface issues. Ms. Olson suggested the following ways to sense an organization:

OD MENTOR CHRONICLE

- Conversations: Talking and interviewing people are one of the biggest ways to sense the culture and management style of an organization. Individual interviews often helps to uncover the true issues behind perceived organizational challenges.
- Document review: This helps to understand if the organization is process oriented or fluid.
- Online presence: Online presence of an organization can show the key initiatives of an organization, whether the organization has a positive social footprint. Social sites like Glassdoor is another avenue to understand if the employees approve the management in a positive way.
- Benchmarking: Benchmarking (through financial reports, market analysis) an organization against similar other organizations helps to realize how the organization is performing in comparison to the peers.

Change & Change Management:

One of her remarks which created a lasting impression on my mind is “*Change is all about mindset, it is about being proactive, thinking about stakeholders, thinking about communication and implementation plan, how to gather feedback and how to assimilate the learning*”.

Ms. Olson clarified the significance of two terms here: the change and change management. Change, as we all know is the act of making something new. Change Management is the process of managing the transition phase (managing people’s response to change). The better an organization manages its change management, more is the likelihood of successful change projects. Before doing any kind of change interventions a consultant must proceed with

stakeholder analysis, change readiness assessment, plan for contingencies, plan for implementation and roll out, defining key metrics to measure change. Ms. Olson shared a very simple yet impactful template which she uses to guide change management initiatives- **William Bridges Transition Model** (ref: <https://wmbridges.com/featured/articles/the-three-questions/>).

This model asks people to reflect on the following three questions:

- What is changing?
- What will be different because of the change?
- Who's going to lose what?

By reflecting on these questions, the group can have more clarity on the road ahead, and come up with an action plan to become more streamlined. A proper change management plan helps an organization to ensure that people are going to embrace it with less resistance.

Hosting Conversations:

The ability to facilitate meaningful conversations with stakeholders is one of the subtle and essential capabilities of a consultant. A consultant needs to be aware of the interpersonal dynamics that can happen inside a room. A consultant needs to create an environment where no one feels threatened and can contribute without hesitation.

During these sessions a consultant wears multiple hats - sensor (what is going on in the system), frame setter (providing orientation), innovator (initiating new conversations, inquiry) (ref: Bushe & Marshak, 2015, p.328). The facilitator needs to ask insightful questions so that the participants can reflect on it and envision the future. Ms. Olson shared one of her approaches of facilitation - start with a broad question which is aligned with the big vision and then asking

small probing questions which progressively unfolds the details to achieve the big vision.

Sometimes she also flips the approach - where she helps the participant to navigate from small details to the big picture. At the end of these conversations, the consultant must debrief the participant and sponsor about the new learnings and the agreed action plan forward.

Providing Feedback:

While providing feedback, Ms. Olson tries to tailor her response according to the *Situation Behavior Impact* Model. This model ensures that feedback is provided on specific situations and behavior and how that behavior has impacted others. This model can be used both for constructive purpose (to reinforce behavior) or to provide a critical feedback. By following this model she ensures that she is objective. The consultant should also ensure that the person receiving the feedback has an opportunity to participate in the conversation and clarify their concerns. Properly constructed feedback will help the receiver to gain strategic insight about their blind spots and be more self-aware. (ref: Cummings & Worley, 2015, p.270)

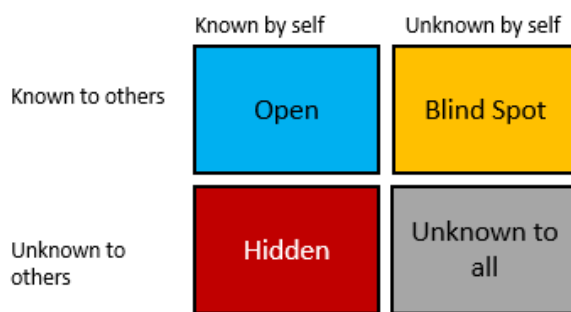


Figure 1: Johari Window, adapted from Cummings & Worley, 2015, p.270

Successful Change Intervention:

Ms. Olson provided an example where a small size organization in Boston acquired another similar organization in Virginia. After the acquisition, people were not aware of their new roles and responsibilities. Ms. Olson & her team did pre-assessment, analyzed the work practices, culture, collaboration tools, communication norms. Based on the analysis of the data, Ms. Olson helped them to re-define organizational structure, formalized leadership by geography and defined new roles and responsibilities. One of the critical factors which provided a headwind for this successful integration was the involvement of the CEO. The CEO was receptive to the suggestions from OD consultant. He ensured that he touch based regularly with his team to explain the new changes and also gave them an opportunity to ask questions. This example shows that embracing change becomes easier when people are given an opportunity to voice their concerns and feel that they are being heard and respected.

Unsuccessful change intervention:

In another example, Ms. Olson was involved in creating a new organization design for a mid-size firm in North East USA. The organization was dedicated to selling educational products, providing customer training, and consulting services. As a growing organization there was a need to define priorities, define roles and responsibilities, create new staffing model. Ms. Olson was hired as an external consultant (hired through another consulting firm) to help them create an organization design. Throughout the project cycle, Ms Olson and her partners met the senior members of the leadership team, but they never got a chance to present their recommendations to the CEO. Although Ms. Olson and her team had invested their time in

OD MENTOR CHRONICLE

doing all the assessment and creating an organizational design, but the project never gained any traction and subsequently aborted.

While reflecting on this experience, Ms. Olson shared couple of key learnings:

1. Lack of access to key contacts: In this particular project Ms. Olson was hired through another consulting firm. Ms. Olson never gained a formal access to the key contacts in the client organization. The chain of communication was broken. There was never a buy in from CEO.
2. Lack of formal contract: The entire contracting project was not laid out very formally. A formal contract with roles and responsibilities, rules of communication and expectations at each stage would have saved the project from failure.

How do you measure success?

Measuring change success is the culmination of organizational development initiatives. At the onset of change effort, organizations need to define key metrics to assess change project effectiveness - like achievement of project goals, timeliness and budget. Although these tools measures the tangible, but an organization should also pay attention to qualitative behavioral indicators as well, because each individual employee contributes to the sum total success of an organization. Ms. Olson stated that getting feedback is always crucial to measure the success of change, especially if there were signs of resistance. Follow up surveys (through either online poll or focus group interviews) or customer satisfaction survey can ensure whether the change management is heading in the right direction.

Future of OD:

As consumer demand increases and competitions toughen up, organizations have to be nimble and flexible. Organizations need to move along with the market and customize their service. Continuous learning and innovation should be interwoven in organizational DNA.

Technology is having a huge impact on how we work, how we communicate and collaborate. As remote working becomes the norm, an organization should empower the employees with the tools to collaborate virtually.

One of the challenges for the organization in the future would be to retain key talents. In a market which is marked with steep competition, the key differentiator would be organizational culture. The culture of an organization would be a key differentiator in how they attract new business and retain talent.

Reflection

a. What did you learn from the experience?

During our conversation it was evident that effective leadership at the top is one of the cornerstones behind successful transformation. Many organizational leaders are more focused on processes, rather than developing people. Leaders fail to understand that one of the important pieces of OD puzzle is people. In order to change behavior or implement a new strategy it requires sincere commitment to invest in people and to have patience in the process. A fully committed leader will be able to create strong headwinds for successful organizational development.

Along with leadership, an organization needs to have effective change strategy (inform and involve everyone), culture (continuous learning, innovation), communication (communicating value of change throughout the organization) to be successful in implementing change.

b. What surprised you?

When I started this course, I was very much intrigued about the different kinds of intervention, their value, and the application stages. While talking with Ms. Olson I realized *Change Management* is probably as important as the *Change* itself. One of her statement which really stood out to me was “*Change is all about mindset - it is a mindset of being prepared beforehand*”. Change management plan helps an organization to understand the gap between the current and future, have a plan for moving from one to the other. This statement also helped me to appreciate the importance of being aware of OD’s behavioral science foundation. One of the reasons that people resist change because it is our nature to settle in the status quo. People will embrace change if the value of change is communicated properly and people are given a chance to get involved during the change process.

c. How does the information relate to what you learned in the course?

One of the core learning from this conversation is managing change. Ms. Olson mentioned the importance of conducting an assessment to understand organizational readiness. According to Cummings & Worley (2015, p.184 - 201) change agents must create a readiness for change, design activities to perceive the future, gather support from leadership, and manage the transition. I also learned how structured conversations have the potential to give birth to new ideas, and generate commitment towards new action (ref: Bushe & Marshak, 2015, p.351).

Cummings and Worley also acknowledges the role of conversation as a learning practice where members learn new language, tools and process (ref: Cummings and Worley, 2015, p.197).

While listening to one of her stories on failed intervention, I was reminded about the challenges of rectangular and triangular contracts (ref: Block, 2011, p.125). Block had warned that consultants need to be careful when there is consultant, consultant's boss, client and client's boss involved in a project. Clarifying who is involved and their specific roles & needs is a primary requirement of the contracting phase.

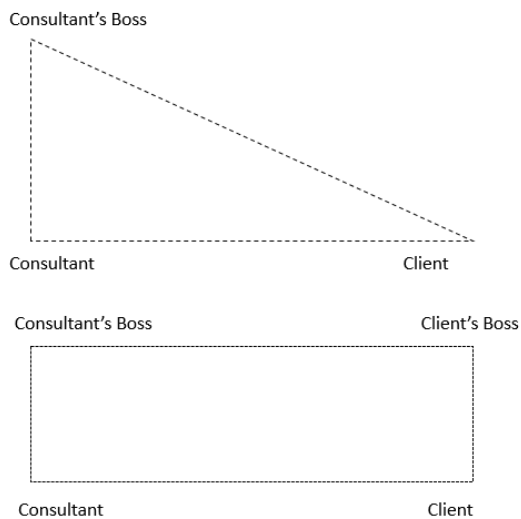


Figure 2: Triangular & Rectangular contract (adapted from Block, 2011, p.125)

While discussing about future work and work practices, I was reminded about the statement from Dr. Dave Uhrich that “ organizations need to be *Market Oriented Ecosystem* ” where organizations continually need to scan the social, technical and political system and anticipate the needs of customers, and able to continuously reinvent itself through continuous learning and innovation (Ref: <https://www.linkedin.com/pulse/emergence-market-oriented-ecosystem-moe->

[organization-dave-ulrich/](#)). This also resonated with “future organizations need to change and adapt routinely” (ref: Cummings & Worley, 2015, p. 664).

As an aspiring HRD practitioner the conversation taught me to continuously scan the horizon to anticipate the changes, sense the organizational need and deficiencies, ask questions, collaborate with business leaders `and be a trusted partner.

Appendix:

Questions to the consultant:

1. What are the competencies required to be a successful OD consultant?
2. What are some of the most common organizational challenges you have witnessed?
3. How do you identify the strengths and weaknesses of an organization?
4. What are some of the techniques you have used as a change agent?
5. How do you provide critical feedback?
6. Please share an example of successful change and unsuccessful change intervention.

What have you learned from the process?

7. How do you measure change?
8. How the changing workforce and globalization has affected the OD practices?

References:

Block, P. (2011). *Flawless consulting: A Guide to getting your expertise used*. (3rd Ed.). New York: Jossey-Bass/Pfeiffer.

Bushe, G. R., and Marshak R.J. (2015) *Dialogic Organization Development: The Theory and Practice of Transformational Change*

Cummings, T.G., & Worley, C.G., (2014) *Organization Development and Change*, Cengage Learning

<https://www.mckinsey.com/business-functions/organization/our-insights/organizational-health-a-fast-track-to-performance-improvement>

OD MENTOR CHRONICLE

<https://wmbridges.com/featured/articles/the-three-questions/>

<https://www.linkedin.com/pulse/what-most-important-contribution-hr-delivers-employees-dave-ulrich/>

<https://www.linkedin.com/pulse/emergence-market-oriented-ecosystem-moe-organization-dave-ulrich/>