

CHANGE THAT STAYS · CHAPTER ONE

The Line Came Back in November

An improvement fades in the months after it is declared done, and those months are a stage of the work with their own measure and their own owner.

Ammanuel Santa Anna

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THE LICENCE

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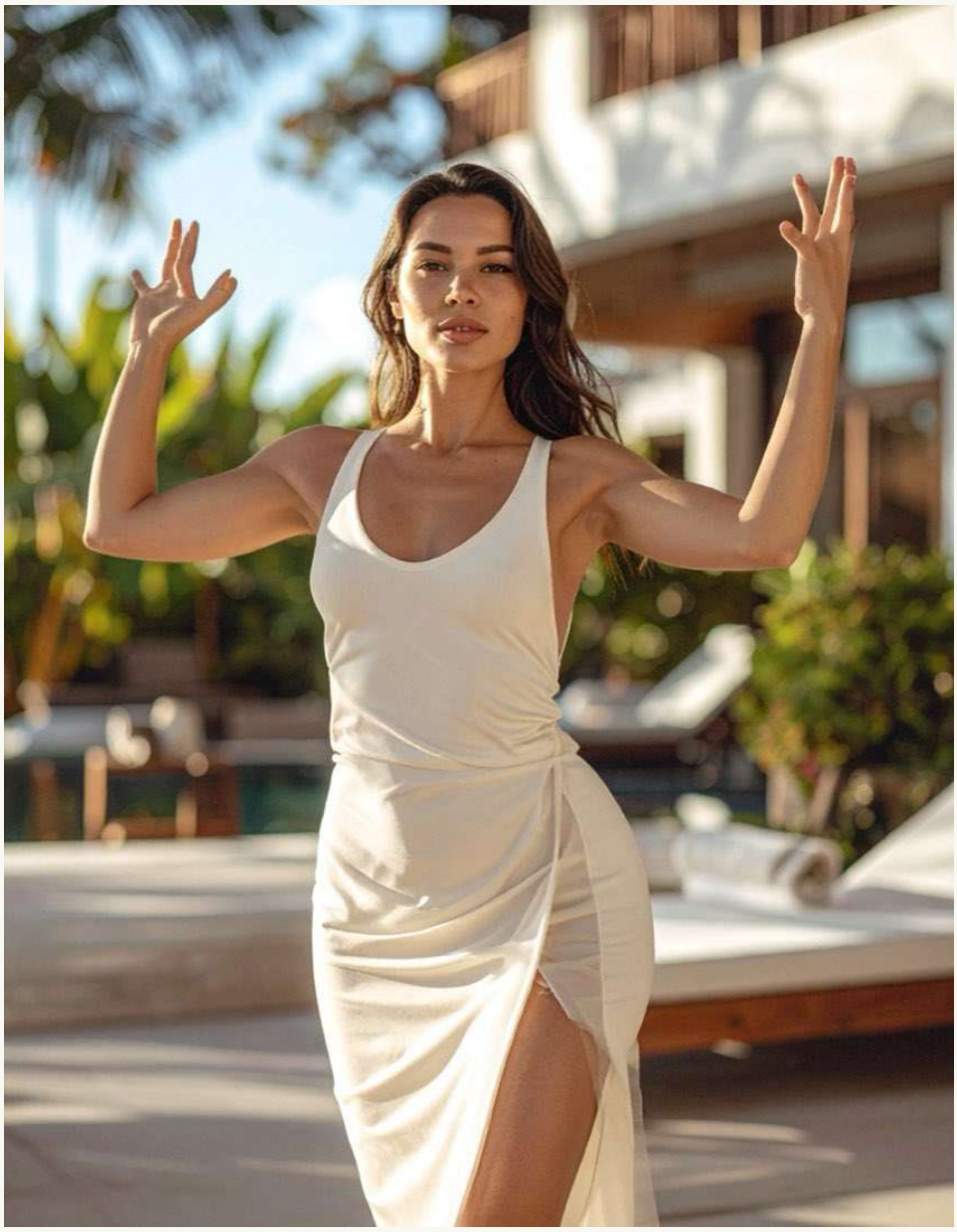
ABSTRACT

An improvement fades in the months after it is declared done, and those months are a stage of the work with their own measure and their own owner. It is ten past four on the last Friday in November, and the outpatients office on the second floor has emptied early. The clinic manager has the monthly report open on her screen and a mug of tea going cold beside the keyboard. The radiator under the window ticks. She is looking for one line, the rate at which patients miss their appointments, and she finds it on the third page. In March it sat near the top of the chart. By June, after four months of reminder calls, a rebooking desk and a new letter, it had fallen to the bottom third, and the project team had cake in the seminar room and a thank-you email from the director. She scrolls back through the summer. July, a little higher. September, higher again. November is where March was.

CHAPTER ONE

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Ten past four, the monthly report

It is ten past four on the last Friday in November, and the outpatients office on the second floor has emptied early. The clinic manager has the monthly report open on her screen and a mug of tea going cold beside the keyboard. The radiator under the window ticks. She is looking for one line, the rate at which patients miss their appointments, and she finds it on the third page. In March it sat near the top of the chart. By June, after four months of reminder calls, a rebooking desk and a new letter, it had fallen to the bottom third, and the project team had cake in the seminar room and a thank-you email from the director. She

scrolls back through the summer. July, a little higher. September, higher again. November is where March was.

Nobody stopped the work. Nobody decided to go back. The reminder calls still happen, most days. The re-booking desk still exists, though it is staffed now by whoever is free. Her shoulders, which have been tight since the second page, know before she does that she will be asked about this at the next performance meeting, and that the honest answer is that she does not know when it went. She is a composite, drawn from the way these months are described in the research below and in the house's own practice, and no hospital is meant.

Ammanuel Santa Anna's canon has a passage for the moment she is in, and it is unusually exact about how quietly it happens.[1] Writing about the stage of any organisational change at which the new way has to come home and live in ordinary days, it says:

> *The return threshold is where many transformations die — not dramatically, but quietly. The new insights are gradually forgotten. The old patterns reassert themselves. The boon, instead of transforming the daily life of the organization, becomes a nostalgic memory: "Remember when we…" The practitioner who is attentive to the return threshold knows that this is where the most patient and persistent work is needed — not the dramatic interventions of the departure phase, but the steady, unglamorous practice of embodying the new in every small decision and interaction.*

This chapter makes one claim. Most improvements that fade were not rejected; they were left unread. The months after a project is declared done are a stage of the work in their own right, with their own measure and their own owner, and an organisation that treats them as the end of the work will keep finding its best results back where they started.

Three words Lewin barely wrote

Every manager who has sat through a change course has met the three words. Unfreeze, change, refreeze. The model is usually attributed to the social psychologist Kurt Lewin and to a paper he published in 1947, *Frontiers in Group Dynamics*, the first article in the first issue of the journal *Human Relations*.[2] Its appeal is obvious. It says that people and groups settle into a way of working, that the settled way must be loosened before anything new can take hold, and that the new way must then be made settled in its turn. The third word is the one the clinic manager needed. Refreezing is the step at which a change stops depending on the effort that introduced it.

The house's Luminous 100, its reading of the frameworks every consultancy sells, keeps the model and changes the metaphor. Ice is the wrong picture of an organisation, it says, because "organizations aren't

frozen objects that need thawing but living systems in developmental homeostasis". And it replaces the violence of breaking the status quo with three gentler questions: "What is already softening? What is ready to flow? What new form is the living system yearning to take?" A living system does not stay where it is put. It keeps returning to the balance its forces hold it in, and the work of a change is to move the forces, not only the position.

The scholarship on Lewin has, in the last twenty years, moved in an unexpected direction. In 2016 Stephen Cummings, Todd Bridgman and Kenneth Brown compared what Lewin actually wrote about changing in three steps with how later textbooks presented it.[3] Their conclusion was that he never developed such a model. The terms appear, briefly, in a long paper about group dynamics and field theory, and the tidy three-box diagram took form after his death, in the hands of the writers who built a new field called change management on top of it. Twelve years earlier Bernard Burnes had mounted a careful defence of Lewin's wider approach against its usual critics, who said it assumed organisations were stable, ignored power and suited only small changes.[4] Burnes argued that the three steps were one part of a body of work that also included field theory, group dynamics and action research, and that the whole was still useful.

Both readings matter to a clinic manager on a Friday afternoon, for the same reason. Lewin's concern was that a group's level of work is held where it is by forces in balance, and that a change made without altering those forces will drift back.[5] That is not a step at the end of a project. It is a description of what happens to every project, all the time, and it is the part of his thinking the three boxes least convey. A box called *refreeze* invites a team to do something once, at the end, and then stop. The forces that pulled the missed-appointment rate back up in July did not stop.

The canon has a sentence that keeps both halves of the matter in view, and it is a useful corrective to the way change courses talk about stability, as if it were the enemy. Living systems, it says, balance two imperatives, keeping a stable identity and adapting to new conditions: "Too much homeostasis becomes rigidity; too much evolution becomes chaos. The gift is in the dynamic balance." The clinic did not need less stability in July. It needed the new arrangement to become the thing its stability defended. A change has held when the organisation's ordinary pull towards balance works for it rather than against it.



A number nobody can find

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A number nobody can find

Most writing about change begins with a figure. Seventy per cent of change initiatives fail, it says, and the figure is attributed to consultancies, to business schools, to "the research". It appears in board papers, in proposals and in the opening slides of almost every change course. It is a useful figure for anyone selling help, because it makes failure the normal case.

In 2011 Mark Hughes went looking for its source.[6] He reviewed five separate published instances in which a seventy per cent failure rate for organisational change was stated, traced each to its evidence, and found

the same thing in every case: an absence of valid and reliable empirical evidence for the number. His conclusion was plain. A popular narrative of seventy per cent failure exists, and there is no valid and reliable empirical evidence to support it. He added that the idea of an inherent failure rate is itself hard to defend, because change is ambiguous, depends on context, is judged differently by different people, unfolds over time and is often not measured at all.

This chapter does not use the figure, and it is worth saying why the absence helps. A leader who believes that seventy per cent of changes fail will read the November chart as fate. One who knows that nobody has counted will read it as information about this change, in this clinic, in these months. The second reading is the useful one, because it asks what happened in July.

The figure survives for a reason that has little to do with evidence. It is comfortable. A change that fades inside a world where most changes fail is not anyone's fault, and a leader who has quoted the number at the start of a programme has, without meaning to, already written its excuse. The honest alternative is less comfortable and more useful. Nobody knows how often changes fail in general, but any organisation can know how its own last three changes fared, if somebody looks, and that history is a far better guide to the fourth.

What the later studies found

There is a smaller and more careful literature on what happens after a change is introduced, and it is mostly written by people in health care, where a programme that fades can be measured in missed diagnoses and longer waits.

In 2005 a team led by David Buchanan reviewed what was then known about sustaining organisational change, and opened with a question the clinic manager could have written: why do some changes persist, while others decay?[7] They defined sustainability as the process through which new working methods, performance goals and improvement trajectories are maintained for a period appropriate to the context. They noted how little attention it had received, and how often stability was treated in management writing as a symptom of inertia, a problem to be solved, rather than as an achievement. And they found that sustainability depended on factors at almost every level an organisation has: the change itself, individuals, managers, money, leadership, culture, politics, process, context and time. Their honest finding was that the relative weight of those factors could not be known in advance.

Read the clinic's year against their list and most of it is there. The change itself was simple enough to keep. The individuals who ran the rebooking desk were moved. The manager's attention went to winter. The money for the analyst's time ended with the project. Nobody would call any of those a decision about the missed-appointment rate, and together they decided it. That is what makes the review useful to a practitioner even though it cannot rank its factors: it is a list of the forces to watch, and most of them move on the day a project is declared finished.

The same year Mary Ann Scheirer reviewed nineteen empirical studies of health programmes in the United States and Canada.[8] In fourteen of the seventeen studies that looked at whether programme activities continued, at least sixty per cent of sites reported keeping at least one component going. That is a finding about partial survival, not about success, and Scheirer was clear that the studies' methods had substantial limits. Seven years later Shannon Wiltsey Stirman and colleagues identified 125 studies of sustainability.[9] About half relied on people's own reports, few used rigorous methods, and among those that did, only a small number reported that a programme had been fully sustained.

The grade on this evidence is modest and should be said. Most of the studies are retrospective and naturalistic, many measure whether an activity is still done rather than whether its benefit has lasted, and almost none can say why one site held and another did not. What they agree on is the shape the clinic manager is looking at. Changes rarely vanish. They thin. A component survives, the reminder calls go on most days, and the result drifts back while everyone can truthfully say the new way is still in place.

Where the attention went

If the decay is not a decision, it has to be a mechanism, and the mechanism is ordinary. Consider what changed at the clinic in June. The project team, which had met every Tuesday, stopped meeting. The analyst who had produced the weekly chart went back to her other work, and the chart became a line on the third page of a monthly report. The two administrators who had run the rebooking desk were thanked and returned to their posts, and the desk was given to whoever was free. The director's attention, which had been on the missed-appointment rate since February, moved to the winter plan. Nothing in that list is a mistake. Every item is what an organisation does when a project ends.

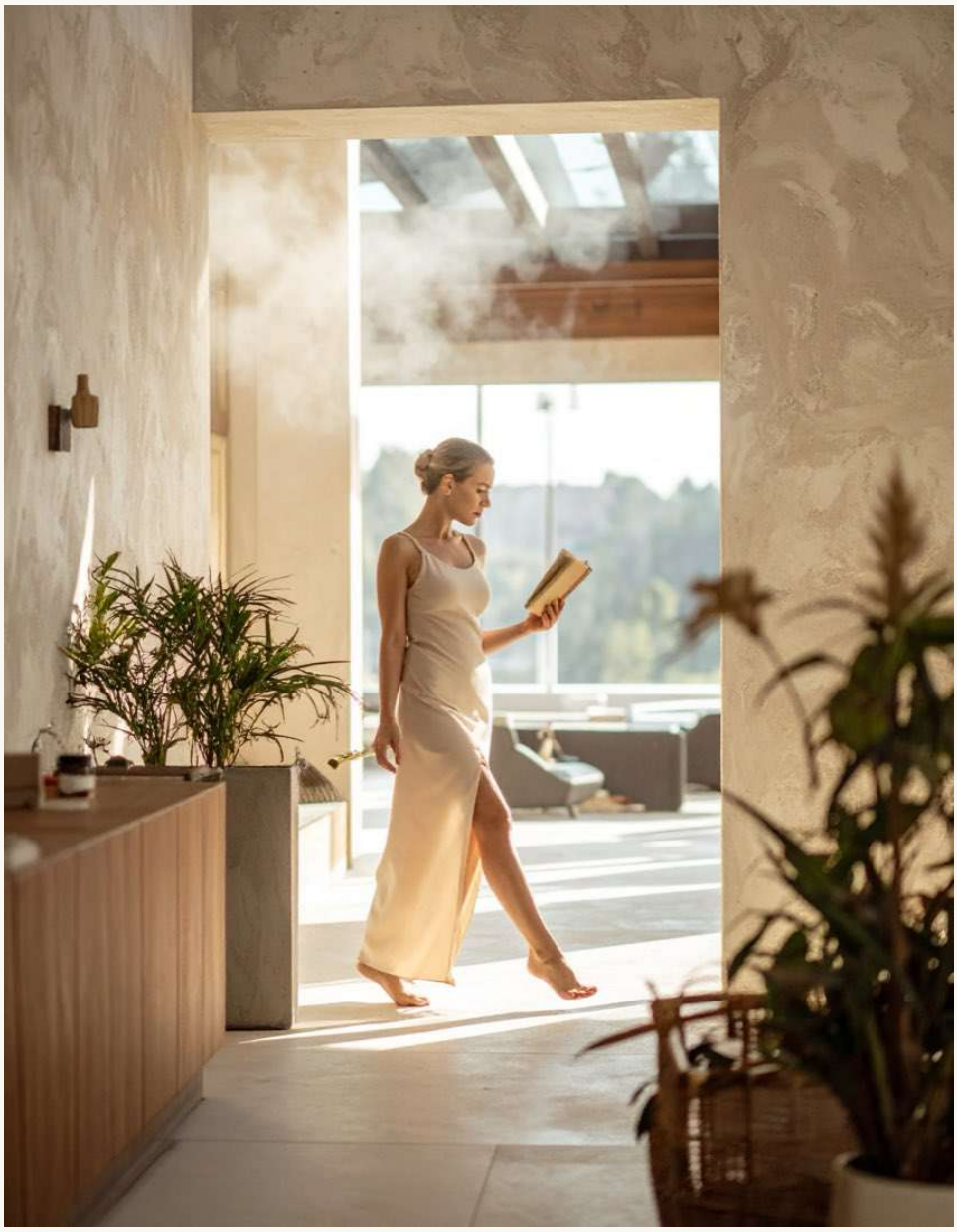
John Kotter, writing about why transformation efforts fail, named one of the commonest errors as declaring victory too soon.[10] The error he described was celebration taken as completion, the moment at which the energy that made a change possible is released before the change can stand without it. The cake in June was deserved. The problem was what the cake meant: that the work was over.

Santa Anna's canon describes the same release from the other side, as a habit an organisation can name about itself once it is willing to. One of its examples of a recurring pattern, the kind a leadership team can say aloud, reads like the clinic's year: "We have a pattern of launching initiatives with great enthusiasm and then quietly abandoning them when the next shiny thing appears." Nobody at the clinic would say they abandoned the missed-appointment work. They would say they moved on to the winter plan. The canon's point is that the two descriptions can be the same event.

And it says what a change looks like when the attention has gone and the structures have stayed. Writing about why reorganisations so often leave an organisation feeling exactly as it did, it puts the result in a sentence: "The furniture has moved, but the emotional field hasn't shifted." The rebooking desk is furniture. The habit of calling the patient whose letter came back is a field, and it was held in place for four months

by a Tuesday meeting, a weekly chart and a director who asked. Remove those and the old balance reasserts itself. The canon's account of the return gives the plain version: "The organization reverts. The old patterns reassert themselves."

There is a second, quieter reason the line came back, and it belongs to how the improvement was measured. The weekly chart in spring showed one number, the outcome. It did not show whether the calls were being made on the days they mattered, the day before and the morning of. When the calls thinned in August, the outcome took weeks to move, and by the time it did, the cause was a month old and nobody remembered it. A change that is measured only by its result is read too late to keep. How a measure becomes one that both sides can believe is the subject of [*Where the Flow Stops*, the house's book on finding the gain an organisation already holds]({{BOOK:orgdev-flow}}); the narrower point here is that a measure has to outlive the project that set it, or the project's gain has no witness.



The holding read

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The holding read

What keeps a change is less dramatic than what introduced it, and the canon is right that it is the more patient work. It begins before the cake. The practice this chapter describes is called the holding read, and it has four parts.

The first is a decision about what *done* means. A project is not finished when the number reaches its target. It is finished when the people who introduced the change have stepped back and the number has held without them, for a period long enough to include an ordinary month, a busy one and a holiday. At the

clinic that would have meant keeping the project open, in a lighter form, through the summer, and closing it in the autumn if the line had stayed where June left it.

The second is an owner who was not on the project team. This sounds like a small point and turns out to be the largest. A project lead who reads her own result for drift is reading her own trophy, and both she and everyone around her will hear any rise as a criticism. An owner from the ordinary line of management, the person who will run the clinic next year, reads it as the clinic's number. In the canon's terms she is the accountability partner, and its coaching questions are the ones she asks each month: "How will you know you're staying on track? What will be your indicators that the vision is staying alive in daily practice?"

The third is a pair of measures, read together. One is the result, the missed-appointment rate, plotted every month against its history. The other is the practice, a simple count of whether the thing that produced the result is still being done: the share of patients called the day before. The practice measure moves first. When it falls, the owner asks what changed that week, while the answer is still in people's memories.

The fourth is a rule for what counts as drift, agreed in advance so that nobody argues about one bad month. A single high point is noise. Several points in a row moving towards the old range is the line coming home, and it triggers a conversation about the system: what has changed in the conditions that held the improvement, whether the desk is staffed, whether the calls have been squeezed by something more urgent. It is never a conversation about who let it slip. The canon's prompt for a group's regular look at its own agreements is the right register for that meeting: "How are we doing with our agreements? Where are we strong? Where have we drifted?"

Picture how the first of those conversations might go, at the clinic, if the holding read had been in place. It is the second week of August. The owner, who runs outpatients and was not on the project, has the two lines in front of her, and the practice line has fallen for three weeks in a row: fewer patients called the day before. The result line has not moved yet. She asks the two administrators, the booking supervisor and the analyst for half an hour, and she asks one question first: what changed in the last month that made the calls harder to make? The answer takes four minutes to arrive. The rebooking desk was given to whoever was free when one of the administrators went on leave, and whoever was free did not know that the call list was printed each afternoon at three. Nobody had decided to stop calling. The list was in a tray nobody now checked. It is moved to the shared screen that afternoon, and the practice line recovers the following week. The result line never moves at all, which is the point, and also the reason the conversation is so easy to skip.

Three mistakes are common. The holding read becomes a report that nobody discusses, which is the November page again with a new name. The owner is chosen from the project team, out of gratitude. And drift is met with a relaunch, a new campaign with new posters, which treats a mechanism as a lapse of enthusiasm and produces another June. Chapter 7 carries the holding read as working pages, with the agreement, the chart, the drift rule and the questions for each monthly conversation, and Chapter 6 places it in the ninety days after done.

The practice also answers the reason the line came back in the clinic's case, which was that the forces holding the improvement were removed one by one, each for a good reason. A holding read makes each removal visible as it happens. The day the rebooking desk is given to whoever is free, the practice measure dips, and someone asks. Often the answer is to keep the change and adjust it: a smaller desk, a different hour, calls made by text for the patients who prefer it. A routine that the people who perform it are allowed to adjust, the subject of Chapter 3, lasts longer than one that can only be kept or abandoned, a finding the sustainability studies repeat.

The forces most likely to reverse a change are often the least visible ones. One is the hours an organisation spends rescuing what was never maintained, which Chapter 2 follows into a packaging plant. Another is the person who carried the work and has since moved on, whose absence, Chapter 5 argues, is a test a change can be prepared to pass.

Keeping the holding read

The article this chapter began as ended at the clinic's second November. The book can go further, into the finer points a manager meets when she tries a holding read in her own organisation, and the first is choosing the period.

A holding period has to include the conditions most likely to undo the change, or it proves nothing. For the clinic those were the summer holidays, when the booking team ran short, and the winter, when every department's attention moves to beds. A change in a warehouse needs a peak season in its holding period; a change in finance needs a year-end. The practical rule is to name, at the start, the two or three ordinary pressures the change has not yet met, and to keep the holding read open until it has met each of them once. That usually means somewhere between six months and a year. It rarely means the eight weeks most project plans allow.

The second point is the practice measure, which is the half of the pair most often skipped. It should be the thing that produced the result, counted as directly as possible: the share of patients called the day before, not the number of staff trained in calling. It should come from records the organisation already keeps, or from a count so simple that it costs a few minutes a week, because a practice measure that needs a new report will be the first thing dropped in a busy month. And it should be shown beside the result, on the same page, so that nobody reads one without the other. When the two lines disagree, the disagreement is the most useful thing on the page. A practice line that holds while the result drifts says the world has changed around the change: a new group of patients, a new referral route. A result that holds while the practice line falls says the result is being held up by something else, and that the change itself may already be fading.

The third point is the drift rule, which should be agreed with finance or whoever keeps the numbers before anyone has seen a bad month. The rule that works best in practice is borrowed from the way statisticians read process charts: one point outside the range the history shows, or several points in a row on the same

side, moving towards the old level. The exact numbers matter less than two features. The rule is written down before the data arrive, and it is applied the same way whether the news is good or bad. A drift rule invented in the month the line rises will always find that this month is an exception.

The fourth point is what the drift conversation asks. It is held within a fortnight of the rule being met, it is short, and it has four questions in a fixed order. What has changed in the last two months in the conditions that held the improvement: the people, the hours, the equipment, the instructions, the demand? Is the practice still being done as it was, and if not, what is in its way? Does the change need adjusting to fit the new conditions, rather than restoring? And who will do what by when? The order keeps the conversation on the system. A conversation that begins with *who let this slip* ends with a relaunch, and the canon's whole account of the return threshold is a warning against that cycle.

The fifth is honesty about what a holding line can show. A number that holds after a project closes has not proved that the project caused it. Some of the improvement may have come from a mild spring, or from a fall that would have happened anyway after an unusually bad winter, the effect statisticians call regression towards the mean, which *Where the Flow Stops* reads in its chapter on measurement. The holding read is not a test of cause. It is a watch on whether the new arrangement is still working, and its value is in the early warning, not in the proof.

The sixth is when to stop. A holding read ends when the change has become ordinary: when the practice is written into the role descriptions of the people who do it, when it appears in induction for new staff, when its cost sits in the budget like any other running cost, and when the practice line has stayed put through the pressures named at the start. At that point the result line joins the department's ordinary report. The holding read was a stage, and the stage is over.

There is a last, quieter use. Every holding read, finished or abandoned, leaves a record of what happened to a change after it was declared done. Kept together, those records become the organisation's own history of change, the kind of evidence Hughes found missing from the literature, and one any leader can build for herself. Chapter 7 begins with a page for it: the last three changes, what each was meant to do, what it is doing now, and when anyone last looked.

The report, a year on

It is ten past four on the last Friday of the following November. The clinic manager has the monthly report open, and the missed-appointment rate is on the first page now, with a second line beneath it showing how many patients were called the day before. Both lines are a little ragged. Both are where June left them. In August the second line dipped for three weeks, when a new booking system went in and nobody had told it about the call list, and the owner noticed and asked, and the list was moved.

She closes the report. The radiator ticks. There was no cake this year, and nobody has asked her about the line.

It stayed.

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