The Big Big Question: Can My Organization, University, or Company Change?

A research symposium presented by the Sanford C. Bernstein & Co. Center for Leadership and Ethics at Columbia Business School
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In order of symposium agenda

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The Need for a New Look at Change

Organizations are always under threat — they must evolve or risk disappearing. Whether or not change is desirable, it is inevitable; stasis is rarely possible for businesses, public institutions, or political bodies.

Today’s world appears to be unusually riddled with large-scale challenges. The financial crisis of 2008 shook confidence in the moral foundations of markets and drew attention to trends dating back decades, especially regarding the ability of the middle class to enjoy incomes that grow with productivity. Globalization, in theory, was supposed to help all countries through a more efficient division of labor, yet the fruits of these gains remain poorly distributed among a small percentage of workers (the “working rich”) both in the United States and internationally.

Most voices across the political spectrum believe that access to quality education is fundamental to addressing these long-term trends. Educational institutions must transform despite a reliance on the status quo. There are many signs higher education, including business schools, is not fulfilling its promise to students as high levels of student debt, technological disruption by online coursework, and low matriculation rates for economically disadvantaged students continue to make media headlines.

Organizations differ dramatically in their response to these challenges, hinging on whether an organization interprets challenges as threats or as opportunities to change. In today’s evolving landscape, threats can be repurposed for business advantage. Technological disruptions will negatively impact some organizations, but create new opportunities for others. For example, while some ask whether online education will replace traditional universities, we recommend focusing energies on how institutions, such as universities and libraries, can utilize online education to create an education system that is more inclusive.

This conference, organized by the Sanford C. Bernstein & Co. Center for Leadership and Ethics, made clear that the capability to change separates those organizations who only see threats from the need for change, from those organizations who identify opportunities even in threatening times. Towards this end, the conference program was designed to focus on this latter type of organization and those who lead them. Duane Bray, partner and head of global digital business at IDEO, set the stage with an explanation of how change is accomplished, and Anthony Marx, CEO of the New York Public Library, demonstrated how the power of a belief in change can result in the delivery of a better public library system through the adoption of new technology and services.

In incorporating the research of top scholars, our academic panel began with Elke Weber’s discussion of the neural foundations of fear and willingness to change. Joe Porac, from NYU, used examples from the monumental achievements in ancient Egypt to demonstrate that change does not happen without organizations and leadership. Ray Fisman further examined this topic in his narration of the role of political leadership in transforming the habits and beliefs of citizens living in Bogota. The conference closed with a panel of industry leaders from technology, telecom, and financial services, moderated by our own Todd Jick. This panel built upon the academic experts’ ideas and presented a detailed account of not only how change can be planned and executed, but how opportunities can also slip away if not properly attended to.

We were particularly gratified by the large turnout for the conference. It was informal evidence that we all not only desire change, but we also seek the knowledge and skills to make it happen. This argument is what motivated Center co-director Sandra Navalli to host this conference — and we are grateful for her foresight.

We would like to thank our academic colleagues Professor Todd Jick, Senior Vice Dean Gita Johar, and Columbia University Provost John Coatsworth for their contributions. No conference is possible without the many hours of preparation of our staff, Tiffany Pollack, Diana Rambeau, and Heather Barbakoff. Finally, we would like to acknowledge the generous contributions of our donors to the Bernstein Center and the efforts of our External Relations office.

Please enjoy the following narrative of the day’s discussion, written by Dan Fleshler, who has our thanks for his skills and patience with us.

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Anticipating and Navigating Around the Icebergs

At the outset of this symposium on change, Damon Phillips, James P. Gorman Professor of Business Strategy at Columbia Business School, offered a cautionary tale about the consequences of being unprepared for unexpected challenges. He recounted the behavior of a little-known crew member of the Titanic, wireless operator Jack Phillips, in the days leading up to the ship’s encounter with icebergs:

He was a customer service guy, passing along messages from passengers on the ship to the rest of the world. It turns out other ships in the area were sending messages about all of the ice in the area… his response was, “Please shut up, I’m trying to get this stuff done.” He had a pile of work he was dealing with, and dealing with those messages was a secondary priority.

The wreckage of countless companies that were unprepared for change is hardly a secret among today’s business leaders. Neither is the need to look up from the pile and recognize new and even surprising challenges, and to alter the status quo so that employees can meet those challenges. Phillips noted that 70 percent of leaders in 600 companies said they expected change in the next two years. (See figure 1.) Yet even when they recognize that change needs to happen, “two-thirds of the time, the change doesn’t work out well.”

The central question confronting organizational leaders, as Phillips put it in his introductory remarks, is “maybe we have the capability to change, but can we convert it into actual change?”

The need for practical guidance on implementing change was clearly on the minds of the representatives of companies, nonprofit organizations and academic institutions in attendance. But in its pursuit of workable answers, the conference raised other questions. Did the insights of academic researchers have any bearing on the real-life experience of people working to effect organizational change? Was the experience of successful corporate change agents directly applicable to universities and other organizations and vice versa? How do leaders develop a comprehensive and coherent set of suggestions for initiating and managing change?

Innovation Is No Longer a ‘Nice to Have’

“Fifty years ago, big companies could expect to be on the S&P 500 list for more than 50 years. Now the average is close to 15 years,” said Duane Bray, partner and head of global digital business at IDEO. Given this short and unforgiving timeframe for success, “innovation is no longer seen as a “nice to have.”

In a lively, opening keynote speech, Bray articulated other emerging challenges and lessons learned in the organizational trenches by his company, IDEO, a design firm that helps a broad range of corporations and institutions reconfigure and transform themselves.

New pressures to innovate have meant that expectations for leadership are shifting, with more emphasis placed on creative thinking. “IBM’s Global CEO Study cited creativity as the most important trait for leadership.” Creative responses
are necessary in part because “new tools and channels for disruption are here.” With new technology, “it has never been easier for new competitors to enter markets, as the gap between prototype and product narrows.” For example, Weight Watchers is facing competition from “99-cent weight loss apps” now available online.

So what is to be done? Some of Bray’s prescriptions are probably counterintuitive to managers who are accustomed to deliberative, structured planning processes — and to business school professors who endorse them.

He admonished the audience to not be afraid of starting new ventures without well-developed plans, expressing a fondness for new academic programs that “started lean” with “rough and ready prototypes.” NYU’s Center for Urban Science and Progress, the Harvard I-Lab, and the Stanford d.school all began without fully formulated ideas of precisely how they would achieve their objectives. Their leaders were willing to learn while incubating their organizations.

Bray also favors accelerated schedules for coming up with creative innovations and then trying them out. Speed, he contended, can help to reduce the kind of “self-editing” that inhibits the most brilliant ideas. Among the techniques IDEO uses to encourage imaginative thinking is to have ideas written down on Post-it notes, which can easily be marked and discarded after they are shared. (See figure 2). “When there’s not much investment in an idea, it’s easy to dispose of it and learn from it.” Finally, he urged, “once you have an idea, test it out and learn from it.”

Another suggestion was to foster innovation “away from the mother ship,” i.e., start new projects “away from the core” of institutions. In order to speed up product development, Proctor & Gamble set up a physical space in a gym that was designed to encourage both teamwork and the process of building ideas. When PNC Bank wanted to develop a new model for framing and selling financial tools for “Gen Y” customers, it created a separate, parallel microsite targeted to those customers. Eventually, it became “Virtual Wallet,” and some of its features were incorporated into other parts of the company.

This concept is familiar to the corporate world. “Skunk works” projects, in which small teams do research and development free from the normal strictures of large corporate bureaucracies, have been around at least since World War II. But Bray made the novel suggestion that it was also a useful idea for higher education. He provided several examples of universities that started separate semi-independent initiatives to promote innovative programming and thinking, such as the NYU Center for Urban Science and Urban Progress, a public-private research center that aims to foster improvements in urban life.

The Imperatives of Stakeholder Outreach
Of course, change management involves more than facilitating creativity and designing new, “lean” programs that are offshoots of established organizations. What about organizations that want and need to implement broad-based structural and cultural changes?

**The Innovative Thinking Process**

Once you have an idea, test it out and learn from it.

**Build a Stakeholder Map**

Ensure you have a plan to engage everyone (not just faculty & students).

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Figure 2: Items like Post-its allow ideas to be thought of, self-edited, and disposed without much risk.

Figure 3: Knowing and accounting for all stakeholders helps organizations avoid mandating “top-down” decisions.
One essential task, Bray contended, is to “build a stakeholder map” and then reach out to and engage with all stakeholders. This is crucial, in part, because of the increasingly horizontal nature of organizational cultures. Purely top-down change made at the behest of CEOs and top management doesn’t work well. Especially given the need to innovate, “change must be both emergent and directive.” (See figure 3.)

A key function of multi-stakeholder outreach is to help formulate broad organizational missions and objectives before implementing major changes. In other words, “align change with purpose,” he advised.

Stevenson University, a commuter school in Indiana, galvanized faculty and administrators to discuss and agree on its fundamental raison d’etre, which was eventually articulated in a promise to “empower our students to take unexpected turns, create new paths, and change destinations.” The process of creating a mission statement “got students and faculty to rally around what they were doing,” Bray said. This, in turn, helped the university set up a range of new programs to deliver “career architecture experiences” at different points during and after the four-year undergraduate stint.

Most examples of institutional reinvention that Bray cited were achieved by small, for-profit academic organizations. Did his advice apply to large companies, private universities, and organizations — which he called “legacy institutions” — that are not only starting new programs, but trying to redefine and transform themselves? Once legacy institutions do make changes, how can they sustain a culture of change and not succumb to the temptation to do business as usual? Before contending with those matters, the conference explored why organizational change is maddeningly difficult.

Why Is Change So Hard?

“No one likes to update their software,” pointed out Elke Weber, the Jerome A. Chazen Professor of International Business at Columbia Business School, who offered the insights of behavioral psychology and neuroscience during a panel of academics. There is an innate temptation for individuals to stick with the status quo, in part because the risks and costs of change are “up front and the benefits are down the road, and it is natural to be risk-averse,” she said.

Thus, those who embrace change tend to have the willpower needed to resist immediate gratification and wait for rewards down the road. Weber even indicated that neuroscientists now know where this willpower “lives” in the brain: “It’s in the dorsolateral prefrontal cortex, the area right behind your temples.” She and other researchers have shown that transcranial magnetic stimulation of this part of the cortex can influence whether people accept immediate rewards or defer them. That might be a tempting tool for frustrated CEOs or university deans whose memos on change are ignored, but this was not an intervention that Weber endorsed.

Choice Architecture That Promotes Change

Behavioral scientists have several theories to explain the innate preference for the status quo. One of them is “query theory,” which provides a framework for understanding how people make decisions about different courses of action. As a result, it provides clues that could help change agents.

According to this theory, Weber explained, when faced with different options, people will “argue with themselves” in the form of queries, e.g., “What’s good about option A? What’s good about option B?” Research has demonstrated that, all other things being equal, the first option that gets considered is at an advantage, because we generate more arguments for it. Therefore “the order in which we ask ourselves” these questions “matters tremendously.” Typically the status quo is the first option to be considered, and it is natural to think, “We’ve been doing it this way for awhile, it hasn’t killed us,” so why change?

Using “choice architecture,” it is possible to use this insight to encourage people to embrace new opportunities. Specifically, asking them to consider the option of change first will help raise the odds that they will embrace it. So will packaging it, i.e., “make the change option sexy,” because attractive options also have a higher likelihood of being considered first.

Bureaucracy and the Problem of Possibilities

But even if techniques exist to encourage individuals to accept change, reshaping large bureaucracies to implement change remains a daunting task, according to Joseph Porac, the George Daly Professor of Management at the Leonard N. Stern School of Business at New York University.

Porac — who framed his discussion around how bureaucracy
enabled the building of the great Egyptian pyramids — was sanguine about the capacity of the human mind to innovate, noting that the bureaucracy itself was a particularly "remarkable invention," giving humankind the ability to launch and sustain lengthy, elaborate projects. But successful change requires the ability to confront a "tension that is fundamental to the human condition." That is, "organizations are not built to change, but to turn a set of possibilities into realities. This will always be a source of constraint as long as we continue to imagine new possibilities" that the organizations "were not designed to enact."

Hearkening back to his former career as a management consultant, Porac added: "The most fun is always coming up with possibilities. It’s an endless stream. And then you choose one and try and implement it (and) all of the energy goes out of the room."

One of the most difficult stumbling blocks is the nature of organizational culture. As defined by Raymond Fisman, the Lambert Professor of Social Enterprise at Columbia Business School, "culture tells us how to behave when there are no formal contracts or rules." In settings or circumstances where "we can’t write a perfect contract to describe our obligations, we need informal agreements to fill in the gaps."

But it is hard to maintain those informal agreements in the midst of the organizational change. One simple but critical reason is the difficulty of coordination, Fisman said:

If you think of an organization as having an array of complicated, interconnected parts, it’s a real challenge to change the way things are done. In these sorts of situations, unless you can have everyone change how they behave all at once, the whole organization can come apart at the seams.

While the three scholars noted some of the potential ways that the obstacles to change can be overcome, much of the evidence they presented suggested that overcoming challenges was rare. But are the challenges identified by these scholars for successful change really so formidable, in the "real world"? The rest of the day featured change agents who demonstrated that, despite all the neurological, psychological, and bureaucratic hurdles, dramatic and positive change was possible in even the most complex organizations.

Creating a "Culture of Trust"

If any institution epitomizes the hurdles to change cited by Weber, Porac, and Fisman — individual resistance to change, bureaucratic slowness, and the difficulties of coordination — it is the private American university. And while the insights shared at the conference were meant to apply to all manner of organizational cultures, the discussions persistently circled back to the question of how — and whether — institutions of higher education could transform themselves.

"Universities are uniquely hard to change," said Gita Johar, senior vice dean of Columbia Business School. "We all know that change is hard" and that "we must change." The question is, "how do we go about doing it?"

One problem is the somewhat paradoxical nature of highly accomplished, tenured faculty, according to John H. Coatsworth, Columbia University’s provost:

At Columbia, we’re faced with the need to continually change and face such issues as online education, globalization, and cross-disciplinary teaching. One of things I’ve found surprising and interesting is that Columbia faculty, who are among the most creative people you are ever going to meet… have become attached to the institution that allows them to be creative. So when you talk to them about change, they become less creative and innovative.

So it was fitting that the second keynote speaker was Anthony Marx, who proudly noted that he had been called a "revolutionary" when he initiated controversial changes as the president of Amherst University. Now president and CEO of the New York Public Library, he is seeking dramatic changes at an equally complex institution with a wide variety of missions and stakeholders, some with very strong opinions.

In the course of his address, it became apparent that the challenges confronting universities have much in common with the challenges confronting libraries. For one thing, these institutions face similar questions about their relevance in a digital age. The traditional library, a passive repository of learning that requires the physical presence of readers, is an
A strong feeling of love can hamper efforts to innovate and change,” said Marx.

“industry in question,” Marx said, one that is under pressure to incorporate online learning and reach people “proactively.” One could just as easily apply that description to the traditional, modern university. Indeed, in his morning address, Bray had remarked that in academia, “disrupters are focused on shifts in learning styles... and digital and multimedia learning have created opportunities for new forms of competition.”

Moreover, both universities and libraries include stakeholders with passionate attachments to the status quo. At Amherst, Marx faced considerable resistance to his efforts to increase the enrollment of low-income and minority students. He and his leadership team managed to do it, despite predictable and, he maintains, needless worries about lowering academic standards.

Similarly, since taking the reins of the Library in 2011, he has encountered widely publicized hostility — notably from prominent researchers and writers — towards a plan to remove stacks of books from the Library’s flagship branch in midtown Manhattan, consolidate some collections and other steps. And while there is widespread acknowledgement of the need for change, Marx has also contended with widespread “love” of the status quo. “No one,” Marx said, “wants the image of the library to change. ”

So “how do you create a culture of trust that supports innovation” in organizations with such deeply entrenched cultures? “Nothing in the world is going to happen,” Marx said, “unless people at all levels not only want to do it; they have to feel like they invented it...You need to create and inform popular demand...You have to try to feed that demand so that it doesn’t feel like change is being imposed but that it is being requested.” Interestingly, this idea was somewhat reminiscent of Weber’s emphasis on “change architecture” and packaging change options to encourage assent.

Echoing Bray’s call for careful and comprehensive stakeholder outreach, Marx also emphasized the need to meet with a broad range of constituents and “listen and not be defensive... You have to be honest about what you’re thinking about, and then you have to be willing to take the hits of people saying, ‘No, that’s a stupid idea for the following reasons’. And in my experience, much of the time, they’re right.”

His interactions across the City were “part of a shift to a horizontal model. You need that horizontal input and direct communication.” Nevertheless, he insisted, “You also need leadership because somebody...needs to be able to take the hits.”

Especially in large organizations with multiple missions like libraries and universities, leaders are required to make the tough choices needed to address conflicting priorities and the different needs of different stakeholders. Marx is “taking hits” because researchers and writers (many of whom are university scholars) want to retain a cherished, sheltering environment with ready access to physical books. The plans he has endorsed call for online technology that could mean quicker access to research that would benefit both the public and scholars, but the price is that some physical books will be kept off site. Based on his own, not entirely pleasant, experience, he offered a succinct summary of the task of contemporary organizational leaders: “identify the problems, create solutions and understand some [people] will have scars” as changes are implemented.

The Science and Art of Change Management

Yet even if organizations have people with the gumption to lead in the manner prescribed by Marx, that doesn’t mean they will have the faintest idea how to facilitate change. The difficulty of major transformation is consistently underestimated by organizational leaders, said Todd Jick, senior lecturer in discipline in business at Columbia Business School, during a panel with industry representatives that concluded the conference. His research on organizations making changes indicated that their leaders usually underestimated “the time required and key constituencies, the skills and resources needed, and the project leadership needed.” At the same time, “they overestimated the clarity of their plan.”

Change also takes practice. In one IBM study of public sector change cited by Jick, only 41 percent successfully changed. The top 20 percent were “change masters,” who had an 80 percent success rate. The bottom 20 percent were “change novices” and had only an 8 percent rate. The novices who succeeded “essentially got lucky,” he remarked.

At the same time, organizational change has been made easier by “more professionalism,” Jick noted enthusiastically. There is growing appreciation that change management is a science
as well as an art, and that professional “change experts” have a vital role to play. Several of these experts were on the panel. They tied together at least some of the threads from earlier in the day, agreeing with some previous assertions and disagreeing with others.

**Imposing Discipline**

“When change works well, there is a method. There is discipline. There is a budget. We tell leaders there is a checklist,” said Nancy DeViney, vice president, organizational change management at IBM. To foster successful change, she urged organizations to “infuse training into the core leadership programs of the company. Change has to be embedded, it needs to be pursued as a necessary skill set” by leaders.

DeViney agreed with Bray and Marx on the importance of outreach before embarking on major organizational change, but she also stressed the importance of continuing the outreach once the change process starts. That is crucial to facilitating the kind of coordination that Fisman had indicated was often difficult. “Organizations… need to continually discuss and review how change is being adopted, and those discussions need to be conducted at every level, involving all stakeholders. Once face-to-face and online conversations begin,” she said, “people start helping each other if there are issues.”

She also noted the importance of formal tools and processes that gauge the effectiveness of change. “We are not just studying how we deploy change, but also how do we know if it is working. We look at deployment metrics, adoption metrics, and business impact.” For change “to get traction, it has to be woven into the fabric of the enterprise.”

DeViney’s company has 75,000 “communities of practice,” online groups that employees join voluntarily to discuss problems and devise solutions. She runs a community called “Better Changes for the IBM Community” with 8,000 participants. Would a similar but much smaller community of this kind make a difference in libraries, universities, hospitals, advertising agencies, and other organizations represented at the conference? How can smaller organizations lacking IBM’s resources continuously gauge the impact of change? That was one of the questions prompted, but left unanswered, at the conference.

**Hurry up…Or Slow Down?**

In the morning, Bray had placed an emphasis on speed, accelerated innovation and lean prototypes that start without elaborate planning. Lauren Chesley, Verizon’s director of change execution, begged to differ. The sheer complexity of change is “often underestimated by corporate leaders, who expect things to happen quickly.”

After the conference, Chesley elaborated: “I would remind leaders that many of the realities of change are inconvenient. When you’re trying to effect change, there’s often an urgency to do so. Nonetheless, the work required to drive meaningful, sustained change rarely happens with the speed we’d prefer or sometimes need. It’s not easy work and ultimately, as with many things, there’s a trade-off to make. We have to ask ourselves, “Do we want subpar (albeit better than current) results fast, or satisfactory or exceptional results in due time?” These are the tough choices that come with leadership.

For example, one of the keys to orchestrating change in large organizations is to develop “techniques to visualize how much change will be hitting specific workers,” she noted. Otherwise, employees can be forced to tackle too many changes all at once. “To unpack how complex change is,” it is critical to think about its “downstream effects,” DeViney concluded.

**The Thorny Problem of Middle Management**

In Chesley’s experience, a certain amount of cynicism sets in among employees and managers who have already encountered sweeping plans for change and observed that plans have not gotten anywhere. So they tend to “keep their heads down” and wait for the latest, long-term change project to “blow over.” Moreover, in big corporations, middle managers “don’t want their projects delayed while other time and resources are being dedicated to change.”

To elicit both cooperation and enthusiasm, “either decrease the volume of change or increase the ability to deal with change,” she advised.

In an exchange after Marx’s remarks, Chesley had asked him how he created “passion for change at the level of middle manager, to people who report to you.” His answer was telling: “that’s the hardest thing to do.” Almost inevitably, “self-interest will come into play, because some people will feel
that their jobs are threatened.” So his advice is simply to “talk a lot, try to inspire. And give folks the ability to develop ideas themselves and feel like they own them. Find as many creative venues as you can to bring people together.”

In other words, there is no magic bullet, and it was evident, by the end of the day, that even the most accomplished change practitioners had no easy solutions to the challenge of incentivizing people at all organizational levels to accept change.

The Perils of Cultural Drift

“So some organizations change planfully. Some change unwittingly,” said Jick. When leaders are not carefully charting the course for change, the result can be organizational and cultural “drift,” a term that panelist Steven Mandis applied to Goldman Sachs. An adjunct professor of finance and economics at Columbia Business School and a former Goldman Sachs executive, he discussed some of the themes of his book, What Happened to Goldman Sachs: An Insider’s Story of Organizational Drift and Its Unintended Consequences.

When Goldman’s guiding principles were enunciated in 1979, one of them was “putting clients’ interests first.” To say the least, the company’s public image — and Mandis asserted, its culture — no longer reflects that principle, given the accusations against it that came to light during the financial crisis of 2008.

One explanation is that Goldman went public and placed a priority on promoting the interests of shareholders rather than clients. Yet, Mandis contended, its leaders didn’t seem to notice cultural shifts at the firm that came about as a result. One of his explanations for organizational drift is that “changes happen so slowly that nobody notices… until there is a massive organizational failure.”

Would professional change managers like DeViney or Chesley have been able to prevent the drift at Goldman? It’s not clear.

In the same spirit, Jick described the qualities needed by individuals in charge of shepherding organizational change as “a high degree of resiliency...The ability to deal with a high degree of ambiguity...Very rarely does what we think is going to happen end up happening.” Judging by the day-long conversation about change management that took place at this conference, Jick also could have been describing the attributes needed by the cultures of corporations, organizations, and universities.

Takeaways from the Day’s Proceedings

The discussions during the course of the day were filled with proposals to manage and create change. While some differences were expressed, these proposals also shared many commonalities. Here are the points of agreement.

To orchestrate successful organizational change, leaders should:

1. Create and then try to sustain a culture of trust — as well as enthusiasm for change — by reaching out to and continuously engaging with all relevant stakeholders.
2. Rely on leaders to make the inevitable tough decisions and choices that won't please everyone.
3. Start by articulating — and forging agreement — on missions, goals, and strategies. Align change with purpose.
4. Embrace starting some new ventures even without well-developed plans. But careful, deliberate planning is essential for most major organizational changes and reforms.
5. Consider the downstream effects of change on everyone who will feel its impact.
6. Given the pace of technological and other change, build the capability for accelerated brainstorming and quick, innovative thinking, especially when developing new initiatives and products.
7. Keep in mind that organizational cultures and individual habits can’t be changed overnight. Leaders should not be impatient. Change takes time.
8. Be careful of cultural drift and be attentive to the cumulative effect of many small actions that steer a culture towards undesired behaviors and beliefs.