



The Q-Loop

The Art & Science of *Lasting* Corporate Change

THE SUMMARY IN BRIEF

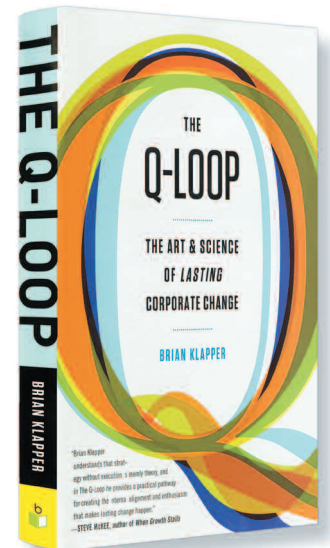
The business environment has never been more fast-paced and competitive. Survival, let alone success, depends on an organization's ability to recognize possibilities, innovate, implement change and sustain that transformation. Yet a paradox exists. How does an established organization with a history of drawn-out planning and development cycles become nimble, innovative and responsive?

Brian Klapper reveals the "art and science" of lasting transformation based on a proven, repeatable model called "the Q-Loop"; it is a process that forms a complete circle — from ideation to complete implementation. Klapper explains: "It's called the Q-Loop because, as the name suggests, it's more robust than a simple circle. Far from going in circles, like so many strategies intended to implement change, *The Q-Loop* is anchored in both theory and practice, in art and science — it works every time."

The Q-Loop extracts the deep knowledge that resides with frontline employees, breaks down the inherent resistance to change, and converts them into passionate advocates who are fully invested in leading the organization to achieve transformational results. Fleshed out with actionable steps, suggestions and fresh insights, *The Q-Loop* provides practical guidance for all types of organizations.

IN THIS SUMMARY, YOU WILL LEARN:

- The path to maximizing your organization's collective IQ through ideas.
- A new method to ignite a grassroots mindset shift by focusing on and achieving your mandate.
- Ways to embed the Q-Loop into your organization.
- How to create an easy and transparent way to share ideas.



by Brian Klapper

CONTENTS

Part One: Entering the Q-Loop

Page 2

Ideas — The Lifeblood of an Organization

Page 3

Launch Your Employees on an Idea Quest

Page 4

Part Two: Going Around the Q-Loop

Page 5

The Corporate Lab: The Art of the Possible

Page 5

A Scientific Method for Achieving Your Mandate

Page 6

Part Three: Exiting the Q-Loop

Page 8

THE COMPLETE SUMMARY: THE Q-LOOP

by Brian Klapper

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Introduction

The Q-Loop is a process that forms a complete circle — from ideation to complete implementation. The Q-Loop relies on the real heroes in the trenches of your company, the ones who know how to get things done and get people on board.

When you look at the illustration of the Q on the cover of *The Q-Loop*, you see that it shows lines before they enter into a loop. This represents ideas and initiatives as they are considered throughout the entirety of your organization. The Q illustration then shows the loop itself, as these ideas and initiatives are delivered to upper management to assess and prioritize in relation to your overall business objectives. Then these ideas and initiatives are delivered back down to frontline employees for refinement. Finally, these initiatives are delivered out from the loop to the rest of your organization and embraced by the front line because the idea was initially created by them.

Why the Q-Loop Works

It starts with a compelling story, one that originates with management but is written by employees. It recognizes that employees are motivated by their impact on their customers, company, colleagues and themselves, and it uses this motivation to help them lead the change. The Q-Loop allows employees to drive the agenda.

A successful Q-Loop decision process is critically dependent on both the span of influence and the bottom-up input mechanisms that support the loop. The Q-Loop can be deployed at multiple levels within your organization to improve current operations, to create new products and services, and to capitalize on market opportunities. This multi-tiered approach enables an

organization to quickly mobilize Q-Loops to address specific projects and to pilot change. ●

PART ONE: ENTERING THE Q-LOOP

Adapt or Atrophy

Adaptation is essential to healthy growth and economic vigor, and this axiom is more true in this second decade of this second millennium than it has ever been in history. An ability to embrace industry changes, technological advancements, and evolving customer demands opens up your organization to opportunities that your competitors fail to see. It's a chance to shed your skin and explore new and profitable innovations. It's how an organization thrives now and long into the future.

Yet a paradox exists. While an overwhelming percentage of organizational leaders recognize the need to adapt, transformation rarely takes root in any lasting way. What can be done to convert this shocking rate of failure into overwhelming success for any organization?

The challenge is to

- Recognize the need for change, and overcome fear of it.
- Be scrupulously honest about your organization's current shortcomings.
- Get everyone in the company to buy in to your vision for the future.
- Offer the necessary tools to help deliver your vision.
- Successfully coax a behemoth from where it is today to where it needs to be tomorrow.



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So Why Is Change So Hard?

If adaptation is a sign of a healthy organization poised to outpace its competitors, why aren't all change programs hungrily embraced and implemented with lasting success? We all fall into routines. Sometimes they're healthy ones, like going to the gym after work. Other times, they're less than ideal. Organizations are no different. Years of patterns lead to ingrained and deeply entrenched sets of beliefs and behaviors that extend into practices that are systemic and cultural. Change is risky because by definition, it involves doing something unproven, something that hasn't yet been shown to work.

Employees resist change for lots of reasons. They might simply disagree with the change or the rationale it's based on. Or they might believe the change will be a fad. Or there might be deeper psychological factors, such as a fear of learning new skills or losing authority.

However, for most change initiatives, lack of alignment among the leadership team is the primary cause of failure. Or there is not complete commitment to the vision and path. The initiative becomes bogged down by lack of consensus and stalls.

To execute strategy successfully, it's essential that you take your organization's current cultural temperature. That way, you'll understand its collective attitude toward change — both its openness to change and its points of resistance. By doing so, you'll determine the specific hurdles that will stand in your way as well as the people you can lean on to keep you moving forward.

There are numerous methods for assessing an organization's readiness for change. In my experience, focus groups, small-group meetings with key influencers and organization-wide employee surveys are most effective at deriving thorough and reliable results. ●

Ideas — The Lifeblood of an Organization

Drawn on a napkin, hashed out over the fourteenth hole, or devised while eating junk food late at night in a college dorm room, great ideas are the rich deposit on which organizations are founded. And organizations flourish because of new ideas. Quite simply, if a company doesn't recognize the need for a constant infusion of creative thinking and fresh strategic concepts, then that company most certainly won't be willing to take the necessary steps toward lasting change. Good, bad, brilliant, even god-awful, ideas propel a business to new heights. They distinguish an organization from the competition, delight customers and reward stockholders. Without them, organizations languish.

On the road from ideation to realization, however, a lot can go wrong. Great ideas are too often kicked to the curb, sometimes intentionally out of fear, sometimes despite heroic attempts to actualize them, sometimes because there's a collective belief that the status quo is good enough. Research has shown that employees in a negative environment, who are focused primarily on looking out for themselves and constantly defending their own space, are less innovative.

Nurturing an Atmosphere of Creativity

Fostering a culture of creativity and innovative thinking can be easier than you might think. Consider the following five ways to shake the tree of ideas a lot harder than you currently do:

Killing the status quo. In the same way that people hold deep-seated beliefs, organizations have sets of accepted core convictions about how to get things done. The first step to killing the status quo is to accept that these core beliefs exist and then challenging each and every one.

Altering your point of view. To break stubborn obstructions that stand in the way of new modes of thinking, you sometimes need to experience something firsthand outside of the office or boardroom.

Comparing your organization to others. This strategy is not about emulating other organizations; it's about stimulating surprising ideas that you might not come up with otherwise.

Imposing artificial limitation. It might be counterintuitive, but imposing limitations on your thinking can be an invaluable way to spark creativity. By constraining you, it paradoxically frees you to run wild within a smaller area.

Looking for unorthodox opportunities. To spur the ideation process, do not constrain your thinking only to improving products or services. Instead, rethink every touch point between you and your customers to improve how they currently interact with your organization. Perhaps you are forcing them to interact with you in a way that's less ideal, and you could improve it.

It is imperative that you begin to reward innovative thinking in meaningful, memorable ways. Through recognition and rewards, a healthy culture of competition may emerge. Managers should construct incentives that stimulate collaboration by encouraging innovators to share their inventions and insights within the organization.

There are two approaches to choose from to motivate and reward employees for their ideas, and both have their merits.

Intrinsic motivation. An intrinsic reward is one that comes from within. An employee's sense of intrinsic motivation can sometimes be enhanced with praise and added attention from management.

Extrinsic motivation. An extrinsic reward comes from an external source. The source of inducement can be powerful but can also be more short-lived than an intrinsic motivator. When an extrinsic motivation such as a monetary reward is removed, so is the enticement. ●

Launch Your Employees on an Idea Quest

Your assistant, junior associate, bank teller, barista, pizza maker, custodian or forklift operator might have answers to your organization's most pressing issues or fixes for time-wasting problems. But most organizations don't benefit from these valuable IQ points because management doesn't invite meaningful, focused input and collaboration from frontline employees.

The challenge is to focus your employees' combined brainpower by asking smart questions and facilitating the flow of information along fruitful paths to solve problems and discover opportunities.

Frontline experts see a great many problems and opportunities that their managers don't. The tremendous opportunity for organizations is to pull this knowledge from employees' day-to-day experiences, make decisions and act upon them through those same employees.

You need to cultivate a culture in which staff at all levels can easily share solutions for improving the business. When it comes to ideas, the biggest roadblock senior management often faces is the widespread, deeply entrenched belief that ideas from the rank and file don't matter. In many companies, this wellspring of valuable insight simply isn't encouraged, considered or rewarded. You might be shocked by how frontline employee participation lubricates the gears to get major change initiatives moving along smoothly.

I have worked in dozens of organizations that continue to use the age-old suggestion box as a means of generating ideas, and it rarely produces quality ideas. Why? Far too many suggestions, too many irrelevant ideas, too many redundant ideas, and a lack of transparency and recognition. I have developed a better strategy that can be used to solicit the most fruitful, strategic and relevant

ideas from the collective intelligence of your organization. I call it Idea Quest.

The advantages of Idea Quest are numerous:

- It introduces a formal, disciplined process into what is often a helter-skelter, shotgun approach.
- It sharply improves organizational focus by recognizing an opportunity to be acted on.
- It quickly separates the best ideas from the worst so you can allocate resources effectively.
- It lets you evaluate the effectiveness of the ideation process.

Let's consider the five steps to effective idea quest in detail:

1. Focus employees on a specific mandate.

While open-ended innovation has its value, the most successful systems for ideation define focused business challenges. Invite the appropriate employees and employee groups to generate ideas to address a specific business opportunity within a defined time frame.

2. Engage employees in meaningful ways. Use multiple mechanisms to motivate employees to become involved in your Idea Quest. Set a good example by having management participate. Make sure contributors share in the success of the result. Ensure that all ideas are welcome, and make it fun.

3. Create an easy and transparent way to share ideas. Participants should work independently or together in meaningful groups to develop ideas. The environment should be transparent so everyone can see all ideas and build on ideas submitted by others. Get people who do not normally work together to come together for this effort. Encourage out-of-the-box thinking that challenges the status quo.

4. Require that ideas be turned into a project plan. Without a workable written project plan, ideas can be abstract and extremely hard to evaluate. By requiring that ideas be presented as a simplified project plan, weaker projects must be strengthened or can be identified and scrapped so that stronger ideas can move forward. A basic project plan should consider at least an overview of the idea, the competitive advantage offered, the degree of difficulty, and estimated time, cost, revenue and team size.

5. Evaluate each idea, and respond promptly. When ideas disappear into a black hole, contributors become discouraged. Allocating adequate resources for evaluation is important. ●

PART TWO: GOING AROUND THE Q-LOOP

Focus on the Mandate and Form a Team of Heroes

Regrettably, the least common approach to problem-solving is fact-based solutions that rely on deep insight and analysis to solve the problem coupled with a deep understanding of why the problem occurred. Once the how and why are verified, root cause analysis can occur. And with root causes come meaningful insights that can be captured and applied across the organization in a once-and-done fashion.

Fixing this problem doesn't require substantial capital investment to begin. Getting started simply requires that you identify the right idea to turn into a mandate and build the right team to achieve it. If the process for getting started is followed as outlined below, the team should enjoy tremendous success:

1. Ensure senior management support. Without the full support of senior management, the remaining steps are pointless. A single project champion must also be identified. An important role throughout the project, this is particularly essential at the outset.

2. Choose the project. Before making a final decision, be sure to have a thorough discussion about resource availability and management support to ensure that the project can be effectively staffed. An understaffed or unsupported project can be doomed before it gets a fighting chance. Then dive in. Change efforts will not work if the organization is always thinking about change and rarely implementing.

3. Select the project champion. The project champion must be an executive who provides the vision for the team, reviews and supports its efforts, and acts as a team sponsor to the rest of the organization. Primary responsibilities are to maintain accountability for the effort, define the project mandate, leaders and members, and establish weekly commitment and project duration, to mention a few. It's no small task. So choose wisely.

4. Scope the work. The project scope describes in detail the project's deliverables, the boundaries and the work required to create those deliverables. The scope definition should be clear and understandable to all project stakeholders.

5. Write the mandate. For any team to be successful, it must have a clearly defined sense of purpose. This purpose comes from a well-crafted mandate. The mandate should state your team's goals and why achievement

of these goals is critical to the organization. It should be brief, memorable and meaningful to all members of the team. Think elevator pitch, not long-winded speech.

6. Select the coach. An ideal coach is someone who is experienced in working with teams and can guide the team through the project. The coach generally works behind the scenes with the project champion and team leader. The coach should ensure a sense of urgency and plans upcoming meetings, reviews agendas as necessary, and helps to structure the analysis.

7. Select the team leader. The team leader is often — but not always — a manager or supervisor in the area where most of the change is likely to occur. The team leader is charged with creating and maintaining an effective working environment and helping the team resolve its problems. This person schedules and generally runs most team meetings and manages or delegates administrative details. Among the many desirable attributes of the team leader are people skills, technical skills, communication skills and project management skills.

8. Select the team members. Your company is full of heroes. The ones who know how to get things done, who have been consistently more effective than their peers. These heroes are your influencers, and must be the primary agents of change. If you can identify, train and galvanize these key influencers you will release tremendous organizational energy. Look for heroes out in the field and as far away from headquarters as possible. Heroes generally spend most of their time with customers.

9. Secure dedicated team space and team requirements. Prior to the team kickoff, the sponsor should secure a dedicated meeting room to accommodate the entire team plus several guests. This will become known as the team's war room, where they will be papering the walls with process maps, graphs, charts, interview notes and more. ●

The Corporate Lab: The Art of the Possible

A fundamentally transformative, proprietary experience I named The Corporate Lab™ is a unique force that drives the ability to produce lasting change around the Q-Loop. It's one that I have personally witnessed redefine the mindset and cultural attitudes within dozens of organizations. It is the next step toward achieving a lasting change initiative after focusing on the compelling mandate and forming a team of heroes.

Summary: THE Q-LOOP

My goal was to establish a highly flexible, scalable, reality-based platform that would build clients' capabilities in a number of different areas. I knew I needed to immerse participants in an environment that would precisely mirror their day-to-day workplace in terms of culture and behavior.

The basic philosophy of the Lab is that it weaves together traditional problem-solving, in the form of the scientific method, and a strong constructivist element. Constructivism holds that students learn best when making sense of something on their own with the teacher as a guide. The Lab lets participants discover, dream, desire and reach their destiny. It works by allowing participants to learn and implement the Q-Loop in just two days.

To achieve success, you must build a transformation program that allows change to be rapidly pulled across departments and throughout layers. Unless well-respected thought leaders at all levels embrace the change, the initiative will wither and eventually die. To create widespread passion, the workforce must be exposed to what could be, which will let them rethink their mental models, break free from their entrenched paradigms, and embrace the opportunity to learn.

Overview of The Corporate Lab

- **Getting started.** Approximately twenty client participants assume job responsibilities of a new operating division of NAVCorp, a \$270 million designer, manufacturer and marketer of computer navigation-related products. Typically, participants take on very different roles from their current positions so that they gain new perspectives. The experience is not a game-like simulation. This company exhibits the complexity and depth of the participants' organization.

- **Setting the scene.** The Lab takes place in approximately 1,600 feet of contiguous space with 20 participants from different parts of the client company. Each participant has a workspace — frontline workers have cubicles, and senior management has a conference room. Participants receive a welcome kit, and a company overview video is watched. Participants receive their tablets, individually loaded with job requirements. These tablets let participants send and receive e-mails and notifications and perform the analysis required by the job.

- **FY1.** During the morning of day one, participants encounter a series of significant business challenges that can potentially cause customer defection. Participants experience familiar stress, anxiety, time pressure and inconsistent data, which leads to fatigue, frustration and failure. The experience shows how their conventional approaches to problem-solving are not sustainable. We

then introduce The Klapper Institute's scientific method. We begin to discuss how these new skills can be applied.

- **FY2.** Fiscal Year 2 begins on the morning of the second day. FY2 helps participants experience how optimizing department-level performance without building connections across the organization fails to deliver the desired result. Participants start to feel the impact of internal focus versus customer focus and realize how bureaucracy inhibits a quick response to changing market conditions. They discover how hierarchical decision-making contributes to slowed actions.

- **FY3.** During the second and final afternoon of the Lab, participants operate FY3 of NAVCorp and apply all of the knowledge, new skills and — most important — radically new perspective to make dramatic performance gains across all financial, operational and cultural measures. Employees now also recognize that change is inevitable and embrace it as an ongoing part of their professional life.

The Corporate Lab drives the ability to produce lasting change around the Q-Loop. The Lab absorbs the cultural norms of an organization, which lets participants view familiar information through a very different lens. This new way of viewing their organization and themselves recalibrates their perspective and makes them open to change. ●

A Scientific Method for Achieving Your Mandate

It's time to learn the Results Triangle, which comprises three powerful steps designed for you to systematically and consistently deliver on the promises made to your customers. The three Ls of the Results Triangle are

- **Listen.** Listen to both the customer and the business by interviewing customers and key stakeholders, analyzing past research and documents, assessing competitor positioning and mapping key processes.

- **Learn.** Learning is the act of understanding the current operating environment, analyzing its performance, hypothesizing potential root causes, and conducting experiments to validate the hypotheses.

- **Launch.** Launching initially begins with a series of rapid prototypes or pilots, followed by a carefully coordinated rollout and detailed monitoring.

Listen Phase Step 1: Listening to the Voice of the Customer

The customer must be considered at the start of all major change initiatives. Learning to listen to the cus-

tomer will help you identify the specific customer needs around which a product or business process will be designed or help you understand how customer needs relate to strategy development, growth, achieving operational excellence, or preparing for an IT implementation. Learning to listen to the voice of the customer will let you establish clear standards of performance based on actual customer input. It will also help you obtain a complete description of the factors that create customer satisfaction, including output requirements and service requirements.

I have been associated with organizations that have spent millions of dollars and many months surveying their customers. I take a radically different approach. I call my survey strategy the Rule of 10³. This means 10 questions conducted with 10 customers, prepared and launched in 10 hours. For the focused work you are performing, if you can ask the precisely targeted 10 questions to the right 10 customers, you will learn 90 percent of what you need to know.

Listen Phase Step 2: Listening to the Voice of the Business

Listening to the voice of the business means generating a deep and thorough understanding of how the business is performing today. You should determine who should attend strategic planning sessions (six to eight people usually works best, and these should all be key decision makers).

Be careful, because everyone will want to attend, but contributing to strategic planning is different from merely attending the meetings.

Learn Phase Step 1: Hypothesizing the Root Cause of the Problem

Asking “why” in the right way leads to new insights and innovations that can yield elegant and powerful solutions. Repeatedly asking why, as a child might, is a source of continuous self-renewal. But asking why properly is an art.

I do not doubt that you and many of your colleagues are excellent problem solvers who generate solutions daily. But if you tend to solve the same issues repeatedly, you are not getting to the true root cause.

Brainstorming is an effective way to generate ideas to solve problems, make decisions and explore improvements. In true brainstorming, it is essential that you do not interrupt the thought process. It is a creative, free-thinking activity. As ideas come to mind, they are captured without bias on a flip chart or by some other recording device.

Learn Phase Step 2: Experimenting to Validate the Hypothesis

Now it's time to validate the hypothesis you developed for the root cause. Experiments are only effective if they deliver significant learning to the company. Although companies can save money by lumping experiments into one large test, experimenting frequently minimizes problem-solving delays and the cost of redesign. Given that new technologies drastically reduce the cost of testing, the need for frequent experimentation becomes more vital. But companies must be prepared to handle the increased load of information that comes with greater experimentation.

Launch Phase Step 1: Building a Pilot

It might seem counterintuitive, but to achieve your mandate, it's imperative that you build a pilot that's rough, rapid and right. In other words, it's not meant to be a finished product.

Depending on your mandate, there are several types of pilots that can be mixed and matched as needed.

Offline. This is not performed on actual customers or services but simulated by using old customer information to minimize any potential disruption in business.

Limited duration. Depending on the pilot, these can be run for a week, month or quarter, but they have well-defined stop and start dates.

Segmented customers or products. This provides scope to make the pilot more manageable by operating in one customer segment. Remember, you are after confirmation that the pilot is effective, not yet financial results.

Limited locations. Designed to make the pilot more manageable, this type selects one office, region or sales territory.

Once you run a successful pilot, your next step is implementation in the form of a broader rollout.

Launch Phase Step 2: Implementing Across the Organization

Cited as the number-one reason for CEOs failing, final implementation is possibly the hardest part of the entire Q-Loop. Certainly, it's the most important job for senior management, and it's the hardest discipline to achieve throughout an organization.

It's critical to know why 75 to 85 percent of implementation efforts fail. The most widely cited reasons are lack of top management commitment and lack of proper commitment of time and resources.

Summary: THE Q-LOOP

For successful implementation, there must be two components: dynamic leadership and an effective plan.

Launch Phase Step 3: Measuring, Monitoring and Providing Ongoing Feedback

Now that the groundbreaking ideas are approved and the team of heroes can finally exhale, you need to embark on the real beginning of hard work. The beginning, you ask? Yes, the beginning. This is where you translate all the ideas into action.

The trouble is that when it comes to successful implementation, execution tactics are just as critical as strategy. Detailed planning involves breaking work down into smaller parts.

I've found that achieving strategic planning and management goals requires an actionable plan that considers the people required to bring the plan to fruition. Sounds simple enough. Yet in practice, both plan and people have challenges and uncertainties that must be carefully managed. An inherent lack of accountability in the planning process leads to problems and sometimes complete failures in execution.

Everyone is accountable for his individual tasks, which are required to achieve the overarching organizational goals; some people, including the CEO, may be accountable for reinforcing the tasks. ●

PART THREE: EXITING THE Q-LOOP

Ignite a Wildfire of Pull

Now the questions are, "How can you be sure not only that this change initiative takes root but that future initiatives run smoothly as well? And how can you make certain that the energy you triggered over the past month gets embedded into your organization's DNA?"

Here is where the executive management team needs to take ownership of the process and be the true leaders they were charged with being. Too often, organizations set the strategic direction for the change, and then the leaders remain remote, leaving the actual change to less motivated people. It's a cause for defeat.

It's time to eradicate all detrimental attitudes and actions and replace them with the following four key strategies to ignite a wildfire throughout your organization for all future change initiatives:

- **Create and sustain real energy.** As soon as possible, create a new team and a new mandate. Use members of the previous team as advocates to promote the

experience. Set clearly defined and well-communicated goals for the next 36 months. A principal reason that so many change programs collapse is that management fails to quickly move from talking to action. Focus on both quantitative performance and corporate health. And as you build your teams, identify key influencers at all levels, and bring them on board for specific initiatives.

- **Communicate goals and successes compellingly.** By demonstrating success, you encourage other areas of your organization to quickly embrace the approach. While the iron is hot, do everything you can to help the organization roll out the pilot and then quickly commence another high-profile project — or several simultaneously. Share as much information with colleagues as is appropriate during a project. Communicate the positive stuff in a tweet, a blog or by e-mail. Make sure senior managers live the change they want to see in the organization.

- **Raise employees' expectation.** Individuals in organizations, to embrace change, must also engage in a process that reshapes how they think about themselves, not just about their jobs. Change needs to become part of your organization's culture. The surrounding structures must be in tune with these new behaviors. Employees must be given the skills and support to do what's required of them. And they must see people they respect modeling it every day.

- **Ensure that transformation is an ongoing effort.** Transformation is a perpetual process, and it involves all members of your organization. Change is a constant. A one-off program doesn't address the need for the long-term change.

Greatness comes to the bold. Be bold. So many of my clients have been and continue to be, and it has served them well. When someone writes a book many decades from now about organizations that have weathered the years by remaining nimble, will you be on the list? Will you have left your competitors in the dust? Will you have achieved the ability to produce lasting change?

Now it's up to you. ●

RECOMMENDED READING LIST

If you liked *The Q-Loop*, you'll also like:

1. ***The 4 Disciplines of Execution* by Chris McChesney, Sean Covey and Jim Huling.** Battle the whirlwind of urgent activity required to keep things running by learning the four disciplines that make execution repeatable.
2. ***Changeology* by John C. Norcross, Ph.D.** Change is hard, but not if you know the five-step formula that Norcross provides. Backed by cutting-edge research, this process can make change permanent.
3. ***Adaptability* by Max McKeown.** McKeown draws on millions of years of evolution to create a practical, strategic set of rules that will make adaptation a part of your company's DNA.