

Lift Your Organization



A TidalShift White Paper

Organizational Lift Theory Developing Resilient Organizations

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Executive Summary

What Is Organizational LIFT Theory?

Organizational Lift Theory (OLT) is an integrated approach to mobilizing organizations as a whole to achieve business results.

OLT focuses on developing understanding, skills and consistent behaviours in the three interconnected areas of competency. These competencies underpin every organization's ability to move ahead:

- **Thriving In Change** - through Change Management
- **Pulling Together** - through Leadership, Self-leadership & Team Development
- **Getting Things Done** - through Initiative & Project Management

These competencies and behaviours constitute an organization's operational metabolism. Taken together, they create organizational resilience.

The Challenges All Organizations Face

The current reality is that every organization - no matter what sector it is in - faces the immense challenges of:

- Ongoing change
- Organizational restructuring
- Pressure for improved performance

To thrive in the face of these challenges, organizations need to become resilient - and not be caught flat-footed. As a consequence, learning & development programs must deliver organizational resilience, which is where Organizational Lift Theory comes in.

The Essentials of Organizational Lift The Resilient Organization

Organizational Competency	Thriving In Change	Pulling Together	Getting Things Done
Organizational Trait	An Adaptive Organization	A Cohesive Organization	An Effective Organization
Skills & Behaviours	Change Management	Leadership, Self-Leadership & Team Development	Initiative & Project Management

OLT Principles

Organizational Lift Theory is built around the objective of delivering consistent business results. Three principles follow from this:

1. **Performance-Oriented:** The aim of development is not merely "learning." Instead, the aim is consistent behavioural change leading to measurable business results.
2. **Science-Based:** To be more effective, L&D programs need to be founded in the science of learning, deploy content that is based on research and deliver programs that are optimized for the learner.
3. **Organizational:** To develop individuals, it is essential to develop the organization.

Equipped with Organizational Lift Theory, L&D departments can more productively re-engage with senior leadership in the mission-critical role for development.

New Realities Drive New Approaches to Learning & Development

Organizations in all sectors – in business, government and not-for-profit – are being buffeted by “the new realities.” Few if any are untouched, or can confidently remain so.

These new realities are so all-encompassing, dynamic, complex and unpredictable that organizations frequently are forced to react to specific pressure points, rather than formulate an overarching strategic response.

The key to developing an overarching response is not to deal with issues on a piecemeal basis. Instead, it is first to identify the macro ways in which the new realities impact the organization. Second, to develop the competencies required to meet these macro challenges. Armed with such strategic clarity, L&D departments may engage more fruitfully with senior leadership on their mission critical contribution.

TidalShift has identified three interconnected drivers of the new operating environment:

- 1. The Challenge of Change** - Rapid, vast changes in the world around us, forcing individuals and organizations to respond to it.
- 2. The Challenge of Restructuring** – Fluid reorganization of workgroups, divisions of the entire organizations, forcing changes in roles, relationships, behaviours and skills.
- 3. The Challenge of Improved Performance** – The continuous demand for improved performance from individuals, teams and the organization as a whole – forcing everyone to become better at what they already do and to find new ways to deliver work output.

Origins of Organizational Lift Theory

OLT grew out of TidalShift’s roots in project and people management practice, helping people and organizations get things done.

Early on, we discovered that mastering the recipes for project management didn’t always result in desired outcomes. The ‘people’ factor kept cropping up. In response, we implemented leadership and team development programs optimized around achievement and made great progress. Then the world changed, change became a constant, so we factored in the need to master practical change management skills.

The necessity to deliver organizational outcomes and not just individual improvement required us to elevate our perspective and deepen our offering. OLT grew out of this need.

One: The Challenge of Change

The forces of change sparked by technology, social transformation, innovation and globalization (just to name a few) are moving at immense speed. They're creating an operating environment that is anything but stable and predictable. Change has been identified as volatile, unpredictable, complex, ambiguous and ceaseless¹. This is the new normal.

Three Foundational Necessities

The upshot of this is that organizations need to be able **thrive in change, pull together** to act as one and be able to **get things done** on projects and initiatives – all with the precision of racecar pit crew. These necessities underpin forward progress.

Thriving In Change

Thriving in change is not simply a matter of becoming used to it, like getting used to loud noises. Instead, being able to capitalize on change requires having the practical skills to manage it. As in project management, there is a growing body of tangible, pragmatic techniques and skills for change management. As these skills are mastered, the inhibiting stress of change can be dissipated and the pace of absorbable change can be accelerated.

Redefining Leadership

A paradox of change is that organizations must be ever more responsive to leadership from the top. Yet, the organization can't simply wait for the top team to tell it what to do. Things are just happening too fast. Moreover, those on the front lines of change will see more than senior leadership. They need to be able to act on their own when needed, and know when to read a situation and report back to their leaders. As a consequence, leadership is being redefined.

¹ Based on the work of Lewin (1951) and Kolb (1984) that focused on experiential learning, as well as Knowles (1984) who focuses on the characteristics of adult learners and more recently Bandura (1997) whose work on cognitive processes of social learning and change are incorporated into our work.

Top-down is being complemented by bottom-up, outside-in and inside-out. Everyone must be able to demonstrate leadership and to be able to embrace the leadership of others.

The New Usual for Business

Traditionally organizations have been built around core operations. Departments were structured, roles and tasks defined and skills developed accordingly. The very stability of organizations was a source of their strength.

Now, the need to respond to change, gain market advantage, or better serve stakeholders is placing a new premium on the strategic initiative and the special project – over and above traditional operational roles. Initiatives are bigger, more frequent, have higher strategic stakes and higher performance expectations. They are becoming a core organizational competency that everyone must master. Projects and initiatives can be said to be “the new usual” for business, government and not-for-profit alike.

The temporary nature of projects pulls people out of their comfort zones of job-defined roles and power bases. It joins together people from across the organization in new relationships. Frequently, people must play on multiple teams in addition to carrying on their normal operational duties. As a result, in addition to project management skills, leadership, self-leadership and teamwork skills are also paramount. These skills may even deliver higher value to an organization than being good at one's day-to-day job.

Two: The Challenge of Restructuring

Traditional silo and layered organizations are facing the need for fluidity. Restructuring is often an ongoing process rather than an arrival at a new permanent order. In restructuring, roles may be collapsed or redefined. Rosters may be pruned. People may be reassigned to new departments, teams or locales. Whole missions may be ended and new ones begun. All without much notice.

This structural fluidity has two key impacts:

- It requires that people be able to take change in stride, not just the change in the outside world, but change in the security of their job definitions and performance expectations.
- It places new demands on leadership development.

Taking Change in Stride

Organizational restructuring is arguably one of the most distressful and distracting forms of change because it can pull people out of their comfort zones and creates many new performance demands on them with uncertain outcomes. Mastering the skills and behaviours of resilience is key to being able to take such changes in stride.

Leadership Development

One consequence of restructuring an organization is that there is simply less mentor-time available for developing emerging leaders. At the same time, younger staff are expected to step up and lead sooner and with confidence. This is in addition to the need for everyone in the organization to exhibit self-leadership and situational leadership. The drive forward for an organization may come more from emerging leaders pushing collectively up from below, than from senior leaders pulling the organization along from above. To meet the demand for emerging leadership requires active, programmatic development. While traditional leadership development for executives is as important as ever, the greatest gains may be won via leadership development for the vast majority.

Three: The Challenge of Improved Performance

No organization today, (whether for-profit or not) can afford to simply do a “good job.” The demand to meet rising expectations is not going away. Whether the demand springs from the marketplace, owners and shareholders, members and donors or the electorate, the ongoing expectation is still to do more, better and

faster with less. This is continuous improvement with a vengeance.

Beyond blunt cost cutting, substantive organizational performance gains come from pulling together across many divides that separate one person, team or department from another – reducing the internal friction that drags on performance. It also comes from the ability to adapt or innovate, which in turn require facility at implementation, often through special projects and strategic initiatives. None of this is possible, if the organization isn’t comfortable with change, adept at pulling together or competent at getting things done.

Closing the Gap between Development and Business Results

It is clear that delivering business results – “lifting the organization” – requires across-the-board competencies in Change Management, Leadership & Team Development and Initiative & Project Management. This is the “What” of Organizational Lift Theory.

The “How” of Lift Theory is equally important. The “How” in question is how development actually works so that development sticks. Too often what is learned in the classroom stays in the classroom and doesn’t transfer into consistent on-the-job performance – with the obvious hit on outcomes.

Organization Lift Theory identifies three principles of development that ensure that development consistently leads to business results:

1. Business Results Derive from Measurable Changes in Behaviour and Performance.
2. There is a Science of Development – and Consistently Effective Development Is Based On It.
3. To Effectively Develop Individuals, It is Also Necessary to Develop the Organization as a Whole.

One: Business Results Derive from Measurable Changes in Behavioural and Performance

The fundamental principle of development is that development is not what is learned in the classroom. It is what is consistently practiced on the job.

The best way to be sure that learned behaviours become practiced behaviours is to:

- Measure those behaviours
- Hold the right people accountable for those behaviours
- Correlate the practice of those behaviours with target business outcomes

Challenges for Implementing Effective Development

For leadership to mobilize the organization around its strategy, there needs to be a clear, correctable correlation between learning, doing and results.

Developing such a mobilized organization, however, is easier said than done. Progressively minded L&D departments face a number of challenges in implementing “development that actually works.” Here are two key examples:

The legacy of classroom-centric development.

The course can be treated as something like a pill, prescribed for a specific condition. What happens after the learner takes it can be more or less up to the learner... with loose obligations for support by managers and soft requirements for accountability. Re-engineering the classroom-centric legacy will take a mind shift, one that Organizational Lift Theory is dedicated to bringing about.

Limited budget available for structurally extending courses into actual practice.

This requires the programmatic participation and accountability of others outside the L&D department. It may require assembling a number of different courses together to create a solution. And it usually

requires ongoing interventions such as coaching, sustainment and measurement. Extending an excellent course into an effective program can add to costs. This in turn may either require increasing L&D budgets or trimming programming, with the first less likely and the second less desirable.

The budget concern may be counterbalanced by the observation that if current practices do not consistently lead to measureable changes in behaviour and targeted outcomes, current investments in training may be underperforming. Leadership will gain a far greater return on investment by properly funding gap-closing development programs.

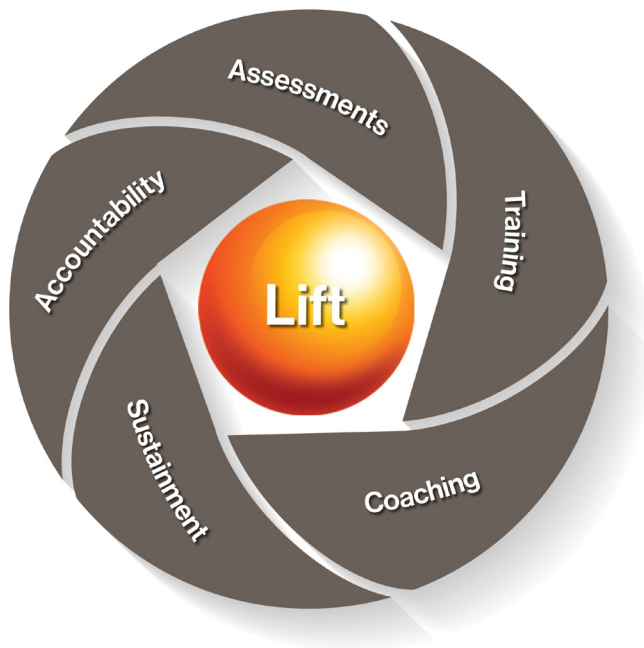
Two: There is a Science of Development

There is a clear, objective and practical path from development to business results. It has its foundation in the science of adult learning, research-based curriculum and learner-optimized delivery. The core science of development is supported by proven best practices in strategy implementation in order to deliver a complete Learning Solution.

The Learning Solutions Process™

TidalShift developed the Learning Solutions Process™ and model in 2004 to help organizations realize greater, more consistent returns on their investment in development. We've evolved this process to incorporate deeper understandings of the linkage between development and results at the organizational level.

There are 5 steps to the Learning Solutions Process™



- 1. Assessments:** Determine the level of need for individuals, work groups or the organization as a whole based on Lift objectives. While there are many exceptional productized assessment tools available, assessments may need to be customized or custom-developed to meet strategic Lift objectives. Assessments feed into design, optimization and delivery of training programs.
- 2. Training:** Provide an instructional experience that motivates the learner while developing relevant skills and behaviours. Training works best when it reinforces the development of both skills and behaviours through relevance to the actual work context.
- 3. Coaching:** Build coaching formally into development to help people master behaviours and address individual concerns and challenges. It is rare for people to master skills in the classroom and then, on their own, apply those skills consistently without coaching feedback. For each training program, there may be a specially defined role for the coach.
- 4. Sustainment:** Provide ongoing learner directed support such as: exercises, reference and

instructional materials, self-assessments and access to neutral, confidential experts. A key to behaviour change is to keep the learning and the behaviours top-of-mind, so that when an employee returns to work he or she does not return to the old ways. Equally important is enabling the learner to take control and ownership of the learning process by providing a range of accessible supports that suits the learner's style and needs.

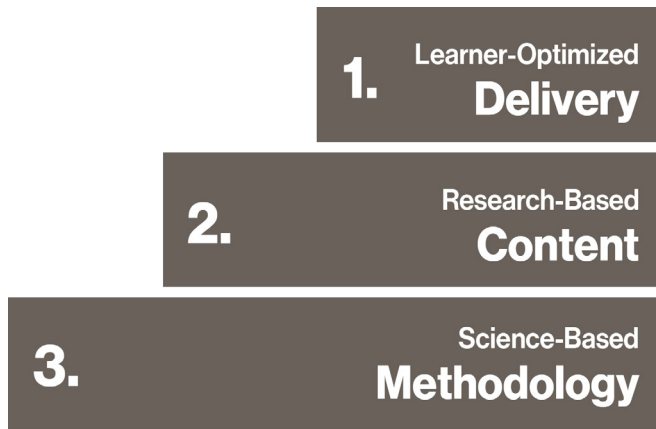
- 5. Accountability:** Define the performance expectations, the measure and reporting systems and set rewards and consequences. The difference between learning and results is accountability for performance. Accountability starts with setting goals and measuring actions and results. Accountability can be defined relative to the particular development goal and to the reporting and accountability culture of the organization. Accountability and measurement programs can be customized to the culture and practices of the organization.

Development That Actually Works™

We've underscored the contribution of the overall Learning Solutions Process™ in delivering behaviour change and business results. This is not to play down the decisive, central contribution of what goes on in the classroom at the Training stage of the Learning Solutions Process™. What goes on in the classroom is the seed from which everything grows.

There is a formidable difference between conceptual learning and consistent behavioural performance. Development that actually works – that actually results in improved performance – requires proven delivery methodology and type of content.

Organizational Lift Theory identifies three constituent components needed to deliver successful, consistent, optimal results.



From top to bottom, they are:

1. **Delivery:** Finally, greatest gains are realized when course delivery is optimized for the learner:
 - A key OLT technique is for the learners to bring actual work issues to the classroom, work on them there, apply learning to the job, and then bring the job experience back into the classroom for further exploration and feedback. This makes learning highly relevant and lasting.
 - An additional optimization technique is to employ terminology and phraseology familiar to the learners, rather than straight out of a syllabus.
 - A third area of optimization is enhancing the delivery experience. Nothing undercuts outcomes like learner letdown. The choice of instructor can make a big difference. Optimization requires selecting an instructor whose skill set, T&D expertise, experience and personality are matched to the learners. Frequently, subject matter experts who are not also T&D experts are called on to deliver content. While they may ably impart information, enabling behaviour change is another matter. Further, if the instructor also has an operational role, this can inhibit learners and their learning.
2. **Content:** Wherever possible, the content of training programs should be based on solid research that correlates learning with behaviour change with business results. Anecdotal content and inspired insights may make for rousing class

sessions, but do not consistently correlate to behavioural change

3. **Methodology:** The foundation for results is a development methodology based on the accepted science of adult learning. OLT uses widely adopted models, developed by both academic and professional association standards. Programs that do not follow scientific models cannot be relied on to deliver desired results

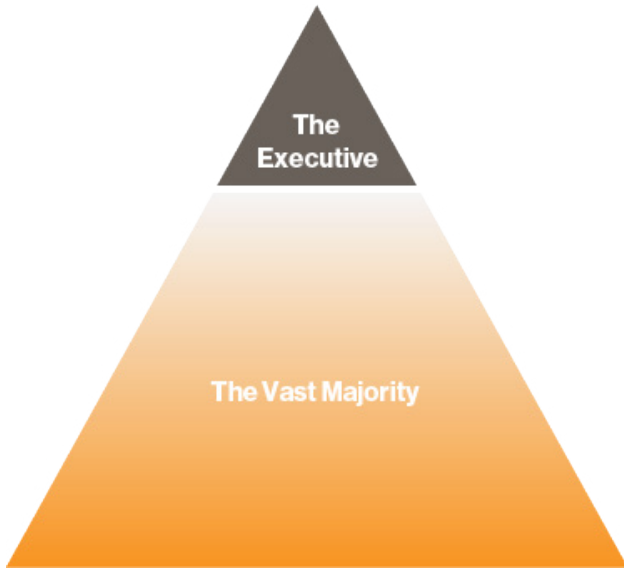
Three: To Develop Individuals, It Is Essential to Develop the Organization

Organizational Lift Theory is based on the premise that it is far better to move the organization as a whole a little ahead, than it is to move a few star performers or senior executives way ahead.

Any progress an individual makes can be undercut or stymied by the intransigence of the whole. It's a truism that if you put a changed person into an unchanged environment, the individual will soon revert to old ways.

However, OLT is far more than making the work environment safe for new skills and behaviours. Organizational Lift is about building across-the-board competencies. When an organization moves ahead as a whole – even if only a little – it has a multiplier effect on overall performance. This builds organizational momentum, which pays ever-increasing dividends.

The upshot is that individual development is most effective when nested inside a larger organizational development strategy – a strategy that enables the organization to respond to the driving forces of change, restructuring and performance pressure by building capacity to **thrive in change, pull together and get things done**. Organizations that can do all this are in OLT terms: Resilient Organizations.



OLT Focuses on the Organization as a Whole

Our hierarchy of skill and learning development is structured according to its enabling impact on the organization. Let's start with the bottom, foundational layer.

Organizational Lift Skills

We define LIFT skills and competencies as foundational, because they:

- Underpin the organization's ability as a whole to move forward – to adapt to change, to pull together and to get things done.
- Have a multiplier effect on all performance.

Investing In Organizational Performance

Developing **Lift** skills and behaviours is just one of the many competing priorities L&D leaders must manage. A review of where **Lift** programs fit in the overall scheme of things can help in making decisions about what works best for each organization.

Types of Learning Programs

Higher Order Learning	Skills like strategic thinking, psychological insight, and executive leadership
Operational Performance Skills	Task-oriented individual performance needed to do the job at hand, e.g. sales skills for sales reps
Skills & Behaviours	Core skills and behaviours needed to mobilize the organization and apply a multiplier effect to individual performance

Operational Performance Skills

Sitting on top of this foundation are job skills, the skills specific to the operational role for which the employee has been hired. It is vital that employees demonstrate an acceptable level of performance in these skills. However, the gains to be had from moving people from 'good' to 'excellent' in operational skills may not deliver as great an ROI as the gains to be had from improving work group's or department's **Lift** capacity. In fact, poor change management, self-leadership or teamwork skills may degrade operational performance. In some cases, the best way to improve operational performance may be to develop **Lift** competencies.

Higher Order Learning

At the very top of the stack are the higher order learnings. These make the most sense to develop when the foundation of **Lift** Operational skills and behaviours are in place, because **Lift** skills enable individuals to make full use of their higher order learnings.

What Senior Leaders Need to Know About OLT

Organizational Lift is about developing across-the-board skills for the general population of an organization. OLT is avowedly not about executive development and does not seek to replace executive development. What it does do is help create an organization that leaders can more easily and effectively lead. The value of **Lift** to senior leadership is incalculable.

Senior leaders will benefit from educational programs designed to inform them about Organizational Lift Theory and how they can leverage it to address the specific challenges their organizations face. Senior leaders may need to be engaged in order to champion the building-in of Learning Solutions Process elements such as organization-wide assessment, measurement and accountability.

Conclusion

The Path to Organizational Resilience

The path to Organizational Resilience starts with implementing Lift capacity development wherever the need is greatest, for example in change management or in self-leadership.

It continues by programmatically extending development beyond the classroom into behaviours. and then recognizing that developmental issues are often not one-dimensional. To increase organizational performance, people need to fire on all three **Lift** cylinders: Change Management, Leadership & Team Development and Initiative and Project Management.

Organizational Lift Theory Puts the Future in Your Hands

The forces of ongoing change, restructuring and performance pressure may seem daunting at times, but they provide tremendous opportunity. An organization that thrives in change, pulls together and gets things done is a great, enjoyable and productive place to be. Organizational Lift Theory gives every organization the means to make this happen.

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