

Psychology of Change

Dr. Rachel Cubas-Wilkinson
Principal Organizational Development Consultant
The Myers-Briggs Company

December 5, 2019



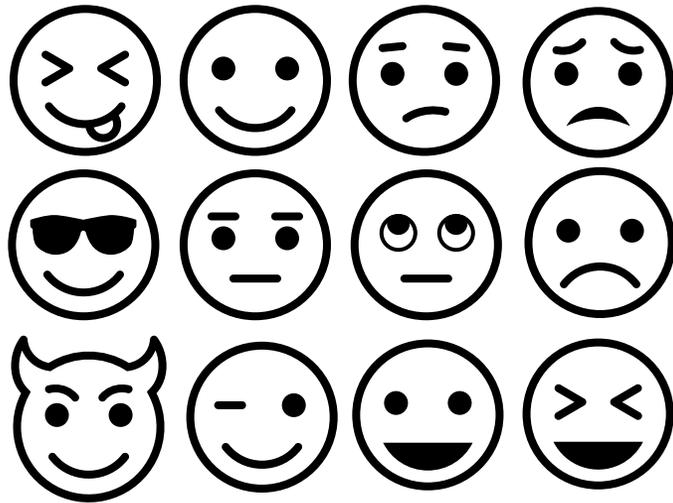
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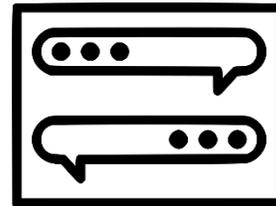


- **Passionate about people development**
- **Leads Consultancy Services for The Myers-Briggs Company, US**
- **Partners with organizations to develop staff and leaders and to resolve people-development challenges**
- **Master's and Doctoral Degrees in Organizational Leadership and Change. Graduate specialization in Adult Learning Methods, Curriculum, and Instruction.**
- **Certified in MBTI® Step I and Step II, FIRO-B®, FIRO-Business®, CPI 260®, and Hogan Assessments.**
- **Based in Palm Beach County, Fl**

You decide...How would you describe change?

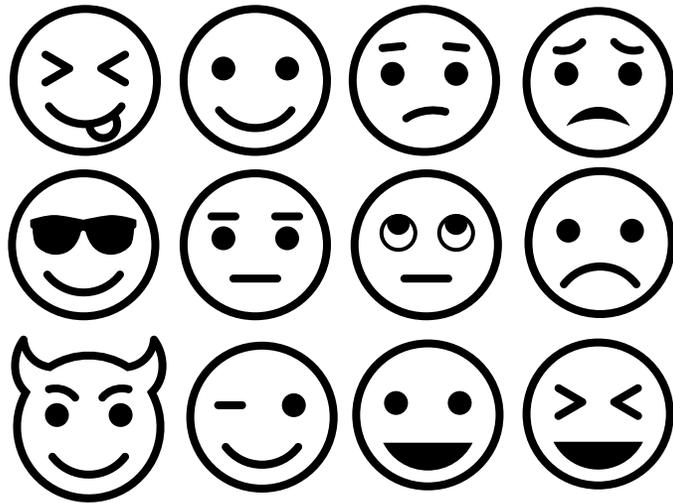


Change is...._____.



Please comment
in the chat
window

You decide...How would you describe change?



**"Change is...inevitable -
except from a vending
machine."**

- Robert C. Gallagher



Truth:

**Change is
experiential.**

"Ok, there was a small change... the blue bags have the sandwiches, the black bags have the parachutes."



What?!?

Truth:

Change is experienced individually.

Our mission as the Myers-Briggs Company

“ To inspire everyone to lead more successful and fulfilling lives. ”

Session Roadmap

1

Explore factors
to consider
during times of
change

2

Experience
change through
a simulation

3

Brief walk-
through of one
institution's
major change
initiative

4

Key take-aways
and Q&A

Key takeaway:

Deeper appreciation of how change can be more successfully navigated through the power of psychological insight





Drivers of Change

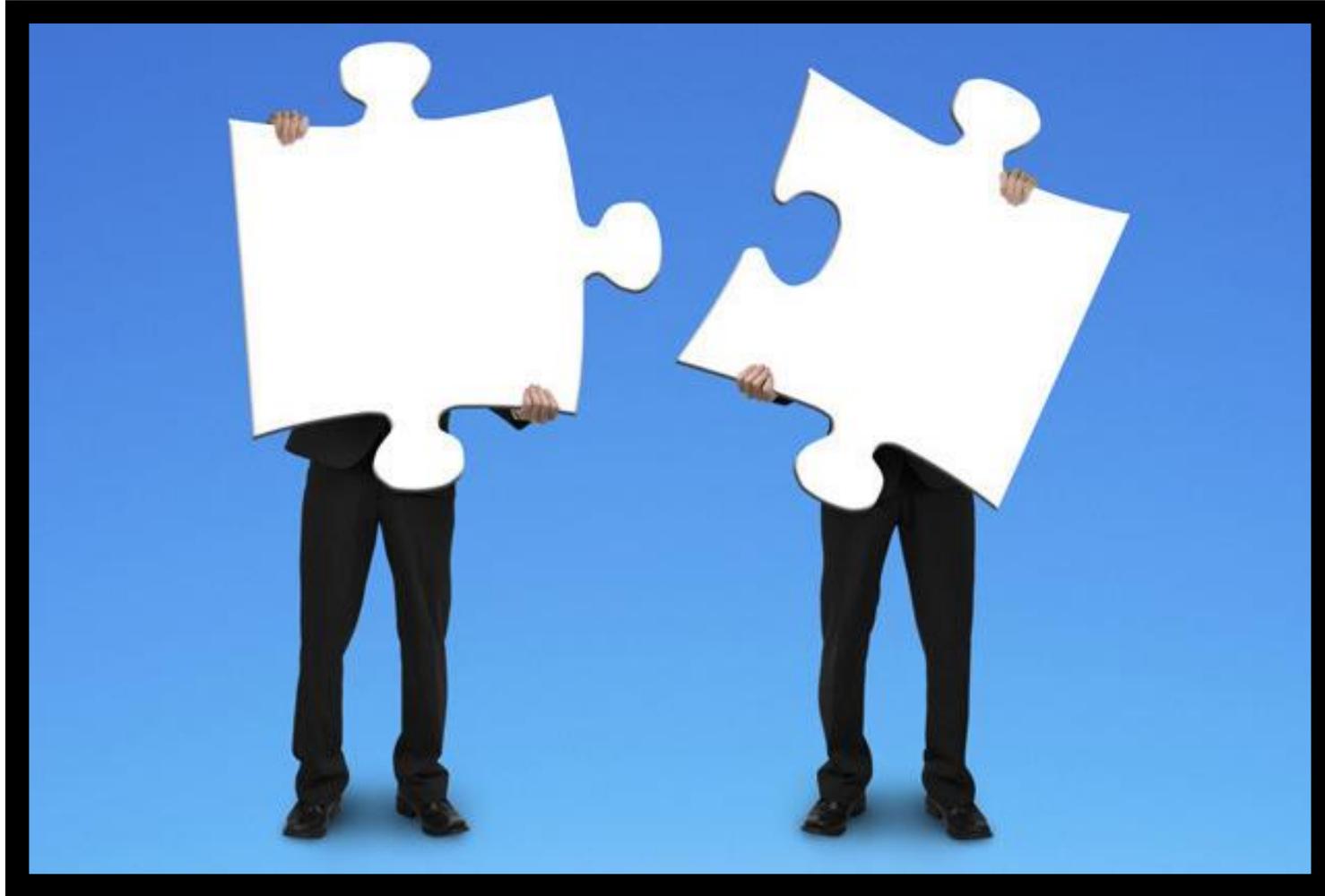


Technology



- Transforming how we work
- Driving New Products and Improved Products
- Re-shaping Business processes
- Replacing human intervention
- Enabling Push for Convenience and Access

Reorganization



- Mergers
- Acquisitions
- Rapid Growth
- Downsizing
- Re-strategy

Ways of Working



- Globalization
- Project teams
- Virtual teams
- Virtualization

Truth:

Employees are asked to change constantly.



Experiencing Change



Business Simulation

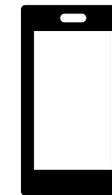


Mission: To provide the best products of all time.

Slogan: “We bring you the best products.”

MVP Best-Selling Product of All Time:

**Yes, you guessed it! The inventors of the “*SmartSocks*” with embedded Bluetooth tracking so you never lose a sock again!
*Over 10 million sold!***





Brief Presentation for EOY 2019 Shareholder's Meeting



You have 5 minutes!

2020 Product Line Announcement:

- **Flex-n-Fitted Trousers** – New “Keep your pants” technology lets you go up / down 3 sizes with patented micro memory fibers that mold to you
- **Smart Messenger Bag** – New “Keep your Stuff” technology w/built-in anti-theft alarm for when your bag is moved 50+ feet away from you

Your Task:

- Brief Go-To-Market Pitch – Write a compelling 60 second story of a customer using our new 2020 products. (Scene + Subject + Situation).



Brief Pitch



Meet



From: John_snow@bestproducts.com
To: Cubas-Wilkinson, Rachel@bestproducts.com
Subject: For upcoming meeting

Hey Rachel,

The go-to-market story pitch sounds cool, but we are thinking that instead of a pitch, we want a business reason for the products, particularly, what % of total new revenue each of these products will provide in the first year of market penetration.

Thanks,

John

John Snow, Shareholder
Best Products, Inc.

"Corporate social responsibility is our business."

er's Meeting

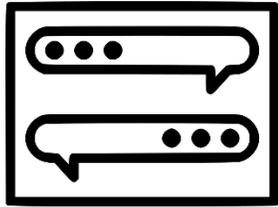
ement:

New "Keep your pants"
down 3 sizes with
pairs that mold to you
New "Keep your Stuff"
left alarm for when
away from you

Write a compelling
ner using our new
bject + Situation).

Debrief – Business Simulation

- What was your reaction to the change? / Impact for you personally?



Please comment
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window

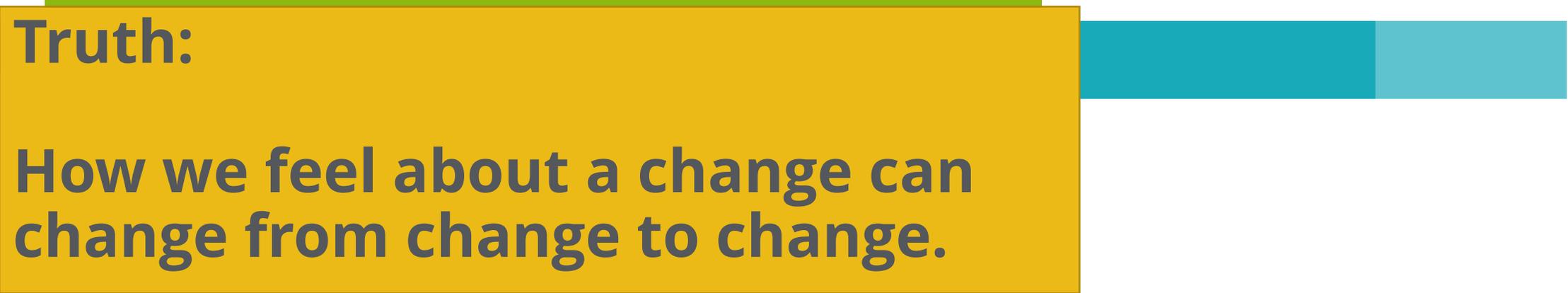
On your own...Can you think of a change event you have gone through in your workplace that relates this business simulation?





“Most people hate change”

– Not true!



Truth:

**How we feel about a change can
change from change to change.**

Types of change

Intentional change

For **decision makers**, change:

- Is a conscious, considered decision
- Solves problems
- Provides opportunities



Types of change



Imposed Change

For **employees**, change:

- May seem sudden and abrupt
- Creates problems
- Disrupts routines/procedures

Which do you prefer?

Intentional change

For **decision makers**, change:

- Is a conscious, considered decision
- Solves problems
- Provides opportunities

Truth:

**Ownership influences
our response to change.**

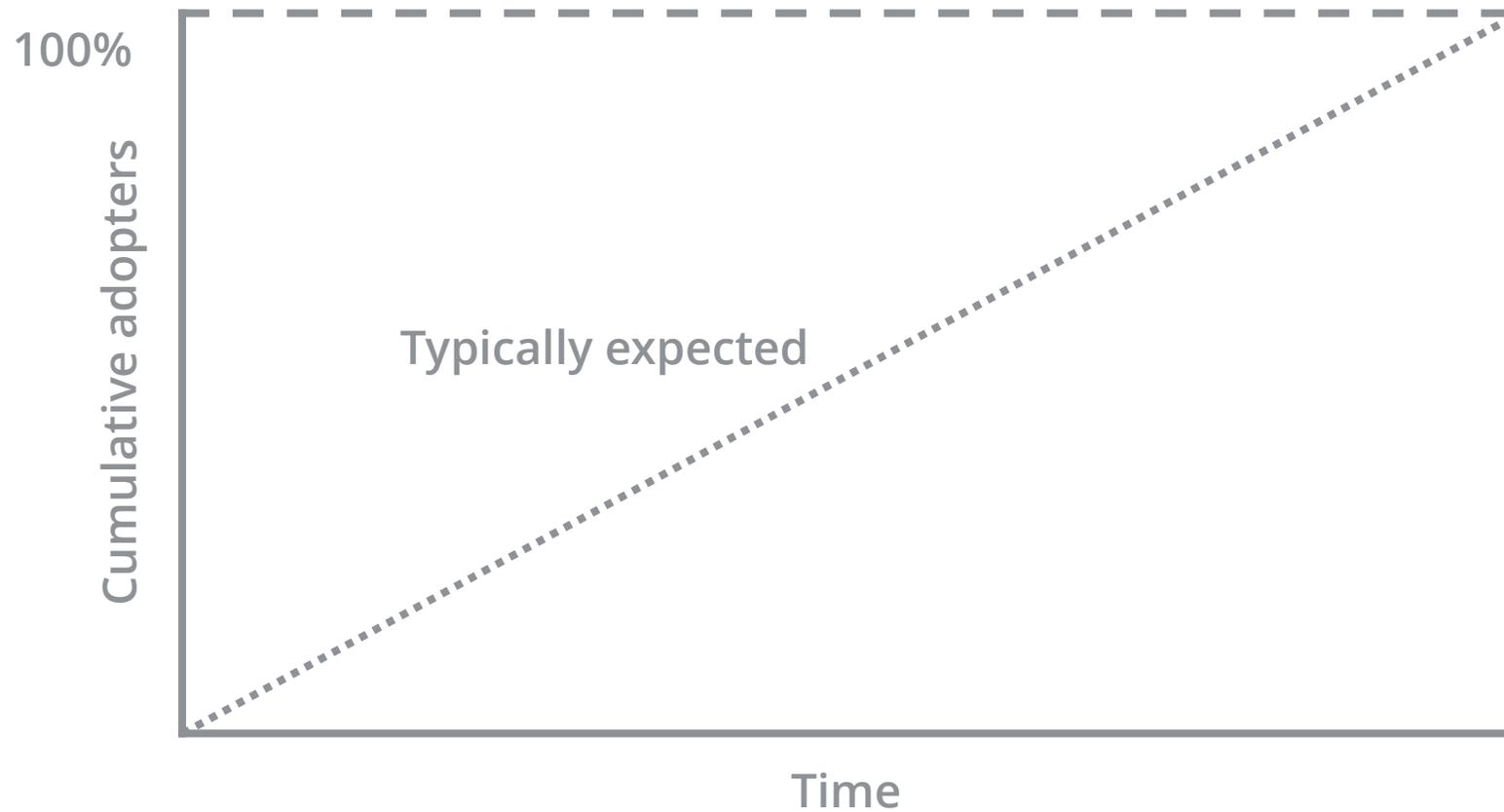
Imposed Change

For **employees**, change:

- May seem sudden and abrupt
- Creates problems
- Disrupts routines/procedures
- Can lead to demotivation,
resistance and resentment

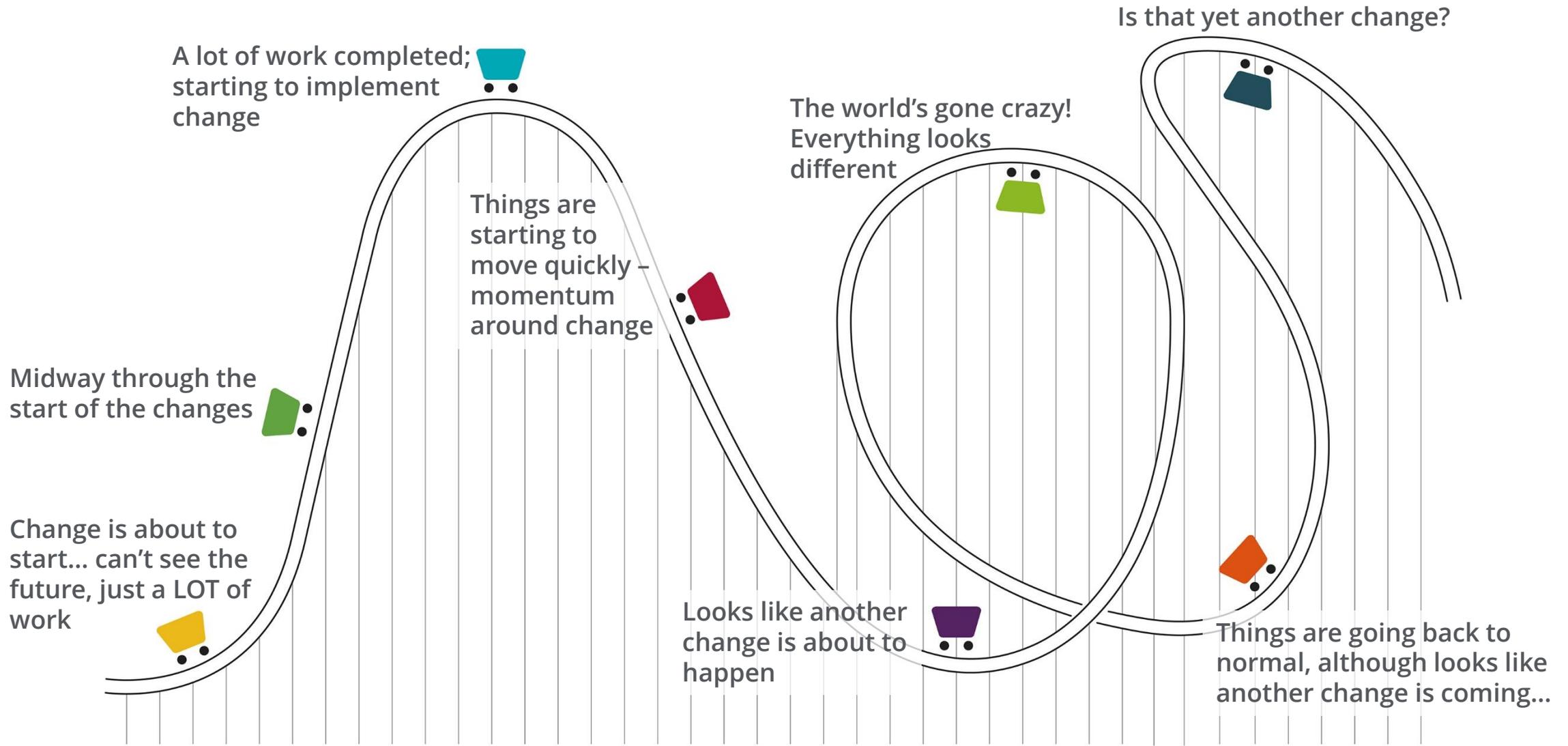
How do we
successfully
navigate all of this
change?

Adoption Curve - Ideal



Source: Gaba, V. (2017), "Leading Change", INSEAD.

Actual Experience of Change



Adoption Curve - Experienced



Truth:

Organizations report that change execution often proves more challenging than anticipated during planning phases.

Source: Gaba, V. (2017), "Leading Change", INSEAD.

**Why do some initiatives succeed
and others fail or do not result
in sustained change?**



Factors impacting change initiatives

	Tangible	Intangible
<u>Organization</u>		
<u>Personal</u>		

Factors impacting change initiatives

	Tangible	Intangible
<u>Organization</u>	<ul style="list-style-type: none">• Strategy / business goals• Organizational structure• Systems / technology• Employee capabilities• Products / services• External environment / customers	
<u>Personal</u>		

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<u>Personal</u>	<ul style="list-style-type: none"> • Job role / responsibilities • Reporting authority • Remuneration / benefits • Knowledge / capabilities • Location 	<ul style="list-style-type: none"> • Commitment • Intrinsic rewards • Personal history • Relationships • Values • Personality

Where do organizations focus the most energy?

	Tangible	Intangible
Organization	<ul style="list-style-type: none"> • Strategy / business goals • Organizational structure • Systems / technology • Employee capabilities • Products / services • External environment / customers 	<ul style="list-style-type: none"> • Organizational culture • Leadership • Employee engagement
Personal	<ul style="list-style-type: none"> • Job role / responsibilities • Reporting authority • Remuneration / benefits • Knowledge / capabilities • Location 	<ul style="list-style-type: none"> • Relationships • Values • Personality

Truth:
Managers often approach change with a focus on systems and processes.

Closing the gap in change rollout and adoption

Tangible

Strategy / business goals

Intangible

Organizational culture
Leadership
Employee engagement
Loyalty

Commitment
Intrinsic rewards
Personal history
Relationships
Values
Personality

Truth:

Perfect approaches to the *tangible* are destined for failure when we neglect the *intangibles*.

A focus on the intangibles...

Help Leaders and All Employees address their needs around:

- Communication
- Self-awareness
- Decision making preferences
- Resilience/Agility
- Working within structure or autonomy

¹ CPID (2014) Landing transformational Change: Aguirre & Alpern. (2014) 10 Principles of Leading Change Management

² Gilley et al., (2009) Organizational Change and Characteristics of Leadership Effectiveness

Personality and Change

- Personality and response to change are *linked*.
- Myth: Personality is someone's interpersonal style or what it is like to work with them.
- In reality, our personality is so much more. It's the natural, habitual ways we *think, feel, and act* on most occasions.
- It affects many behaviors during times of change, including how we:
 - Are motivated
 - Communicate
 - Make decisions
 - Approach leadership

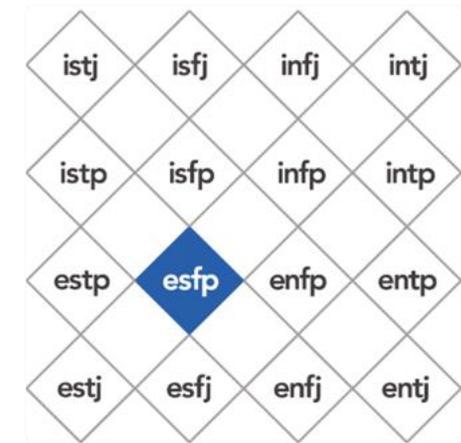
How do we address personality ethically and reliably?

The Power of Proven Psychometric Assessments

- Objective
- Intangible* becomes *tangible*
- Understand others
- Insights for development
- Prioritize learning



YOUR LEADERSHIP CHARACTERISTICS	CONSIDER THESE YOUR STRENGTHS	EXAMINE THESE POTENTIAL DEVELOPMENTAL OPPORTUNITIES	ASSESS WHETHER THESE BEHAVIORS WORK TO YOUR ADVANTAGE
SELF-MANAGEMENT			
1. Self-Awareness	■		
2. Self-Control		■	
3. Resilience	■		
ORGANIZATIONAL CAPABILITIES			
4. Use of Power and Authority	■		
5. Comfort with Organizational Structures			■
6. Responsibility and Accountability		■	
7. Decisiveness	■		



MBTI® = “Myers-Briggs Type Indicator”®



- A personality assessment with over 70 years research
- Used by 89 of the Fortune 100 from entry to executive levels
- Creates a common language for self-awareness and to explore differences
- Applications include: team building, leadership development, communication, and change

EXTRAVERSION OR **INTROVERSION**

Opposite ways to **direct and receive energy**

SENSING OR **INTUITION**

Opposite ways to **take in information**

THINKING OR **FEELING**

Opposite ways to **decide and come to conclusions**

JUDGING OR **PERCEIVING**

Opposite ways to **approach the outside world**

Which one most resonates with you during Change?

I like to conserve what works

I want to understand
the practical value of change

I want to keep things
real and concrete

I like the idea of change,
as long as it fits with my own vision

I appreciate having time
to think it through

I like change to be congruent
with fundamental principles

I am action oriented

I like to make change happen

I tend to focus on tangible results

I see change as fun and creative

Change is about evolving ideas

I often think if it doesn't work,
we can stop and try something different

Extraversion (E) *Talk it out*



I wonder



I wonder

Energy



Introversion (I) *Think it through*

Extraversion-Introversion Preferences and Change

People who prefer *Extraversion* typically:

- Are energized by interacting with others
- Are expressive and prefer to meet to discuss
- Prefer to communicate by talking
- Work out ideas by talking them through

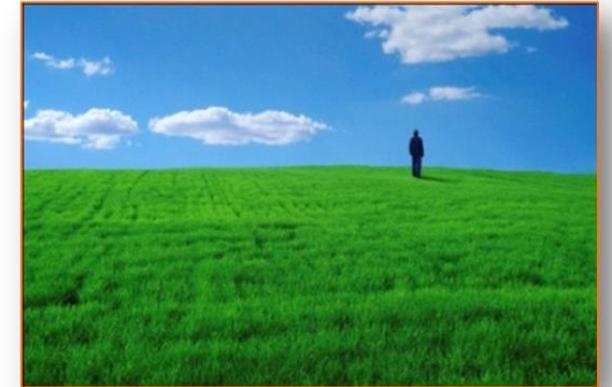
People who prefer *Introversion* typically:

- Are energized by opportunity to reflect
- Are private and contained, may need to process internally before participating in Change tasks
- Prefer to communicate in writing
- Work out ideas by reflecting on them

Sensing (S) *Specifics*



Information



Possibilities, big picture **Intuition (N)**

Sensing - Intuition Preferences and Change

People who prefer *Sensing* typically want to know *first*:

What's not changing

Practical reasons for the change

What specifically isn't working

Their role in the change

What, where, when, who

People who prefer *Intuition* typically want to know *first*:

Why

The overall goal

Future possibilities & options

The vision

Links to other initiatives

Typical Reactions During Change

**Introversion
Sensing**

I like to conserve what works
I want to understand the practical value of change
I want to keep things real and concrete

IS

IN

I like the idea of change, as long as it fits with my own vision
I appreciate having time to think it through
I like change to be congruent with fundamental principles

**Introversion
Intuition**

Truth:

People have different needs during change – There is no one size fits all.

I see change as fun and creative
Change is about evolving ideas
I often think if it doesn't work, we can stop and try something different

**Extraversion
Intuition**

Involved in discussions (E-I)

- The kind of information that will help people deal with change positively (S-N)

MBTI® Insights: Change Needs + Leader Approach

- **Individual Needs during times of change**
- **Go-to-Approach for leading others during times of change**



Typical Approaches During Times of Change

EXTRAVERSION OR **INTROVERSION**

Opposite ways to **direct and receive energy**

SENSING OR **INTUITION**

Opposite ways to **take in information**

THINKING OR **FEELING**

Opposite ways to **decide and come to conclusions**

JUDGING OR **PERCEIVING**

Opposite ways to **approach the outside world**

Your Approach during Change?

How you approach structure and make decisions

Structuring; decisions and action; clear position; confident and consistent

Expertise and knowledge; high standards; hands-off, style; analyze information; flexible

Value-based; involve others; loyal; consensus and needs of others

Views of others; coaching and encouragement; supportive of differences; flexible; resourceful

Leading during change

TJ

Structuring; decisions and action; clear position; confident and consistent

TP

Expertise and knowledge; high standards; hands-off, style; analyze information; flexible

FJ

Value-based; involve others; loyal; consensus and needs of others

FP

Views of others; coaching and encouragement; supportive of differences; flexible; resourceful

Leader Approach & Flexing to the Change Needs

ENTJ

Thomas, IT
Manager

INTP

Phoebe, CEO

ESTJ

Judy, VP
Operations

Truth:

**We can help leaders
develop their ability to flex
to meet the needs of their
employees and teams.**

Maria, Customer
Support Lead

ISFJ



Applying Psychology of Change Concepts- Client Example

Walkthrough of one institution's major change initiative



Brief

SITUATION

- Currently a successful organization, however,
- Operational Efficiency Audits and New Product Rollouts pointed to restructuring needs

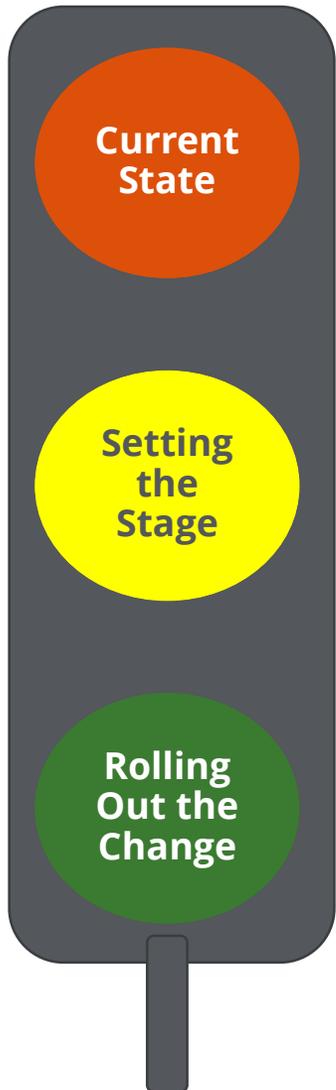
REALITY

- Unclear level of employee commitment to change
- Concern for employee buy-in, morale, and dissention
- Change must not negatively impact bottom line and business goals

PROFILE

- 800 Full-time Employees
- Financial Industry
- Strong public reputation

Our Proven Approach to Support Organizational Change



Current State

Setting the Stage

Rolling Out the Change

PHASE 1: Discovery of the people & organizational context

PHASE 2: Supporting the people, Laying the leadership groundwork

PHASE 3: Customized Change Strategy Rollout and Ongoing Efforts to Start, Sustain, and Finish

- Goals
- Climate Survey
- Employee Development Diagnostic
- Leader Development Diagnostic

- Custom Design and Delivery of On-site and Virtual Employee Development Options
- Leadership Development Workshops

- Climate Survey #2
- Ongoing Development for Leaders and Employees *through* the change

Climate Survey #2- Results

Client Outcomes:

1. Improved climate survey ratings by employees (commitment, morale)
2. Improved sense of understanding the reasons for the change
3. Increased trust in leadership (transparency, focus on employee needs)
4. Increased sense of company commitment to employee development (valuing employees)

Truth:

Change is a process of adopting a new reality-perception, attitudes, competencies, and achievements. People need support.

Our Proven Approach to Support Organizational Change



Closing the Gap: Understanding the Real Factors at Play



Truth:

**The organization does not change--
people do.**

anced

Source: Gaba, V. (2017), "Leading Change", INSEAD.

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Key Takeaways

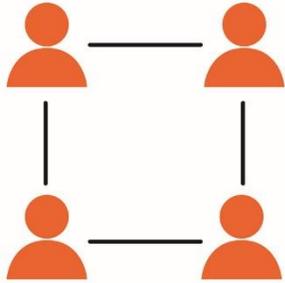


Change can be more successfully navigated through the power of psychological insight

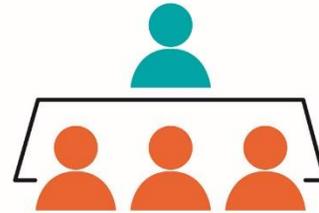
- 1. Change is personal. Understanding people's psychological needs and using validated psychometric assessments can help.**
- 2. Don't begin with the Change. DO begin with your context, leader approach, and the people on board.**
- 3. Support people through a change process. Find the champions and leverage their support to engage buy-in and sustain momentum.**



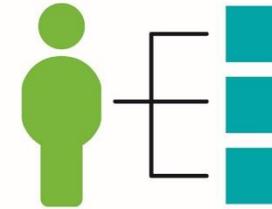
Your partner during times of change



Self awareness



Interpersonal
needs



Leadership
competencies





Questions?

