

CHANGE THAT STAYS · CHAPTER THREE

What the Hands Still Remember

A change that has been taught has changed the description of the work; the work itself answers to cues the training never touched.

Ammanuel Santa Anna

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Chapter Three of Change That Stays. The whole book, with every chapter, is at business.hautelumiere.life/library/change-that-stays (DOI https://doi.org/10.5281/zenodo.23989557).

A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

ABSTRACT

A change that has been taught has changed the description of the work; the work itself answers to cues the training never touched. It is ten to nine on a Monday in November, and the claims office on the fifth floor smells of the weekend's carpet cleaning. The senior handler has been here eleven years. She has her coat on the back of the chair, a glass of water, and forty-one new claims in her queue from the weekend: two burst pipes, a dozen cars, the usual run of phones dropped in the usual places. In September the whole team spent a day learning a new routine for exactly this moment. Every new claim is to be read within the first hour and sorted into one of three tracks, and the simple ones get a short call to the claimant the same morning. Everyone agreed it was better. There is a laminated card with the three tracks on it propped against her monitor.

CHAPTER THREE

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Ten to nine, the queue

It is ten to nine on a Monday in November, and the claims office on the fifth floor smells of the weekend's carpet cleaning. The senior handler has been here eleven years. She has her coat on the back of the chair, a glass of water, and forty-one new claims in her queue from the weekend: two burst pipes, a dozen cars, the usual run of phones dropped in the usual places. In September the whole team spent a day learning a new routine for exactly this moment. Every new claim is to be read within the first hour and sorted into one of

three tracks, and the simple ones get a short call to the claimant the same morning. Everyone agreed it was better. There is a laminated card with the three tracks on it propped against her monitor.

She opens the first claim. The screen opens, as it has for eleven years, on the assessment tab, and the queue is sorted, as it has been for eleven years, oldest first. Her hands do what they know. By ten she has assessed six claims in date order, thoroughly and well, and has called nobody. Her chest is a little tight in the way it always is on Mondays, and the routine she agreed with in September has not crossed her mind. She is a composite, drawn from the way these mornings are described in the research below and in the house's own practice, and no insurer is meant.

Ammanuel Santa Anna's canon has a passage for the gap between the card and her hands, and it is direct about where most changes are installed and where they actually live.[14]

> *This is why so many culture-change initiatives fail. They try to install a new culture — new values, new norms, new behaviors — as if culture were a software upgrade that could be loaded onto the organizational machine. But culture is not software. Culture is a living process, continuously self-creating through the daily interactions of the people within it. Installing new values on the lobby wall changes nothing if the patterns of interaction remain the same.*

This chapter makes one claim. A change that has been written down, taught and agreed has changed the description of the work, and not yet the work. The work is performed by particular people at particular hours, in answer to cues that the training never touched, and a change that does not reach those cues will be performed the old way on the first busy morning.

The routine and its performances

For a long time organisational theory treated routines as the enemy of change. A routine was a fixed pattern, repeated, that kept an organisation doing what it had always done; changing an organisation meant breaking its routines and installing new ones. In 2003 Martha Feldman and Brian Pentland argued that this picture was wrong, or at least half wrong, in a paper that has since become one of the most cited in the field.[15]

Borrowing a distinction from the sociologist Bruno Latour, they described every routine as having two aspects. The ostensive aspect is the routine as an idea: the description, the procedure, what people would say the routine is if asked. The performative aspect is the routine as it is actually done, by specific people, at specific times and places. The two are related but never identical. The ostensive aspect guides performances and lets people account for them. The performances, in turn, create, maintain and modify the ostensive aspect. A routine changes when its performances change and the change is kept, and it stays the same when the performances keep reproducing the old pattern, whatever the procedure says.

Three years earlier Feldman had made the same point from the field, in a study of routines that changed as the people performing them responded to the results of earlier rounds.[16] When the people doing a routine are seen as part of it, she wrote, routines turn out to hold a great deal of potential for change. They also turn out to hold a great deal of potential for staying the same, for the same reason. People adjust a routine to what happens to them while they perform it, and what happens to the senior handler at ten to nine on a Monday is forty-one claims and a screen that opens on the old tab.

Read the claims office through that distinction and the September day looks different. The training changed the ostensive routine, thoroughly. Everyone could describe the three tracks. The laminated card is the ostensive routine, propped against a monitor. The performative routine, the thing that happens when a claim arrives, was not touched at all, because the performance answers to things that the training did not change: the default tab, the sort order, the Monday volume, the handler's eleven years. The canon's account of how old patterns return names the moment it is most likely: "The old patterns will always return in moments of stress." Monday morning is the moment of stress the new routine was designed for, and it is also the moment the old routine is strongest.



What the hands answer to

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What the hands answer to

The psychology of habit gives the same answer at the level of a single person, and it is more precise than the organisational version about why agreement is not enough.

In 2007 Wendy Wood and David Neal set out a model of how habits work and how they interact with what people intend.[17] Habits, they argued, form through the slow learning of associations between a response and the features of the context in which it is usually performed: the place, the time, the preceding action. Once a habit is formed, seeing the context triggers the response directly, without passing through a goal.

The habit associations accrue slowly and do not shift much with a person's current intentions or with the occasional exception. That is the sentence a change programme should read twice. A training day changes intentions. It does not change the associations between the assessment tab, the date-ordered queue and the handler's first move, which were built over eleven years of Mondays.

The model also explains why the usual remedy disappoints. When a new routine slips, the instinct is to remind people of it: another email, a refresher session, a second laminated card. A reminder works on the goal, and the goal was never the problem. The senior handler wants to sort the claims within the hour; she said so in September and she would say so now. What she meets at ten to nine is not a goal but a context, the same context that has cued the same first move several thousand times, and the reminder is not in it. Wood and Neal's own conclusion points the other way: the most promising route to changing a habit runs through the cues that trigger it.

How long the new associations take to form is a question with an honest and unhelpful answer. In a study published in 2010, Phillippa Lally and colleagues asked ninety-six volunteers to choose an eating, drinking or exercise behaviour and do it daily, in the same context, for twelve weeks, and to report each day how automatic it felt.[18] For those whose data could be modelled, the time to reach most of the eventual automaticity ranged from eighteen days to 254. Missing one day did not materially set the process back. The study is small, the behaviours were chosen by the volunteers and simple, and automaticity was self-reported, so it is a guide to the shape of habit formation rather than to any office. The shape is the useful part. New habits form along a curve that flattens slowly, they need a consistent context to form at all, and the time varies so much between people that any programme assuming a fixed number of weeks will be wrong for many of them.

Santa Anna's canon, writing about how to work with patterns that live in the body as well as the mind, makes the practical inference in a single instruction: "Use environmental design (change the physical space, the routines, the social networks) to support new consciousness." In the claims office, the environment is the screen. *The Tuning Fork*, another of the house's books, makes [the argument that a body learns by repetition in small doses]({{BOOK:rsd-module-one-introduction-for-practitioners}}), and a team learns the same way, one Monday at a time, if the Mondays are arranged so that the new move is the easy one.

Two checklists

The clearest evidence that a written routine is not the same thing as a performed one comes from operating theatres, and it comes in a pair.

In 2009 a team led by Alex Haynes reported the results of the World Health Organization's surgical safety checklist in eight hospitals in eight cities, from Toronto to Ifakara.[19] The checklist has nineteen items, designed to improve communication and consistency in the theatre. The team collected data on 3,733 consecutive patients before the checklist was introduced and 3,955 after. The rate of death fell from 1.5 per cent to

0.8 per cent, and inpatient complications from 11.0 per cent to 7.0 per cent. It is a before-and-after study, not a randomised trial, and the hospitals knew they were being watched. But the effect was large, and checklists were adopted across the world within a few years.

In 2014 David Urbach and colleagues reported what happened when the province of Ontario, in Canada, encouraged universal adoption.[20] Using administrative data from 101 hospitals, they compared about 109,000 procedures in the three months before each hospital adopted the checklist with about 106,000 in the three months after. The adjusted risk of death moved from 0.71 per cent to 0.65 per cent, and complications from 3.86 per cent to 3.82 per cent. Neither change was statistically significant.

The two studies can be argued about at length, and they have been. Ontario's hospitals began from lower complication rates, the follow-up was short, and the data cannot show how the checklist was actually used in each theatre. The reading this chapter takes is narrower, and it is one the data allow. The same nineteen items, introduced with great care and attention in one setting and as a policy across a province in another, did not produce the same results. The artefact was the same. Whether the routine changed is a different question, and the paper alone cannot answer it.

Pentland and Feldman gave that difference a name in the title of a later paper, and the title is the argument: *Designing Routines: On the Folly of Designing Artifacts, While Hoping for Patterns of Action.*[21] A checklist, a laminated card, a new screen, a procedure manual, are all artefacts. They can be designed. A pattern of action, the thing people actually do at ten to nine on a Monday, cannot be designed in the same way; it can only be influenced, and then watched, and then influenced again.

The screen opens on the old tab

If the routine lives in its performances, then the question for anyone who wants a change to hold is what each performance answers to. In most offices the answer is a short list of ordinary things, and almost none of them is in the training.

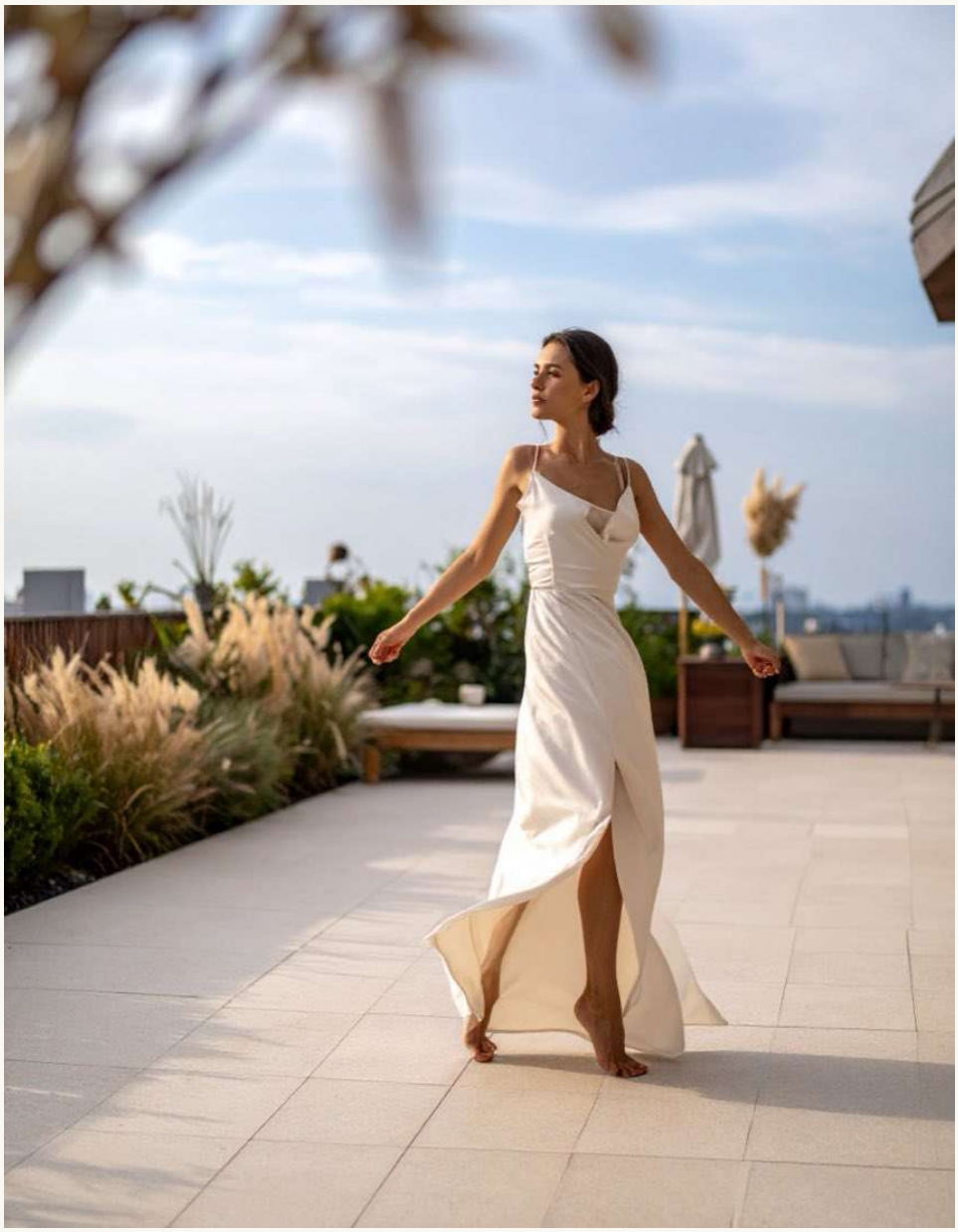
The first is the default. The screen opens on the assessment tab because it always has; the queue sorts oldest first because someone set it that way in a previous system. Defaults are the strongest instruction in any workplace and the least discussed, because nobody experiences them as instructions. The second is the measure people are read against. If the weekly report still counts claims assessed, and not claims sorted within the hour, then the old routine is what the organisation is still asking for, in the only language it repeats every week. The third is the order of the day: what happens first, what comes after the stand-up, which task fills the gap before the first meeting. The fourth is who is praised, and for what. The fifth is the room: who sits beside whom, whose experience is in earshot when a new handler is unsure.

The canon's chapter on rituals explains why such ordinary things carry so much weight. Writing about the recurring practices that make a group feel safe, it says that rituals "create predictable containers for safety

— recurring moments in the collective life where the nervous system can anticipate what is coming and, over time, begin to settle *in advance* of the experience itself." The old routine is such a container. Its predictability is part of why it feels right on a hard morning, and a new routine that asks a tired person to give up a predictable container for an unfamiliar one will lose, unless the new one is made predictable too: the same first move, at the same moment, every Monday, until it becomes the thing the body expects.

The sustainability research read in Chapter 1 adds one finding that bears directly on this. In Mary Ann Scheirer's review of programme sustainability, one of the factors that most consistently helped a programme last was that it could be modified over time.[22] That fits the performative view exactly. A routine that the people doing it are allowed to adjust is a routine they are performing, and therefore keeping. A routine that can only be followed or broken will, under pressure, be broken.

There is a telling detail in most offices that try a change like this, and it is worth looking for. The handlers who joined after September tend to perform the new routine more readily than the experienced ones. It is not that they are more willing. They have no eleven years of Mondays; the triage view is the only Monday they know, once someone has shown them how to set it as their default. The experienced handlers carry the old cues in their hands, which is also why they are the best placed to say which cues need changing.



Walking the routine at its busiest hour

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Walking the routine at its busiest hour

The practice this chapter describes is simple to state and takes patience to do. It is to walk the routine where it is performed, at the hour it is hardest, and to change what the performance answers to rather than what the procedure says.

It begins with the hour. Most changes are observed, if they are observed at all, on a quiet afternoon in the week after training, when the new routine is fresh and the volume is low. The useful observation is at the routine's worst moment: Monday at nine in the claims office, month-end in finance, shift change on a

ward, the last hour before the van leaves in a warehouse. Someone sits beside the work, with permission and without a clipboard of judgements, and writes down what is actually done, step by step, and what each step was prompted by. Not what should have prompted it. What did.

Picture the first walk in the claims office, on the last Monday in November. The team leader sits beside the senior handler at ten to nine, with her agreement, and writes down what happens. The screen opens on the assessment tab, and she clicks into it. The queue is in date order, and she starts at the top. The team leader asks, after the third claim, what made her start at the top. She thinks for a moment and says that she has always started at the top, and that the triage view is two clicks away, and that on a Monday two clicks feels like a decision. Neither of them had thought of the clicks before. By ten the team leader has seven things written down, and only one of them is about the handler.

Then the list of cues. For each step in the old routine that came back, the walker and the person doing the work ask together what prompted it: the default, the sort order, the report, the habit of the person at the next desk. The person doing the work is the expert here, and what the person who does the work already knows is, as [*Where the Flow Stops* argues of a nurse who fetches linen from another ward]({{BOOK:orgdev-flow}}), usually the best information an organisation has and the least collected.

Then the changes, and they are made to the cues. The screen opens on the triage view. The queue sorts by track, not by date. The weekly report counts claims sorted within the hour, beside claims assessed. The Monday stand-up begins with the three tracks, so that the first move of the week is the new one. None of this is training. All of it is the environment the canon's instruction describes.

Then the adjustments, and they belong to the team. The handlers will find that the three tracks need a fourth for claims involving a vulnerable customer, or that the same-morning call works for cars and not for burst pipes. The canon's advice on complex change applies at this scale: "Run small experiments rather than large programs." Each adjustment is written down with its reason, so that the ostensive routine catches up with the performances instead of drifting away from them.

And then the walk is repeated, at the same hour, a month later and again two months after that, because the first walk shows where the old routine was strongest and the later walks show whether the new one has taken its place. The canon describes the moment that tells a team the change has held, and it is the right measure for the third walk: "The first time the organization faces a challenge of the kind that would previously have triggered the old patterns — and responds differently."

The mistakes are predictable. The walk is done once and on a quiet day. The cues are listed and the training is repeated anyway, because training is what a change programme knows how to buy. The team's adjustments are treated as deviations and corrected back to the procedure, which teaches the team that the routine is not theirs. And the time to walk and adjust is the first thing cut when the queue is long, which is the trap of Chapter 2, in another office. Chapter 7 carries the walk as a working page, with the cue list and the artefact inventory.

Sometimes the walk turns up a handler who did not forget the new routine at all. She chose the old one, because she believes the new one will fail the customers she worries about, and she may be right. That is a different matter from habit, and it calls for a different conversation, the one in which an objection is heard as information about what a change will break, which Chapter 4 describes.

Walking the routine, in practice

The article this chapter began as ended at the claims office in February. The book can go further, into the finer points a manager meets when she walks a routine in her own organisation, and the first is choosing the hour.

The hour to walk is the one at which the old routine is most likely to return, and the people who do the work can always name it. Ask them. In a claims office it is Monday morning; in a warehouse, the last hour before the vans; in a hospital, shift change; in finance, the three days before month-end; in a restaurant, the first sitting on a Saturday. A walk at any other hour shows the routine as it is performed when nothing is pressing, which is the version the training already described.

The second point is the walker's stance. The walk is done with the agreement of the person whose work is watched, and it is explained beforehand, in plain words: the purpose is to find what the routine answers to, not to check whether she is following it. The walker writes down what happens and, where it is not obvious, asks what prompted a step, after the step and never during it. She does not correct anything during the walk, however tempting it is. A walk that turns into coaching produces the performance the walker wants to see and teaches the team that walks are inspections.

The third is the record. For each step, three columns: what was done, what prompted it, and whether it was the new routine or the old. The middle column is the one that matters, and it fills with ordinary things: the screen opened here, the list was in this order, she was asked a question by the person at the next desk, the report counts this. It helps to write the prompts in the person's own words.

The fourth is the inventory of artefacts, which turns the walk's middle column into a list of things that can be changed. The categories are nearly always the same: the defaults of any system the work passes through, the order in which work arrives or is listed, the forms and templates people fill in, the reports that count the work and the measures people are read against, the room and who sits where, the first move of the day or the shift, and what is praised. Chapter 7 gives the inventory as a page, with a column for who owns each artefact, because changing a default usually needs someone outside the team.

The fifth is the order of changes. Start with the cheapest cue that prompted the most old steps. Defaults and sort orders often cost minutes to change and remove the largest share of the old routine at a stroke. Reports and measures come next, because they take longer to agree and are read every week. The room and

the order of the day come last, because they affect other teams. Train only after the cues have changed, and train briefly, because the work now teaches the routine.

The sixth is how to treat adaptations. The team will change the new routine as they perform it; Feldman's whole argument is that this is how routines live. Each adaptation is written down with its reason, and within a week the team leader decides with the team whether it becomes part of the routine. Most should. A few will undo what the change was for, and those are discussed openly, with the reason the change was made. What should never happen is an adaptation discovered months later and corrected without discussion, which is how a team learns to hide its improvements.

The seventh is using newcomers as informants. People who joined after the change have only ever performed the new routine, or have been taught the old one by colleagues without anyone noticing. Asking them, in their second or third week, what they were shown and by whom is one of the quickest ways to see which routine the team is actually passing on.

The eighth is that the walk sometimes shows the old routine was right. A step the new design removed may turn out to be the one that caught a fault the designers had not seen. When that happens, the honest response is to change the design and say so. A change that cannot learn from its own walk will lose the people performing it, and they will be right.

And the last is how to tell habit from choice. A person performing the old routine out of habit will usually say, when asked, that she meant to do the new one and does not know why she did not. A person who has chosen the old routine will usually say why, and the reason will often be specific. The first is a matter for cues, and this chapter. The second is a matter for the conversation in Chapter 4. Chapter 6 places the walk in the second month of the ninety days after done, and Chapter 7 gives the walk sheet and the artefact inventory as working pages.

Ten to nine, in February

It is ten to nine on a Monday in February, and the claims office smells of wet coats. The senior handler has forty-four claims from the weekend, a lot of them storm damage. She opens the first. The screen opens on the triage view, and the queue is sorted into four tracks, the fourth one the team added in December for customers who need a slower call. She sorts the first twelve in twenty minutes, makes four calls before half past nine, and starts on the assessments.

The laminated card is still propped against her monitor. She has not looked at it since before Christmas.

Her hands know the way now.

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