

# Working with beacons

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## Preface

Business initiatives are an important element in society through which people in co-operation with each other, make marketable products that meet the needs of other people. From these activities, we derive material and spiritual benefits; we develop ourselves and ... thereby society develops.

For us, initiative means a continuous striving towards "sound organizational process". In this context, "sound" relates to financial, technical, commercial and social aspects. Sound initiatives occur when these various aspects are in equilibrium with each other and in addition they do not form a negative contrast with their surroundings. If the equilibrium is disturbed, the organization must (in principle) restore the balance by its own efforts.

### Why do we start with this?

We think that it is important for people, who work in a business process every day, that they should be aware of the higher order, the context in which they can place their activity.

Initiative is in fact a "cornerstone of society", the significance of which is considerably greater than its yield in terms of products produced, and the returns achieved thereby.

It is our opinion that initiators, the people who must be able to develop our organizations in the future, can be supported by this concept.

Adriaan Bekman, Zeist 1995

## Index

Preface .....	1
Why do we start with this?.....	1
Index.....	2
Intended readership of this book .....	4
Layout of the book.....	5
Beacons .....	5
First do, then understand .....	6
Introduction.....	7
Information and organization .....	7
The significance of questions .....	7
Maintenance questions .....	8
Problems .....	9
Framework renewal questions .....	9
Chapter 1 Beacons for guiding renewal initiatives .....	11
Introduction.....	11
Further discussion of beacons .....	12
Beacon: NETWORK.....	12
Beacon: AIMS and OBJECTIVES .....	14
Beacon: ORGANIZATION.....	14
Beacon: POLICY.....	15
Beacon: TIME.....	17
Beacon: PHILOSOPHY .....	18
Beacon: RESOURCES .....	18
Chapter 2 The phases of the renewal process.....	20
Orientation.....	20
Investigation .....	21
Decision-making.....	22
Implementation.....	23
Evaluation.....	24
Consolidation.....	24
Chapter 3 Beacon exercises .....	26
Questions .....	26
Networking .....	27
Aims and Objectives.....	28
Policy making .....	30
Philosophy.....	31
Organization .....	33
Time and process.....	33
Resources .....	36
Chapter 4 Project work.....	40
The result that must be realized with the project.....	40
The process of realization of a project .....	41
Networks .....	41
Project diagnosing form.....	42
Project strategy form .....	43
Chapter 5 Aspects of the integrated organization .....	44

Groups.....	44
The significance of "looking back" .....	44
Policy as a guiding factor .....	45
The courage to make choices .....	45
Rhythms .....	46
A new beginning.....	47
Project agenda .....	48
1. INTRODUCTION.....	49
2. PHILOSOPHY OF CHANGE.....	49
3. HOW CAN THIS PROJECT AGENDA HELP YOU?.....	49
4. ARRANGEMENT OF THE PROJECT AGENDA .....	49
5. SUPPLEMENT .....	51
6. IN CONCLUSION.....	52
QUESTIONS ARRIVING AT QUESTIONS.....	53
Questions .....	54
IDEAS PARKING PLACE FOR IDEAS .....	55
Ideas.....	56
PREPARATION CONCRETE ACTIVITIES.....	57
Preparation.....	58
NOTES NOTES ABOUT ACTIVITIES.....	59
Notes .....	60
BEACONS SIGNIFICANCE OF BEACONS.....	62
PHILOSOPHY SUPPORTING QUESTIONS:.....	63
Philosophy.....	64
POLICY SUPPORTING QUESTIONS: .....	65
Policy.....	66
AIMS/OBJECTIVES SUPPORTING QUESTIONS:.....	67
Aims / Objectives.....	68
NETWORK SUPPORTING QUESTIONS.....	69
Network .....	70
ORGANIZATION SUPPORTING QUESTIONS:.....	71
Organization.....	72
TIME SUPPORTING QUESTIONS:.....	73
Time .....	74
RESOURCES SUPPORTING QUESTIONS:.....	75
Resources .....	76

## Intended readership of this book

This book is written for all those people who want to initiate something themselves in this life. It contains clues for all those who through an organization are endeavoring to achieve a goal, to realize an ideal, in co-operation with others. We have based ourselves on the principle that in the future it will matter in both large and small organizations that initiatives are taken by many networks of initiators who want to influence the progress of the organization all the time. These networks create room for initiatives, in which work can be done on the permanent renewal of the product, the work conditions, the co-operation with others etc. The hierarchical organization as such will be primarily charged with monitoring and taking care of what already exists. The hierarchy as such will act as the conscience of the organization, which means they decide which renewal processes are important for the continued development of the concern, and which are not. This book contains clues: vision, instruments and experiential data, which will help networks of innovators to exercise a permanent and relevant influence on the development of the organization for which they work. It helps to create the learning organization based on process thinking.

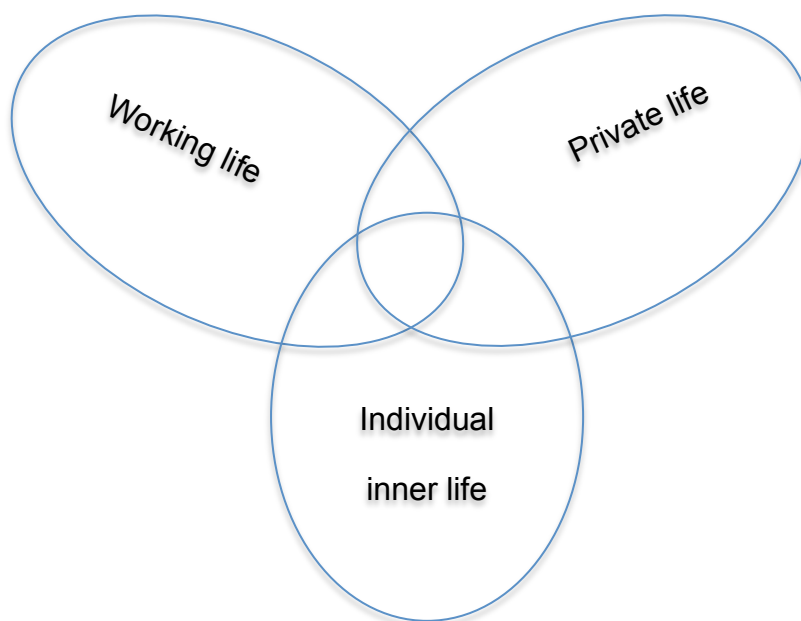
## Layout of the book

### Beacons

The keyword in this book is "BEACONS".

A beacon is defined in the dictionary as "a fixed mark, which guides seafarers". There are also radio beacons, which help aircraft to determine their course.

It will become clear what is the significance of the word "beacon" in the context of renewal: the book gives seven beacons, which initiators can use in order to leave the "traditional waterways and airways" and plot a new course. These beacons have a general validity. They apply not only to initiators in firms and organizations, but also to people who need or want to bring about changes in their private life. In writing this book, we have aimed at readers who are faced with genuine renewal problems in their working lives. However, people operate in the three fields shown below:



Skills, which we develop in our working life, can be applied in private life, and vice versa.

This is why the different fields overlap. Each individual can try to achieve a balance in dividing him or herself over these three fields. Balance in this context does not mean equality as regards volume and/or intensity. But anyone who is entirely absorbed by his or her work runs the risk of burning out and in the end not being able to contribute to what could have happen.

## First do, then understand

This book is mainly based on experience. Both in the Netherlands and abroad, innovators have taken initiatives for the organization in which they work. By their actions, they bring new possibilities to the organization and to themselves. The message of this book is to help you to become "an initiator within your own organization" You can more certainly shape your own reality. This means reading and re-reading the book and above all applying it in your own situation. By using the exercises you can bridge the gap between what you have read and your own actual situation. Then concentrate preferably on a single burning issue. Tackle it "according to the book". Because once you have done something in a careful yet inspired way and discover that it works, new experiences will gradually become ever more full of significance.

This is how you will make the seven beacons and the seven phases described in this book into an integral part of yourself

# Introduction

## Information and organization

The organizations, in which we work, are characterized by complex structures and complicated interrelationships. Quite simply it is difficult for us to see the wood for the trees. Our field of vision is limited for example by the extreme division of labor.

The management of an organization is therefore more and more based on management systems, which function independently of people. This applies not only to production processes, but also to administrative and policymaking processes. People have as it were been turned into "bystanders". A manager in the old days had all the information needed stored in his own files around him. He could find his way around them with his eyes shut. They surrounded him. When information is automated, he is no longer part of the work system. The same applies to personnel people, designers, planners, etc. Work systematization has gone far, but it has its limits.

Whenever we try to discover which organizations contribute substantially we find that they are not necessarily the organizations, which have completely reorganized and systematized themselves. They are mainly those organizations in which people have shared aims and common policies, take initiatives, which lead to results. The essential thing is that there should be a balance between the degree of differentiation and independence of work units and the degree of integration of policy and aims of these work units as part of a larger whole. If you work in an organization, you are faced with the question of whether you can make your process part of the greater whole and keep it that way.

While we work, we are all the time in the midst of a stream of information. The problem is often not so much a shortage of information, but an inability to grasp the information that there is. How can we get to grips with the information, which is relevant for us?

In this connection it is of fundamental importance that the absorbing of information is accompanied by the asking of questions. When we have questions to ask, there is a chance that we will go looking for answers. Questions make us look closely at reality.

By living with questions what was at first hidden is revealed. In this context, information, which becomes available to you and is consciously absorbed by you and is the final point of a process. You seek out related information to confirm or disprove your own observations, judgments and intuitions. In this sense, information is a messenger from the past, a past that continues its effect in the future.

As far as the future is concerned, this can be observed in the people we meet. It is for instance striking that innovators, who are first and foremost aiming for the future, derive their orientations from meetings with people and their dynamic impulses. They see something in what people say and do and give it a direction. Then they try to find out how this connects with what already exists. They try to bridge the gap between what is new and what already exists. In other words: by asking questions, we see the new and with the aid of information we bridge the gap between the new and what already exists.

## The significance of questions

Whenever we speak of questions, we mean "everything which appeals to our responsibilities". We can characterize the significance of questions as follows:

- By questioning we can make direct observations. We see the world through the "eye" of our questions. We devise our questions in the light of what concerns us. If you are a person who lives with questions, you have the possibility of discovering a great deal in this life. In other words: a person who asks questions is a person who can discover a lot.
- Questions enable you to focus your own attention, and that of others, and activities are thereby given a direction.

- Questions act as impulses for learning processes. People with questions to ask are going on a voyage of discovery.
- Questions are like a magnet in a field of iron filings. They give order to factual material, resulting in form and structure. It becomes possible to seek out the significance and interrelationship of the facts. By asking questions we meet other people who are asking the same questions.
- Questions can be shared with others, which can lead to new relationships.
- A question, which you master, opens up the way to new experiences.
- Questions spur you on to observe constantly how matters are interconnected and they open the door to new ideas.

In our daily life, we are confronted with questions, which can be tackled within existing routines. Solutions for these "maintenance questions" can be found within existing frames of reference. However, there are also questions, which lie outside the routine, and we can characterize these as problems. You then have to seek solutions, which you have not yet applied. In this connection, experts can be of assistance. And there are also questions, which, despite having been solved, keep on recurring. These are what we call renewal questions, because if you do not learn to tackle these questions in an entirely new way, they will never let you go. You must drastically alter your frames of reference and your approach and in order to do this, you must take initiatives yourself. It is of fundamental importance to recognize the type of question with which you are confronted, so that you can tackle it in the appropriate manner. This is why we want to go a little deeper into the differences between these three types of questions. We give below a short description, characteristics and examples of maintenance questions, problems and framework renewal questions.

## Maintenance questions

Everything created by human hands must be maintained and looked after by human hands, otherwise it falls into disrepair. This applies to both material and non-material creations. We can tackle maintenance questions through existing means and in ways which are already known to us: we repair or replace, we clean and renew, etc. In short, we are operating in known territory; for a solution, we merely have to consult our own frame of reference.

The **characteristics** of maintenance questions are as follows:

- They are linked with the past: everything that we have made must be maintained and cared for.
- They can be solved by means of the existing system: it's been done before.
- The answers are known; you can use existing experience.
- There is an inevitable involvement between the question and the person asking it. If the question remains unanswered, the whole matter is a dead loss.
- The topics are always the same: maintenance must always be kept up.
- The answers can be copied. Others can be shown how maintenance must be carried out.
- Maintenance is constantly recurring and can therefore be predicted; postponement is possible, but not cancellation. The question is bound up with ownership and owner. The owner is responsible for maintenance.
- The question absorbs capital; means have to be employed for maintenance.
- The processes involved are those of dying off; ultimately everything comes to an end.
- If the person responsible does not answer the question, he has to abandon the question, i.e. the responsibility has to be transferred to someone else.

**Examples** of maintenance questions:

- The windows are dirty; they must be cleaned.
- This procedure is old-fashioned; it must be adapted.
- This building must be restored

- We must revive peoples awareness of our policy
- The files must be kept systematically up to date.
- The engine oil must be changed.
- The colleague must be visited.
- Staff members must be informed
- Training brings people up to date.

## Problems

Problems are questions to which we do not have a direct (ready) answer. We must find out the answer for ourselves and in doing so we make use of the ideas and experiences of others that know how to handle problems of this kind. We must therefore seek solutions, which can be applied, in our own situation.

The **characteristics** of problems are as follows:

- Problems are bound up with the here and now; they are acute, unpredictable and require a solution.
- Problems require direct attention, otherwise matters grind to a halt.
- Solutions must be sought outside the usual channels, i.e. from people who have previously had to deal with matters of this kind.
- You are confronted with a problem: do you grasp hold of it or let it lie? Do you go into the matter further or do you live with it?
- New experiences are encountered in problem solving.
- Solutions must be adapted to the situation.
- Solutions and answers must be specific. Problems can be recognized by many, but solutions are bound up with the situation
- In the end, problems are always linked with people; who owns this problem?
- Problems absorb energy; inner space must be made available for them.
- Problem solving is a learning process; in the process of problem solving you encounter resistance.
- If you do not take hold of the problem, it will take hold of you; the problem will keep coming back.

**Examples** of problems:

- Your competitor has a new product. How do you react?
- People are not communicating with each other. How can we restore the links?
- The windows are no longer being cleaned properly. What other methods can we try?
- The engine has broken down. How can we repair it?
- How can we work in a more systematic way, so that we can achieve a definite answer?
- How can we separate the combatants?
- What solution can we offer to the dissatisfied customer?

## Framework renewal questions

Whenever solutions found elsewhere are of no help, then the framework within which we operate must be questioned. The structure and/or culture must be done away with and renewed. Renewal questions are those we have described as "insoluble". In these cases we are no longer able to consult others. We must ourselves embark on an initiative process, taking the risks, and without knowing what the outcome will be. It is however certain that our convictions and our customs will be affected.

Models and theories are not much help with renewal questions. All "solutions" and opinions, which are offered can do no more than help us to formulate our own thoughts and fix our own course of action.

In renewal processes a vital feature is the renewal of our conceptions and customs, the destruction of our existing framework. This process of destruction is a painful one. You only embark on it if you are in the problem up to your neck. A renewal process of this kind is a **learning process**, in which we try to master new skills and a new awareness. Working on a question of this kind gives us a new outlook on reality and new possibilities come within our grasp.

The **characteristics** of framework renewal questions are as follows:

- They are bound up with the future; the present must be left out of the reckoning. The goal must be to seek out something new.
- Answering the problem is a process of trying to find a route.
- There is a continual choice of possibilities. Each step leads to new choices.
- There is not only one answer to the question; the road to be travelled is unknown. The result of the work is not already available. It is an irreversible process; once it has begun, there is no turning back.
- The answer is an initiative process. The steps, which are taken, lead to new insights. The effects of dealing with each step lead to the subsequent steps.
- The answer generates capital.
- It is a development process. Things are done differently from the way we are used to them.
- By not going into the question, not undertaking anything, you have to wait for the next chance/opportunity. However, some chances occur only once.
- We become alert for these questions, because the old ways no longer work and we suffer in consequence. Whether we dare to do it or not, something must be changed.

**Examples** of framework renewal questions:

- How do we create client-oriented attitudes and actions instead of sales-oriented attitudes and actions?
- How do we renew a product for which there is no longer a demand?
- Are our ideas on how to co-operate with colleagues up to date? How can we familiarize ourselves with other points of view?
- How can we develop an awareness of quality?
- How can I as an employee, become an entrepreneur? How can I achieve work, which brings about renewal, not just maintenance work?
- How can we transform our organization?
- Are we doing the right things? Why do we keep on doing things that we know do not work?
- Do we want to stay number one in the market at all costs?

# Chapter 1

## Beacons for guiding renewal initiatives

### Introduction

The organization is confronted with questions, which have to be tackled by the people within it. These questions vary in size and significance. There are questions, which can be resolved with a measure of effort and in which the organization itself is not at stake. However, there are also questions, which have directly to do with the survival or disappearance of the company, with its development or its stagnation.

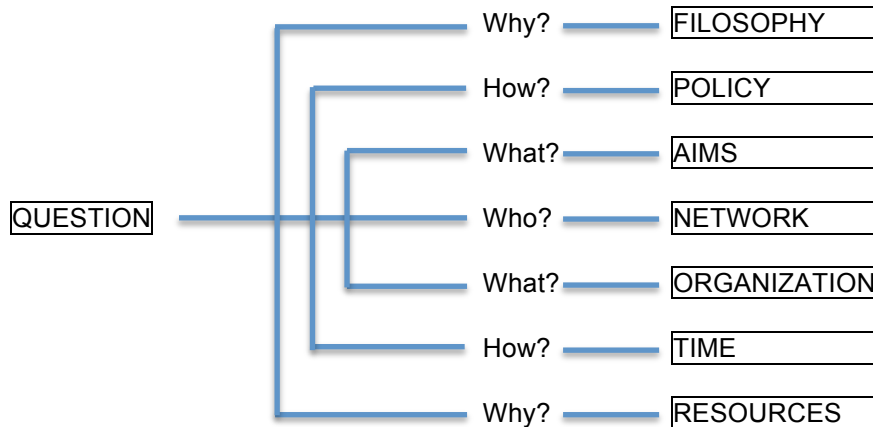
Management is above all involved with this type of question. We must recognize that the number of questions with which we are concerned demands more of us than we are capable of providing. We must therefore make a choice and concentrate on those matters, which we regard as most significant. For some questions, a speedy solution can be devised and implemented, others require a long and intensive search for answers and solutions. Tackling difficult questions demands an innovative approach, especially since these questions require new and unknown paths to be followed.

If you want to act as an innovator in your own company, and want to take initiatives, you can consciously or subconsciously make use of a number of beacons. Just as a sea captain at sea can orientate himself with the aid of compass, chart, buoys, other ships, radar, stars, etc., the innovator can orientate him with the aid of these beacons. The seven beacons do not constitute a hard fast model, but they are mutually interlinked guidelines for a question confronting the organization, and where there is a question of renewal.

Beacon PHILOSOPHY:	<ul style="list-style-type: none"> <li>• What is the leading image?</li> <li>• What vision do we have?</li> </ul>
Beacon POLICY:	<ul style="list-style-type: none"> <li>• What are our done policies?</li> <li>• What policies do we wish to adopt?</li> </ul>
Beacon AIMS:	<ul style="list-style-type: none"> <li>• What is the target group?</li> <li>• What do we regard as a concrete result?</li> </ul>
Beacon NETWORK:	<ul style="list-style-type: none"> <li>• Who sponsors the initiative?</li> <li>• Who carries the initiative?</li> <li>• Who is an expert?</li> </ul>
Beacon ORGANIZATION:	<ul style="list-style-type: none"> <li>• What activities are involved?</li> <li>• What are the tasks?</li> <li>• What are the constraints, what are the boundaries?</li> </ul>
Beacon TIME:	<ul style="list-style-type: none"> <li>• How does the process begin and end?</li> <li>• What are the phases, rhythms and time span of the initiative?</li> <li>• What are the phases, rhythms and time span of the initiative?</li> </ul>
Beacon RESOURCES:	<ul style="list-style-type: none"> <li>• What resources/means can we draw on?</li> <li>• Why should they be used for this purpose?</li> </ul>

## Further discussion of beacons

Before we go further into each individual beacon, we show in the diagram below how they are mutually interlinked.



We have already shown that this interlinking must not be regarded as a static model or a sort of checklist. The beacons are viewpoints from which a question can be considered in order for thoughts to be formulated, which will help you to progress. This is why the links between the beacons are important. They ensure that when dealing with the question you consider it as a whole and keep the whole constantly in mind. We shall now explain what the individual beacons signify.

### Beacon: NETWORK

#### *The people working on the question*

Questions are tackled within the organization when they are observed and have their being in networks of people. Organizations are network structures of people co-operating with each other. Various kinds of network operate within the organization:

- The network of **formal relationships**.  
This is the network of people who operate in a hierarchical system on the basis of power and responsibilities.
- The network of **support** (experts).  
This is the network of specialists who operate on the basis of their expert knowledge. They contribute indirectly to the accomplishment of the primary aims of the organization in that, within the network of formal relationships, their advice and support are called upon.
- The network of **initiative takers**.  
This is the network of people who come together for a specific purpose and who operate on the basis of self-selected viewpoints and responsibilities. Such networks can be composed of people who have been seconded from within an organization to do work on renewal and change. Moreover, formal relationships and expert support can also play a part in renewal initiatives. The people involved make use of the "spare capacity" they have available.

#### *Note to 1. Network of formal relationships*

These networks represent everything, which has happened up to the present. They fulfill the role of a conscience, i.e. they judge what does and does not belong to the organization, what can and cannot happen.

### *Note to 2. Network of support*

These networks of support represent all the intrinsic aspects of what the organization does. They advise on what is or is not possible in relation to the aims of the organization. In this sense, these networks are strongly oriented towards keeping the content up to date.

### *Note to 3. Network of initiators/carriers*

These networks represent renewal in the organization. They are aimed at the future and bring about new realities for and in the organization. These renewals arise out of the initiatives of innovative people.

### **Functions of the networks**

The networks of **formal relationships** are formed by line members and staff. They fulfill the role of a conscience, setting limits and testing results. Within the formal network there are sponsors who support the initiative. The networks of **experts** are formed by staff personnel, who work as experts and specialists. They define, explore limits and carry out research.

The networks of **initiative takers** are made up of people who start up and pursue innovation and of people who support these initiatives.

Their role is to innovate, break through boundaries and to renew.

### **Meeting and co-operation between networks of people**

People choose each other, seek each other out and find each other on the basis of common interests and problems. Innovators meet and recognize each other as a result of a common orientation towards asking questions, involvement in questions and a common approach to problems. Innovators are always asking questions. They are unhappy if there are no solutions to hand and/or in place, and consequently take initiatives.

They recognize each other as innovators because they are ready to take unknown routes.

Innovators set limits to their initiatives in relation to other activities within the organization. They create their own style and capacities and can be seen to work as a co-operative team. When they work on problems "creative confrontations" are continually taking place between innovators, line management and experts.

The initiatives have a profound effect on the development of the organization and possibly also on its relations with shareholders, employees and customers.

The connections between the internal networks and the shareholders and customers are mostly impersonal. They lack the force of personal contact. Personal links are essential for renewal initiatives, both within and outside the organization.

### **Meeting conditions**

Much of what comes to pass is based on meetings between people. The meeting is the basis of co-operation. It is not an obligation. We must want to do it. And it is from this alone that renewal comes. A vital aspect of all this is interaction. Interactions can have very varied effects on people: boredom, stimulation, inspiration, distraction, etc. Interaction is an alternation between speaking and listening; it is getting into other people's minds without letting go of our own self. Interaction as an activity creates a climate for co-operation.

The meeting between co-operating networks of people is in the most favorable case a process of creative confrontation.

## Beacon: AIMS and OBJECTIVES

### ***Target group and setting of aims and objectives.***

Aims and objectives must be sought outside one's own immediate situation. They are tied up with people's inner needs; they must be concrete, i.e. bound up with a known target group. Aims and objectives are the results, which we propose ultimately to achieve. They give direction to our actions.

When defining aims and objectives we thus make use of two viewpoints:

- the target group
- the projected result

### ***The target group***

Who asked for this?

If I myself have asked, then a learning process and learning activities are involved. If it is others who have asked, then it is a question of work activities. Do I know the people involved?

Who benefits?

Who must receive the results?

The target group is a source of inspiration for renewal. Almost all-genuine renewal is inspired by and comes from questions asked by the target group. Initiatives are taken by the innovator together with the target group. Renewal cannot just happen. It has to be sought, as a result of at least one question being asked, and of at least one process which takes place outside oneself.

### ***The projected result***

What must be achieved in the target group? Can I visualize it in concrete terms? Is it possible to have a clear picture of the desired final result?

What will be the new situation after the renewal has been achieved? Projecting results means having a concrete picture as a basis for orienting action, for seeking in which direction to go. Projected results make it possible to evaluate contributions to the work process. In the course of time, new experiences can lead to adjustment of the projected results.

## Beacon: ORGANIZATION

### ***Agreements on what to do***

An organization is a structure of agreement, relating to:

- **Activities which have to be carried out**  
What has to be done?
- **Tasks which have to be carried out**  
What tasks are these?
- **Functions which must be fulfilled**  
What are the links between tasks? Who does what?
- **Constraints**  
What are the limits beyond which we cannot go?
- **Powers**  
What room for manoeuvre can we create?
- **Responsibilities**  
What responsibility is there for results? In many cases others too are busy with the problem - possibly in other contexts. Are there bodies both inside and outside the company who (want to)

play a part with regard to the target group and its problem?

These can be:

- aid bodies: those who can help in solving the problem;
- legal bodies: they indicate what cannot be done;
- financial bodies: they provide resources.

The organization structure lays down parameters for the activities of all those concerned. A clear definition of everyone's role (who does what and is responsible for what?) at the early stages prevents problems in relation to obstructive powers at a later date.

## Beacon: POLICY

### ***Policy, the starting points from which we go to work***

This beacon is concerned with "how we go about things". This style is derived from the customs, attitudes, ingrained values and standards that govern our behavior in the light of the situation in which we are acting. Customs, attitudes, values and standards that govern our behavior are all gathered together under the word "policy". In other words: Policy relates to concepts of a basic nature, ingrained in our thinking, feelings and actions.

We can distinguish between:

- policy in words and/or thought
- i.e. what we **think**
- policy in behavior
- i.e. what we **feel**
- policy in action
- i.e. what we **do**.

In organizations, it is important to lay down joint, explicit policies. Policy is an important tool of management. We can agree about the result we want to reach, but opinions are divided when it comes to the manner in which the aims are to be achieved.

Policy gives direction as to the way we want to go. Moreover, a collection of policy concepts, which has been put together by a network of people, will bring about a feeling of community and solidarity. Policy is the cement in an organization and gives direction to **individual** actions within the framework of the **whole**.

We explain this further below.

### ***Policy formation***

Policy is a word you hear a lot nowadays, in all sorts of situations. Politicians speak of policy and the word is often used in organizations too.

What does the word mean? If you ask around, you will find that it means different things to different people. To some, policy means "rules to be obeyed", to others "what you want to achieve". To a third person, policy means "our way of doing things".

In our view, policy is different from:

- target setting - the result which must be achieved;
- rules guidelines for action in different situations;
- strategy the way you proceed in order to achieve the aim;
- tactics the approach to directing resources towards the target;
- structure the links between functions.

Policy relates to the more fundamental concepts, which apply in decision-making. These concepts arise out of the values and principles, which underlie our thoughts and actions. Whenever there is a choice of policy, the choice lies between concepts on which we base our actions. These choices are largely dictated by what we regard as giving us inspiration in our life and work, and what motivates us when we endeavor to achieve our aims.

Policy formation can be seen as the process whereby we arrive at choices or reconsider them.

### ***Principles and situations***

Our actions are to a large extent dictated by the interaction of principles and situations. In every situation we find challenges, which spur us on to action. We can let ourselves be wholly led by what we find our own inner principles. In this way, we bypass what the situation demands, and just follow our own principles. The art lies in relating and then integrating situation and principle. This integration succeeds when we see ourselves as part of the situation, as a participant who can influence what happens. By our actions we add something to the situation.

In organizations, it is important that staff members should let their personal viewpoints be influenced by those, which have been adopted as policy by the organization. This can only succeed when the staff members have been involved in policy formation. This means that the staff members must have an attitude of being prepared to sacrifice their own viewpoints to the common good, up to a limit where it is no longer possible to identify with the policy.

If the gap between personal and common viewpoints is too great, the staff member can no longer function within the organization without continual irritation on both sides.

### ***Policy in words and deeds***

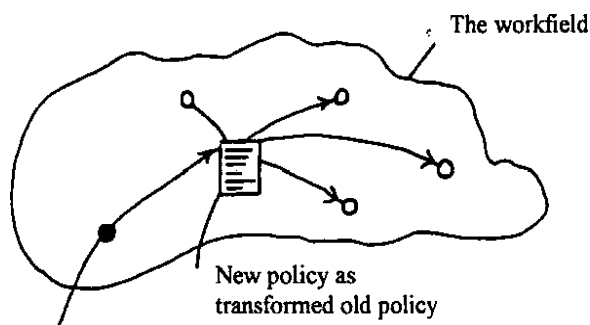
In formulating and renewing policy, attention is mainly focused on what people think and feel. This gives rise to a whole range of opinions, which are hard to coordinate into a single whole.

In policy notes, attempts are made to put the various viewpoints into words. We then speak of policy in thought. These policy notes are the result of a long and difficult process of finding the "lowest common denominator". However, when we come to policy derived from actions, we find that there is far more common ground here. We are closer to each other in our actions than in our thoughts or imagination. In our actions, the common viewpoints arising out of the past come to the fore. "That's the way we do it here" and "that's our approach" are expressions of this. By realizing the principles on which actions are based, we can see what has hitherto guided us in our common dealings. This is how the common will to act differently can arise. "Policy shows the way." If we want to renew our way of working, then we must familiarize ourselves with the existing principles on which we work. And we must also decide which ones we want to abandon and which new principles we wish to adopt. Personally mastering new principles calls for a long and intensive learning process. Mastering new principles in common requires an intensive process, which permeates the whole organization.

### ***Summing-up***

Let us consider a field of work.

We use a concrete case, for instance an incident, which highlights the problem, in order to formulate the new policy. What is surprising is that policy concepts formulated in this way can guide actions in numerous other unforeseen problem situations.



A concrete situation i.e. an incident

## Beacon: TIME

### *The process over time*

Time has an objective and a subjective significance. Objective time: everyone has available all the time that there is, i.e. twenty-four hours per day. Subjective time: one person never has time, the other is always available; one person is short of time, another finds it hard to make the time pass.

Processes take place over time, i.e. the activities take place over time. Processes can take place according to logical patterns, but they can also progress in the light of human choices.

In accordance with the distinction made earlier between different sorts of problems, we can distinguish three sorts of processes:

- **maintenance** processes  
These take place along already established lines in known phases.
- **problem-solving** processes  
In these situations, people continually have to make a choice between alternatives as to what the next step should be in order to complete the process.
- **framework** renewal processes  
In these situations, the activities arise from orientation-seeking activities by people, who want to carry out the process in a new way and are therefore seeking a new direction.

### *Available time*

Maintenance processes and processes relating to the solving of problems can be planned in time in the light of previous experience. They can be guided by means of a plan for activities, e.g. in the form of network planning. With this kind of plan, a specific starting time and finishing time can be established. The sequence of steps, the speed, the route, and the critical path - all these can be accurately fixed. The plan guides the activities and shows how things must be done.

Renewal processes are entirely different. In this case, the shape of the processes must come from the progress of the activities over time. Unfamiliarity with the question makes it necessary to seek out what course the process will take. Time can be planned on the basis of general experience. The next step can only be planned on the basis of one's own experience.

Maintenance makes constant demands on our time. The solving of problems requires our concentrated attention and can thus get in the way of maintenance.

Renewal can only come to pass if we ourselves consciously make time for it. In the time we have made available, activities can take place, which step by step respond to the challenges which we could not previously foresee.

This can be pictured as follows:



Maintenance and problem solving

open space for innovation

- Standpoint: he or she, who gives away all the available time to the routines of the day, will not develop him or herself nor the organization one works in.

## Beacon: PHILOSOPHY

### *The leading image*

Philosophy is all about "why". In other words, how to make sense of it all.

Underlying every action is a more or less conscious inspiration or impulse. Impulses are sparked off by inspiring ideas. Whatever reality one creates is determined by the ideas on which one can draw. Philosophy gives expression to the image of man and of the world, which is present in everyone. Philosophy is expressed as:

- the title of a story;
- the 'leitmotiv' of an event;
- the inner essence which is attracted by others deeply;
- affects one's inner being;
- the shape of material;
- the image.

Philosophy makes real and visible the inner essence whereby the reality of the organization manifests itself. Philosophy is addressed by developments in the community of a more fundamental nature, such as for example automation, customer orientation, and the quality of work.

Philosophies can be perceived as "waves" in the organization: e.g. the quality wave, the automation wave, the customer orientation wave.

These waves reflect current questions, which have to be discussed by people and organizations. In these discussions the various images of man and the world collide with each other.

Everything that we can observe and perceive is formed by dominating philosophies and permeated by them.

The art lies in observing these philosophies at work in the functioning of people and organizations. It is then possible to make a conscious choice of these, or to decide whether to shape and develop them further.

## Beacon: RESOURCES

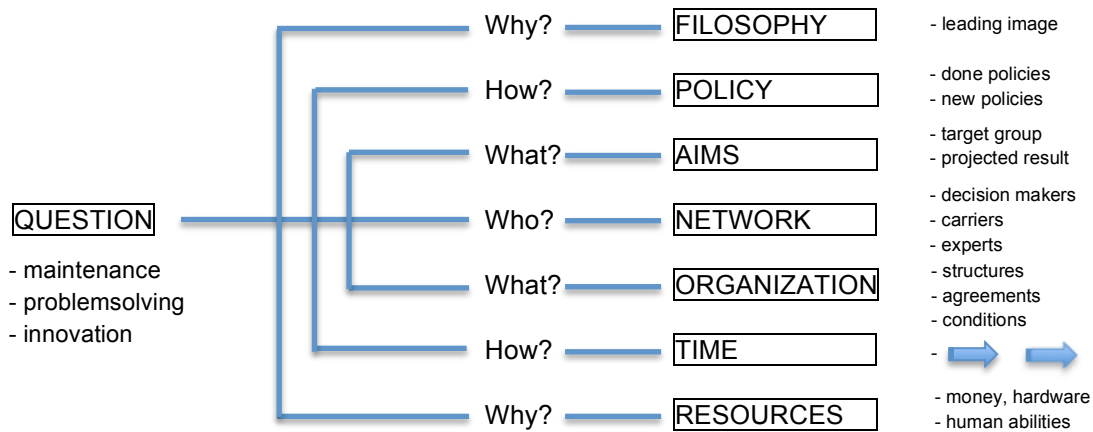
### *Instruments and abilities*

Resources are instruments made by people so that they can work. Skills are instruments created in people so that they can work.

The development of resources and skills lies at the heart of an organization's investment problem. The availability of resources and skills is reflected in the available funds. Wherever aids and skills are employed, funds are also needed. Resources can be devoted to processes for maintenance, problem solving or framework renewal. The purpose for which the resources and skills are employed depends on the philosophy of the organization. And this philosophy is bound up with the circumstances, whichever phenomena specific to the moment prevail within the organization.

Where resources and skills are applied, depends on observation and perception of the future.  
 Are we concerning ourselves with continuing the past replacement or are we concerning ourselves with doing away with the past (= renewal)?  
 Resources are used and in the end disappear. Capital resources must be written off, but skills can be entered on the credit side.

We complete this chapter on the beacons with a repetition of the beacon diagram, but this time it has been expanded with keywords representing the content of each beacon.



## Chapter 2

### The phases of the renewal process

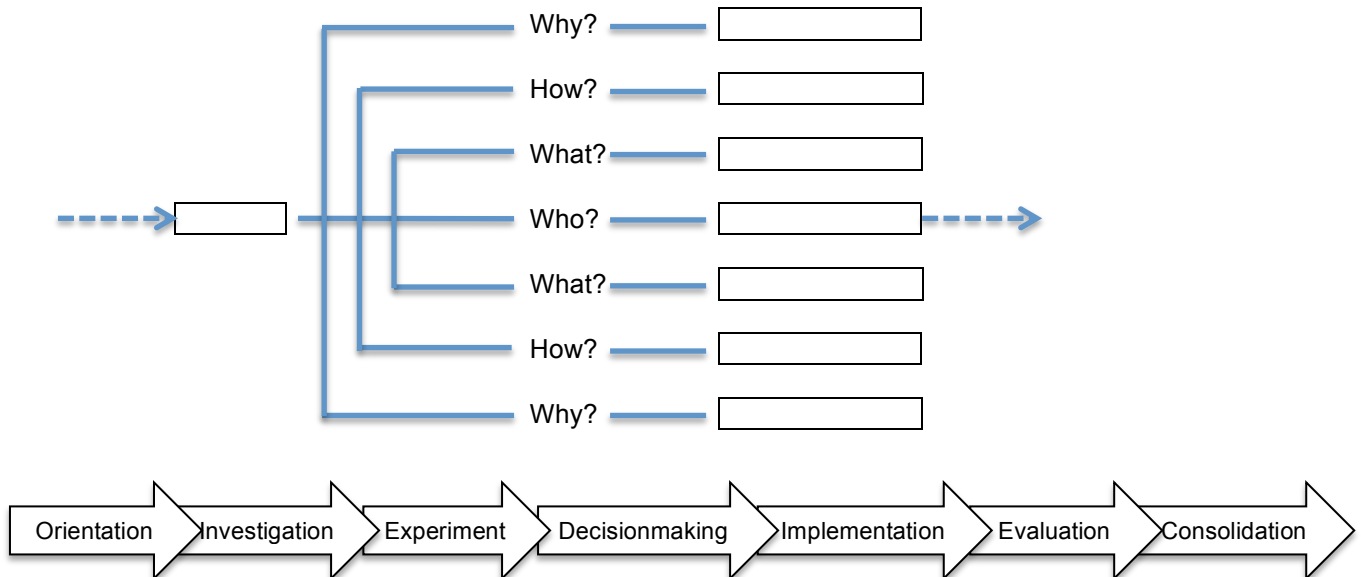
On the basis of a multiplicity of experiences, we have tracked down a number of phases, which characterize the way in which renewal processes take place. The phases to be described below indicate a certain sequence. This sequence is relevant insofar as the activities in the renewal process take on the "colour" of each phase in succession.

The phases we can distinguish are as follows:

1. Orientation
2. Investigation
3. Experimentation
4. Decision-making
5. Implementation
6. Evaluation
7. Consolidation

In guiding renewal processes, the beacons discussed earlier cannot be dispensed with. These must be seen as orientation points for guiding the renewal processes and steering through changes (renewals). In fact the seven phases form in time a renewal path when seen in longitudinal section. The seven beacons could be represented as a coherent whole by means of which the "cross-section of renewal" can be represented phase by phase.

The dynamic model formed by the beacons also runs through the seven phases.



#### Orientation

##### ***Becoming aware of the question***

Orientation is: becoming aware of the question, which confronts the organization by meeting other people who have also come up against this question. The sequence of events might for instance be as follows:

Small incidents in the organization, which constantly require actions and solutions, give rise to an awareness that something must change. A number of people have the feeling that things cannot go on as they are. The fact that solutions are always found to the questions and answers to the questions does not diminish this feeling. On the contrary, it is strengthened! The solutions and the answers require so much effort that in view of the poor results the people concerned become exhausted and frustrated. This is what drives them to look for the underlying causes of the questions. It is this meeting between people who are "suffering" as a result of a particular questions in an organization which can lead to a search for change and for renewal.

### ***The question comes to life***

In the orientation phase the question comes to life, i.e.: people come face to face with a question. To give an example: parents become aware of the fact that their child suffers from asthmatic bronchitis. They had heard of it previously, but it was nothing more than a name to them. Now they are really confronted with a problem: life is no longer going to be the same as it was before. The accustomed pattern must be disrupted. The child receives specialized medical support. The parents try to understand the situation. In so doing, they suddenly realize that many people are confronted by the same problem and that until recently they had been unaware of this. They read up the problem, talk it over with their friends, ask questions. By asking questions such as: "Is this condition temporary or does it last a lifetime?", "Should we go and live by the sea or should we stay here?", etc., they look for ways and means to tackle the problem. This search may lead to a new view of life, even to a new ideal, which in the long run can lead to a new lifestyle and direction.

## **Investigation**

### ***Clarification of the question***

A question does not just come out of the blue. It arises over a certain period of time. The essence of the question becomes visible once its genesis can be seen. When during the orientation phase, a certain measure of understanding of the question has been achieved, then in the investigation phase the genesis of the question or problem can be charted. The genesis must be sought from people who had been confronted with the question at an earlier stage.

By listening to their experiences, it is possible to identify the key-points on which to base the next step in the investigation process. The genesis of a question can help to indicate where the root of the question lies. From previous actions and activities, which have not led to a solution, it is possible to avoid obstacles and resistance at later stages in the solution of the question.

When investigating a question it is not in the first place necessary to gain an insight into the whole, but rather to discern which aspects are the crucial ones. These can give a lead as to which steps should be taken next.

### ***Seeing a way out***

When working on a question it becomes clear where there is some understanding of the relationship between the framework and the question and where there is hardly any. As we investigate, it becomes clear where the obstacles are, where there are "bogs" and where there are "paved, passable roads". The investigation provides insights and clues for the subsequent steps in the solution of the question.

Questions in an organization with a climate of renewal are questions for innovators. They are the ones who carry the question along. They are capable of making use of such questions within the organization. Each question has its own "carriers", who are existentially bound up with the question, but are also able to distance themselves from it and see how things are going and what should be done. The carriers' investigations give them ideas about the questions and some idea as to possible courses of action. As a result of meetings and discussions between people, networks come into being, made up of people who can do something about the question. These networks can see and seize opportunities in connection with the question for putting something into effect within the organization. In the case of renewal

questions, it is a question of renewing the interconnections and contents of the basic frameworks. These frameworks relate to both the visible and the invisible side of reality. It is mainly the invisible side in the form of aims, viewpoints and policies from which renewal must be derived.

In the daily life of an organization the management have a lot to say about aims, viewpoints and policies. Memoranda are written about this side of the organization. Market analysis, policy notes, plans, budgets, etc. are used to seek answers to the essential questions, which the organization has to solve.

However - and this is a fundamental point - what is new cannot be perceived, but has to be called into being intuitively by people through their actions. In fact, investigation is a search for and with the people who have already achieved new aims, viewpoints and policies. These people must serve as an example for the others.

## Experimentation

### *Taking initiatives*

In experimentation, a conscious effort is made to try out a new approach or working method. On the one hand, it is a question of purposeful investigation and testing of these new working methods and on the other, it is a renewal of frameworks while the testing process is going on. The experience and results obtained during the experimentation phase will give people the courage to bring about changes in situations or to tackle the question in a new way. They start to take initiatives.

Experimental activities lead to a confrontation with one's own abilities and resistances within the organization. What is new must first prove itself. Theories on their own cannot further the cause of renewal; they must first have been put into practice, if they are to have any significance. For each renewal, initial small-scale results must be achieved, in order to give it the right to exist. These small-scale results can be achieved in a sort of test-bed. New ideas can be tried out within specified limits. The small scale will reveal the potential of the larger scale. This is why it is important to set up the experiment in such a way that it is correct in the smallest detail. It must not however be forgotten that successful results of an experiment are only of value if later, when reproduced on a larger scale, the same conditions can be fulfilled.

In the case of technological renewal, we are accustomed to experiment first before the innovation is introduced on a large scale. To give an example: a fitter, who presses a siren to check whether a battery is working, is informally carrying out a genuine scientific experiment. He is testing a hypothesis by asking a question of nature.

In social, economic and organizational renewal, however, we work on the assumption that results can be achieved directly, without any testing process in which assumptions are tested. But it is precisely in social renewal that there should be a testing process, so that the correct degree of renewal can be prepared. It is precisely these experiments, which require a genuine spirit of enquiry in those concerned, as well as willingness to observe how something works, to see what are the effects of the new course of action and to take these effects as a starting point for the next steps.

When setting up experimental activities the seven beacons can be of help to innovators. They must form an integrated whole. If one of the beacons is not used, sooner or later the experiment will founder or fail to function properly.

## Decision-making

### *The meeting of the new with the existing*

In renewal processes, decisions have to be made all the time. We are scanning the future and we are leaving the beaten track. We must continually ask ourselves what the next step must be.

Initiatives give rise to breaking points. Past and future, the existing world and new ideas collide with each other. In initiatives, people have to address their inner selves because they constantly have to make

choices and because their motivation is tested against what already exists. It is only if the innovator is fully convinced of the rightness and necessity of the initiative that he can hold his ground. When during experimentation the new has manifested itself, it acquires a say over what already exists. The new and the existing meet each other. There is a difference between the frame of reference of those who are putting into effect what is new and those who are taking care of what already exists. When the renewal question can be seen and perceived by all, there is a possibility that space will be created to give what is new a chance. In this, it is not only the experimental results, which play a part, but also the expectations people have about the difficulty people will undergo in integrating the new with the old. Decision-making in connection with renewal processes almost always requires consensus between those who are involved in the aim, method and resources. If the renewal is on a large scale, more people and bodies both in the organization and outside must be put in the picture, not only the board for example but also the staff council, personnel department, financial department, trade unions, etc.

In decision-making, the "political" aspect plays an important role. In this force field, which surrounds the power of decision, it must be clearly seen whether there is a sufficient support for renewal. The decision-making process demonstrates the value of preparatory work. It is necessary to present this preparatory work in a novel way to the decision-makers, so that the case is put forcefully. If some of the beacons have been neglected in the preparatory work, the initiative will founder in the decision-making process. It is the carriers of the renewal initiative who prepare the decision-making process. They realize that the decision-makers have to perform an overtaking manoeuvre and that the results of the experiment must show what the future might look like. This is a "sticky" decision-making process, in which the decision-takers commit themselves one by one. One element of the decision-making process is the question: "How much further?"

In order to guarantee continuity in renewal, it is a prior condition that the formal decision-takers should raise the status of the plan to a project and assign it to one person who takes on responsibility for its implementation.

## Implementation

### ***Project design***

Projects are used to help create the conditions, which are needed for integrating the new with the old. We can find a foothold here in the various aspects of the organization. The projects can for instance be aimed at:

- new products, services and advice;
- new policies and new targets;
- the mobilization of new people;
- the planning and programming of new activities.

Projects have an ideal side, i.e. they are aimed at the introduction of new guidelines and ideals, as well as a practical side, in that they affect concrete tasks, methods and resources. In view of this, it is important how the project is managed and at the same time how the results of the project are introduced into the existing organization.

Here again, we orient ourselves with the aid of the beacons:

1. The composition of the network of people, i.e. formal relationships, carriers and experts.
2. The indicated aims, i.e. target group and projected result.
3. The indicated meeting and organization conditions, i.e. tasks, responsibilities, forms of co-operation, limits.
4. The indicated premises and criteria, i.e. the policy concepts whereby one works.
5. The indicated time span, i.e. start, finish, tempo, rhythm.
6. The guidelines, i.e. the focal point.

7. The resources, i.e. capital and capacities.

These seven points must be related to each other if the project is to make any progress.

## Evaluation

### ***Projects and learning***

During renewal processes, friction arises in the organization between what already exists and what is to come. This friction manifests itself in the form of clashes between people. They keep the decision-makers in the organization busy.

On the basis of the observed results of renewal projects, the decision-makers establish an order of priorities. The decision-makers test renewals for their value to the organization. It is important that projects should produce results even at an early stage and on a small scale, in order to inspire and encourage people about the progress of the project.

The results of renewal processes require to be evaluated and processed. With their aid, people can evaluate the significance of the results achieved so far. This means that learning programs must be set up whereby all those involved can find out about and experience the results of renewal projects and activities. It quite often happens that little attention is paid to the learning process. Renewal results are promptly embedded in policy, aims and structure. It is then expected that when this is made known, activities will take place differently or better.

It is however necessary to facilitate the necessary skills training for the people who are to participate in the renewal process, or who are to be affected by it. It is not sufficient just to talk to them about it. A specific learning process must be set up, in which people can familiarize themselves with the renewals. If people are not given the opportunity to learn, this will lead to great resistance to change.

It should be the responsibility of the people in charge of the renewal to hold themselves available for the training of others.

Skills training can take place at three levels:

- proficiency;
- inward and outward attitude;
- knowledge and conceptual skills.

Renewal can require a different kind of proficiency or a new attitude on the social plane, or an innovative attitude to the environment.

Learning processes demand training activities. These are initiated by the request for renewal and the consequent learning need and are fulfilled by the acquisition of new skills, which are used in the new activities.

The assimilation and evaluation of process and results can throw new light on the renewal process, which is in progress and can provide starting points for further integration of the results into the organization.

## Consolidation

### ***New frameworks***

The results of the renewal process are consolidated in the organization. The experiences, which have been gone through during the process, are now embedded in people. These experiences are used as tools in the organization in order to bring about new products, new policies, new structures, etc. Renewal in and of an organization, brought about by innovators as organization development, does away with existing frameworks and creates new ones.

Today's frameworks have usually arisen from the need to make the organization manageable and controllable in response to the growth in scope and complexity of the organization in an evermore-turbulent world. A multiplicity of systems helps people to keep a grasp on the whole. However, we find

that we are approaching the limits of controllability and manageability. We are at a turning point as regards our thinking and dealing in society. We must clarify our thoughts with regard to the development, guidance and control of the organization in which people will once again take a central position and role. All the same, the raw materials used by your organization are also available to your competitor/colleague. This applies to your means of production, buildings, machines etc. as well. And the market at which your organization aims is also accessible to your competitors.

This means that the extent to which your organization is and remains successful depends on the way in which the people within the organization play their part, both as individuals and in co-operation with each other.

In the first instance, we must not derive these insights from what others in the past have thought and considered, we must create them for ourselves by the power of our own constructive thinking.

At this point, efficiency thinking must give way to the asking of effectiveness questions.

What is necessary and ... has what we have developed the effect we were aiming for? This is what it is all about, to an ever-increasing extent. Only afterwards does efficiency come up for discussion again.

## Chapter 3

### Beacon exercises

Beacons are orientation points for steering in the evaluation as well as the design of initiative processes or projects. Here we will give you some exercises that you can use to get familiar with the working of the beacons. It needs some practice to be able to use the beacons in a fruitful way. First of all you will find separate exercises linked to one beacon at the time. These exercises can help you to get a feel for the quality of each beacon and for the area in which a beacon finds its origin and its application.

#### Questions

##### ***Ownership of question***

Questions are expressions of a need for change in reality. Questions need owners, which take care of this process of change. "Who owns this question" is a marvelous intervention one can make to keep social situations transparent and clear. If there is no owner, it is difficult to do something substantial to the question. If there is an owner of the question, the process can be consciously steered and managed.

##### ***The question as an expression of reality***

Questions can express themselves in different ways. There are three different kinds of manifestations of a question.

1. Maintenance question: "Can we restore the situation" is the main focus for the process.
2. Problem question: "Can we find a solution to the problem" is the main focus for the process.
3. Change question: "Can we find a new answer to the question" is the main focus for the process.

A question in reality can be described in these three different ways and subsequently there are three different kinds of processes that will generate the answer to the question:

- a maintenance process;
- a problem-solving process;
- an innovation process.

It is of crucial importance to the change process on what level you formulate the question.

##### **Exercise: Formulate your question**

Describe your question as a maintenance question, as a problem and describe the question as a change question.

Which formulation do you see as most precise and relevant?

##### ***Questioning***

Working with questions requires the ability to question. Questions can be asked with two different aims:

1. To gather information and/or do investigation
2. To generate communication and create opportunities for action.

Possibility 1 is directed to the past.

Possibility 2 is oriented on the future.

In possibility 1 the questioner taps, through asking content questions, information out of the person who is questioned: a content oriented approach.

In possibility 2 the questioner uses questions to search for concrete descriptions of vivid memories of events that happened. This gets the one who is questioned to start to think about the problem and discover opportunities to act on the problem: a process oriented approach.

Through the process of questioning and investigating you see realities sharp and you can come to a re-formulation of the question. Through doing this you see also new opportunities to act.

### **Exercise: Questioning in two ways**

Interview a person in two different ways.

First ask questions like a journalist would do to tap information.

Then change your style and ask for vivid descriptions of concrete events.

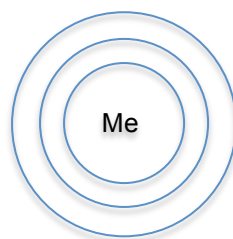
## **Networking**

To be able to take initiatives and create something that you find valuable to live, it needs connections to other people that can help you to do so. Networking is a key activity in all management work.

To change and develop networks is to create different opportunities in live.

### **Exercise: Evaluate your networks**

1. Put yourself in the middle of a series of circles and put the key people of your networks inside these circles. The ones you feel closest to, you put closest to you.



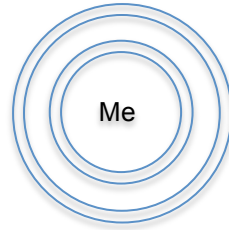
2. Characterize the type of relation you have to each person. For instance:
  - Is the relation dominated by the formal connection you have to the, other person because of the position and function of that person versus your own function and position?
  - Is the relation dominated by expertise, knowledge and skills that you share with the other person?
  - Is the relation dominated by the entrepreneurial connection you have to the other person?

When you look at the total picture, do you find it too one sided?

### **Exercise: Change your networks**

1. Put yourself in the middle of a series of circles in which you place persons that you find essential to your work-activities.

The most essential relations you put closest to you:



2. Describe for each relation you have mentioned the crucial binding element for that relation? Is it responsibility, knowledge, the functional connection or other binding forces that connect you to the other person?
3. What is the key investment you should make in the relation to keep it working? Most relations have a very specific binding element that need to be nourished to keep the relation substantial and fruitful.

## **Aims and Objectives**

### **Goal group awareness**

In working life it is essential to be aware of the fact that you work for others. It means that others will use the effects c.q. products of your work in their working-situation. Awareness of those people for whom you work can help you to find out what it is that you must do.

### **Exercise: Client connection and product use**

- Who are the people you work for, that is who are the people that use the products of your work in their work-situation?
- What are they doing with your products?
- What does your product mean in their work-process?
- Is it essential or only supportive to your clients?

### **Imaging results**

Setting goals can be a very abstract thing. Goals work as orientation points for people if they are concrete and visualized. People carry in themselves images of possible future situations they want to achieve. It is very helpful in processes to express these images to each other and see where the differences are.

### **Exercise: Picturing the future**

What concrete pictures of the future situation do you see that can give you a hint in what direction the process must go?

### ***Formulation of aims/objectives***

To formulate a goal it is essential to be concrete. To do so one can use four elements in the formulation of a goal.

1. Describe the concrete behavior in the future situation as you see it acted out there and then.
2. Describe a standard norm that is directing the future situation you are aiming at and that is guiding the future behavior.
3. Describe the timespan in which the new situation should be arrived at.
4. Under which circumstances is the goal to be reached.

So a goal formulation could be:

"We see that within two years time 80% of our clients will drink our product twice a day at home".

or

"Our pupil will be able next spring to count from 1 to 100 in the classroom".

#### **Exercise: Goal formulation**

Try to formulate as concrete as possible your goals for your area of responsibility in your organization.

### ***Working with scenario's***

In the process of goal setting it is often useful to work with scenarios. Scenarios are images of future situations that could be, reached or that will possibly happen.

You could make different scenarios for the same situation for instance:

- a good weather scenario;
- a bad weather scenario;
- a changing weather scenario.

To make scenario's one can use different elements to do so, for instance:

- Extrapolation of trends and facts.
- Predictions in the future by experts.
- Signals given by clients.
- Dreams you have about the future.

#### **Exercise: Making scenarios**

A good way to work with scenarios is as follows:

You make three different but possible pictures of how the future situation can be, concerning the development of your company, department, function or what ever question it is you want to look at. The scenario's must be different, so not three variations on the same theme.

Describe in the scenarios:

- how will the situation look like;
- what will happen;
- the future behavior of relevant people;
- developments that influence future situations;

- policies at work.

When you have done so you should not choose one of the scenario's to start working with but you should ask yourself the question: If I see these three possible future situations what decisions must I take or what is it that I really should take care of? What could be then my first steps.

As you cannot predict the real future, scenarios could help you to be better prepared for situations where you feel a need to be entrepreneur of your own future.

## Policy making

To realize change one needs to be aware of the policies that guide the behavior of the people involved in the change-process.

One can often see the difference between done policies and policies on paper. To become aware of your policies you can look at the policies at work and you can look at the policies you would like as guiding principles for future behavior.

### Exercise: Done policies

To become aware of the policies at work one can analyze concrete situations and concrete behavior.

1. Describe to others a concrete situation in which the need for change was shown vividly.
  - Describe the space and persons that were involved in the concrete situation.
  - Describe the moment in time when it all happened.
  - Describe what was said and done by the people involved in the situation.
  - Describe also what happened in yourself feelings, thoughts, emotions, drives, motives.
  - Describe it all as if you write a movie picture script.
2. When a clear picture description is made of that situation try, together with others, to characterize the happenings in the situation. So do not judge if things were done right or wrong but try to give a qualitative description of what happened.
  - Describe what you found striking in the description you heard.
  - Describe what you think were important parts of the happening described
3. After you have characterized the concrete situation and happenings one can ask himself the question "what were guiding principles that speak out of the behavior of me and other people acting in the concrete situation" One can call these the guiding principles or "the hidden directors" that directed the behavior.

### To give an example

- The situation that shows the need for change is "You are together with your boss and a colleague in the room of your boss and you discuss the complaint of a client. You say: I had this client on the telephone and she said: "this is the last time I accept your excuse that the delivery is to late. If it happens once more, you have lost a client". You ask the others "what are we going to do about this?"

The boss says: "Do not get to nervous. I have had this problem with this client before. They cannot leave us, there are no other parties they could go to". The colleague says: "This makes me nervous because this client is not the only one that complains".

- Characterizations could be
  - there is a client who is angry and will not except a new delay;
  - the boss reacts by memorizing past experiences with this client,
  - the colleague shows that this is not a rare example.

- What are the "hidden directors":  
The situation shows the confrontation of two possible "hidden directors":
  - you and the colleague: "when a client is going to leave we must do something immediately";
  - the boss: "when the client has no alternative it is not a priority to act on".

Change is needed when there is a confrontation of different "hidden directors" alive in peoples acts. These hidden directors will work in many more situations and discussions than the one example given. To break through these differences in guiding principles is a key intervention that management must make. The first step is to become aware of these differences.

### ***New policies***

To create new and shared policies it is necessary first of all to have a shared awareness of what the new policy could be.

So the first step is "policy formulation". In policy formulation you try to describe the principles, values, or norms that you want to play a decisive part in future behavior of all people involved.

To formulate policies one has to be:

- concrete;
- keep it simple;
- keep it do-able.

It is important that all people that have to integrate a new policy in their behavior are also involved in the process of policy formulation.

A next step is: "to create little experiments in which the new policy is acted out". By trying it out one discovers the necessary abilities that correspond with the new policy. It is a learning process in which concrete experiences are being evaluated. To monitor in how far the new behavior leads to the desired results is important, as the whole process is interactive and influenced by non-involved outsiders.

Based on experimental results one can come, as a third step, to a "policy decision". This means that the new policy becomes formal and will be the done policy to the future. Decision-making is not something done behind the green table. It is a process in which people involved decide every day every moment to do it different than it was done in the past. This creates new realities in new organizations.

## **Philosophy**

### ***Vision building***

Vision building is an essential part of strategic management-processes. To create strategies it is necessary to have a vision alive.

A vision is a mental expression of the core business of the company. A company is centered in a key process in which the added value comes about and for which the client is willing to pay a price.

In the key process of a company you can find a key moment, a key action that really reflects the specific know how and abilities of this company. Everything else is preparation and follow-up of this key moment in the key process.

Here you find the real source for vision building.

**Exercise: Key concept**

One can ask oneself the question:

- What is it that we are really good at?
- What is it that the client really appreciates in our product or service?

The vision can be expressed in "the companies key concept", that is communicated to clients and company members all the time.

**Strategy**

Vision building is essential in two processes:

1. The process of crafting strategy.
2. The process of budgeting and planning.

***Crafting strategy***

Crafting strategy is a management process activity in which managers make interventions in the concrete work/processes of a company. These interventions represent steering acts of management through which processes are changed. These interventions can be directed to:

- people;
- technology;
- money.

"What is done and what is not done", that is the strategic question. If the strategic interventions are opportunistic and not based on a shared-vision, that is the awareness of our key business, it will create chaos in the company and this will lead to many problems that can not be solved.

Communicating is the key element in vision building. All meetings one has are opportunities to create visions or to refresh visions. If there is no communication, visions do not come alive and cannot be shared. Communicating visions is a key activity in the management task of developing the organization.

**Exercise: Communicating vision**

Express your vision to your clients, your workers, your bosses.

***Budgeting and planning***

There are two sides to company development

1. The content in terms of knowledge, products, processes.
2. The conditions in terms of buildings, technology, markets.

These two sides must be in balance with each other. Through planning and budgeting we try to do so.

Planning and budgeting needs three elements.

- **Forecasting:** through forecasting we predict what will happen and what we will do to make it happen.
- **Monitoring:** through monitoring we discover what the surprises are that is, where things go different than one had expected.
- **Evaluating:** through evaluating we value what has happened and we learn from our experiences.

Planning and budgeting must be based on solid management information. It requires for instance the translation of bookkeeping information into management information.

#### **Exercise: Planning and budgeting**

Choose one key area of development in your organization. Compare over time the described expectations and the actual results? What are the real surprises you see and what can you learn from them?

## **Organization**

### ***Responsibilities to be met***

Organizational responsibilities are based on the functional diversification of tasks. A job is described in a task-description. The task-description is the bases for "remuneration and organizational structure building". Because of the many interdependencies between functions the whole area of responsibility have become a complicated matter. "Who is responsible for what?"

#### **Exercise: Responsibilities**

To investigate one's responsibilities one can ask three questions to oneself:

- For what results are you accountable?
- What expertise do you represent in relation to the key process of the organization?
- What are your personal responsibilities related to initiatives you have been taking?

To see your responsibility realistic and sharp one can ask oneself the question:

- What would happen if my function disappears?
- What would happen if I personally would leave the company?

Functional responsibilities will be transformed into personal responsibilities because tasks to be done will be transformed into personal contributions to the key process of the company.

## **Time and process**

### ***Time-management***

There is a simple formula concerning time:

time = availability = priority = policy.

Everyone has 24 hours a day. That is a fact. But time has a subjective element as well. Some people have all the time, some people are always short of time. To manage time is to manage the availability of oneself. For who I am available is a key decision, for instance: "Do I go to this meeting or do I visit the client?"

To choose to be available is to set a priority. Priorities are not a list of point's put on paper but they are choices of being available or not .To be there and then is essential to the quality of time. If you are there but your heart and mind are somewhere else it means a lack of quality. To be able to choose where to be it needs a policy. If your policy is that "work always goes first", your family will suffer as well as your innersole. It needs a clear and consistent policy to be able to develop for yourself a clear "play concept", that is a concept with whom you move yourself through time

To become aware of your "play concept" you can investigate:

- day;
- week;
- month;
- year.

**Exercise: A day**

From the moment you wake up till the moment you go to sleep how does a day look like. Can you discover the underlying pattern that rules your day? If you distinguish between a workday and a non-work day what is then the basic pattern of your workday?

For instance: wake-up - shower - breakfast - drive - talk to your secretary - 1st meeting - visit - 2nd meeting - post - fooling around - drive - dinner - newspaper -TV and drinks - to bed.

Different jobs have different time patterns.

You can ask yourself the question: Am I available for what I find really important or am I carrying my workday like a uniform that is given to me?

**Exercise: A Week**

You can make your week pattern visible:

	Morning	Afternoon	Evening	Night
Sunday				
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				

Can you discover your workweek pattern? You move through the week in a certain way. For instance you see:

That you have management meetings on Monday or Friday.

That you are out to clients on Wednesday.

That you see your co-workers around lunchtime.

That you meet your boss shortly before leaving work for home, etc.

If you see a pattern you can ask yourself if this really enables you to do what you feel you should do. It is possible to change your time pattern if you are able to communicate this to the people that are depending on you. If your policy is "I am always available for everyone" you will be disturbed all the time by telephone and visitors. May be it is not necessary to be always available. May be it is even counter productive. So to change your work pattern you have to change your personal policy. To do so

you will be confronted with the done policies of your business. In some jobs for instance it is normal to work from 08.00 o'clock in the morning till 19.00 o'clock at night. In some jobs it is not.

### **Exercise: A month**

There are monthly rhythms in your time schedule. Certain meetings, visits, budget rounds etc. are monthly repetitive happenings. If you are aware of that you can see to it that you are prepared in time. Some people are always late and under pressure because they have no awareness of the time patterns they are in. Some people work relaxed because they are, in their conscious, ahead of the time to come. They have taken inner time to prepare for their activities.

Time also reflects your responsibilities. If you own to many questions and responsibilities you will not be able to do all these in time.

To be aware of your real responsibilities and to leave other one's responsibilities to the other one, it will save you an awful lot of time.

### **Exercise: A year**

A year also has its patterns through which you move yourself in time. Holidays, business cycles, travels, yearly evaluations, year budget preparations etc. To place these activities in time can help tremendously to be available at the right moment in time. Every business has its seasons, its rhythms. To be aware of them can help you to move effectively through time. If you change your business, you change time patterns. To start changes at the right time in the year is an essential condition to see such change through.

Describe your day-, week-, month- and year patterns, make them visible for yourself. Discover the friction points in these patterns, also the moments where there is little added value. Can you design new patterns that reflect your priorities?

### **Care-Process**

There are three different types of care processes you can be involved in:

1. Maintenance processes;
2. Problem solving processes;
3. Innovation processes.

1. **Maintenance processes** have their patterns in time. To maintain what is there and to replace what is needed requires an insight in timespan and rhythm. Machines have a life cycle, products have a life cycle, people have a life cycle, etc. Everything has a life cycle and a maintenance rhythm. The art of maintaining is to find the right balance between the least time and energy spent on it and the best refreshment gained by it.

One intense visit to a client a year to inform this client on shared business can often do more than 100 brochures, letters, etc. sent to him.

2. **Problem solving** is a care process in which a special event happens that requires mostly an acute and specific answer. A problem blocks the continuation of a work process. So a problem requires a break away from the continuation of the existing work process. Solving problems requires specific designed and acute acted out solving processes. One must make oneself free to be able to work on a specific problem. There are problems that, without doing something, disappear themselves in time. There are also problems that stay and teas you as long as nothing

is done. It is an art of management to be able to see this difference in nature of a problem. To act or not to act, that's the question.

3. **Innovative processes** To innovate it needs a person who is really able to free himself from everyday business to take up innovation. It needs willpower and courage to take up innovation and also it requires personal discipline to get it on the ground. Innovating means breaking through existing patterns, it requires the creation of inner and outer space to do this.

The innovating process has three phases:

Phase 1: Awareness of the need for innovation.

Phase 2: Creation of the innovation.

Phase 3: Integration of the innovation.

1. Awareness arises through confrontation. To be confronted with facts that show the need for change and innovation is crucial for waking up the will of a person to do something.
2. The creation of innovation requires the mobilization of talent, time and money. To free these three it requires a systematic appeal to the consciousness of the people in power.
3. The integration of the innovation requires learning processes for all people involved and projects that bring the innovation as a new pattern of organizational behavior alive.

#### **Exercise: Process characterization**

If you observe actual processes and disturbances in processes you try to characterize these processes and disturbances in three different ways.

- Is it a maintenance process?
- Is it a problem solving process?
- Is it an innovation process?

## **Resources**

### *Money*

Money is always a part of the process when it comes to concrete action. If we do something concrete it requires money to do so. Money reflects the resources we use to be able to create something in reality. With money we arrive in the area of the household. Money streams are monitored through financial information; We can look for instance at a profit and loss account, a balance sheet, a liquidity overview or a cash flow sheet. A household has an incoming and outgoing money-stream. Incoming money monitors 3 different outgoing or sold products:

- goods;
- services;
- expertise.

Outgoing money monitors 3 different incoming or bought activities:

- materials;
- personnel;
- development investments.

These two basic money streams must balance each other.

Clients	Incoming	Outgoing	Deliverers
	Selling expertise	Buying development investment	
	Selling services	Buying personnel	
	Selling goods	Buying materials	

**Exercise: Money streams and organizational balance**

Can you reflect your organization or project in terms of concrete money streams that are incoming and outgoing? To do so one could use a 5-step procedure.

- **The first step** is to analyze the bills you did pay and the bills you did sent to clients. Can you category them in the different departments of the overview? You do this for a certain period of time for instance a week, a month, a year, or a quarterly period.
- **The second step** is to put individual names to the money stream of people that create these streams and take the important decisions that activate or block the stream. What is it that these persons are doing to influence and steer these activities and the connected money streams?
- **The third step** is to describe concrete examples that show how a person who is responsible for a money stream is influencing and steering this stream. These examples can show you the underlying policies that are acted out by the responsible person.
- **The fourth step** is to see the connections between the 3 different streams. If you change one stream, what effect will it have in other streams? How is the connection between incoming and outgoing money streams?
- **The fifth step** is to see what measures must be taken and what processes must be started to restore an unbalance between incoming and outgoing money streams.

Money is very often a taboo in working life. Not many people are aware of the consequences of their decisions and actions in terms of money.

To be aware of and to have an insight in the money streams is a solid basis for a consciousness of the totality of an organization or project.

Another way of analyzing the organization in terms of money is to see what money is connected to the key process of the organization and what money is connected to the conditioning part of an organization. All money that is directly involved in the making and selling of the key product, service or expertise is money involved in the key process. All money that is indirectly involved in terms of staff activities, supportive activities and management activities is money involved in the conditioning part of an organization. It is very often a tendency that more and more money is involved in the conditioning part of an organization and less in the key process of that organization. We tend to make things complex and we have difficulties to skip things we have been doing so often in the past.

## Overall beacon exercise

Choose a change question that you feel is essential to your organization and that you feel personally responsible for.

### 1. Question

Formulate this question in two ways:

- a. Analytical - past oriented. Start with "How is.....?"
- b. Actively - future oriented Start with "How can.....?"

When you have formulated the question then describe one concrete example that shows and illustrate how the question appears in reality. The example must be out of your own practice and must be characteristic for the question.

### 2. Networks of people involved

Who are the people involved in the question that carry a responsibility in the process of working on the question? Who owns the question?

Who are the formal decision makers? Stakeholders?

Who are the experts in content and/or process?

Who are the carrier(s) of the question, the entrepreneurs for this question?

### 3. Aims

Who are the people that will benefit from the work on the question: the target group?

Is this target group specific or are there different target groups that have different interests in the solution of the question?

How will the future situation look like after the first substantial step in the change process is taken?

### 4. Policies to work with

When you observe the concrete examples that reflect the question and you characterize the behavior that people show in this example, can you then formulate the done policy that directs the behavior of the people involved?

Do you see this done policy at work in many more situations, that is, is it characteristic for the company culture?

Can you formulate the policy change you think is essential to see the change process happening?

### 5. Leading image

What is the basic idea that should be realized with this change process?

Can you picture that idea as a leading image?

### 6. Responsibilities

What are the key responsibilities that should be taken care of through people out of the network?

Can you describe who is carrying what kind of responsibility?

Can you describe the boundaries to the change process that should not be passed?

### 7. Time and process

What is the timespan of the change process?

What is the timespan for the first step in the process in which convincing results should be created?

What are the processes that should be initiated and how can they run parallel in time

### 8. Means and money

What money is involved in the whole change process?

What are the key investments that should be made to see the process happen?

*The answers 1 to the 8 questions must be in balance with each other*

If you have an ambitious goal but you have no time or no people that want to carry responsibility for this change process then there is an imbalance that can distort the progress of the change process. If you are not aware of leading policies that should be changed you will be blocked by them as they are acted out through people that you meet in the process. These beacon questions can make you aware of sides to the change process that you are not so much aware of in every day routines. With these beacons and questions you can analyze the process when there is little or no progress and you can design a step in the process when the process needs such a new step. If you cannot give all the answers to the question you have to search for the missing answers. Through observation and investigation you can find the material that gives you an answer. The beacon questions reflect realities that are there in all situations. These realities show themselves more clearly when you ask these questions. That helps in the steering of the change process.

## Chapter 4

### Project work

If you are responsible for a project and you have to steer the activities in this project it requires a systematic way of working. For a project leader it is often rather difficult to monitor his project in progress. A lot of outside influence disturbs the project development and progress. To be aware of these developments and to take action in the right way the project leader needs a systematic set of orientation points with whom he or she can realize a good development of the project. There are three basic issues, that should be monitored all the time and all the way in a project.

1. The question to which the project is an answer.
2. The mission that must be realized with the project.
3. The process of realization of the project.

To be able to do so the project leader can use the following schemes belonging to the three basic issues.

#### The question to which the project is an answer

It is often rather difficult to see clearly the question or problem to which the project is an answer. Because more than one person is involved in the matter there are different views and standpoints on the question or problem. There are three different elements that the project leader should monitor all the time.

1. How do I as project leader formulate the question? The question can be formulated in two ways:
  - a. as a research question;
  - b. as an action question.
2. How do other persons that are involved in the question express their standpoint?  
The project leader is alert to monitor the differences in standpoints. This gives him a good view on the different sides to the question.
3. What are concrete examples, observations, facts through which the question expresses itself?  
Questions are manifestations of processes of change.  
A question is an expression of the need for change.

The project leader will get, by working with these three questions, a good insight in the basic nature of the question or problem.

#### The result that must be realized with the project

Through a project process an answer is developed to a question. The answer is, like the question, based on the different standpoints and views of the people involved. These standpoints and views have a connection with the result that must be realized through the project. A result involves three basic elements.

1. **Target**  
How does a concrete answer to the project look like?  
A realistic imagination of the future situation, that with the help of a project should be realized, can help to guide necessary activities.
2. **A policy**  
What are the basic assumptions underlying the project realization?  
To steer a project successfully it needs a shared opinion on "how" to realize the goals.

### 3. **A philosophy**

What is the basic idea that must be realized with the project? To keep a project focused it needs clarity on the basic idea that will guide the activities of the project.

## **The process of realization of a project**

To be able to get a project on the ground it needs three different kind of agreements between the key people in the project.

### 1. **Who is responsible for what?**

In projects different people participate with different connections to the project. To regulate these differences the project leader formulates the responsibilities of the participants.

### 2. **What will happen when?**

In a project there are different activities needed on different places at different times. The project leader must make a timing of activities to secure an availability of the critical people for project activities.

### 3. **What tools are needed?**

To realize goals there is a need for tools to do so. The project leader must invest money in tools that can be used in the project work.

## **Networks**

The three basic issues that a project leader must take care of are linked with the networks of people that are involved in the project work.

There are three different networks involved in the project work.

- *The formal network*

Who are the decision makers that will formalize the results of the project and that will make available the recourses needed to continue the project work?

- *The expert network*

Who are the experts that can contribute knowledge and expertise-to the project?

- *The carrying network*

Who are the carriers and co-carriers that will see the project through and will make the things happen?

**Project diagnosing form**

Note down the essentials of your initiative or project.

Name of project:.....

Date:.....

---

**I QUESTION**

- my formulation of the question:
- how do other people formulate the question;
- facts/observations that illustrate the question:

---

**II RESULT**

- objective to be reached:
- policy to steer with:
- philosophy to be realized:

---

**III PROCESS CONDITIONS**

- responsibilities of key persons:
- availability for the process:
- investments to make:

---

**IV NETWORK OF PEOPLE**

- formal decision makers:
- experts on content and process:
- carriers entrepreneurs:

**Project strategy form**

date.....:

My question: .....

Name of project:.....

Note down the essentials of your project or initiative related to the question:

time period 

Elements	1	2	3	
Aims and policies to be met				
Network of people to be involved				
Tools to be used				
Decisions to make				
Decisions to make				
Actions you take				

You can make visible with lines how the different elements of your project relate to each other.

## Chapter 5

# Aspects of the integrated organization

### Groups

The project structure works alongside the vertical hierarchic structure and the horizontal functional organization structure. We can form steering groups, project and work groups, and study groups, each responsible for a specific task. We create a time organization structure alongside the space organization structure. The time structure covers not only the force of individual task setting and motivation, it also mobilizes the groups as 'a working unit. These groups form a new foundation for the improvement of work content and quality. They create and achieve new policies and do pioneering work in the experiments aimed at finding new directions. These groups bring into the organization new developments such as automation, quality enhancement, market orientation and, product development.

### The significance of "looking back"

A condition for sound working life is a balance between learning, life and work. As far as the learning element is concerned, this is where looking back at past experience has the greatest significance. Experience can lead to meaningful learning results provided that the lessons are fully absorbed. Only then do they contribute to the formation for personality. In achieving integration of learning results and people, looking back constitutes a "didactic aid". When we were initiating the innovative processes, we established that this aid could be valuable to the participants. For this reason, we shall go into the topic in greater detail.

Looking back can be done both by individuals and by groups working in co-operation. The method we use when working with groups is as follows:

- Working backwards in time, i.e. in reverse order, the participants recall the actual pattern of a meeting, a work conference or a period of working on an initiative;
- Next, each participant thinks over what he himself regarded as the special moments or events, whether positive or negative. They make notes and then ask themselves the question: what was happening at that moment, both within myself and outside myself? And, what can I derive from this for the future?  
This activity is carried out quietly in a group and takes about ten minutes;
- Finally, some or all of the participants "report" to the others on some of the points they have noted down. They do this without restraint, and without any subsequent discussion.

This last exercise has a "hygienic function" with regard to the group process. In this way, the participant zooms in on the aspects, which struck him in the totality of a meeting, a conference (day) or a working period. These can be high points or low points.

By speaking about these things to the others, you as it were externalize them and have a clear-out. For the **group process**, this has the advantage that you hear from others how you are getting on and what you yourself and the others will be doing in the future in relation to the initiative. The **personal value** lies mainly in the short time that people work as individuals. Looking back in reverse sequence has an objectivizing effect. It frees people from the apparent inevitability of the order in which events occur. Working backward means that we first look at the consequences and then the causes. This contraflow activity also makes us aware of a subtle undercurrent, which comes towards us from the future. In other words: we develop skills for living more easily with the consequences of our actions and we can discern better from the future what actions that future will demand of us. Another effect of this activity is that by digging things out of our memory we call all sorts of things into our field of vision, whereas during the course of the day they had completely escaped our attention. Or else, we can become aware of gaps.

By standing still for a little while and considering these gaps we can build up the full picture. And we are encouraged to be more careful about such matters in future.

So, looking back is a valuable tool in promoting learning by experience. Experience is a means whereby we absorb within ourselves something of the outside world. By means of this experience we can reveal something to ourselves about that bit of the outside world, and also about ourselves in relation to that same part. The processes of learning by experience will produce results all the sooner the more closely they are bound up with the individual. In this context, we must avoid two pitfalls. One is that people are not aware of the experiences they are undergoing; it all goes over their head. The other is that they are aware of the experience, but evaluate it from the standpoint of their own sympathies and antipathies and in the light of their own tried and true judgment. In this case, the experience has taught them nothing new about the world outside themselves and they remain unchanged thereby.

### Policy as a guiding factor

In the integrated organization the accent shifts from specialized and differentiated policy to inspired and coherent policy. Policy no longer expresses itself in the form of rules and regulations, but rather as statements of principle for action and decision-making. In this way, policy becomes a guidance and consensus instrument. We are continually coming up against the trio of policy preparation, policy implementation and policy control. In this case, contrary to what we have been describing, policy is conceived as a combination of aims, rules, regulations and standards, which give direction for the co-ordination of activities.

Policy preparation is in the hands of specialists. Policy implementation is then in the hands of top management. Policy control is the responsibility of organs like the work council, the board of directors and the "next level up". In the integrated organization, policy develops into a supra-personal means of guiding everyone's actions. Policy development has hitherto been the responsibility first and foremost of top management.

In a certain sense policy is the integrating factor whereby it plays a guiding role in decisions taken by various people at various places and at various times. By this means we take decisions which all tend in the same direction. Development is thereby coordinated.

In today's organization, policy thinking is strongly influenced by three elements:

- thinking in product terms;
- thinking in quantities;
- thinking in organization terms.

These three elements play an important part with regard to the manageability of the organization. They reduce the whole to observable, measurable factors and they provide back-up material/concrete thinking and actions. It is because of them that the invisible sides of the organization remain implicit and unperceived. In the integrated organization, the spiritual side is made explicit. In this case, the following three elements dominate:

- customer-oriented thinking and actions;
- quality-oriented thinking and actions;
- integration-oriented thinking and actions.

### The courage to make choices

We have suggested that "change - starting from the existing situation - is taking small steps fast".

Now, a question underlies every step and in order for an answer to be given, choices almost always have to be made.

In our own lives we are used to choices, which exclude other possibilities: spouse, house, religion, etc. If you opt for A, you think that B is no longer possible. You may wonder whether later a situation may not arise in which you might choose B. This can facilitate the making of a choice. How is this? Choosing

means that you (temporarily) abandon something. This is the root cause of "choice stress" in organizations. However, choosing also means: making a connection. From this connection, it is possible to achieve something, which will lead to the creation of new possibilities. An attitude to life which is characterized by openness towards possibilities instead of "setting oneself against everything" helps innovators to progress. It gives you the courage to make choices.

## Rhythms

In the integrated organization time is of fundamental importance. Organizations are subject to certain rhythms, such as the seasons, processes, planning etc. These rhythms affect the way time is handled by the people in the organization. Every organization has its own self-created rhythms, which are bound up with processes, i.e. production processes, learning processes and, consultation processes.

Time must be given a shape. The most commonly encountered aspect of time nowadays is "there's no time for it"; "I haven't the time". The organization requires so much maintenance time, that renewal processes can only be undertaken with difficulty. In this sense, the time problem is as much one of availability as of priorities. Every process requires its own rhythm.

Insight into these rhythms forms the basis for strategic thinking and action. By this we mean people's ability to let time work for them by giving new impulses to a process at specifically chosen moments. Policy and time give shape to "how do we do things?" The significance of policy and time and how to handle it is as yet little understood in organizations. We have as yet little knowledge and experience of the working of policy and time in human actions.

Only through practice can we integrate both dimensions into our lives as consciously exercised skills. Learning how to handle our own use of time as a guiding principle for our own development and learning to observe the hidden guides in our own and other people's actions, are excellent exercise material. In the integrated organization work is rhythmic and so is co-operation; agreements are fulfilled; people are present where their contribution can be of use.

## A new beginning

This book's text is nearly at its end. Every end has within it a new beginning. Whether reading this book means that you achieve greater awareness in your thoughts and actions in the light of the seven beacons and phases depends on you alone. With our description of "practical examples" we have endeavored to show that your decision does not depend on your position or role in the organization. Renewal actually occurs at all levels in organizations where work is done. One characteristic of renewal, however, is that whatever is created always has to do with people, people who want to play a part themselves in their own reality. This, then, is the question: do you want to be more influential, do you want to be in a position to shape your own reality? If you answer this question in the affirmative, this book can in future become a reference book for you, while you -initially on a single front - endeavor to put theory into practice with the help of the exercises. The design of the exercises is based on the contents of this book. With its aid, the insights outlined in this book can form an integral part of your thinking and action.

The Project Agenda will support this process in practice.

## Project agenda

This project agenda is an instrument to help you to take initiatives in your own organization.

## 1. INTRODUCTION

You are facing the task of bringing about a change. The basis of this task is:

Possibility 1: an unexpected occurrence has turned the existing situation into a problem situation.

Possibility 2: it is gradually becoming (or has become) clear that the existing molds need to be broken.

You feel that you are responsible for the change, i.e. that you (perhaps together with others) are responsible for its implementation. This comprises both the final result and the way it is to be achieved. This way is in fact a result-oriented learning process. Every step you take towards the desired situation is an experience for you too, a little bit of personal development. In bringing about the change, this 'project agenda' is your personal aid. So you keep it handy at all times when you are dealing with the project, whether on your own or with others. Firstly so as to have the information it contains at your fingertips, and secondly in order to be able to add new information quickly and in an accessible form.

## 2. PHILOSOPHY OF CHANGE

Your present situation arises out of the **past**. Now - in the **present** - you have the tasks of effecting change. In this case you obtain guidelines for the way you deal with the situation from impressions of the **future**, the desired situation. The odd thing about the present is that it is always with you. It accompanies you as time goes by. Carrying out a project for change therefore boils down to always doing things in the present, but aimed at the future. In order to be able to do the right thing at the right time, it is important that you should always be able to see things as a whole, and yet be able to have an eye for the details of the situation.

## 3. HOW CAN THIS PROJECT AGENDA HELP YOU?

This book is a **glorified notebook**. You have to supply the contents. The book invites you to express in your own words, ideas, questions, points to note, appointments etc.

The format of the book is **loose-leaf**, so that you can always 'freshen up' the contents. For projects aimed at change, it is always vital to have good information for the steps to be taken now. Everything, which has been completed, can be removed to create more space.

The book is provided with **tab pages** to help you insert your notes in an orderly fashion and consequently easily and quickly retrieve them while you are doing preparatory work or taking part in a discussion.

Of course, it should be remembered that this project agenda does not take the place of the customary reports, records and correspondence. It constitutes a personnel supplement, and will help to enhance the quality and effectiveness of your contribution to the project.

## 4. ARRANGEMENT OF THE PROJECT AGENDA

The basis of the arrangement follows the contents of the book. The book tells you how in addition to the routine of everyday work, you can also contribute actively and innovatively to your (working) life.

In fact, this project agenda helps you to bridge the gap between theoretical concepts and practice. It enhances your capacity to cope with problems while learning at the same time. In other words: it helps you to come up with good, clear and practical ideas and proposals about the desired reality and then to bring about situations, which correspond to that reality.

### Agenda Part 1: Action

Questions People get themselves going because they have questions to ask. In the beginning, but during the course of the project too, it is therefore important always to have a clear idea of the question, which is currently being worked on.

Forms for the relevant questions follow the appropriate tab page. Note: Before a genuine question is formulated, there can sometimes be a lengthy gestation period. Sometimes the question is hidden behind feelings of discontent or a whole series of trivial incidents. You can use this section to make

notes about how questions came into being. Once a question has been finally formulated, you can draw a box round it, like this:

There, that is the question!

### **Ideas**

There is a separate section of the agenda for ideas. It should be regarded as a sort of parking place for inspirations, which have occurred to you or others. Sometimes a question or a remark from another person, or an incident of some kind, which happens to you, makes you think: 'Hey, that's relevant to the project.' Often you can not immediately see the connection with what has already been done or what is currently in progress. But so that you can keep an idea of this kind in mind, we advise you to make a note or sketch in the relevant tab section.

### **Preparation**

You use this section to prepare the next meeting(s) with others. You prepare every planned meeting/encounter, which has to do with the project, in the following way:

- you form a picture of the probable course of events;
- your contribution (asked for by others, or of your own volition) should be recorded in outline on a clean sheet of paper;
- you list everything you have to take with you.

In your preparatory work, you use the notes from other sections of your project agenda, plus any relevant reports, but mostly you rely on the reality, which presents itself at that particular stage of the project.

After the meeting has taken place, you remove the relevant page, after:

- noting down agreements for follow-up activities in the 'notes' section of you project agenda;
- or, if a subsequent meeting has been fixed, you need a new preparation process (and therefore a new page);
- or it is clear that this contact will have no follow-up.

It is also useful after the event to consider whether the actual course of events coincided with your expectation. Therefore you can ask yourself the next questions for 'looking back':

- What were the differences, how did they arise?
- What were the high points/low points, if any?
- What have I learned?

### **Notes**

Everything, which occurs in organizations and in life in general is human activity. You yourself are busy with the project and the meetings you have with others lead to proposals about the result and the way to achieve it. This process takes place in the inner world of people. The notes you make in your project agenda and the reports, records and correspondence embody this. Moreover, the activities agreed upon have to be carried out. This section of the project agenda encourages you to make notes during activities.

Note down briefly for each activity:

- Who are present?
- What happens and/or what is said? (appointments)

- On which time/day will the next activities take place?

*Note:* In fact you can find in this section the things, which have to be done. Be aware that these must be related to your notes in the tab section 'Time'.

## **Beacons**

The following seven tabs come after the tab called 'Beacons':

- Philosophy
- Policy
- Aims
- Network
- Organization
- Time
- Resources

These tab pages have a list of 'supporting questions'. In this way, these beacons constitute as it were standpoints from which you can view the project. By bearing all seven in mind all the time, you ensure that you have the whole project in perspective. The beacons, which are nothing new in themselves, are not a rigid framework, but a dynamic grouping. They must constantly be related to each other, that is the new thing about them. If something is done which affects one beacon, it has consequences for the others too. In short: using these beacons ensures that you have a lively approach to innovation.

Answering the supporting questions helps you to bring about the change step by step.

Your notes on the answers to the supporting questions in your project agenda will give you up to date information at all times: the targets to be achieved, the network of people involved and their roles, agreements and conditions, time spans and necessary/available resources.

Data relating to these beacons will gradually alter the way the project is handled. These data must however always be related to the stage reached by the project. If you refer to this book you will see that these phases are divided up as follows:

- Orientation
- Investigation
- Experimentation
- Decision-making
- Implementation
- Evaluation
- Consolidation

It should be pointed out that the contents of the tabs 'philosophy' (what ideals inspire you?) and 'policy' (the concepts which underlie the actions taken) will be more stable and consequently less subject to change, even during later phases of the project.

## **5. SUPPLEMENT**

- It is your present activity, which has to be recorded. In situations, which occur in the here and now, your contribution must be effective. Your project agenda serves as your dashboard for this purpose. You are always well prepared, if you are very much occupied with the questions, which are topical at the moment. Get to know the contents of your project agenda. In order to be able to do that, you must not let it get too fat, which means constantly clearing out the old pages which are no longer useful. (You can file them away, but after a while you will realize that you rarely if ever refer to them.)
- By using your project agenda you can organize your time better.

- The way you record your notes and diagrams, if any, is the way, which suits you best. It is however worthwhile recording on the sheets you fill in for each beacon which phase of project the information refers to. For lengthy projects, it can also be useful to date your notes, and you may even find 'it sensible to allocate a project code number.
- If you are working on more than one project for change at a time, you may have to use several project agendas. This is also to be recommended if the project is a major one, with two or more main themes running through it.
- There is nothing dictatorial about the project agenda. You are the boss, and you decide what you will note down (or not). Some people will confine themselves to the broad outline, while others record every detail. The degree of detail will also depend on the stage reached by the project.

## 6. IN CONCLUSION

You are fortunate to be entrusted with the task (perhaps with others) of implementing a project for change. In addition to your everyday routine, the project offers you a whole range of personal development opportunities. Every renewal process is of course made up of a series of questions and problems, which need to be solved. The essence of process ownership is precisely this learning and result-oriented approach to 'sticky problems. Your abilities in this respect will be considerably enhanced if before the (first) project for change you apply the working method outlined in this book for at least 6 months. We recommend that during this (learning) period for your preparation for meetings, discussions, etc. you should consult the relevant sections of the book.

We wish you every success and we hope that this project agenda helps you to become more and more your own consultant/adviser.

# QUESTIONS

## ARRIVING AT QUESTIONS

A question gives direction and impetus for action, as soon as the question is felt to be a real one.

Real questions, however, often lie hidden behind:

- feelings of discontent observed by yourself or expressed by others;
- repeatedly occurring small incidents/accidents.

Note down here the basic questions which have arisen and to which the project must give answers.

It is also important for you to note down in this 'section' questions asked by yourself and others during the process. This gives you an idea of what sort of questions you and others ask.

**Questions**

	<b>Date:</b>	<b>Page:</b>
<b>Project:</b>	<b>Subject:</b>	
Note here the problem on which the initiative is focused. Ideally, the problem should be expressed in the first person singular or plural.		
Phase in the initiative process:		

## **IDEAS**

### **PARKING PLACE FOR IDEAS**

Here you can record all ideas and insights, which occur to you or to others in connection with the initiative/project. The ideas are worth thinking over and can be transferred into the beacon sections when the time is ripe.

**Ideas**

	<b>Date:</b>	<b>Page:</b>
<b>Project:</b>	<b>Subject:</b>	
Note down here your idea and insights, which you feel are worth thinking over in connection with the initiative.		
Phase in the initiative process:		

## **PREPARATION CONCRETE ACTIVITIES**

Note down here what you have done in preparation for:

- your own activities;
- group activities.

It is recommended that you should use a separate sheet for each activity being prepared.

**Preparation**

	<b>Date:</b>	<b>Page:</b>
<b>Project:</b>	<b>Subject:</b>	
Make notes here about your preparations for specific activities and / or meetings.		
Phase in the initiative process:		

## **NOTES**

### **NOTES ABOUT ACTIVITIES**

You can record your own notes here during activities or at meetings. These notes can be transferred to the beacon sections at fixed intervals, i.e. you can enlarge or change these notes.

**Notes**

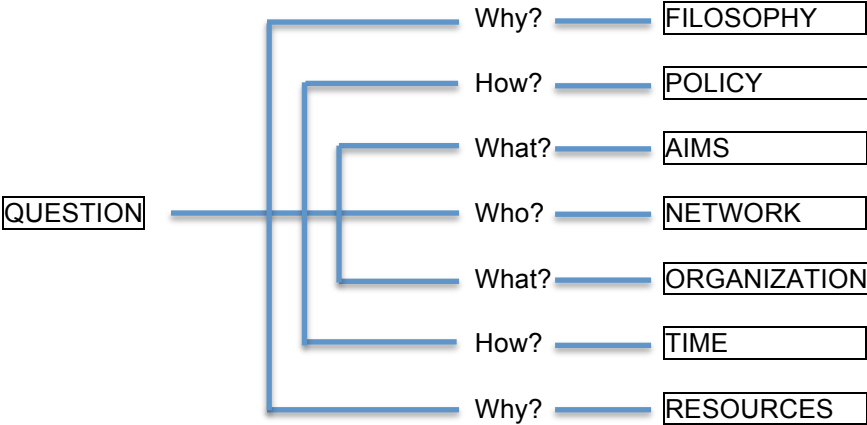
		<b>Date:</b>	<b>Page:</b>
<b>Project:</b>		<b>Subject:</b>	
You can record your own important notes during activities or at meetings with regard to the future.			
<b>Who?</b>	<b>What?</b>		<b>When?</b>
Phase in the initiative process:			



# BEACONS

## SIGNIFICANCE OF BEACONS

The seven beacons are the standpoints from which a problem must be viewed in order to obtain a perspective of the whole. By asking 'supporting questions' from these standpoints you get the answers, which help you to progress further.



## **PHILOSOPHY**

### **SUPPORTING QUESTIONS:**

- What inspires us?
- What are our ideals?
- What is the guiding thought behind them?

**Philosophy**

	<b>Date:</b>	<b>Page:</b>
<b>Project:</b>	<b>Subject:</b>	
Your philosophy is the source of your inspiration. In order to define it, list below the ideas which have inspired the way you work.		
Indicate with an * which idea was the mainspring of this initiative.		
Phase in the initiative process:		

## **POLICY**

### **SUPPORTING QUESTIONS:**

- What concepts guide our present actions? (Past policy)
- What concepts do we want to guide our future actions? (Desired policy)

**Policy**

		<b>Date:</b>	<b>Page:</b>
<b>Project:</b>		<b>Subject:</b>	
<p>These are the basic factors, which guide our actions ('hidden pilots'). Make a note of these basis factors under the following two headings.</p>			
<b>Past policy</b>		<b>Desired policy</b>	
<p>Indicate with an * which factors were the mainspring of this initiative.</p>			
<p>Phase in the initiative process:</p>			

## **AIMS/OBJECTIVES**

### **SUPPORTING QUESTIONS:**

- What is the target group (whom are we doing it for)?
- What concrete results are expected?

## Aims / Objectives

		<b>Date:</b>	<b>Page:</b>
<b>Project:</b>		<b>Subject:</b>	
This selection relates to the target group, which you wish to assist by means of your initiative and to your expectation of the result you wish to achieve for the target group.			
<b>Target group</b>		<b>Expected results</b>	
Indicate with an * which target group has priority.			
Phase in the initiative process:			

## **NETWORK**

### **SUPPORTING QUESTIONS**

- Who is formally responsible?
- Who participates in decisions?
- Who makes the initiative for renewal?
- Who has expert knowledge?

**Network**

		<b>Date:</b>	<b>Page:</b>
<b>Project:</b>		<b>Subject:</b>	
Indicate here which people are involved in the initiative, and in what capacity.			
<b>Initiator + Carriers</b>	<b>Formal decision makers</b>	<b>Experts</b>	
Indicate with an * which people make a critical contribution, i.e. which ones are 'indispensable.			
Phase in the initiative process:			

## **ORGANIZATION**

### **SUPPORTING QUESTIONS:**

- Which activities are involved?
- What are the tasks?
- What are the limits, what is the scope?



## **TIME**

### **SUPPORTING QUESTIONS:**

- How does the process begin and how does it end?
- What phases can be distinguished?
- What time spans are contained in it?
- What is the duration?

## Time

		<b>Date:</b>	<b>Page:</b>
<b>Project:</b>		<b>Subject:</b>	
Note down here:			
<ul style="list-style-type: none"><li>• Which activities / steps have to be undertaken in time?</li><li>• Who is keeping a check on timing?</li><li>• By which time the activity must be completed.</li></ul>			
<b>Critical activities</b>	<b>Who</b>	<b>End(dates)</b>	
Indicate with an * which activities have priority.			
Phase in the initiative process:			

## **RESOURCES**

### **SUPPORTING QUESTIONS:**

- What is the resources hardware required?
- What is the balance between expenditure and income"
- What are the resources"
- What are the skills required?

**Resources**

			<b>Date:</b>	<b>Page:</b>		
<b>Project:</b>			<b>Subject:</b>			
<p>Note down here how the estimated figures compare with the actual income and expenditure, as well as the required facilities and human skills.</p>						
<b>Income</b>			<b>Expenditure</b>			
<b>Sources</b>	<b>Estimated</b>	<b>Actual</b>	<b>Destination</b>	<b>Estimated</b>	<b>Actual</b>	
<b>Required hardware / facilities:</b>						
<b>Required human skills:</b>						
Indicate priorities with an *						