CASE STUDY: Change Management at Lancaster University

The client

Lancaster University is a leading academic institution that aims to be in the top 10 universities. The 100-strong Student Based Services department urgently needed to play a greater role in helping improve customer (student) satisfaction and deliver innovation. As an academic body, there were unique challenges for engaging staff with a change project.

The challenge

With the aim of becoming a top 10 university, it was with a sense of urgency the senior team within Lancaster University Student Based Services realised a new approach was needed to support a move from a provider to a customer (student) focused approach. To reach this goal, existing methodologies needed overhauling with a new focus on working in the interests of customers. Necessary changes in process management were not being made. For example, the department was resistant to using new technology and preferred paper-based processes which impacted the quality of service delivered to students. This represented a major mind-set shift for the majority of the department.

In looking to benchmark against top universities, the quality of processes would demonstrate their calibre, and the involvement and innovation of Student Based Services would be a major factor in achieving this. Achieving this goal in light of the pervading belief from within the department that its work had no impact on the institution as a whole would be challenging particularly given that new initiatives developed to effect process change often faced barriers from both senior management and staff.

Preparation was also key to the programme's success, and we dedicated significant time to working on how people within the department would experience the training and the context it was being delivered within, moulding the programme to specific requirements. This was vital in understanding how to transform the underlying mind-set permeating the service. Previous attempts to break down these barriers, such as away days, regular meetings and leadership development training, only scratched the surface of what needed to be done in terms of changing the underlying culture and behaviour of those involved.

The challenge was exacerbated as the majority of staff had long tenures (up to 25 years) and had never worked in a corporate environment or been exposed to change programmes. This brought with it resistance and scepticism to a change management programme that most perceived as a threat.

The process

The catalyst for the programme came after Claire Povah attended a one-day Insights Discovery open programme with Learning Cog's Ric Hayden. Working with Ric, Claire realised it would be a good match to be able to drive real change within Student Based Services. Ric worked with the senior managers and also with the teams to look at the reasons why change wasn't happening and it became apparent early on in the research that it was all due to mind-set and beliefs. Any programme that was going to work would need to be able to break down this belief system in order for change to really happen.

What were the learning objectives and key deliverables of the change programme?
- For Student Based Services to own their part in Lancaster University becoming one of the top 10 universities in the UK
- To remove personal self-limiting beliefs affecting the department
- To develop a culture of innovation where team members do not fear change

The first stage was to achieve buy-in from senior management and develop a sense of understanding around the benefits of the programme not only for them but for their staff and organisation, as a whole. Our approach was to undertake the project in two parts: first, a development programme for the department's 14 senior managers, achieving buy-in from this key group of stakeholders.

To deliver the most effective results, we felt it was essential to work with the managers individually and then expand the programme to include all teams and departments.

Senior managers would then go through the process again within their team having already experienced the benefits of the Insights feedback. They would prove a strong driver in achieving the desired outcome: better personal relationships and a transformation of team mind-set from passive to proactive.

The benefits

Learning Cog's approach in delivering the programme to the audience was key to its success. It was clear there was a need to work on a more personal level with each individual. To ease the suspicion of the department, Ric engaged his audience on a personal level. Using his enthusiasm and desire to bring out the personal strengths of each individual, Ric was able to win over the team and remove all suspicion and resistance early on. By focusing on engaging the person first rather than trying to 'teach', Ric successfully overcame the not-insubstantial barriers to developing the team's understanding of their own selves and how they operated in their wider context.

In many ways the transformation of the team mirrored their receptiveness to this programme, with Ric taking the team from lack of enthusiasm to a strong belief that they could support the organisation to achieve its objectives. During the programme, he delivered incredible quality with a twist, drawing in alternative elements relevant to the context as well as seemingly-unrelated ideas to keep the team members engaged. Through this tailored delivery, unconscious learning took place which had a deep-rooted impact on each individual.

From this the Senior Management team were then able to go back to the working environment and be able to innovate a much greater speed with little to no resistance. The managers themselves were the driving force for managing the change throughout the programme working closely with Ric to ensure the best outcomes.

Discovery Insights uses a four colour model to gain an understanding of personal preferences and improve communication by learning how to adapt to others. In the context, Insights was the best choice of business psychology model considering the very personal self-limiting beliefs affecting the department

In ruling out other explanations for the outcomes, it's important to note this was the first ever major programme successfully completed across the service. No parallel initiatives ran during the same period nor other more individualised approaches to transform staff behaviour. The approach within the service to performance management was not in any way consistent, as identified by a piece of research by Claire Povah. In many ways, the programme's positive results were straightforward to measure due to the absence of other possible contributing factors.

"Overall, the programme has proved so transformative it's being undertaken on a recurring basis to ensure new team members benefit from the experience and fit within the renewed ethos of the department." Claire Povah commented. "*We believe the impact of business psychology within this academic context provides an exemplary and innovative model for other academic institutions looking to transform their customer delivery."*

From the outset, a key measurement of the programme's effectiveness was immediate feedback after delivery. This informed the subsequent Discovery sessions in a process of continuous improvement. Ultimately, success would be judged by the impact on the relationships within the teams and across the department. Fortunately, these were immediate from the completion of the programme and continue through to this day.

A key benchmark in judging the programme's transformational effect is the university's improved NSS (National Student Survey) scores in the period between implementation and the present. Scores are awarded based on direct student feedback on the quality of the services provided - the closest available metric to a customer satisfaction score in the academic sector. Before the programme Lancaster University sat in 14th and 19th place respectively in 2012 and 2013 for student services satisfaction; since the programme the university has jumped significantly to seventh position, due primarily to the widespread improvements in the processes within student services.

Resistance to change has performed an about-face. Having identified individuals in the department who are primarily process-driven (blue on the Insights spectrum), they are now being trained on Lean Six Sigma - a situation that would have been unheard of previously. There has been a noticeable change within the department with discussion regularly coming back to the Insights programme. Staff now consider their interactions with other team members and adjust accordingly, bringing long-term benefits. This was significant considering the suspicion with which the programme was initially viewed.

The most important transformation is a changed belief amongst the department that it's now able to enact change and make a difference to the whole organisation. Recent examples include creation and delivery of a 'welcome site' for new students, something which didn't exist prior to the programme and which was driven by Student Based Services and the development of a Student Journey Mapping project, a cross-organisation project driven by the service to map the student journey with a view to identifying areas for enhancement.

The learning from the workshops is constant and reflected on in all the projects and decisions that are made. So much so that all new people joining the student based services teams now attend a workshop so that they can "speak the same language" as the rest of the team.

What lessons have been learnt from the change?

A number of lessons were learned. Most resistance was with senior management holding onto beliefs rather than team members. Once management changed their approach, team members were set free to develop and grow. It was also clear there were several individuals who were key resistors to the programme; upon the next iteration of the programme, we'd seek to minimise the impact these individuals have on the experience of other team members. Recognition of this ahead of the process would make the programme even more effective.