

# Shift!

Powerful Stories of  
Organizational Transformation

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# Foreword

Jim Kouzes, coauthor of *The Leadership Challenge*

**M**y earliest memory of the power of stories was of my Danish grandmother—my mom’s mom—telling my brother and me about how, unaccompanied, she crossed the Atlantic Ocean on a ship from Copenhagen to New York City when she was sixteen years old. She didn’t speak any English, yet she managed to get from Ellis Island halfway across the United States to Audubon, Iowa. We never tired of hearing that story, which she often told us while making Danish pancakes—our favorite—in our kitchen in the suburbs of Washington, DC.

Grandma Loss was a force of nature. She was tenacious, tough, independent, and strong in body, mind, and spirit—which you have to be to grow up on a farm, cross a big ocean and traverse half a continent all alone, and live through two world wars, the Great Depression, the much-too-early death of her husband, and being a single woman who had to cook, clean, and do laundry for other people to feed herself and her two daughters. I learned a lot from Grandma Loss, but the lesson that transcends all others is how, despite what life throws at you, you can overcome adversity and make a better life for yourself and those you love. And, as Grandma Loss would never tire of reminding us, you also have to work hard to make that happen.

I thought about Grandma Loss when reading the stories in this book, how they are about a similar theme—overcoming adversity and making a better life for those you care about. The times are very different now,

but the morals of the stories seem very much the same. Out of adversity can come transformation—a transformed life, a transformed organization, a transformed community, and even a transformed world—if, and it's a big if, you embrace it wholeheartedly.

Adversity introduces us to ourselves. Challenges and difficulties force us to examine our strengths and weaknesses, values and beliefs, and hopes and dreams. Sometimes we choose the challenges, like hopping on a ship to a new country, and sometimes they find us, like an economic depression, but when we come face to face with them and embrace them, we learn how powerful we really are. We learn that if we broaden the context, we can see that we're not the first to experience adversity. We learn that we can defy the verdict that we're doomed. We learn that if we want to transform something, we have to fully commit to it. We learn that we have to take charge of change and not let it take charge of us. We learn that it's a lot easier to handle when we engage with others and show that we care.

The stories in *Shift! Powerful Stories of Organizational Transformation* teach all of these lessons. They teach lessons of perspective, of mission, of passion, of dreams, of teams, of service, of heart, of persistence, of character, of diversity, and of so much more—including the power of a simple smile. This is a wonderful collection that celebrates the power of the TMI brand and the TMI global team—individuals and an organization uniquely equipped in the art and science of personal and organizational transformation.

Congratulations to all on the celebration of TMI's fortieth anniversary. The world is a much better place because of the work that you do. Just imagine what can happen in another forty years!

# Foreword

Kostas Hatzigeorgiou, Global CEO, TMI International

**M**any business books have been written by commentators, thought leaders, and captains of industry about the knotty problem of successful change. But few books take the reader on a practical, “roll-up-your-sleeves” approach to transformation based on multiple case studies from around the world.

Written by consultants from TMI companies, this book takes the reader on a practitioner’s view of transformation. We have been in fiercely competitive business arenas, facing challenges and working out how to make change happen. Above all, we have focused on how to make change sustainable. We have had to face the risk and fear of failure. And we have had successes.

Our consultants work in what is arguably the most complex space of all: the people and organizational transformation space. There is a saying: “It is a wise person who learns from experience. It is a wiser person who learns from the experience of others.” We believe that this book has a definite place on the bookshelves of many readers who want to learn from TMI’s experience:

- Leaders and leadership teams who face the daunting task of moving their organizations forward
- Mentors and coaches who want to draw on practical examples of transformation
- Change agents who need inspiration and ideas about how they can make an impact on people and organizational mind-set
- Transformation consultants who want to improve their craft

- Individuals who want to pursue and achieve personal transformation and wish to be active contributors to the success of their team and their organization

The most successful transformation initiatives demonstrate a coherent and consistent pattern. A fundamental and necessary requirement for the success of any transformation initiative is a strong commitment of top management toward the change process. This commitment flows through the organization's levels like a rolling stone, encompassing everyone. A sustainable cultural transformation demands that the change be pervasive. For cultural transformation to happen, all people in the organization have to be fully aligned to its shared values—vision, mission, beliefs, attitudes, goals, and strategy. They need to have a clear line of sight to the common objective of the transformation initiative.

*Shift!* shares the challenges, the practical steps, and the lessons learned during TMI's forty years of experience worldwide. This book contains examples written by thirty-five TMI transformation consultants from twenty-four countries around the world. These transformation stories span the areas of customer service, leadership, complaints, quality, and safety. The book shares stories of leadership and management transformation. It also shares stories of personal transformation that lead to happier, more fulfilling lives.

It is with humility that we share the distillation of our experience.

It is with excitement that we reveal the essence of our craft.

It is with pride that we present this book to the world!

# Transformation, Change, and Culture

Janelle Barlow, President, TMI US

Organizational transformation is a little like a home remodeling project. If you have ever attempted to change something in your house, you know it is not a good idea to go at it halfway. Paint one room, and the whole house begs to be repainted. I sometimes say in jest that if you change one doorknob, you might as well give in and remodel your entire home.

The same is true of business change projects, particularly if they require changes in your organizational culture (how things are done). You will see this in the stories in this book. Many of these initiatives started with one relatively small change. Very soon, however, the change ricocheted throughout the whole organization.

If the proposed change does not engage the people in the organization, the change will ultimately fail. Statistics back this up. Approximately 70 percent of change efforts fail because people have not been engaged in the process.<sup>1</sup> In addition, if a change is not supported by the existing organizational culture, culture will win—every time. And the organization and the people in it will revert very closely to the behaviors that were present before the change was implemented. Is it any wonder that many adopt the attitude of “Just wait. This, too, shall pass”?

*Approximately 70 percent of change efforts fail because people have not been engaged in the process.*

So what is *transformation*? It is a term that is used in logic, design, mathematics, genetics, theatre, statistics, linguistics, politics, and business. In fact, if you use *transform* as a verb, it can be used in any field. In its simplest presentation, transformation is about change. In fact, these two words are used synonymously in this book.

The types of transformation we work with and write about in this book represent fundamental changes in how organizations conduct business through people. These transformations are closely bound to the culture of an organization.

Many organizational leaders believe they can drive transformation by simply making structural changes to their business operations. These structural changes could include massive reorganizations, mergers and acquisitions, or the establishment of detailed rules for how staff should interact with customers. For example, leaders who believe smiling by staff will achieve higher levels of customer satisfaction may say, “Let us all smile at the customers every time we see one.” Yet those same leaders may rarely smile at the customers themselves. In their belief system, service rules are for customer-facing staff—not for themselves.

If customer-facing employees do not smile, however, perhaps the leaders are not taking into account that team members could be dissatisfied

*Many organizational leaders believe they can drive transformation by simply making structural changes to their business operations.*

with how they are treated by their bosses. Perhaps these employees feel regularly abused by customers who are upset. After all, some customers scream at web pages that load too slowly or do not work. Some customers swear they

will never do business with a company again if they are hit with fees that they feel are imposed far too frequently. The organization may have a long history of increasing profits at the customer’s expense whenever it can. For example, advertising may draw customers in with promises that cannot be met by employees, though employees are expected to keep customers happy—or face getting reprimanded by their managers. Something has to give in situations like this. Smiles typically go first.

Sometimes managers do not support their people when they attempt to meet customers' needs, even though the managers state they want their staff to be empowered to handle customer complaints. The managerial structure often is based on a top-down command-and-control approach, which creates a reality where employees have to get permission to do just about anything for customers.

When a business needs to change, simply adjusting its structure or changing procedures will not guarantee a desired shift; culture must be considered in the mix. Figuring out how to align organizational cultures with behavioral transformative initiatives is TMI's expertise. When this alignment is done well, the newly restructured or redefined organization creates a synergy that yields sustainable and significant behavioral change. When we help people in an organization pay attention to their culture, we can help them translate their goals (words on a page) into staff performance (behaviors in action).

While our focus is not on organizational theory, at TMI we believe that when an organization embarks on a transformational journey, its culture must be understood first to see how it will interact with proposed structural changes and goals. If, for example, an organization's culture consists of a toxic relationship between staff and management, that toxicity must be addressed first. If the organization changes its policies and procedures but does not address how the culture must also change, the transformational goal is not likely to succeed.

As Peter Drucker once pointed out, "Culture eats strategy for breakfast."<sup>2</sup> In other words, culture will ultimately reestablish itself. Strategic changes that fly in the face of organizational culture will have difficulty succeeding in the long term. People are loyal to people and to the cultures in which they work. They are not loyal to policies and procedures.

When businesses seek out a transformation process, they do it mostly to have a different relationship with customers, to reduce costs, or to increase market share. As Peter Drucker said more

*Strategic changes that fly in the face of organizational culture will have difficulty succeeding in the long term.*

than fifty years ago, the focus of a business has to be its customers. After all, he wrote, “The purpose of business is to create a customer.”<sup>3</sup>

The stories in this book show how culture and structure can work together to create better relationships, to make things happen, and to swiftly transform an organization. At the same time, TMI consultants will be the first to admit that not all the ventures we undertake with clients are sustainable. Frequently we discover this only after we have been working with a client for some time. It is never pleasant to watch proposed transformation goals collide head-on with the reality of culture.

We know that transformation is never easy. Resistance to change grows strong and tall in most organizations. This is true even if the proposed transformation is needed just to keep pace with changes occurring in the external marketplace. Let us repeat a critical point: an organization’s culture must first be analyzed to see how it will support or resist a proposed change. Only after incorporating this analysis should you move ahead with a proposed strategy.

We also know that transformation requires time. It does not happen in the blink of an eye. The process normally has starts and stops, as you will see in the examples presented in this book. Success comes when your people behave in ways that your competitors’ staffs do not—because they do not have your culture. You can also think about your culture as your internal brand. In fact, Tony Hsieh, CEO of Zappos, says, “Your culture is your brand.”<sup>4</sup> If you get it right, he believes, pretty much everything else will take care of itself. And Zappos is a company avid about its culture.

## What Is TMI?

Founded in 1976 in Denmark, Time Manager International (TMI) is a classic “started in a garage” type of company—only in TMI’s case, it was a basement. Claus Møller, his wife, Viveca, his brother, and some highly competent friends started the Time Manager company. It made the first planning tools to help people manage their time. The tools were great. Millions of people owned Time Managers, especially in Europe. In fact, they became so popular that *Time Manager* became a generic term for any type of planning tool.

But what really made the company successful were the two-day Time Manager seminars that accompanied the little black books. People organized their lives in these ring binders, carried the binders with them, and made huge changes both in their personal lives and at work. People attended the programs and then talked about TMI. Through word of mouth, the company grew exponentially. The programs were hilarious and instructive at the same time—people did not fall asleep in these seminars (and even after forty years, they still do not today).

The programs were funny and touching, and they showed people how to live in the modern world without destroying themselves and their families. People finished the programs and started taking responsibility for their lives. Our ideas and approach touched people in such a personal way that they transformed themselves.

Almost everyone involved in those early days of Time Manager International joined the company because of how he or she was personally transformed. I joined TMI in 1981 because I learned the lesson about taking responsibility for my life. That may sound so simple and mundane, but it meant that I took total control over the decisions I made, how I was with other people, and what I chose to do with my time and life. That is significant. We still hear examples like this in most of our programs, and you will read some of those individual transformation examples in this book.

TMI also had to transform itself because of changes in the marketplace. Very quickly, we were no longer the only company selling planning tools. So we moved into the customer service space. But even then, we did not just teach customer service techniques. Our Putting People First programs were about personal development—or, as we would say today, personal transformation.

One TMI client that has been written about in a number of books is British Airways. British Airways was a UK state-owned airline, ripe for transformation. Margaret Thatcher wanted to see changes in the bloated bureaucracy of BA, its bad customer service, and its even worse attitudes. Few staff members saw any need for the airline to turn a profit. An old joke that circulated at the time said that BA 747 planes were the best way

to move four engines around the world, but they were not good for much else. Thatcher wanted the airline to transform itself and get ready for privatization and a public stock offering.

TMI had demonstrated its capacity for transformation the previous year with its work with Scandinavian Airlines. SAS transformed itself from a huge money loser to a multimillion-dollar profit maker by focusing on customer service aimed at business travelers. SAS is still going strong today. The SAS success helped TMI win the BA contract, and TMI was invited to deliver its two-day Putting People First seminar to more than thirty-eight thousand British Airways employees around the globe. Colin Marshall, then fifty years old, came out of the rental car market (Hertz and Avis) in the United States to lead BA. He was experienced at transforming companies in highly competitive environments. Marshall introduced several ideas to BA, including lounges in airports, business class, and a focus on fixing problems for the traveling public.

But it was Colin Marshall's focus on people, both staff and passengers, that was the key to BA's transformation. Regarding the Putting People First program he said, "I was anxious to inculcate its principles into the minds of front-line people—those who had direct contact with passengers, including people in customer-service jobs, check-in agents, flight attendants, pilots, and reservations agents."<sup>5</sup> Marshall was one of the first CEOs of a giant company who demonstrated a clear understanding that mind-set changes were crucial if customers were to be treated differently.

In fact, Marshall said at one point that BA needed to invest in a transformation project the size of TMI's Putting People First initiative every three years or so.<sup>6</sup> That was a significant conclusion to reach given the necessary resources that went into putting thousands of staff through a two-day program about attitudes.

Marshall was made a peer in the House of Lords in 1998 based on his success with British Airways. Sir Colin Marshall, Lord Marshall of Knightsbridge, passed away on July 5, 2012. Even though he was retired at the time, his passing represented a huge loss to the airline industry in terms of daring and innovation.