Journey Management

Successfully managing a complex portfolio of change

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Statistics show that the vast majority of organizational change initiatives underperform, or even fail to produce their intended value. And the situation is getting more challenging all the time: changes come more rapidly and have longer-term impacts. Companies are typically managing, not just one initiative, but a complex portfolio of change as part of a larger, enterprise-wide transformation.
Managing change is also more difficult because employees increasingly work across multiple functions; in such a matrixed organization a manager may have direct responsibility for some employees but only indirect influence over others. As work processes increasingly cross multiple functions of an organization, resulting in the sharing of applications and tools, better transparency and stricter controls over the use of information is also important.

This paper looks at how major companies have successfully driven large-scale organization transformations and change programs through a discipline called "journey management." Using extensive case studies, the paper details the phases of a successful journey management program and explores several keys to success.
Introduction

The challenge of managing transformational change

Strange to say, but the era when organizations could focus on managing a single organizational change initiative—as tough as it might have been—now seems almost like a luxury. Today, industries, technologies and markets move at such a pace—and challenges are so complex—that many organizations are managing multiple programs running concurrently as part of more sweeping organization transformations.

This sense of a portfolio of change programs with an ever-expanding impact on the enterprise—change resulting in even more change—requires management approaches and tools beyond traditional change management competencies. Typical activities such as communications and training are still relevant and can be critical to managing change. But if that’s all you’re doing, you might be in trouble.

Why?

First, because leaders need to see to it not only that the portfolio of change programs progresses successfully, but that, simultaneously, the actual work of the company gets done. Customers or citizens have to be served; products must be manufactured and shipped; operations and the supply chain need to keep running. The company or organization needs to stay agile and flexible even while retooling parts of the business.

Second, the overlaps or touchpoints between different initiatives need to be carefully managed so the organization as a whole is not stepping on itself, or that delays in one program do not hold up progress on others within the broader organization transformation. Time marches on for each part of the change portfolio and if one program grinds to a halt waiting for another program to catch up, then waste, redundancy and dissatisfaction can occur.

Finally, “change fatigue” can set in for a workforce buffeted by the demands made on them by successive changes thrown at them over an extended period of time. The business needs to be able to assimilate the scope and depth of change required across these multiple change programs at a very personal, employee level. Organizational change affects people both professionally and emotionally.

Add it all up, and one can understand why the track record on delivery of benefits from long-term change programs is often dismal. Various studies have suggested that as many as 60 percent to 70 percent of large-scale change programs fail to achieve their intended benefits.

Businesses can increase their success rates for change programs and improve their overall organizational agility through a discipline Accenture calls “journey management.” Journey management involves processes, tools and methods appropriate to long-term transformational change. To handle the challenge of managing multiple programs in a change portfolio, journey management also includes a cross-program management capability (sometimes called a Journey Management Office) that provides an overarching view of the company’s change journey, manages the different programs in the change portfolio (and how they relate to each other), and helps set an appropriate pace for transformation based on the business’s ability to absorb change.

Journey management, successfully planned and implemented, has been shown to increase the certainty of reaching the desired business goals at the right pace and with fewer risks, while also creating an organization that is more agile and change capable—with the ongoing ability to adapt to and capitalize on transformational change.

Real-life experiences

This paper provides an overview of the processes and approaches which, based on Accenture’s experience, can help organizations increase the probability of successful long-term organizational transformation. The discussion of general points about journey management methodologies and tools is augmented by case studies to illustrate how methods are used in real-life instances.

One major case used throughout our discussion is the success story of a significant, multi-year journey of change undertaken by the IT function of a global energy company. The company’s IT group had a vision to move from a distributed organizational structure to one that was more consistent across geographies and business units. This would enable faster and better decisions, continuously optimize business-critical processes through more adaptive solutions, and help the business as a whole expand its global opportunities.

Working with Accenture, and following a proven methodology for managing a long-term portfolio of change programs, the company has successfully transformed IT from a good service provider to a great business partner, adding significant value to its business. The company has achieved more than $1 billion in benefits from its IT transformation journey since its inception.
Understanding the lifecycle of change:
Phases of a journey management program

Traditional change management techniques should be supplemented with more strategic and comprehensive disciplines to manage a larger organization transformation program as it proceeds along the “lifecycle of change” (see Figure 1)—from the initial identification of the drivers for change through to the delivery of the desired outcomes.

Figure 1: Accenture’s lifecycle of change
A journey management program brings together the best of traditional change management with an approach to coordinating multiple programs within an overall change portfolio over time; it also supports companies in developing an ongoing, internal capability to manage change.

Overall, journey management helps an organization implement specific initiatives while also keeping it agile and able to respond to marketplace events.

The concept of managing the entire lifecycle of change is important; it highlights the need to bring together different aspects of change management and transformation portfolio management to deliver measurable outcomes. The "lifecycle of change" concept also underscores the fact that there is no cookie-cutter approach to journey management. Executives should be aware of the unique aspects of their organization's overall journey and the make-up of their change portfolio. That understanding then supports planning and execution appropriate to where each change program sits within the overall lifecycle, and which elements of the journey management toolbox of diagnostics and other assets are more relevant.

For example, at the beginning of the journey the focus may be on the more strategic aspects of scaling and planning the overall change portfolio and aligning the executive team. In later phases, the focus might be more on making the changes part of the enduring set of employee behaviors and on leaving behind a sustainable change capability and an organization that is more agile in its ability to respond to change.

Based on our experience managing journeys of change for multiple organizations around the world, we find that a typical journey management program consists of five phases:

1. Assess the current environment and drivers for change.
2. Articulate a compelling description of the future state and vision of the organization.
3. Assess the gap between the current state and the desired future state.
4. Create a journey roadmap to plan and prioritize activities.
5. Proactively monitor the journey and change portfolio to keep the organization on track.

The following sections of the paper provide detail and examples regarding the work generally performed within each of these phases.
1. Assess the current environment and drivers for change

In an initial phase of work, the executive team comes together, often in a workshop environment, to understand the current state of the business as well as the real drivers for the change. It is difficult to manage a long-term, transformational change journey successfully if one does not fully understand the starting point. A detailed and fact-based assessment of the current state is important because that analysis then leads to a deeper understanding of why change needs to be undertaken.

Organizations often find that there is more demand for change than is realistic to undertake. So a key aspect of assessing the drivers for change is the ability to pick the “right” change programs from a comprehensive list of potential initiatives. Programs should be chosen based on which will offer a solid return on investment at the fastest pace, and also based on which are most aligned to the organization’s overall business goals.

The importance of this initial assessment phase is well illustrated by the IT transformation journey successfully managed by a major integrated energy company.

The company’s IT transformation began with initial efforts approximately five years ago to define the key elements of what the change journey might look like. The company’s success had been fueled by both organic and inorganic growth. From the perspective of the IT organization, acquisitions and rapid growth had resulted in a distributed IT model, with sometimes inconsistent definition and application of process, data and technology standards across the company. Individual components of the IT environment, including more than 150 data centers worldwide and 14,000 applications, were being managed with different processes, tools, metrics and quality definitions. Solutions were being implemented in silos with insufficient integration and limited sharing of knowledge and experience.

Perhaps the biggest driver for change was in the potential for value creation in optimizing IT spending and overall effectiveness. IT investments at the energy company are a substantial percentage of total revenue, so achieving greater efficiency meant potential savings in the billions of dollars. From an upside perspective, a more effective IT organization could also enable the business to be more responsive to market, regulatory, competitor and customer developments.

Understanding the value drivers: Key questions

The initial assessment phase of a journey management program helps all stakeholders understand the existing situation and the challenges the organization faces. This assessment can help the change program’s key leaders and sponsors articulate the value objectives in terms of specific economic and stakeholder outcomes, and can identify specific actions to achieve the change journey’s overall goals. Key questions to consider include:

- What is the case for change across the organization?
- What are the strategic goals the organization is trying to achieve (e.g., optimization, growth, new product lines, etc.)?
- What is the potential market value of achieving these goals?
- What other change programs are already in motion and how does a new initiative affect and interact with those?
- What are the keys to successful implementation of the change program?
- Who will be affected and how, as the organization moves from its current position to a future state?
2. Articulate a compelling description of the future state and vision of the organization

The executive team and leaders responsible for managing the change journey should agree on what the new destination or future state of the company or organization/function will be—with targeted, tangible and measurable business outcomes—and then define a compelling and memorable vision to bring people together under a common flag. This “to be” state needs to be articulated in language that stakeholders at all levels can understand and embrace.

Another way to support the development of a succinct and compelling vision is to host workshop sessions to review the organization’s strategic priorities with key leaders. Where do they believe the organization needs to be in one year? Three years? Five years? What is the goal the organization and its leadership are trying to achieve? These discussions can examine those priorities along a continuum that maps the current position against the desired future position—along with other factors including competition, regulation, customer environment, technology and so forth. One-on-one sessions with individual corporate leaders can augment the information obtained during leadership workshops.

This information-gathering phase accomplishes two important things in particular. First and most obvious, it provides the input to define the desired future state of the organization. Such a definition should go beyond general intentions to articulate a specific strategic intent—for example, “to own 55 percent of the market for core services and maintain top 10 market leadership in auxiliary services.”

The description of the future should be accompanied by a short vision statement describing the optimal functioning of the organization when the future state is achieved. This statement should be compelling, memorable and, in its own way, inspirational—capable of uniting all parts of the organization behind a stretch goal. At the energy company, the articulation of the desired future state for its IT organization became the seed of the ultimate transformation vision: “Leveraging information and information technology for superior performance and growth.”

A second purpose of the information gathering phase is to involve critical stakeholders in the definition of the future state and vision so that they feel ownership and alignment with the direction of the change journey.

At the energy company, these leadership workshops were important to taking the right initial steps on the IT transformation journey. Executives and IT managers were well aware of what the IT organization was already good at. They were an excellent service provider, but they desired to be, in addition, a great partner to the business, helping line functions improve their strategic capabilities. The IT organization was running its existing information technology assets effectively, but they desired to be an organization with greater impact—one that could use information technology to support superior performance for the entire business.

The importance of alignment around this future state was emphasized by the CIO’s stated mindset, which put a high premium on working as a single, global team. That is, the vision had to be jointly owned by the business and by the IT function itself. All parties needed to agree on a single understanding of the journey—a clear and deliberate plan to achieve the vision.

Defining the vision: Key questions

One purpose of this phase of work is to clarify and document the organization’s strategic objectives and create a succinct and compelling vision of the desired future state. Key questions to consider include:

- What are executives’ strategic objectives and vision for the future, articulated in their own words?
- Is that vision shared by other key leaders in the organization? If there are differences, can these be reconciled?
- Have we articulated the future state in detailed and measurable language so that we will know when we have reached that state?
- Are current projects and programs operating in support of the achievement of the future state? Are they tied to the strategic objectives?
3. Assess the gap between the current state and the desired future state

In this gap analysis phase, the journey management team brings together people from different parts of the organization who can realistically analyze the gap between where the company is now and where it wants to be—and who can assess the scale of the change effort to get there. This analysis is likely to involve assessments of the particular functions affected by the change journey, the effectiveness of existing training programs and workforce strategies, the relevance of current leadership development programs, the culture of the organization and more.

It is typically important to be extremely clear about the scale of the change being undertaken, in its totality. How big is the change challenge and how much can the organization and its people cope with at one time? These questions, considered as part of the gap analysis, can help to determine what programs, in what order and at what pace, should be part of the overall change portfolio.

Organizations and their leadership can sometimes be tempted to proceed too quickly from the articulation of the vision to implementing specific change programs. One European manufacturing company that undertook a comprehensive transformational change initiative found after a few months that the scope and pace of the programs as originally planned were more than the organization and its people could readily accommodate. Leadership took the time to make a correction—they stepped back to perform a gap analysis, which then helped management prioritize and make more realistic choices about specific change initiatives and how they should be coordinated and paced.

At the energy company, the overall vision to be an effective partner to the business—and to grow beyond being an efficient steward of IT assets to being an effective implementer of technology solutions to drive superior business performance—led to some important work to assess current IT capabilities against the capabilities needed to realize and sustain the vision.

For example, the IT organization was already focused on process efficiency, but this work was usually undertaken as a series of discrete projects rather than as a coherent and integrated program across the business. The IT organization’s goal, instead, was to optimize business-critical processes through integrated solutions that could be more readily adapted to changing business needs. More coordinated sharing of knowledge and capabilities across borders and functional lines was also an important aspect of the defined future state.

Finally, to move beyond the existing situation where a multitude of processes, tools and metrics were employed by different parts of the IT organization—and where inconsistent definitions of processes, data and standards were in use—the company put in place a more robust governance structure to ensure compliance with a standardized approach to information technology implementation across the organization. This structure required that each functional domain gain approval for IT projects before proceeding, so that the company could be assured that a project was in alignment with overall strategy, that it was not redundant with existing IT assets, and that it helped to optimize overall IT spending.

Gap analysis: Key questions

This phase of work results in listings of specific capabilities that need to be worked on to move the organization toward its desired future state. The gap analysis helps to both quantify and qualify the totality of the change. Key questions to consider include:

- Given the specific capability gaps identified, how much change in total is required?
- What initiatives can we work on in parallel and which need to be sequential?
- For parts of the change portfolio to be addressed sequentially, what are the priority areas?
- What are the nature and scale of the likely impacts of the different change initiatives?
- How and where do those impacts affect the same area of the organization (people, systems, etc.)?
- How quickly can we progress the change without placing business-as-usual operations or change outcomes at risk?
4. Create a journey roadmap to plan and prioritize activities

The journey roadmap is designed to be a comprehensive planning document that defines the set of activities to be undertaken to achieve the future state of the journey. The journey roadmap uses a business case to set a course of action—detailing the multiple initiatives within the overall change portfolio and their integration points, and then prioritizing them according to impact and based on the ability of the organization to absorb the set of changes. The roadmap also can serve as an important communications tool to keep the entire organization aligned around goals and progress.

In creating the roadmap, two related factors should be taken into account: (1) the ability of the journey management program to deliver; and (2) the capacity of the business and its people to absorb the various impacts of the change portfolio. Trying to do too much too soon is one reason that some transformational change journeys fail.

Providing detailed information about the enablers that will ultimately help move the organization toward its desired state is an important activity. The journey management team also should specify the specific behaviors that need to be modeled—especially by those in management positions—so that change is embraced across the organization more broadly.

An important aspect of the roadmap at the energy company was the work undertaken, in cooperation with Accenture, to define very specific initiatives—about a dozen—and specific performance targets associated with those initiatives.

As with the overall vision, these initiatives were organized and articulated in a compelling way according to three overall categories: “Prioritize, simplify and integrate.” That is:

- Prioritize the set of desired information technology capabilities.
- Simplify the information technology environment.
- Integrate information technology planning, control and operations.

The team then created specific goals within each of these three dimensions. For example, the vision included goals such as reducing the overall number of IT projects, cutting the number of data centers and reducing the number of applications used by the organization.

The overall destination articulated within the roadmap was of an information technology function that connects people, partners and the business; that accelerates business insights; and that automates, integrates and optimizes business operations.

Equally challenging, however, but also equally important, was the identification of specific behaviors—on the part of management but also across the entire IT organization—that would help enable the company’s IT transformation. One-on-one sessions with key leaders were conducted, during which they were asked to plot themselves along a continuum of these behaviors so they could begin to understand the personal dimension of the overall change journey.

Results of this analysis were reviewed in detail with members of the CIO leadership team and each member was asked to pick their top five of all behaviors listed in terms of importance to achieving success. These behaviors were identified as critical to the success of the change program—behaviors that would sustain the transformed IT organization over time.

Creating a journey roadmap: Key questions

The journey roadmap defines interim targets that allow incremental change to take place, and prioritizes the capabilities that have particular impact on reaching the value targets. Key questions to consider include:

- What are the programs, in what order, needed to move the organization from its current state to its desired future state?
- What are the interim points along the overall journey so that we allow adequate time to build capabilities and behaviors to enable and sustain change?
- Does the current operating model support the target state as we have it defined? If not, how do we change the operating model to create an organization that can absorb and sustain the change?
- How does management of the journey complement or potentially interfere with other strategic responsibilities?
5. Proactively monitor the journey and change portfolio to keep the organization on track

Any function concerned with program and project management will use tools to track progress and estimate effort to complete. As these individual projects get rolled up into a larger portfolio of change programs, however, it becomes more challenging to track, measure and manage the integration points. A key to successful journey management, therefore, is moving beyond traditional program management so that multiple strands of work can be coordinated effectively. This can keep the journey and the set of change initiatives in the portfolio on track through leadership regime shifts and marketplace change.

Equally important is to include, in the overall monitoring of the journey, the ability to revisit and revise the roadmap in light of market, competitive and industry developments. The journey management team needs to have the insight and the authority to intervene if aspects of the overall journey go off track.

Relevant and timely metrics are also essential. The ability to measure overall readiness of the organization for the multiple change programs in the portfolio is important, as is the means to assess deployment readiness at different stages of the journey. A new generation of tools can help track progress of the overall change portfolio over time. Change measurement analytics and a scorecard are important to tracking progress and provide the necessary data, but the overall charge here is to use data proactively. It is in this way that the organization as a whole can be agile even while undergoing a massive set of change efforts. The organization must be able to rapidly identify and act on changes in the environment, the organization or the program itself.

This point about metrics is important: Measurement is sometimes seen as a dreary responsibility. But in fact, it is metrics gathered and analyzed in a timely way that can provide the intelligence needed to proactively manage the journey. Measurement can be tough work, but it can actually enable an organization to stay flexible and agile over the course of time.

At the energy company, measurement based on a scorecard approach to monitoring the journey was critically important. For each transformation initiative, the management team established specific metrics and financial targets. Program and initiative status was revisited monthly, with easy-to-monitor indicators of green, yellow and red for areas on track, in question or in danger.

Proactively monitoring the journey: Key questions

The ongoing work to monitor the journey through timely, agreed-to metrics can enable corporate-wide and program leadership to assess the organization’s progress along the journey. This work also can engage leaders in thoughtful pursuit of the overall portfolio of change programs through regular reviews of a progress scorecard. Monitoring includes the ability to adjust the journey map and plan as needed based on scorecard information, progress and external factors. Key questions to consider include:

- Are we progressing toward the desired end state at the pace originally defined in the journey roadmap? Why or why not?
- Are the existing projects and organizations achieving the desired outcomes for each phase of the overall journey?
- Are there any internal factors (e.g., change fatigue, budget constraints that require adjustments to our journey roadmap?)
- Are there any changes to external factors (e.g., new competitors, economic conditions, regulation) that we should consider to make alterations to our plan?
Keys to a successful journey management program

As noted earlier, statistics about the effectiveness of major organizational change programs are generally not encouraging—well over half of such programs are usually deemed a failure according to numerous studies. Given that track record, what can executives do to meet the challenge of managing long-term journeys, especially those that include multiple programs in an overall change portfolio? Based on Accenture’s experience, and on the success realized by numerous companies across industries, the following are some especially important lessons to bear in mind.
Broad leadership alignment and buy-in to the specifics of the defined future state

It is important for leadership, and ultimately for the entire organization, to be aligned to a common view of the future state or of what “good” looks like. However, “good” also needs to be defined in ways that can be measured. Transformations can fail for many reasons, but an important one is that different senior stakeholders fail to agree on what end state the organization is actually pursuing, and how one can actually measure progress toward that goal.

Recall that in the energy company case study, the organization articulated a simple and powerful vision of IT being a business enabler, rather than just being an efficient steward of IT assets. But then that vision was further clarified in terms of three transformation objectives—“prioritize,” “simplify” and “integrate”—and then those three areas were further clarified in terms of specific targets.

Thus, one of the keys to the success of the company’s IT transformation was in engaging in the hard, detailed work needed to articulate goals in measurable ways. Drilling down a layer or two was important. If an intent was, for example, to ensure ready access to trusted data, then what did that really mean? What capabilities were required? What changes to existing processes were necessary to realize that goal?

Such specificity is important. If an organization operates and manages toward agreed-to and specific metrics, that enables the creation of a more meaningful roadmap that can serve as a guide to the program. The roadmap can also enable ongoing work to monitor and make proactive changes to the plan on the fly.

Work done to align leadership around common objectives—and the means to achieve those objectives—can also be critically important when major executive changes occur in the middle of a transformation. That means, however, that the idea of “leadership” has to broaden to include not only top-level executives but also those one or two tiers down in the structure, as they are often the people promoted in the event of a regime change.

Involvement of the management team can also help to create a vision that articulates goals and capabilities in a way that is meaningful to influential leaders. With metrics and accountability in place, a “camaraderie of responsibility” can emerge: we’re in this together and we will succeed or fail together.

This work to align leadership around expected outcomes is especially important with journey management programs that can involve employees across many locations and literally millions of stakeholders. With these kinds of programs, savvy executives take the time upfront to get key sponsors and decision-makers aligned around a set of measurable objectives. Leaders work together to develop a common understanding of “success” in terms of measurable outcomes, and then they ask everyone across the executive team to sign up—sometimes literally—for that definition of success. In this way an accepted view of the journey’s objectives is established and no one can later say, “Well, that wasn’t my understanding of what we were trying to do.”
A compelling, visual journey roadmap

The journey roadmap is important to the success of the overall portfolio of change for several reasons. First, of course, it represents the specific plan, with phases and interim deliverables that guide progress. Beyond that, however, the choice of the word “roadmap” is not accidental: it is also important as a visual representation that can be used repeatedly—and is less likely to lose something in translation—as the journey proceeds.

The roadmap can keep people at all levels and from different functions focused on their specific piece of the journey, as well as the progress of the rest of the organization on the journey. The map can anchor people in the future state and the steps needed to reach it, and then re-anchor them as needed when conditions change.

One organization, Accenture, is currently working with on a major transformation journey has used its journey roadmap as a means for individual vice presidents and their teams to articulate the two or three critical enablers they are responsible for that contribute to the success of the overall journey. The roadmap is designed to provide a way to pull people together and help them stay on course, while simultaneously providing detail that enables all levels of the organization, in an individualized way, to understand how they contribute to everyone’s success.

This ability of the roadmap to engage all affected employees in a common cause was in evidence at a petroleum company in the Middle East which was introducing several strategic initiatives to improve operations, including projects in safety, reliability, supply chain and business process reengineering. These initiatives, when considered together, represented a significant transformation in the way the company had been operating. Given the range and scale of these initiatives, the company was concerned that the business would struggle to understand the overall shape of the transformation and to assimilate the scope of change required.

The journey map created as part of the transformation helped drive the integration of the initiatives into a coherent journey which could be easily understood, communicated and assimilated by the whole organization. Developing this view enabled the design and implementation of a systematic approach to prioritize, align, measure and drive a successful transformation through a number of related initiatives. The journey map also improved organizational commitment to the transformation, and provided senior management with a clear framework to assess progress, interdependencies and risks.
A defined set of behaviors to hold people accountable and support the journey

Drilling down into more detail is also important as a journey management team translates goals into the behaviors needed to attain those goals. “Good intentions” are difficult to measure and thus do not necessarily lead to accountability for results. On the other hand, actual behaviors are more measurable and can be assessed as part of a regular performance management process.

The experience from the energy company case study underscores the importance of providing detail about the behaviors needed to move the organization towards its vision. The journey management team at the company spent considerable time with the CIO and the CIO’s team defining the specific behaviors that would help move the IT group to the desired future state.

The team then developed a communications program that helped cascade awareness of these behaviors through the organization—communications that enabled leaders to “tell their value story.” For example, several leaders shared their story about how they collaborated across the company to optimize processes, frameworks and tools.

To further enable the cascading of behavior awareness throughout the organization, each member of the CIO’s leadership team was asked to hold something called a “transformation conversation.” Conducted as a virtual town hall meeting, the conversation focused on discussing specific desired behaviors relevant to each affected group. Accountability for demonstrating those behaviors—as well as for achieving the benefit targets—was added to the annual performance reviews of all members of the extended leadership team and cascaded throughout the IT organization.
One of the reasons that major change efforts often fail is what is sometimes referred to as the problem of "death by a thousand initiatives." That is, if those managing an overall change portfolio or organization transformation cannot prioritize, and then focus on the most important programs chosen from what might be a very lengthy list of potential programs, the people can lose energy and confidence.

This challenge is sometimes referred to as "making change stick"—that is, preventing employees from slipping back into old habits once the training programs and communications initiatives are a thing of the past. So an important success factor for a change transformation is to select the right projects to undertake to enable adequate focus on the deployment and enablement of the change.

One leading practice is to deploy a team with deep content knowledge about key aspects of the global operating model. This team can support the executives, assess all candidate projects against business objectives and then help to enable rapid mobilization of key projects. The team can work with executives to ensure that the portfolio of change consists of a cohesive set of projects with the appropriate objectives, and that the right management is in place to deliver the outcomes.

Another important benefit of portfolio prioritization is in combating "change fatigue"—an organizational condition in which employees become almost numb about the extent and pace of the changes they are being asked to assimilate.

Some companies have gotten themselves involved with extremely complex change portfolios—divestments, new strategies, cost reductions, transitions to outsourcing, and so forth. That’s a lot to handle. What is often needed is to step back and engage in an enterprise-wide review of the entire suite of change programs and their interdependencies. With that review change leaders can:

- Clearly articulate the desired end state of each program.
- Identify overlaps and interdependencies in terms of how each program affects the others and the stakeholders of each
- Specify the ways people would be affected as the portfolio of programs is executed.

The outcome of this work can be a single, comprehensive assessment of all major projects in one source document—something that highlights all project interdependencies and results in a simplified vision for the end state that corporate functions and business leadership can align themselves to.
A program to track progress and proactively keep the overall journey on course

Effective monitoring and management of the journey and the change portfolio over time can deliver several important benefits.

One is in making the change and its results “real” to the organization. This was something the energy company realized through its detailed scorecard, discussed earlier, that was used to assess progress and to measure effectiveness of management behaviors identified as critical enablers of the change. The scorecard outlined specific metrics to keep the journey on track and also to make the journey real. By seeing the results of the journey month to month, the journey management team gained credibility with the company’s CEO that the journey was real—that it was actually happening and that it was making a difference.

As noted earlier, a distinctive characteristic of a long-term change journey means not only that progress must be regularly assessed, but also that the journey management team and executive leadership need timely information so they can intervene to keep the journey on track. A number of companies are finding that social media platforms are a real boon to their ability to assess the overall “temperature” of a change effort. Certainly the traditional kinds of online surveys of employees continue to be important. But just as change fatigue sets in with long-term journeys, so can survey fatigue set in when employees are asked to complete yet another online form.

Making that difference also meant, however, that the metrics themselves had to be credible. Therefore, the team spent a great deal of time upfront establishing an effective process for measuring business value delivered by the change program. This detailed and very specific work helped in the long run to establish credibility that the team could speak the language of finance, put effective metrics in place and then track those over time.

Social media tools deployed inside a company’s firewall can help in several ways. One is that management can readily monitor chat and information exchanges and use the social media platform to provide quick and consistent answers—one “voice of truth,” as it were. Another benefit is that the exchange of information itself, accompanied and guided by a strong and ongoing presence from knowledgeable sources, can itself expedite and support the change journey.
Conclusion
Successfully navigating the change journey

The business world grows more complex by the day, which increases the importance of managing long-term change in a way that simultaneously supports the level of transformation required and also helps a business to be responsive in the face of events and marketplace opportunities.

A comprehensive journey management effort can provide both rigor and agility as a portfolio of change programs proceeds over time, or as companies engage in broad organization transformation programs. The journey management discipline can also keep change moving at a proper pace so that progress does not languish, potentially compromising the business benefits of the transformation itself.

Major businesses have defied the general odds about the success of major change efforts by working on the basis of a phased journey management methodology proceeding from a vision and assessment of current capabilities, to a gap analysis and establishment of a plan or roadmap, to the ongoing capacity to measure and monitor change and proactively alter the course of the journey as needed.

Journey management brings together competencies and experiences that are all familiar to most companies. But the planning and management of the activities across a complex, multi-year change journey or organization transformation is likely to challenge even the most experienced leaders. The good news is that the ability to manage a complex portfolio of change over time can create an organization that is more agile and change capable—something that can create competitive advantage.
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