

ChangeMasters

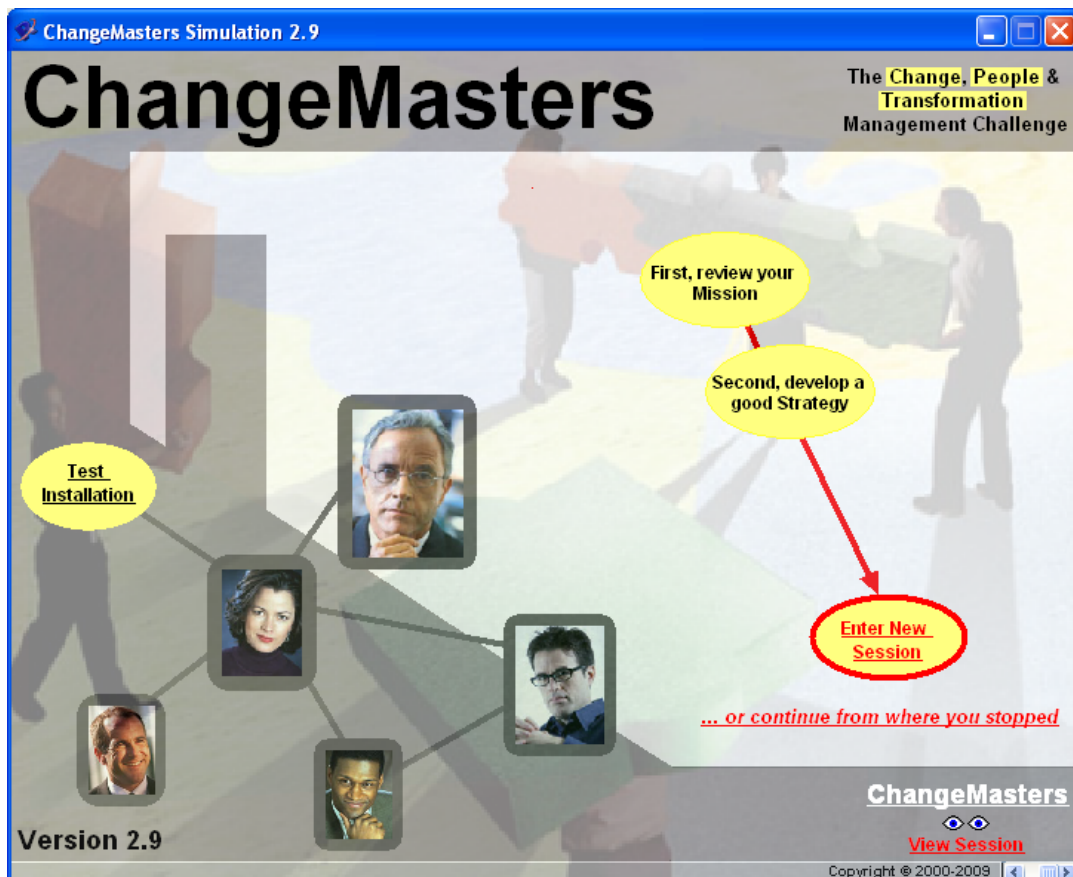
The Change, People & Transformation Management Challenge

User Manual

- 1.0 Overview & Introduction
- 2.0 Your Mission
- 3.0 The Teleswitches Management Team Structure
- 4.0 Getting Started – Your Strategy
- 5.0 Screens & Navigation
- 6.0 Stopping & Saving Sessions

Appendix A: Cross Reference for Key Navigation Buttons

Appendix B: Initiatives (Detailed Descriptions)



1.0 Overview & Introduction

With ChangeMasters you will be challenged to **simulate a 6-month change management intervention** in a large organization (EuroComm Group).

Your **mission** is to successfully deploy the Group's corporate PMS (Performance Management System) in a newly acquired company so that its performance management processes are harmonized with those of the Group.

In practice, the EuroComm's Board has given you a challenging mission, which will absorb all your time and attention over the **next 6 months**. The mission is in fact both critical and difficult. Two years after the acquisition Teleswitches has not yet introduced the performance management processes and systems which are now used consistently and successfully throughout the Group. It's up to you and your Team now, to fix this, **persuading the top management team of Teleswitches** (a group of very successful, but also very autonomous executives) to finally align to the Groups' global processes and start using the corporate Performance Management System (PMS), which will increase consistency, transparency, comparability and ultimately performance corporate-wide.

To complete your mission successfully, you will be **free to choose among many different initiatives/actions/change tactics**. In some cases, you may gather information on the managers (their backgrounds and roles, or also some insights on who regularly drinks coffee with whom, etc.). In other cases, you may take direct action to try to persuade the managers and thus influence their willingness to switch from their current processes and systems to the global ones.

Each time you will decide to implement an initiative, you will receive **qualitative and quantitative feedback** about the impact of your decisions. You will also see the time passing, as every time you will decide to undertake something, this will obviously require time to be completed. And remember that you will be operating under time constraints!

The following sections illustrate in more detail the main elements of the Simulation, and explain the different screens and options.

QuickReading Advice:

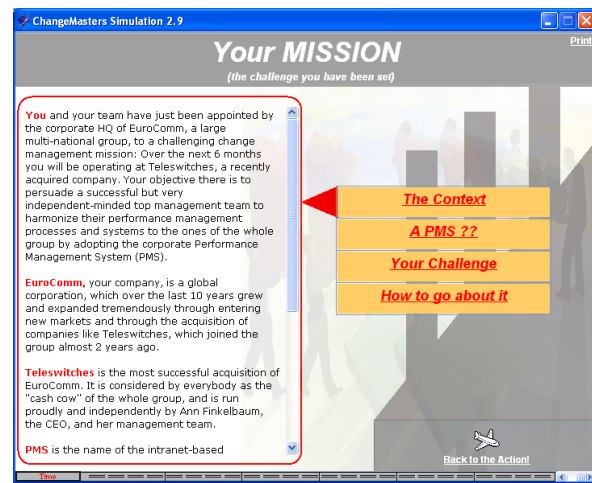
Just read the **Mission Section** (2.0) to better understand the context in which you and your team will operate.

The rest of the manual (Section 3-6) just explains in more detail the user interface of the software you will be using during your mission.

2.0 Your Mission

> The Context

You and your team have just been appointed by the corporate HQ of EuroComm, a large multi-national group, to a challenging change management mission: Over the next 6 months you will be operating at Teleswitches, a recently acquired company. Your objective there is to persuade a successful but very independent-minded top management team to harmonize their performance management processes and systems to the ones of the whole group by adopting the corporate Performance Management System (PMS).

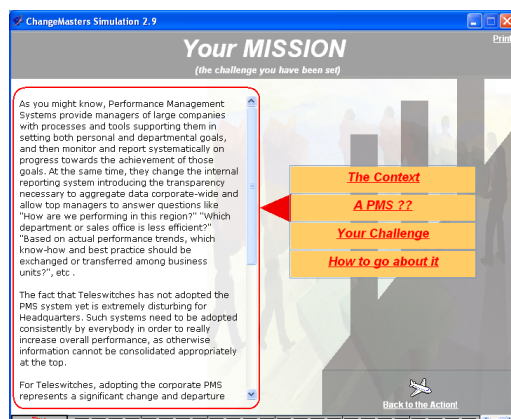


EuroComm, your company, is a global corporation, which over the last 10 years grew and expanded tremendously through entering new markets and through the acquisition of companies like Teleswitches, which joined the group almost 2 years ago.

Teleswitches is the most successful recent acquisition of EuroComm. It is considered by everybody as the "cash cow" of the whole group, and is run proudly and independently by Ann Finkelbaum, the CEO, and her management team.

PMS is the name of the intranet-based performance management system EuroComm has deployed over the last 2 years to make sure that goals are set consistently and monitored continuously corporate-wide. It is said to be the 'backbone' of the whole corporation, providing "Everybody with the information they need to make good decisions and focus on what really matters for the group", as well as a way for everybody to report data and monitor the achievements of goals regularly and systematically. Over the last two years the PMS has been deployed successfully corporate-wide and adopted by all the subsidiaries except Teleswitches, where the CEO - Ann Finkelbaum - has systematically delayed its implementation, in spite of the repeated requests of EuroComm's HQ.

> PMS: New Performance Management processes and systems for Teleswitches



In general terms, **Performance Management Systems** provide managers of large companies with processes and tools supporting them in setting both personal and departmental **goals**, and then **monitor and report systematically on progress** towards the achievement of those goals. At the same time, they change the internal reporting system introducing the transparency necessary to aggregate data corporate-wide and allow top managers to answer questions like "How are we performing in this region?" "Which department or sales office is less efficient?" "Based on actual performance trends, which know-how and best practice should be exchanged or transferred among business units?" etc.

The fact that Teleswitches has **not adopted the PMS system yet** is extremely disturbing for Headquarters. Such systems need to be adopted consistently by everybody in order to really increase overall performance, as otherwise information cannot be consolidated appropriately at the top.

For Teleswitches, adopting the corporate PMS represents a **significant change** and departure from the systems and processes they had deployed and used successfully before being acquired by EuroComm. At the time of the acquisition, Ann Finkelbaum indicated lots of enthusiasm for integrating all the processes of her company to the ones of the group, but since then Teleswitches did not change a lot its way of operating.

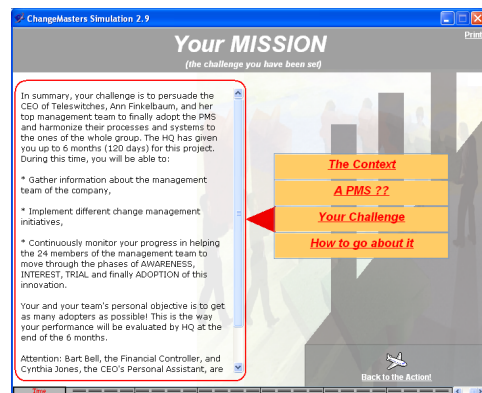
In particular, **all the attempts** of HQ to introduce the PMS at Teleswitches **have failed until now**. Sending information about the advantages of the corporate PMS and news about its successful adoption in other subsidiaries didn't help. Ann Finkelbaum seemed simply too busy running her successful company to have time for introducing such a new system. The "excuses" she presented (lack of time and resources, other priorities, etc.) have thus slowed down and hindered the efficient roll-out of PMS corporate-wide.

> Your Challenge

In summary, your challenge is to persuade the CEO of Teleswitches, Ann Finkelbaum, and her top management team to **finally adopt the PMS and harmonize their processes and systems to the ones of the whole group**.

The HQ has given you up to 6 months (120 days) for this project. During this time, you will be able to:

- **Gather information** about the management team of the company,
- **Implement different change management initiatives,**
- Continuously **monitor your progress** in helping the 24 members of the management team to move through the phases of AWARENESS, INTEREST, TRIAL and finally ADOPTION of this new way of working



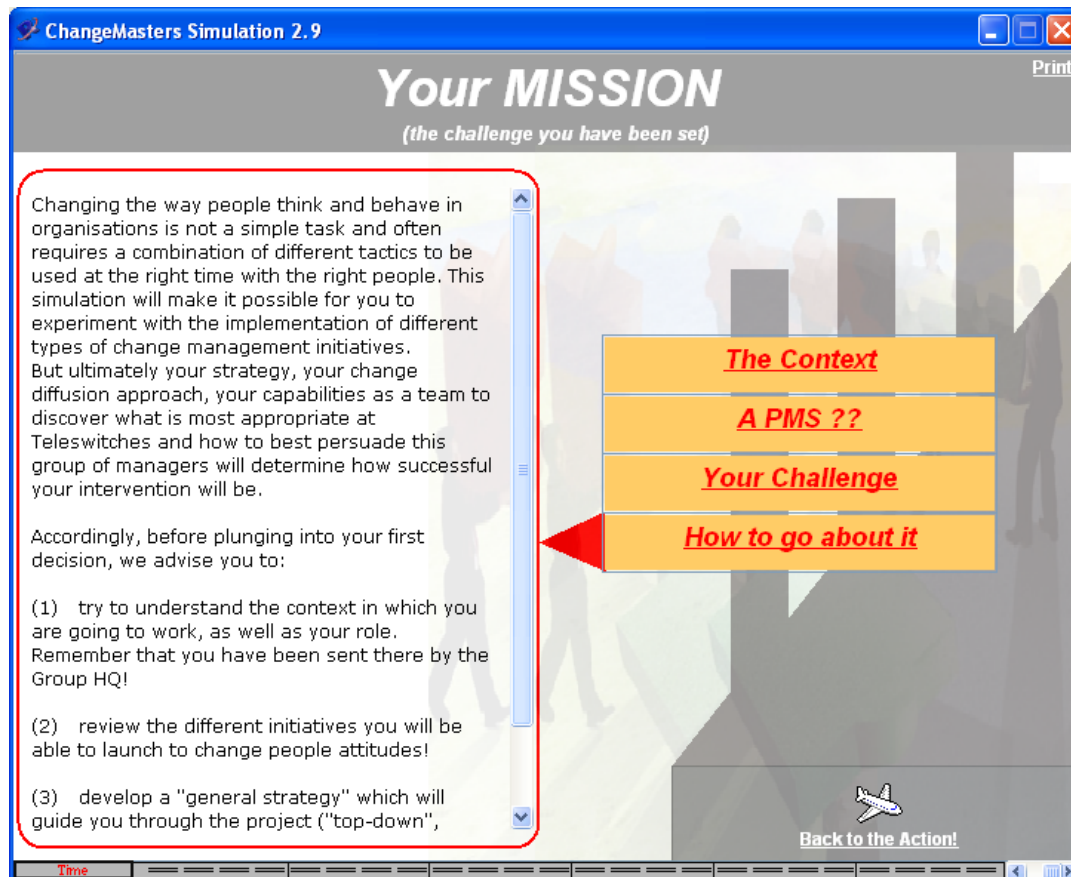
Your and your team's personal objective is to get as many adopters as possible! This is the way your performance will be evaluated by HQ at the end of the 6 months.

Attention: Bart Bell, the Financial Controller, and Cynthia Jones, the CEO's Personal Assistant, are not supposed to adopt and use the PMS. Hence the maximum number of adopters you can reach is 22.

> How to go about it

Changing the way people think and behave in organisations is not a simple task and often requires a combination of different tactics to be used at the right time with the right people. This simulation will make it possible for you to experiment with the implementation of different types of change management initiatives.

But ultimately your strategy, your change diffusion approach, your capabilities as a team to discover what is most appropriate at Teleswitches and how to best persuade this group of managers will determine how successful your intervention will be.



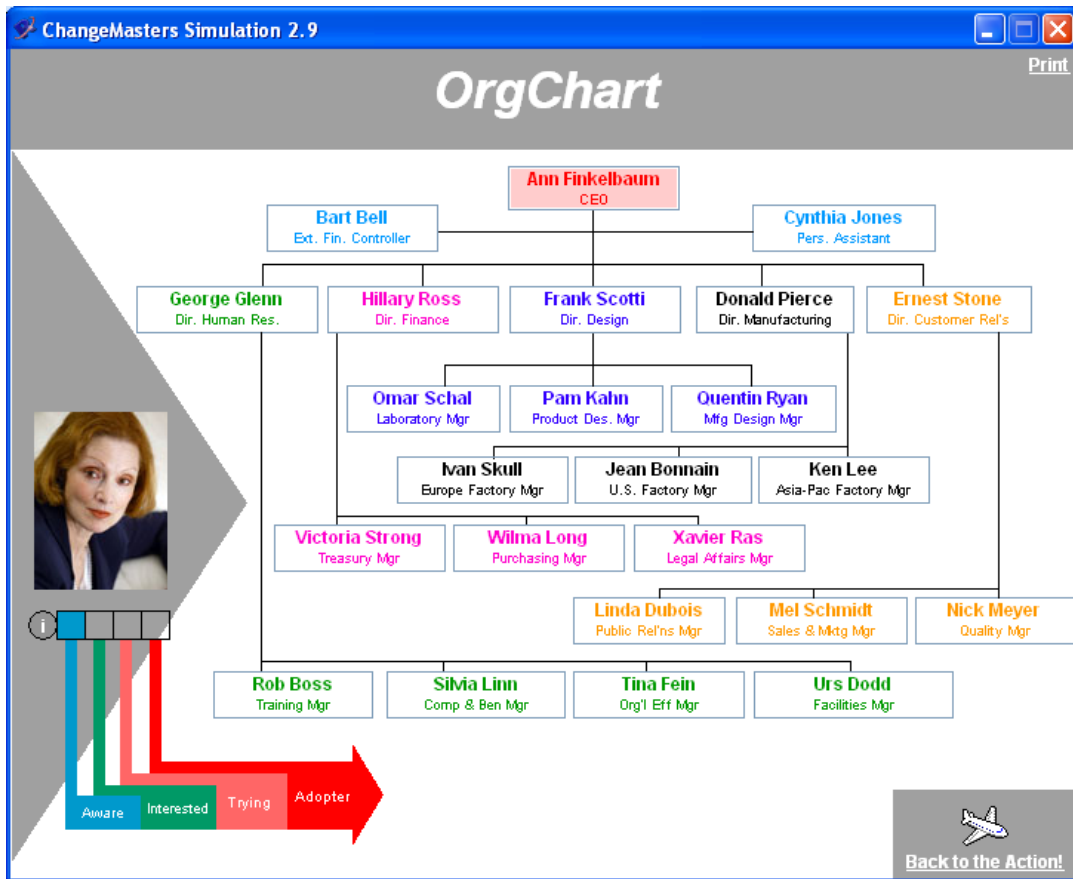
Accordingly, before plunging into your first decision, we advise you to:

- (1) try to **understand the context** in which you are going to work, as well as **your role**. Remember that you have been sent there by the Group HQ!
- (2) review the **different initiatives** you will be able to launch to change people attitudes!
- (3) develop a **"general strategy"** which will guide you through the project ("top-down", "bottom-up", etc.) and write it down!

Good luck!!

To leave the 'Mission' screen, click on the 'Back to the Action!' button.

3.0 The Teleswitches Management Team Structure (OrgChart)



The above screen, 'Org Chart', shows what is displayed if you click on the 'Org. Chart' button at any time during the simulation once you begin.

It is the organisational chart of the management team of Teleswitches Ltd in which you are expected to introduce your innovation during the next 6 months.

The management team of the company consists of 22 managers, an External Financial Controller and the CEO's Personal Assistant. The picture of each person appears when you position the cursor on the name. If you then click on the box, you will also get the profile of that person.

You can access this chart at any time during the simulation, and return to where you were in the simulation by clicking the 'Back to the Action' button.

4.0 Getting Started – A Strategy

Your second action, after reviewing your Mission, should be to click on the 'Strategy' button in the middle oval box of the screen and summarize the strategy you are planning to adopt. Start developing an initial strategy. During the simulation you will be able to come back to the Strategy page anytime you want to review it in the light of the information and feedback you have obtained.

ChangeMasters Simulation 2.9

Our STRATEGY

(how do we plan to proceed to achieve our objective? Top-down? Bottom-up? Sequentially?)

The key points of our strategy are ...

What do you mean by Strategy?

(1) ...
(2) ...
(3) ...
(4) ...
(5) ...

ChangeMasters Simulation 2.9

Our STRATEGY

(how do we plan to proceed to achieve our objective? Top-down? Bottom-up? Sequentially?)

This is your **first challenge!** To develop and agree on a Strategy determining how you, as a team, will succeed in achieving your mission during the next 6 months.

Your **Implementation Strategy** should include considerations related to:

- > the **targeted approach** for your 6-months intervention (e.g. **top-down bottom-up**, ...).
- > **steps and milestones** that you might want to set to structure your progress towards during the 6 months.
- > **interventions** or combination of interventions you might favor (compare with the available interventions list).
- > any **principles or values** you believe you should consider during your actions.
- > as well as **any other points you consider relevant** to guarantee a successful intervention.

A total of 15 minutes maximum should be allocated to the discussion of the implementation strategy to adopt, aiming at reaching a good consensus (as different team members might have initially pretty different views on how to best proceed in such a situation) and at concluding by **summarizing the key points of your implementation strategy** on this screen.

Remember that you can come back any time to your strategy, and extend/revise it if necessary.

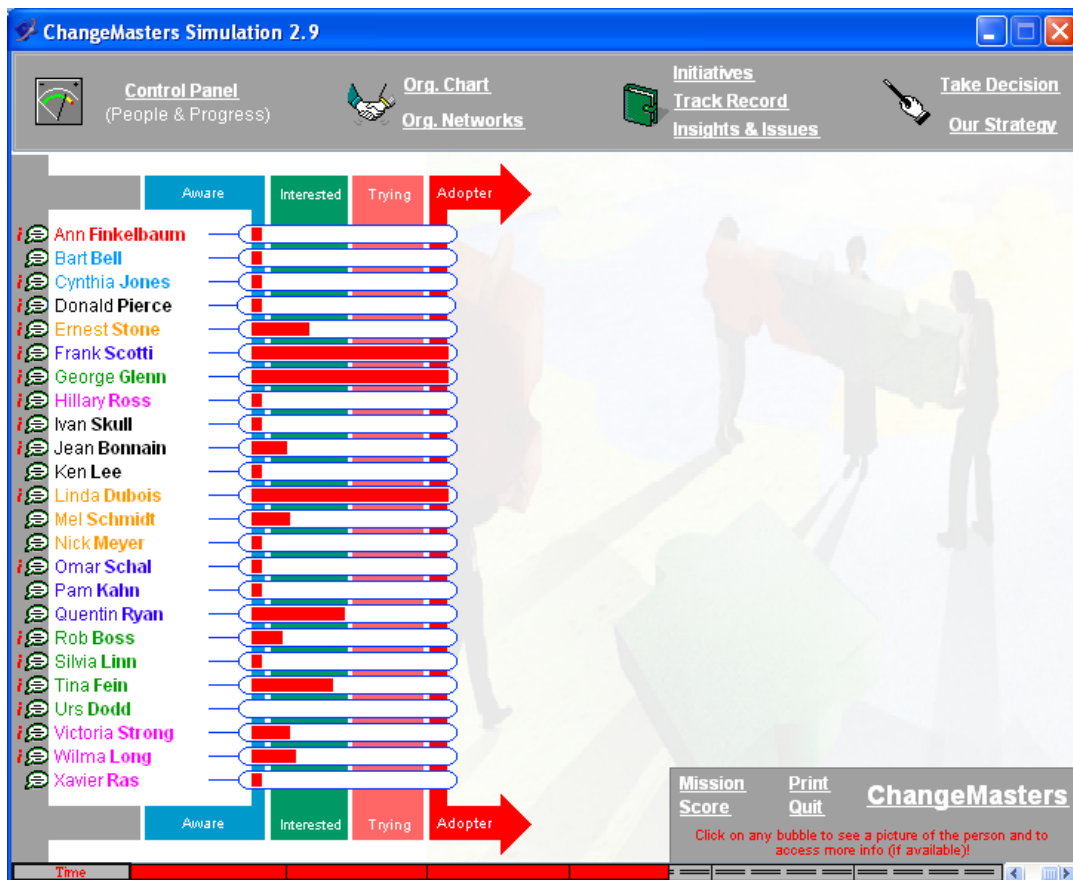
Click **here** to close this message.

Back to the Action!

After having completed your Strategy page, click on the 'Back to the Action' button.

5.0 Screens & Navigation

5.1 Control Panel



On the left hand side of the screen you will see displayed the list of the managers you are trying to convince to adopt the corporate Performance Management System.

A variety of information about these managers can be accessed from this 'Control Panel' screen (depending on the initiatives you take). A status on what you know about a person can be accessed by **placing the cursor over the bubble** to the left of the person's name. A personal profile can be retrieved by **clicking on the (i) bubble** to the left of the person's name.

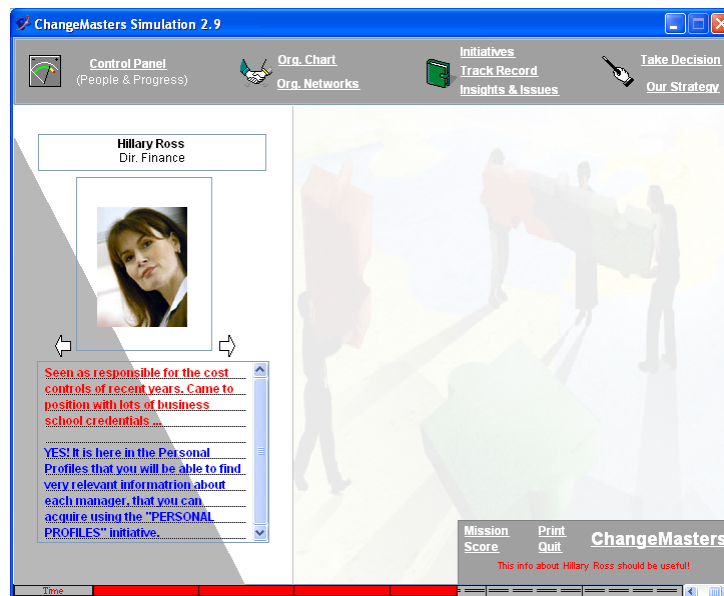
The **red bars** displayed in the box to the right of the managers' names indicate how successful you are currently being in changing the attitude of each manager towards the change that you are trying to introduce.

You can see that the managers all go through a **cycle of adoption**, although at different paces, and can be '**not aware**' yet at all of your change project, '**aware**', '**interested**', or they are starting to have first direct experiences with the new PMS ('**trying**') or might have already '**adopted**' it.

You can access the 'Control Panel' anytime to monitor your progress on the top left hand side of the screen.

Part of the scoring summary at the end of the simulation is a function of the red bars representing the degree of positive attitude that you have achieved for each manager.

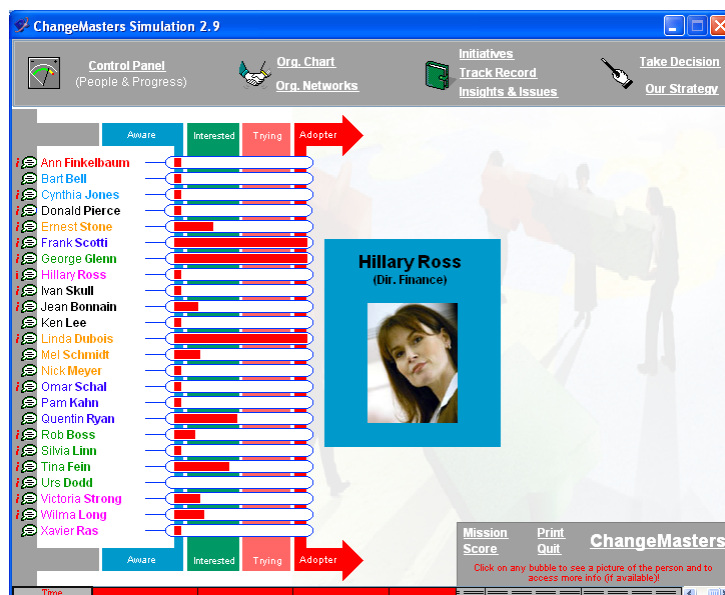
5.2 Personal Profile



The left hand side of the above screen shows an example of the **personal profile**, which can be accessed by **clicking on the (i) bubble** to the left of the person's name or clicking on their **name from the 'Org Chart' screen**. You can also switch quickly between Personal Profiles by clicking on the arrows on either side of the person's image. Access to this information is dependent on the initiatives you have taken.

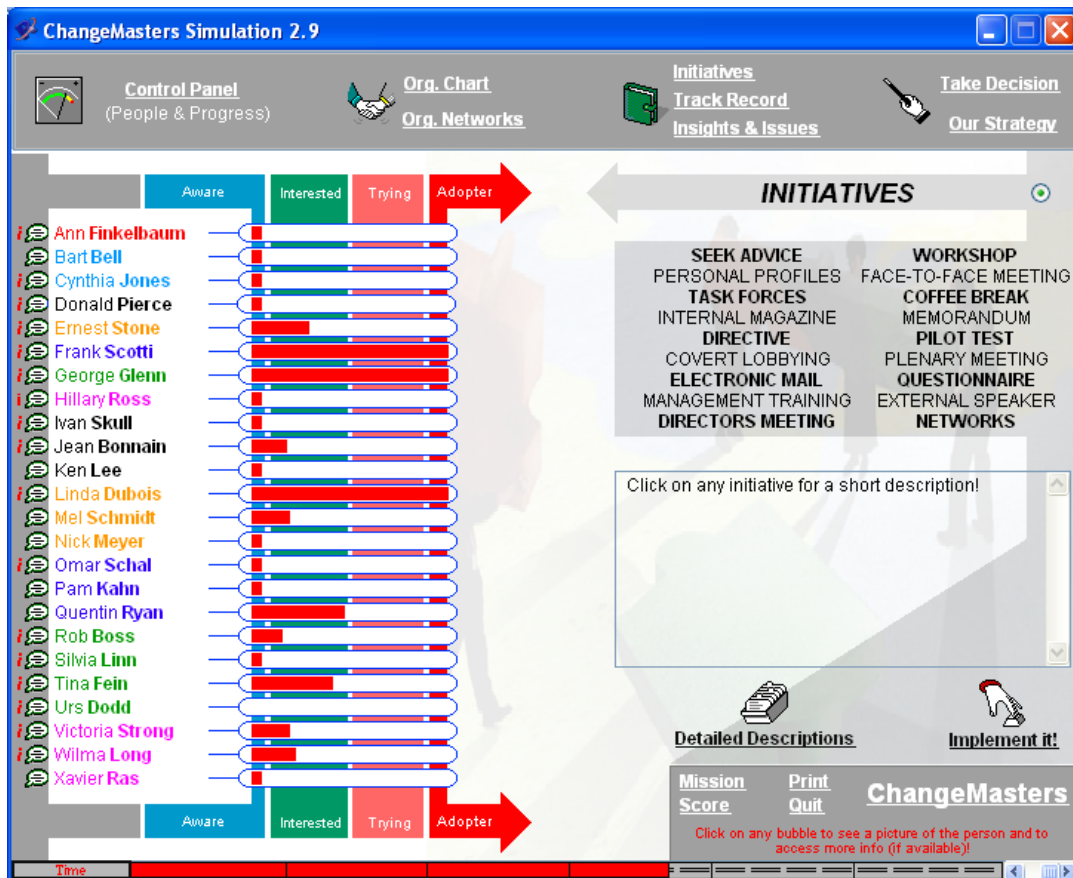
Click the 'Control Panel' button on the top left of the screen to return to the list of all managers.

5.3 Status



The right hand side of the above screen shows a status on what you know about a person. This can be accessed by **placing the cursor on the left of the person's name without clicking**. The color reflects the current adoption stage.

5.4 Initiatives

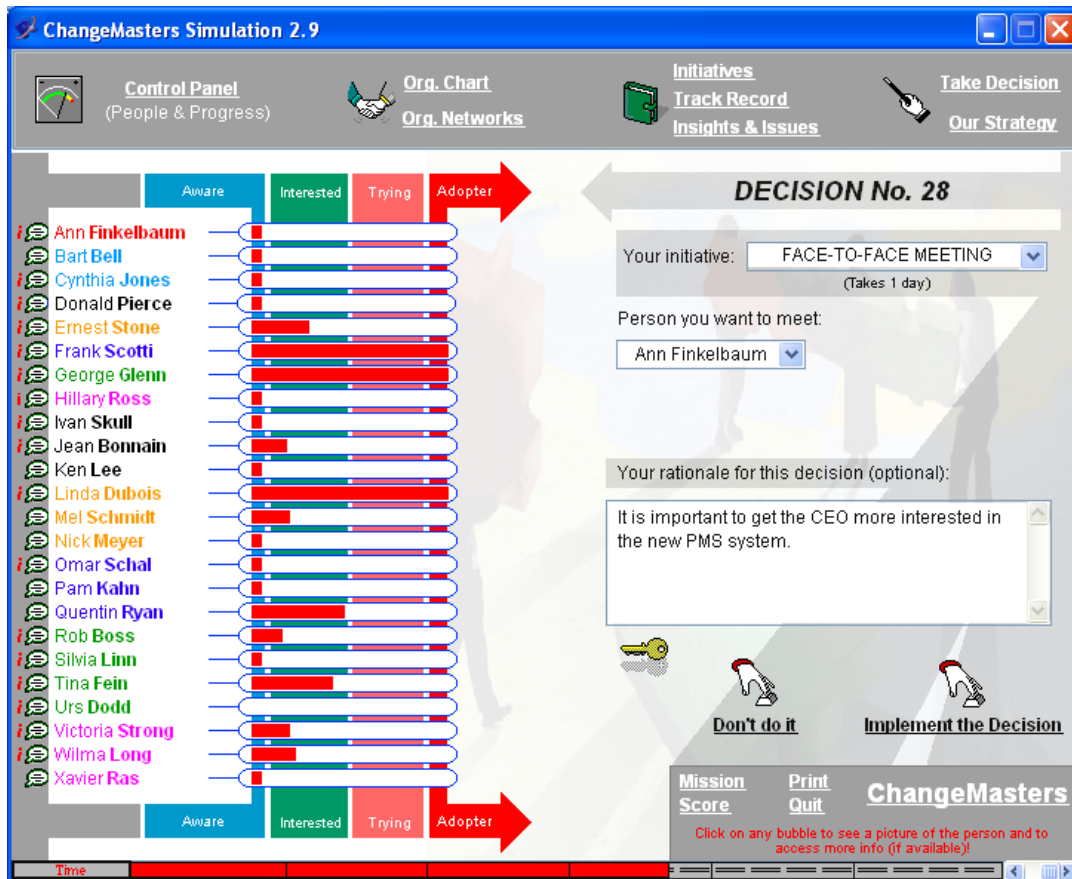


On the right hand side of the screen, if you click on the 'Initiatives' button you will see the above screen, which lists the **change management initiatives** you may launch during the simulation.

A description of each particular initiative will be displayed below this list if you click on any initiative name. You may also click on 'Detailed Descriptions' and scroll through the descriptions of all initiatives at once (see also an Overview in **Appendix B**).

You may also **take a decision** starting from the 'Initiatives' screen. To implement an initiative from this screen, highlight the initiative and click on '**Implement It**'. This will bring the 'Take Decision' screen up (see 5.5) with the initiative already chosen, and a prompt for any other details you need to provide (i.e. the names of managers involved).

5.5 Take Decision



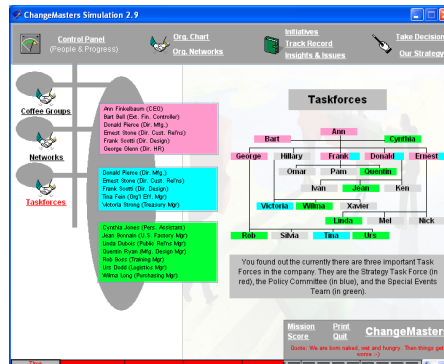
On the right hand side of the screen, if you click on the 'Take Decision' button you will see the above screen, which shows the number of the decision you are about to take.

To implement an initiative, click on the "Your initiative" box and **select the initiative** from the drop down menu that appears. You will also be prompted for any other details you need to provide (ie. Names of people involved). This can be chosen either by **clicking on the name of the person on the 'Control Panel'** (left hand side of screen), or clicking on the box, and selecting the manager (s) from the **drop down menu of names**. If you make a mistake in choosing the initiative or name, or click on the box with the wrong details in it, select '**Don't Do It**' instead of "**Implement the Decision**" at the bottom of the screen.

For each decision, you can optionally complete the 'Your rationale for this decision' box.

After clicking on 'Implement the Decision'. You will receive **immediate feedback** on your chosen initiative. You will receive a summary of the outcome, a positive or negative indication of any attitude changes of the managers involved (and maybe not involved), and the clock will continue ticking off along the bottom of the screen (against the 6 months) for the time taken to implement the initiative.

5.6 Org Networks button



Click on '**Org Networks**' and you can access information regarding the managers - who has coffee with whom - ('**Coffee**'), who socialises with whom - ('**Social**') and who is on which task force with whom - ('**Task Forces**'). Access to this information is dependent on the various initiatives you have implemented.

5.7 Insights & Issues

The screenshot shows the 'ChangeMasters Simulation 2.9' interface with the 'Team Insights & Issues' form open. The form is titled 'Team Insights & Issues' and has a 'Print' button in the top right. It is divided into three sections: 'Related to Strategy', 'Related to Tactics', and 'Other Relevant Points'. Each section has two columns: 'DO s' and 'DONT s'. The 'DO s' column is for sharing insights, and the 'DONT s' column is for sharing issues. At the bottom, there is a text box: 'Summarize and share here the KEY POINTS from reflecting about your experience with this Mission. Share INSIGHTS (what you think you have learned) as well as ISSUES (what you'd like to understand better).' and a 'Back to the Action!' button. The 'ChangeMasters' logo is also visible.

This Version of the Simulation provides the possibility to take notes anytime during a session. This Learning Notebook, accessible by selecting **Insights & Issues** in the upper right side of the screen also provides a structured way to summarize key insights and issues after completing a session.

You may fill in the **Do's** column on the screen to share "Insights" of what you have learned from the experience as well as **Dont's** column for the "Issues" of Change Management you would like to know more about. You are able to print it on paper

or on a slide. The content of the Do & Dont's sheet is recorded in the Session Report.

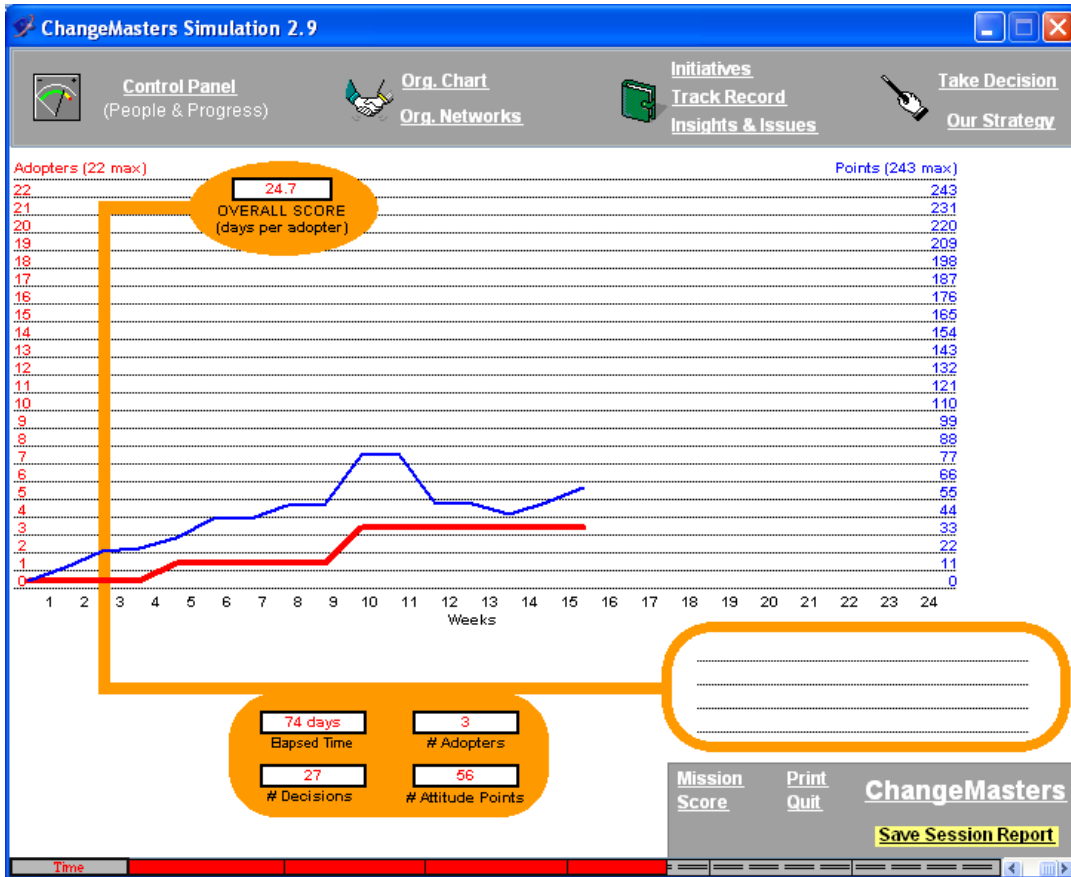
5.8 Track Record

The screenshot shows the 'ChangeMasters Simulation 2.9' interface. The main window displays a list of participants and their progress through four stages: Aware, Interested, Trying, and Adopter. A 'Track Record' window is open, showing a list of 15 initiatives. The 'History Details' button is visible below the list.

Dec	Time	Initiative	--> Result
# 1	(1- 3)	INTERNAL MAGAZINE	
# 2	(4- 5)	PERSONAL PROFILE	
# 3	(6- 7)	SEEK ADVICE (Stone)	
# 4	(8- 8)	FACE-TO-FACE MEETING (Finkelba	
# 5	(9-15)	DIRECTIVE	
# 6	(16-16)	TASK FORCES	
# 7	(17-17)	FACE-TO-FACE MEETING (Scotti)	
# 8	(18-18)	STAFF MEETING DISCUSSION	
# 9	(19-20)	PERSONAL PROFILE	
#10	(21-21)	FACE-TO-FACE MEETING (Fein)	
#11	(22-24)	INTERNAL MAGAZINE	
#12	(25-25)	FACE-TO-FACE MEETING (Jones)	
#13	(26-26)	WORKSHOP (Ross)	
#14	(27-28)	PERSONAL PROFILE	
#15	(29-29)	ELECTRONIC MATI	

Click on 'Track Record' at any point during the simulation and you will see a **summary of your initiatives to date** that you can scroll through. For a detailed history of your Initiatives: Decision #, Initiative, Rationale, Outcome (ie. the immediate feedback), and No. of Adopters to date – click on 'History Details' and scroll through your results.

5.9 Score



This shows the score sheet that is displayed if you click the "**Score**" button located on the bottom middle of the screen.

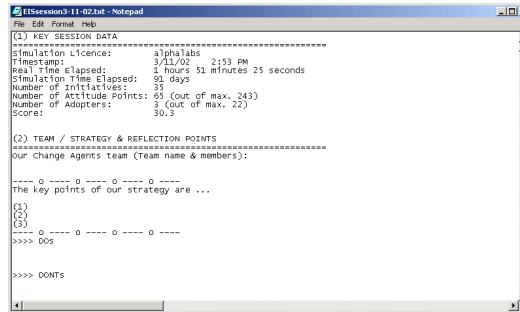
You may click on this at any time to see how you are progressing, and you can return to the simulation by clicking on the buttons at the top of the screen.

The **thin blue line** on the graph (the top one) indicates the cumulative 'positive attitude' (ie. the red bars) you have succeeded in gathering. As you can see in the example on the screen above, the cumulative positive attitude can decrease too during the project, depending on your initiatives and other events that can happen during the 6 months implementation period!

The **thick red line** (the bottom line) indicates the cumulative number of managers you have convinced to adopt. Once someone has adopted they cannot move back through the adoption process.

The numeric scores, the number of 'Days per Adopter', Elapsed Time, '# of Adopters', and '# of Decisions' '# of Attitude Points' are on the top left of the screen.

5.10 Save Session Report



```
[Sessions]-11-02.txt - Notepad
The Edit Format Menu

(1) KEY SESSION DATA
=====
Simulation License:   alpha labs
Timestamp:           3/11/02  2:53 PM
Real Time Elapsed:   1 hours 51 minutes 25 seconds
Simulation Time Elapsed: 91 days
Number of Initiatives: 35
Number of Attitude Points: 65 (out of max. 243)
Number of Adopters:  2 (out of max. 22)
Score:               30,3

(2) TEAM / STRATEGY & REFLECTION POINTS
=====
Our Change Agents team (Team name & members):

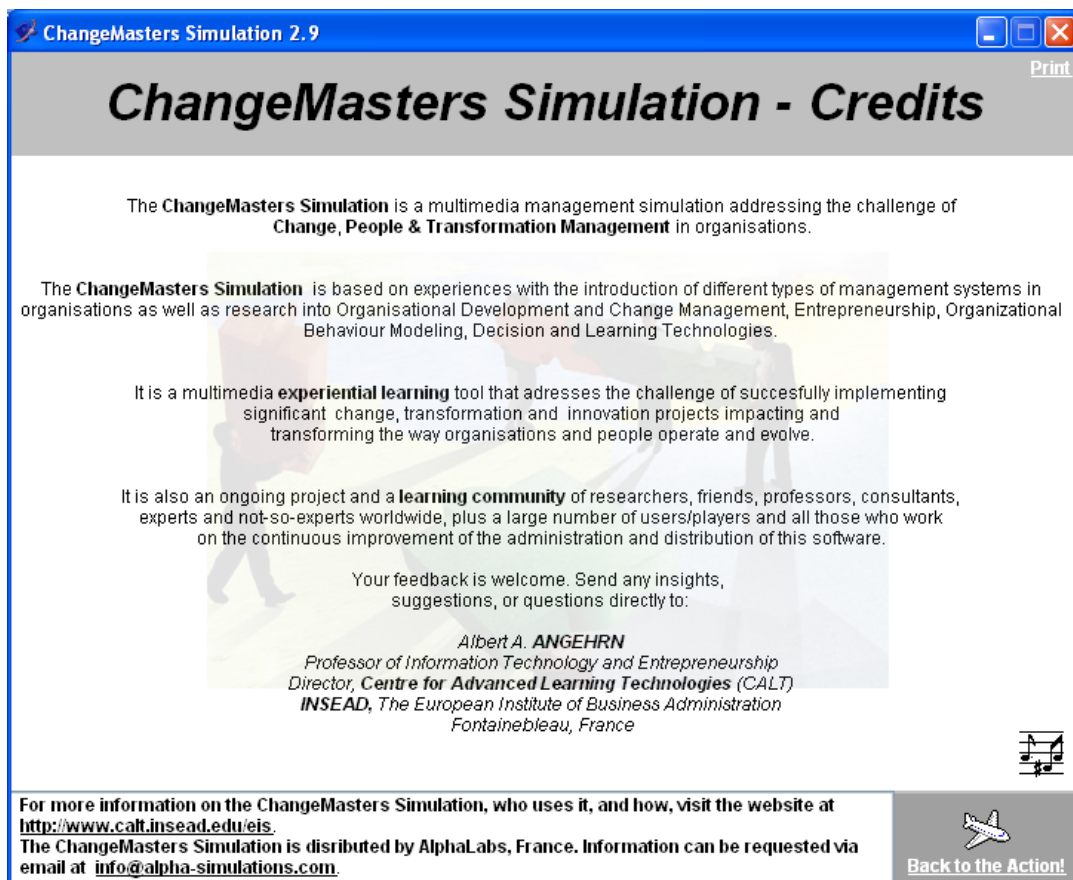
---- 0 ---- 0 ---- 0 ---- 0 ----
The key points of our strategy are ...

(1)
(2)
(3)
---- 0 ---- 0 ---- 0 ---- 0 ----
>>>> DOs

>>>> DONTs
```

You may save your session's report at any time during the simulation by clicking on the **"Save Session Report"** button on the right hand side of the **"Score"** screen. The report allows you to get details about the session including: the date of running, number of adopters, number of initiatives and the time spent to implement these initiatives and of course the key points of the adopted strategy and also the content of do and dont's learning points. Beside you will also get all the information on the adoption stage of each person as well as the feedback for each implemented initiative.

5.11 Credits Screen



ChangeMasters Simulation 2.9 Print

ChangeMasters Simulation - Credits

The **ChangeMasters Simulation** is a multimedia management simulation addressing the challenge of **Change, People & Transformation Management** in organisations.


The **ChangeMasters Simulation** is based on experiences with the introduction of different types of management systems in organisations as well as research into Organisational Development and Change Management, Entrepreneurship, Organizational Behaviour Modeling, Decision and Learning Technologies.

It is a multimedia **experiential learning** tool that addresses the challenge of successfully implementing significant change, transformation and innovation projects impacting and transforming the way organisations and people operate and evolve.


It is also an ongoing project and a **learning community** of researchers, friends, professors, consultants, experts and not-so-experts worldwide, plus a large number of users/players and all those who work on the continuous improvement of the administration and distribution of this software.

Your feedback is welcome. Send any insights, suggestions, or questions directly to:

Albert A. ANGEHRN
Professor of Information Technology and Entrepreneurship
Director, **Centre for Advanced Learning Technologies (CALT)**
INSEAD, The European Institute of Business Administration
Fontainebleau, France



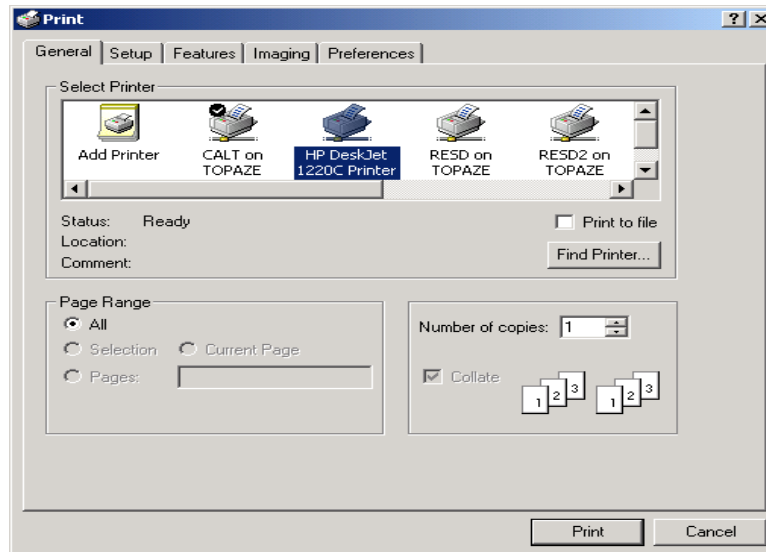
For more information on the ChangeMasters Simulation, who uses it, and how, visit the website at <http://www.calt.insead.edu/eis>.
The ChangeMasters Simulation is distributed by AlphaLabs, France. Information can be requested via email at info@alpha-simulations.com.

 **Back to the Action!**

This screen provides information about the simulation and those who have contributed to its design, development and continuous updating. It is displayed if you click on the **'ChangeMasters'** button located on the bottom left hand corner of every screen.

5.12 Print

The 'PRINT' button allows the printing of any page in the Simulation (e.g the SCORE page). In case you print directly on a transparency, you will have to insert the transparency in the printer and choose the appropriate printing options.



6.0 Stopping & Saving Sessions

6.1 Stopping & Restarting

This Version of the Simulation allows you to "stop" a session anytime you want and "resume" it at a later stage. To "stop" the session, just quit the simulation software by selecting **Quit**. The current session will be automatically saved in the file "EISMission.eis". To "restart" a session just select **... or continue from where you stopped** which will appear automatically on the Main Screen the next time you will enter the simulation software.

6.2 Automatic Saving before Quitting a Session

This Version of the Simulation automatically saves a copy of the session every time you quit the simulation software (in addition to producing the Report in editable form). Hence the latest state of the session is always stored in the file "EISMission.eis" and can be reloaded. You can always restart your session from the point you left it by selecting **... or continue from where you stopped** after restarting.

APPENDIX A

Cross Reference for Key Navigation Buttons (at Top of Screen)

Control Panel (People & Progress)	Refer 5.1
Org. Chart	Refer 3.0
Org. Networks	Refer 5.6
Initiatives	Refer 5.4
Track Record	Refer 5.8
Insights & Issues	Refer 5.7
Take Decision	Refer 5.5
Our Strategy	Refer 4.0



Cross Reference for Key Navigation Buttons (at Bottom of Screen)

Mission Score	Refer 2.0
Print	Refer 5.9
Quit	Refer 5.12
ChangeMasters (Credits)	Quit
	Refer 5.11

APPENDIX B

INITIATIVES

SEEK ADVICE: Organise a meeting with any one member of the top management team in order to get some advice on how to approach the PMS project in the most effective manner. (2 days) **NOTE** – You will not actually receive advice in the feedback message; the aim is to influence the person you visit by taking the 'humble' approach.

PERSONAL PROFILES: Build a personal profile on any five members of the top management team by talking informally with your network at EuroComm HQ. (2 days) **NOTE** – Each person's profile includes a qualitative description of the individual and an indication of how difficult it will be to move that individual through the four change phases.

TASK FORCES: Discover which top managers are on the company's three main task forces. (1 day) **NOTE** – These membership lists will not change, and will remain available throughout the simulation.

INTERNAL MAGAZINE: Ask the editor of the internal magazine to include a short article you write on the advantages that PMSs can bring to managers. (3 days) **NOTE** – This magazine is distributed to all of the top management team. The article is about the generic advantages of PMS, and does not include any company specific information.

DIRECTIVE: Try to convince the CEO to send out a directive to everyone on the top management team insisting that they start using the PMS in two weeks' time. (7 days) **NOTE** – You spend several days writing a draft of this directive to give to the CEO.

COVERT LOBBYING: Without the formal approval of the Directors concerned, suggest to a group of selected Managers that they meet the CEO to lobby for the implementation of the PMS. (8 days) **NOTE** – This initiative assumes that you have identified the appropriate Managers to approach, and does not require you to specify them.

ELECTRONIC MAIL: Send a brief electronic mail to everyone on the top management team explaining your ideas on why a PMS makes sense for them. (1 day) **NOTE** – All of the top managers have an individual E-mail account.

MANAGEMENT TRAINING: For five members of the top management team, organise a 3-days residential training program at a nearby business school on the potential benefits of a Performance Management System and how to actually use such a system. (5 days) **NOTE** – You do not attend the programme, but it takes a considerable amount of your time to plan it.

DIRECTORS MEETING: Organise a special interdepartmental meeting in the main conference room with all the five directors and the CEO to share and discuss thoughts and plans for the PMS project. (3 days) **NOTE** – Directors are informed that they can also bring along Managers from their department.

WORKSHOP: Help one of the top managers to organise and lead a demonstration and discussion session on PMS for all the top managers interested in the topic. (5 days) **NOTE** – This will provide the opportunity for the workshop leader to share and gather views and experiences on PMS.

FACE-TO-FACE MEETING: Fix a meeting with one of the top managers in order to persuade him/her that the Performance Management System would make sense to implement. (1 day) **NOTE** – The meeting will take place in the manager's office.

COFFEE BREAK: Spend some time at the company bar in order to see which groups of top managers meet regularly for a coffee. (3 days) **NOTE** – These groups will not change, and the list will remain available throughout the simulation.

MEMORANDUM: Write and send to any five of the top managers a brief memo on how some of the specific features of the PMS will improve transparency of information flows in the company. (1 day) **NOTE** – This is distributed in the company internal mail system.

PILOT TEST: Try to get commitment from one of the top managers by asking him/her to organise a two-week-long pilot test of the PMS in his/her department using current company data. (4 days) **NOTE** – This will involve setting up the PMS on all the department's computers and providing users with the appropriate training.

PLENARY MEETING: Develop a presentation on the PMS Project, and present it during the regular weekly top managers staff meeting attended by everybody. (5 days) **NOTE** – The presentation includes potential applications of the PMS within the different departments. All members of top management are in principle expected to attend these meetings.

QUESTIONNAIRE: Write and distribute to all the top managers a questionnaire aimed at assessing their current level of interest in becoming regular PMS users. (2 days) **NOTE** – The main objective of using this questionnaire is to demonstrate your approach to the project rather than gathering additional information.

EXTERNAL SPEAKER: Organise a speaker event in which Professor Tom Petersen, an expert on Performance Management, will deliver an address entitled: "PMS: Liberating performance in the organisation". (5 days) **NOTE** – Everyone in the top management team is invited by memo to this event, but attendance is optional.

NETWORKS: Spend some time observing or finding out which top managers go together regularly to the company health club, who is involved in the local charity campaign, and who is looking informally at environmental issues together. (5 days) **NOTE** – These groups will not change, and the lists will remain available throughout the simulation.