



Application of the Initiative Legacy Assessment – how one company used this tool to improve their change capability

In [last month's article](#) we discussed using the Initiative Legacy Assessment (ILA) tool to assess your organisation's change capability.

This month we take it one step further by looking at how you could actually use the ILA on a change project. We share with you a practical example of how one company used the ILA as part of their change agenda to reduce resistance and increase ownership.

But first a reminder:

What is the Initiative Legacy Assessment?

The Initiative Legacy Assessment (ILA) is a powerful diagnostic that is administered and processed online, and which helps you to take a structured look at the historical impact of change implementation within your organisation.

It is a foundation of the PCI® methodology and uses 20 questions - which map to the 6 PCI CSFs or Critical Success Factors - to query the change environment for potential risk areas based on the way change would have been implemented in the past. In change the old adage very much applies – “if we do what we've always done, we get the results we've always gotten”. Therefore to improve implementation success, this tool allows us to pinpoint areas of risk so as not to repeat the mistakes of the past.

So how would you go about applying this tool? Here is an example out of our own portal from one of our PCI Practitioners:

Situation

18 months ago we were formed from the merging of Company A and Company B, with the express purpose of simplifying our operational structures to achieve big benefits in the market place, from scale, some synergies and cost savings in different categories of our work. We were embarking on a major change agenda to combine hundreds of little departments, across two main geographies that:

- Worked very differently, both in terms of the way they differentiated themselves with customers and the way they managed their internal operations and talent
- Had very different approaches, attitudes, past experience and successes with major change
- Were going into a period of change with different adaptability and capacity levels to drive different projects and programmes of work

Method

Our change agenda was based on the following (PHASE 1) road map – we called it **EASP**



- **Envision** the new, combined organisation – possibilities, goals, case for change, quick wins etc. and engage people in designing the future, creating early energy and buzz
- **Analyse** the current situation – understanding the current environment, limitations, areas we must not tamper with, capabilities to move forward, cultural inconsistencies, learning from the past
- **Scope** the change – where must we integrate, what is out of scope, how will we design and implement, how will we manage the change
- Build a high level **Plan** to get a mandate to proceed

The use of the Initiative Legacy Assessment – I had joined this Company a few months before the merger in a senior HR/OD capacity, prior to which I was working in an organisation with much exposure to this type of change and particularly the ramifications for people. As part of the current state analysis, I was looking for a way to get a quick baseline assessment of where both Company A and Company B were in terms of implementation success and process. Three things occurred to me:

1. We can't afford to fail
2. We have some fantastic and unique talent we have to retain and energise through this transformation - need to put people at the heart of implementation (and design) if we are to succeed
3. We need a process for engagement people and implementing this change

I followed the PCI process to the letter with this one – WHY, well I wanted this to work, I wanted to use this to sell the value of PCI and I wanted to gather the best data to inform our SCOPE and ultimate GO / NO GO DECISION.

Being relatively new to the organisation (average tenure is 15 years) I found that the source of the best insights, data, learning from the past were middle managers (I spent loads of time talking to middle managers to understand the business!!). Therefore I targeted them for my ILA.

Process suggests the following:

1. Get a sample from the “heart of the organisation” – “I chose middle managers from production, logistics, engineering, quality, HR, Finance etc..”
2. Draft a careful email to contextualise and explain the use of this tool – “I got our CEO to endorse the message – a real coup!”
3. Tell people about the whole process – “It occurred to me that we'd get data but would have questions of clarification and understanding about why people scored in certain ways. So I arranged a set of Town Hall meetings where we would present data and have that discussion with people about the data.”
4. Let the system on line do the set up and processing – “I set up different group assessments using the application online, knowing that I'd want to compare data from different groups”

Complication:

- The online system offers 2 options – let the system send invites and survey link automatically OR you request a link and attach it to your own email.
- I tried the first option and found that the invitation languished in the junk folders of my sample...



I'd recommend the second option – 1) set up groups online, 2) request a link, 3) craft your own email and add the link

5. Check regularly and send reminder emails – “I did that. That was clearly helpful because we got a 40% response rate”

Complication:

- The online system again offers 2 options to get your data out – use graphs generated online OR download a data CSV / Excel format and create your own graphs.

Again **I'd recommend** the second option – 1) get the data, 2) create your own graphs, 3) brand it appropriately and create your power-points for the Town Halls

6. Review data with project team / sponsors - **DONE**
7. Conduct focus groups to get more information on data – **DONE**

Output & next steps

We did well with the ILA – and some 9 months into the project we've just sent out the sister tool to get update date on the new priorities for implementation. It's interesting to me that when we did the ILA, our baseline score indicated that 30% of people would tend to resist change, 10% of people would feel a sense of ownership and commitment and 60% would sit on the fence. Just looking at the data we have so far from this new risk assessment, preliminary scores on the doors are 30% resistance, 38% on the fence, and 32% taking real ownership for change!

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This and many other practical examples of how to use PCI on your change projects are available in the [Share-a-Method](#) section of our portal.

Next month – How do you create change capability in your organisation?

The first three articles of this series have been about assessing change capability. In the next part of our series we will shift focus and start to look at how you create change capability in your organisation

This article is part of a monthly series on building change capability. You can find out more in our previous articles:

[Part 1: Do you know how much change capability your organisation has?](#)

[Part 2: How do you assess your organisational change capability – the role of the Initiative Legacy Assessment](#)

This paper is one of a series on a number of change related topics all of which are available from the [Knowledge Centre](#) on the Changefirst [website](#).

You can also follow our progress in the following ways:

