Strategic change management at CUNIX infotech

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Abstract
Highly effective are those organizations that have managed changed and that too with a strategy being the governing light for the change management. Due to lean market growth and saturated business scenarios or just a complaisance over time are just a few reasons why change is required and in this case study we look at a change strategy that has led the organization to a 22%+ revenue growth consistently year on year. This is just a proof that change well thought of a better implemented strategically can definitely yield good results.

Keywords: change, incremental change, balanced score card, change kaleidoscope, profitable growth.

Introduction

Change is the only constant and organizations have always tried to grow optimally by managing change in as many ways as possible so long as it suits the organizations growth strategy. While it has baffled management gurus from always whether a strategy is more suitable then another, the established fact is that there is no one size that fits all. Thus, it is important to have a strategy to introduce, manage and carry out a change within the organization by taking pieces from various models and frameworks to prepare a customized change management strategy that will work for the organization.

For the purpose of study, we will consider a mid-sized company based out of Mumbai, India.

CUNIX Infotech is a customer-centric organization and continually drive excellence through the unique amalgamation of industry knowledge and in-depth research and analysis. With vast experience of working in diverse industry segments, expertise on the matter and analytical approach, CUNIX consultants provide valuable inputs on processes improvement, risk management, information security and strategy implementation enabling tremendous growth

and increased profitability in the organizations worldwide.

CUNIX is a CMMI Institute Partner and Management Consulting organization. Globally, CUNIX has conducted CMMI Appraisal in USA, China, Mexico, Greece, Germany, Brazil, Portugal, Spain, Singapore, Malaysia, South Africa, Taiwan, Kuwait, Qatar, Saudi Arabia and Chile. In India, CUNIX has conducted CMMI Appraisals for CMMI certification in Mumbai, Bangalore, Chennai, Ahmedabad, Hyderabad, Delhi/NCR, Bhopal, and Udaipur.

CUNIX has consulted and training expertise in CMMI, Process Definition, Risk Management, Information Security Management Systems (ISO 27001, PCI-DSS, SSAE16, HIPAA), Quality Management Systems (ISO 9001), Project Management Trainings, Balanced Score Card and Blue Ocean Strategy. CUNIX also helps its clients globally with ISO 9001 and ISO 27001 certification. CUNIX has provided ISO 9001 and ISO 27001 certification in Mumbai, Pune and Bangalore, Qatar, Kuwait, and Dubai.

This case study focuses on the transformation of the organizations profitability from 8% to 10% Y-o-Y to a growth of 22% to 25%

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Y-o-Y. This was made possible by deploying strategic change management (SCM) initiatives/tools like Balanced Score Card (BSC), McKinsey 7S Framework, Beckhard Change Model, Kurt Levin's 3 stage change model, Kotter's 8 Step change model, etc. It also focusses on the implementation to affect this change and make it a success story.

Material and methods

Models and Frameworks Used:
1. Kaleidoscope of Change
2. Balanced Score Card Framework
3. McKinsey 7S Model
4. Beck hard Change Model
5. Kurt Lewin's Three-Stage Change Model
6. Dr. John Kotter's Model for 8 steps Change, Kotter, 2007
7. DICE model

Results and discussion

Part A: Critical examination of SCM programme at CUNIX

Purpose and Intent:

CUNIX has been critical of its performance and has endeavored to improve year on year. Having commenced its operations from 1991, by 2013 they had reached an internal operating saturation with Profitable Growth averaging out around 8% to 10%. This was a trigger to embark on a journey to develop a change management strategy to increase Profitable Growth. Also, it was decided that the change would be incremental and sustained over a 10-year period.

This study focusses on the change strategy developed and the implementation of the developed strategy to achieve the desired goal of profitable growth of the organization using change models. The purpose of this case study is to assess the critical success factors and the subsequent growth achieved due to the strategic change management policy adopted and the growth achieved there off.

CUNIX Infotech was able to achieve its strategic business goals by transforming itself and transitioning, from a slow growth rate (8% – 10% revenue yearly) to a dynamically growing (20% – 25%) organization.

Retrospectively, we will examine how SCM was applied at CUNIX, with intention of learning, how it was accomplished effectively and might also be a further improvement vehicle for the future.

Our intention is to show a composite technique of development and adoption of strategic change in the organization which has led to substantial business benefits and increased revenues and profitable growth. In addition, this strategy is still showing success as well as it has potential for realizing further business benefits in the times to come.

Background

Change Management is defined as 'the process of continually renewing an organization's direction, structure, and capabilities to serve the ever-changing needs of external and internal customers' (Syed Talib Hussain, 2017).

CUNIX Infotech (established in 1991), provided training, technical content development and computer hardware assembling services. The business grew slowly as the management learned new technologies and acquired knowledge of different business domains. CUNIX focused on IT training, consulting and audit services (limited to ISO, Information security and CMMI standards in IT industry only).

CUNIX identified, from customer survey, there was a need for new service offerings, especially in quality standards compliance and governance for IT, ICT and IT enabled services, which covers a larger market. *"This was the diagnosis of the condition in relations to these*

goals" (Beckhard, 1975).

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CUNIX Vision and Goals

Success can only be measured and realized when there is a direction or a vision which is like the Northern Star or the guiding light for the organization. Even though CUNIX was established in 1991, it continually learnt from its existence and business processes and in 2013, it realized that it was time for a renewed and revamped vision and mission. Officially it established its Vision for the next 7 years. The vision of CUNIX was:

To serve the society in our own capacity.

CUNIX mission: To be the most valued and preferred Consulting partner, by providing superior outcomes to our customers globally, following CUNIX core values

The Vision and mission statements were deciphered into understandable discrete meanings to communicate the purpose of the change program.

Outcomes= enhance velocity with acceptable quality and delightful communication

Knowledge = develop competence (knowledge, skill, and trait) by training, experience sharing, cognitive learning, mentoring, knowledge transfer

Core Values= process compliance, integrity, leverage best practices, mutual trust and pride of performance

Relations = Practice transparency, empathy, time sharing, encouragement, motivation, and empowerment.

Strategic goals:

➢ to increase revenue by 100% by 2017 (3 years – Change Duration) in first Change management program

➢ to increase revenue by total 200% by 2020.

The strategic objectives were to develop new service offerings and capabilities, augmented marketing and sales team, multi skilled delivery staff, agile and entrepreneurial culture supported by new systems (Change Target). CUNIX management should also have established goal for behaviour change, for both, management as well as the team, to exhibit capabilities to swim through the turbulent change period. "Setting goals and defining the future state or organizational conditions desired after the change" (Beckhard, 1975).

Goal Definition using Balanced Score Card (BSC)

CUNIX used BSC framework (Niven, n.d.) to establish SMART (Specific, Measurable, Attainable, Realistic, Timebound) goals from their Vision. The Quality policy was established to focus on customer and employee satisfaction. Business goals and sub goals were derived for Financial, Customer, Internal Processes and Employee Learning and Growth. (Fig 1: Balanced Score Card).
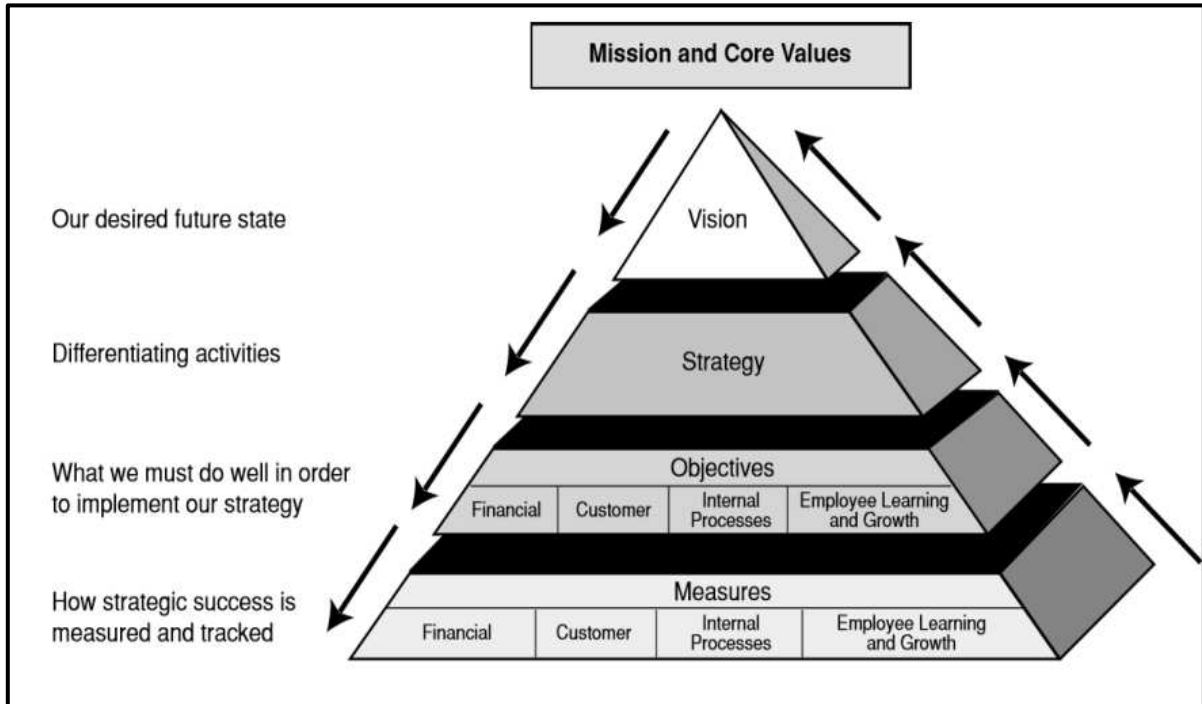
Fig 1 – The Balanced Score Card
(Ref: Paul Niven)

Change Impact on the organization:

Change Target (set of goals) implied overall organization changes as per "*McKinsey 7S Framework*". (Fig 2: McKinsey 7S Framework in annexure (ROBERT H. WATERMAN, 1980))).
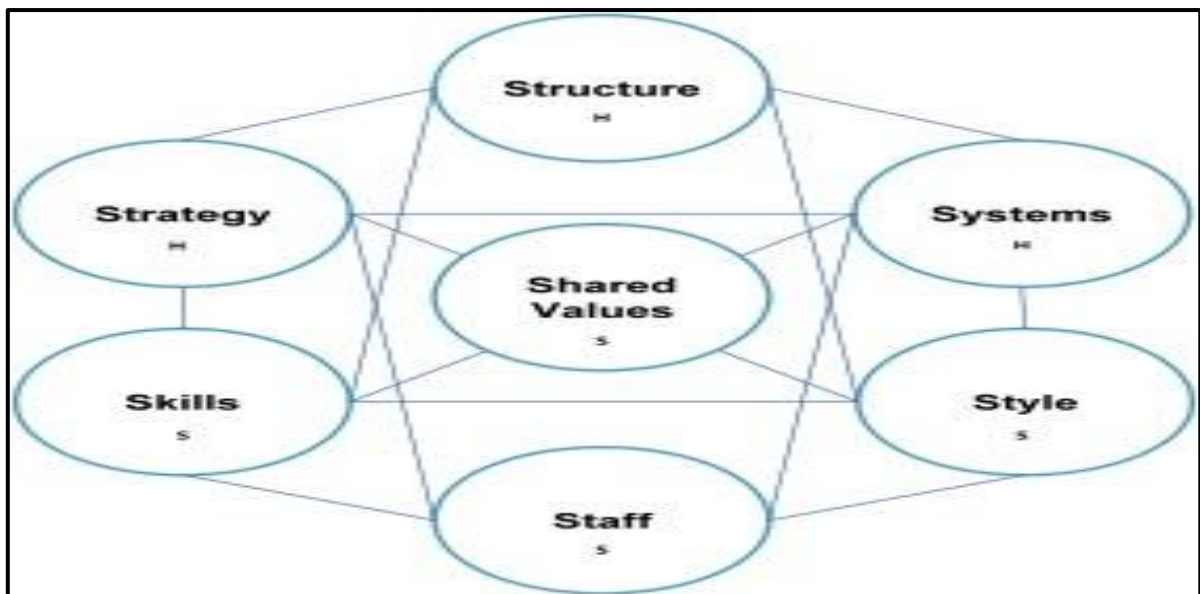

Fig 2 – The McKinsey 7S Framework
[Ref: https://en.wikipedia.org/wiki/McKinsey_7S_Framework]

The CUNIX Management was faced with the challenge of developing a long-term sustainable change management strategy to work towards increasing profitable growth. They then embarked on the journey of constructing a change strategy for long term sustenance of the

change impacts where the first strategy was "***Change should be Top Down***".

At a very early stage itself, CUNIX "Think Tank" realized implementation challenges due to multiple change impacts and competing priorities. Growth was throttled due to numerous start-ups and new entrants, as well as stiff completion between the existing players on the pricing front since multiple options were available to potential customers.

The CUNIX team on the other hand comprised of a small number of young but capable, well-educated Engineering graduates and Business Administration post graduates. Stringent internal reviews of market scenario,

available resources and objective guidance from independent advisors, suggested against "revolutionary" change approach. A radical change with significant upheavals would have been detrimental to the small team, and they could be disturbed and deviate from the *Change Path.* Thus, "evolutionary" approach was selected to manage entire change in phase wise manner as "sequence of change programs". It was expected, that each evolutionary stage might experience internal revolution within its own change paradigm. Larry Greiner's growth model should have been used to evaluate more criterions while deciding these alternatives.
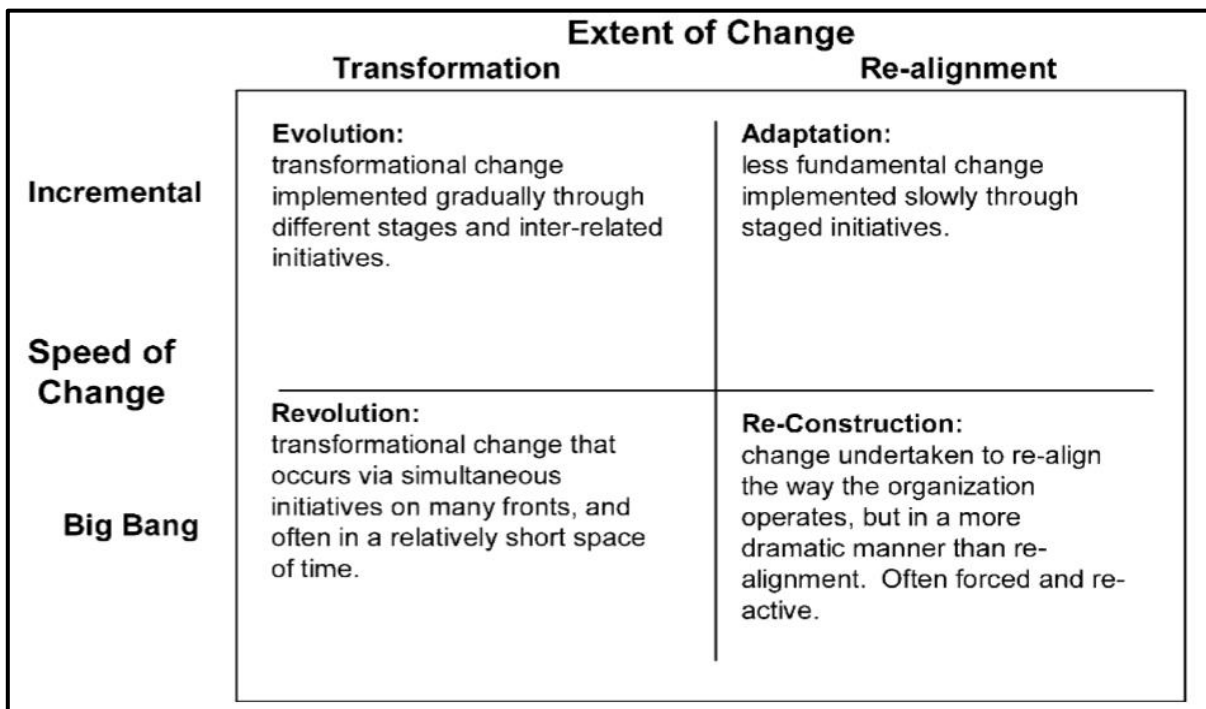

Fig 3: Extent of Change
(Ref: Veronica Hope Hailey, Julia Balogun)

Implementation Strategy

By far the most critical aspect of any strategy is the way that it is executed and implemented. We have seen and heard of a lot of good strategies having failed to achieve the final desired results only because the implementation was not thoroughly thought off. CUNIX think-tank on the other hand had a strong vision and strategy and also invested in a detailed implementation approach.

The implementation was strategically and tactically developed based on the following factors:

a. Geographical Growth – National and International

b. Innovative services development

c. Cross-selling and up-selling to existing clients

d. Establish and Maintain Marketing and Delivery Channels

e. Tapping potential of digital marketing.

Stage	Actions Needed	Pitfalls
Establish a sense of urgency	• Examine market and competitive realities for potential crises and untapped opportunities. • Convince at least 75% of your managers that the status quo is more dangerous than the unknown.	• Underestimating the difficulty of driving people from their comfort zones • Becoming paralyzed by risks
Form a powerful guiding coalition	• Assemble a group with shared commitment and enough power to lead the change effort. • Encourage them to work as a team outside the normal hierarchy.	• No prior experience in teamwork at the top • Relegating team leadership to an HR, quality, or strategic-planning executive rather than a senior line manager
Create a vision	• Create a vision to direct the change effort. • Develop strategies for realizing that vision.	• Presenting a vision that's too complicated or vague to be communicated in five minutes
Communicate the vision	• Use every vehicle possible to communicate the new vision and strategies for achieving it. • Teach new behaviors by the example of the guiding coalition.	• Undercommunicating the vision • Behaving in ways antithetical to the vision
Empower others to act on the vision	• Remove or alter systems or structures undermining the vision. • Encourage risk taking and nontraditional ideas, activities, and actions.	• Failing to remove powerful individuals who resist the change effort
Plan for and create short-term wins	• Define and engineer visible performance improvements. • Recognize and reward employees contributing to those improvements.	• Leaving short-term successes up to chance • Failing to score successes early enough (12-24 months into the change effort)
Consolidate improvements and produce more change	• Use increased credibility from early wins to change systems, structures, and policies undermining the vision. • Hire, promote, and develop employees who can implement the vision. • Reinvigorate the change process with new projects and change agents.	• Declaring victory too soon—with the first performance improvement • Allowing resistors to convince "troops" that the war has been won
Institutionalize new approaches	• Articulate connections between new behaviors and corporate success. • Create leadership development and succession plans consistent with the new approach.	• Not creating new social norms and shared values consistent with changes • Promoting people into leadership positions who don't personify the new approach

Figure 4: John Kotter's 8 steps to Change Management. (Ref: John P. Kotter)

Because the changes were to be brought about in the business vis-à-vis the above, it was affected by firstly selecting potential programs which would be able to adopt the proposed changes in a short amount of time with minimal effort and investment.

Multiple programs (14 in total) were carefully selected after being reviewed by teams and independent advisors (refer table 1: CUNIX Change Program Matrix in Annexure). The table shows "developing strategies and action plans for managing the transition in light of an analysis of the factors likely to affect the introduction of change" (Beckhard, 1975).

Once the programs were selected as potential candidates, the next step was to prioritize them. This was done using the criterion of mutual dependencies with defined degrees of change.

The Change Path constituted 3 sequential stages (Change Cycles) to be incrementally completed in 3 years (2014-2017). Each program "charter" contained

- Change duration,
- Change Target
- Change start (& end) time.
- Changing market scenario,
- Expected impediments,
- Potential risks and
- Opportunities were communicated to justify "Sense of urgency" ((Kotter, 2007).
- Winning practices,
- Reusable assets,
- Best practices,
- Existing success drivers and
- (Veronica Hope Hailey, 2002) accelerators were identified.

Each of these 14 programs was categorized using "Extent of Change" matrix (Figure 3: Extent of Change in Annexure) (Veronica Hope Hailey, 2002).

CUNIX defined a combination of transformation and re-alignment methods incrementally to achieve its change management.

Implementation Plan

A broad base implementation plan was crafted as follows:

1. *Change Roles:* All managers, impacted stakeholders were taken into confidence with commitments of active contribution. Primary Change initiators were involved with agility using RACI (Responsible, Accountable, Concerned and Involved) matrix. The change team always comprised of 1 member each from senior management, middle management, and a junior level, to encourage multiple perspectives for critical activities.

2. Communication plan included key stakeholders, clear message content and use of effective channels, follow up plan to validate the extent of understanding.

3. Risk management was used to categorize and prioritize potential risks (impediments, "Brick walls") and mitigate them systematically with contingency plans and risk mitigation strategies.

4. Resource plan was established with sponsorship and spending criterion for 5M (Men, Machine, Material, Method, and Money).

5. Selected members were trained on competitive entrepreneurial practices, Conflict management, and decision-making to empower them to ideate and innovate new strategies to face negotiations in tough market conditions.

6. Phase wise execution plan for each change program was structured, with "early wins" and KPI based reward points with defined responsibility and accountability. "Try Fast – Fail Fast" spirits overcame the fear of rejection and failures. Selected "Pilots" were planned to prevent early failures.

7. The plan was made simple for understandability to inject confidence and trust for change program. Flexibility was incorporated in selected activities to allow teams to explore better alternatives to execution.

8. Several of Kotter's steps are incorporated in above plan. "Above plan was for defining the transition state activities and commitments required to meet the future state" (Beckhard, 1975).

Thus, for a sustainable change, the below 5 elements were defined in the plan.

Sustainable Change = [Big Picture (vision)] · [Buy in] · [Skills and Tools] · [Manage Risks] · Action (Klatt, n.d.)

CUNIX "Change Kaleidoscope"

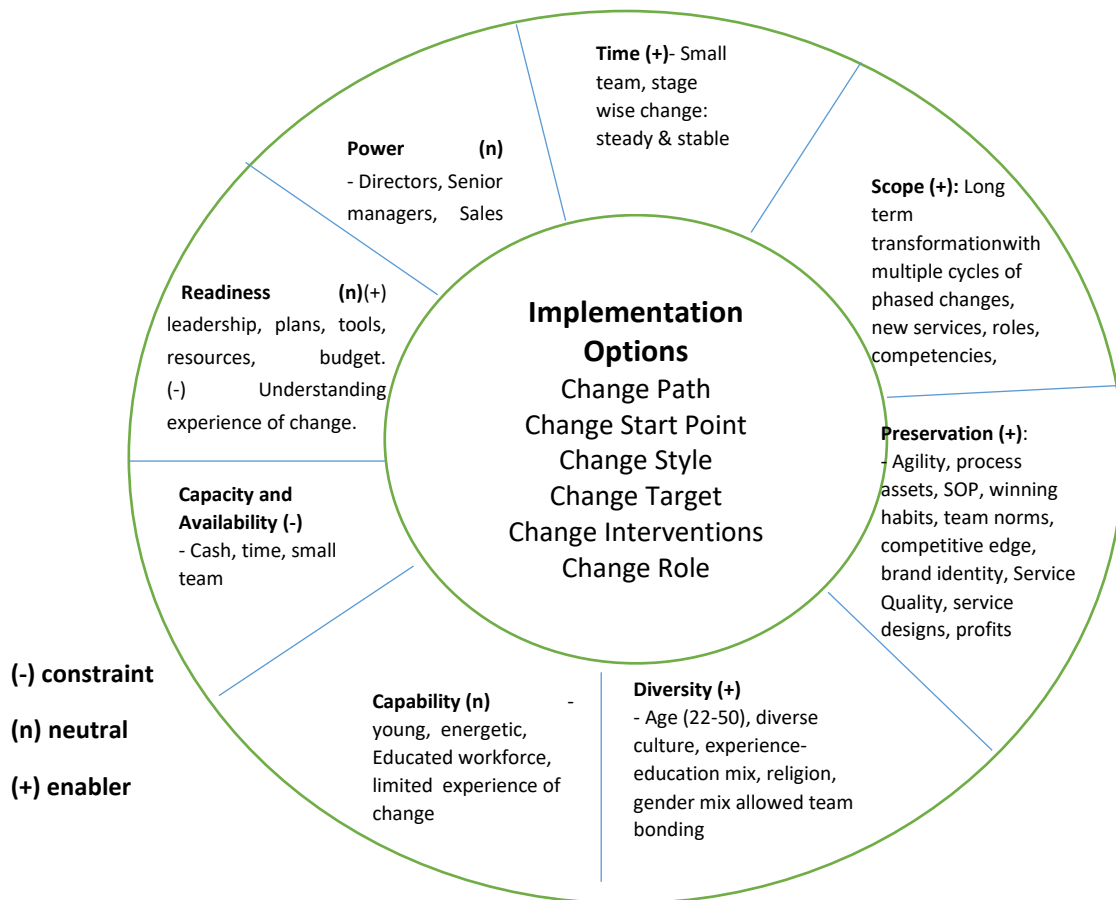The Change Kaleidoscope model is used to explore and assess this case.

Fig 5 – CUNIX "Change Kaleidoscope"

Time (+)- Small team, stage wise change: steady & stable

Power   (n) - Directors, Senior managers,   Sales

Scope (+): Long term transformationwith multiple cycles of phased changes, new services, roles, competencies,

Readiness   (n)(+) leadership, plans, tools, resources,   budget. (-)   Understanding experience of change.

Implementation Options
Change Path
Change Start Point
Change Style
Change Target
Change Interventions
Change Role

Preservation (+): - Agility, process assets, SOP, winning habits, team norms, competitive edge, brand identity, Service Quality, service designs, profits

Capacity and Availability (-) - Cash, time, small team

(-) constraint

(n) neutral

(+) enabler

Capability (n)   - young, energetic, Educated workforce, limited experience of change

Diversity (+) - Age (22-50), diverse culture, experience-education mix, religion, gender mix allowed team bonding

The factors of Change Scope, Preservation, Diversity, and Readiness are listed inside the boxes in the figure above.

Capability, Capacity, and Availability: Competency matrix tracked the status of team capabilities. The management team was trained on BSC, Change Management, decision making and KPI development. Sales and delivery team's competencies were aligned with new services and customer domains. CUNIX achieved ISO: 9001 and ISMS certifications to align its SOPs to attain service quality and customer satisfaction. *Capacity and availability (CAM)*management plan (with budgets and buffers) with available and expected commitments was established for critical resources and functions. CAM with respect to efforts, time, knowledge, motivation and critical involvement needs were defined and agreed.

"**Power:** is defined as a capacity to influence others with or without their consent, whether the power comes from expertise, position, or the ability to reward or punish. Power also established authority for implementing actions and decisions and directives" (Eccles, n.d.). At CUNIX, the power of consensus, collaborative thinking, persuasive techniques, encouragement and justified communication methods were used to encourage teams to participate in the change program.

Implementation Options

Change style: "Four key Implementation tactics were used: Edict, Intervention, Participation and persuasion" (Nutt, 1987). Stimulating the organization for change and embracing impacts is the daunting challenge for the leaders. Persuasion and participation were used to influence team's perspective about being productive and continuous learning.

Change interventions: CUNIX used critical review system coupled with systematic process improvement. External advisors were involved for expert advice and critical reviews at milestones. Planned communications, career development

initiatives and training minimized resistance and influence acceptance to willingly participate in the change program.

Table 1: CUNIX Change Program Matrix

SN	Initiatives	Area	Change type	Extent of Change	Change Time	Status	7S McKinsey Mapping
1	BSC Framework, Goal setting	Executive Management	Top-down	Re-construction	2014-15	Established, Ongoing	Systems
2	Competency, performance development (KPI)	HR		Revolution	2014-15	Established, Ongoing	Skills
3	Strategic alliances (local, International)	Marketing/Sales		Revolution	2014-Present	Established, Ongoing	Strategy
4	Developing new service offerings	Services	Bottom-up	Evolution	2014-2015	Established, Ongoing	Strategy
5	Digital Marketing	Marketing	Bottom-up	Evolution	2015-2016	Established, Ongoing	Style
6	Open Culture (MBO, Results v/s Flexibility, SUP, Quality time, Celebrations, Bonding)	HR (Culture)		Evolution	2015	Established	Shared values
7	Decentralization of delivery (Local consultants)	Service Delivery	Top-down	Re-construction	2015 - Present	Established, Ongoing	Structure
8	Capacity and Availability Enhancement to Deliver			Evolution	2015-Present	Established, Ongoing	Staff
9	Career Planning and Staff Empowerment	HR (Leadership)	Top-down	Evolution	2017	Initiated, in Progress	Staff
10	Leadership Succession Planning	Executive Management		Adaptation	2016-2017	Initiated, in Progress	Staff
11	Decentralization of authority	Executive Management		Re-construction	2016	Established	Structure
12	Renewed Pricing strategy	Marketing/Sales	Bottom-up	Adaptation	2016-Present	Established, Ongoing	Strategy
13	Compliance (ISO, ISMS, CMMI)	Systems		Adaptation	2016-2017	Established	Systems
14	Large Account Acquisition, Penetration Program	Marketing/Sales	Middle-out	Adaptation	2017	Initiated	Strategy

It summarises the status of implementation plan in 3 phases(shaded).

CUNIX Results

Having adopted the above strategic change and the implementation plan it is time to look at the achieved results.

For the recent cycle of 3 years the results have been very encouraging and shows that we are on the right track. Change Management program for last 3 years, shows that CUNIX was able to achieve 93% growth, though a tad bit short of targeted 100%.

Table 2: CUNIX Financial Results

S.N.	Financial Year	Actual revenue	% Growth Expected	% Growth Actual
1	2013 – 2014	2,10,00,000	NA	NA
2	2014 – 2015	2,55,00,000	20%	21.43% ▲
3	2015 – 2016	3,10,00,000	20%	21.57% ▲
4	2016 – 2017	4,05,00,000	25%	30.65% ▲
5	2017 – 2018	5,10,00,000	25%	26.00% ▲
6	2018- 2019	6,20,00,000 (Target)	25%	22.00% ▼

Part B. Recommendations for alternate/ better approach: how the change program might have been approached differently/ better

CUNIX could have used Kurt Lewin's 3 stage Model (Syed Talib Hussain, 2017) for Change Management program using 3 phases:

1. Unfreezing (current known state of organization):

a. Resistance to change (risk) was not measured and could have been minimized before the change.

b. Openness to change(opportunity) was not measured and could have been maximized before the change.

c. Overstretching efforts and low frequency of monitoring directly impacts the desired outcome of the change initiatives. At CUNIX, the overall load on efforts due to change versus the normal work was not properly estimated, thus losing 2 contributors during the program and impacting the change velocity.

d. CUNIX should have taken more precaution to assess the existing comfort index of the teams.

2. Movement: (transition state-during the change and behaviour change)

a. CUNIX could have implemented the change with more political support during the transition. Also, the change events could have been sequenced with better integration considering the impact of other changes.

b. ROI was reflected in sales, but analysis of bottom-line impact for each change program could have attracted better buy-in from employees.

c. Few more experienced people should have been inducted into the program to convince the teams professionally by aligning them to the importance and need of initiating the change. CUNIX was implementing the change program of this scale for the first time and were naïve to understand the context, character, and design of the change. CUNIX could have used DICE model – Duration, Integrity, Commitment, effort to structure its change program. (Harold L. Sirkin, 2005)

3. Refreezing (desired state-after the change): Implementation of the plan for change program with commitment and communication.

a. CUNIX should have profiled the new context of the organization, its structure, change in values and using some formal framework after the transition, in support of next change initiative.

b. Periodic program status updates by sponsor (like "town hall meeting") will motivate the employees and boost their confidence to willingly invest more efforts in future change

program.

   c.   Rewards play an important role in raising

the self-esteem and morale of employees and increase their pride in their future roles.

Conclusions

In retrospection, CUNIX used Kaleidoscope change model and John Kotter's model (Kotter, 2007) for achieving its change management program. The case also identified the use of BSC, Beck hard and Levin's Change Model. Change management program during 2014-2017, yielded overall 93 % growth, which was little short of the target. Periodic reviews and analysis highlighted the success and failure cause. The improvement areas, lessons learned, and winning formulas were institutionalized and anchored in the system and culture to ensure sustained change. CUNIX created and communicated compelling Vision for the change

program and motivated the employees for the change. CUNIX could have focused more on the resistance and openness to change and garnered better political support with help of influential actors. Communication of benefits and accomplishments of qualitative and quantitative results could have been better to have better impacts on team morale, and thus, the behaviour. The context, history and the characteristics of the organization should have been studied in detail to understand the mentality, and predict the behaviour of the owners, during this change management program.

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Abbreviations

1. KPI: Key Performance Indicators
2. WBS: Work Breakdown Structure
3. SCM: Strategic Change Management
4. HR: Human Resources
5. ROI: Return on Investment

6. IT: Information Technology
7. BSC: Balanced Score Card
8. CAM: Capacity and Availability Management