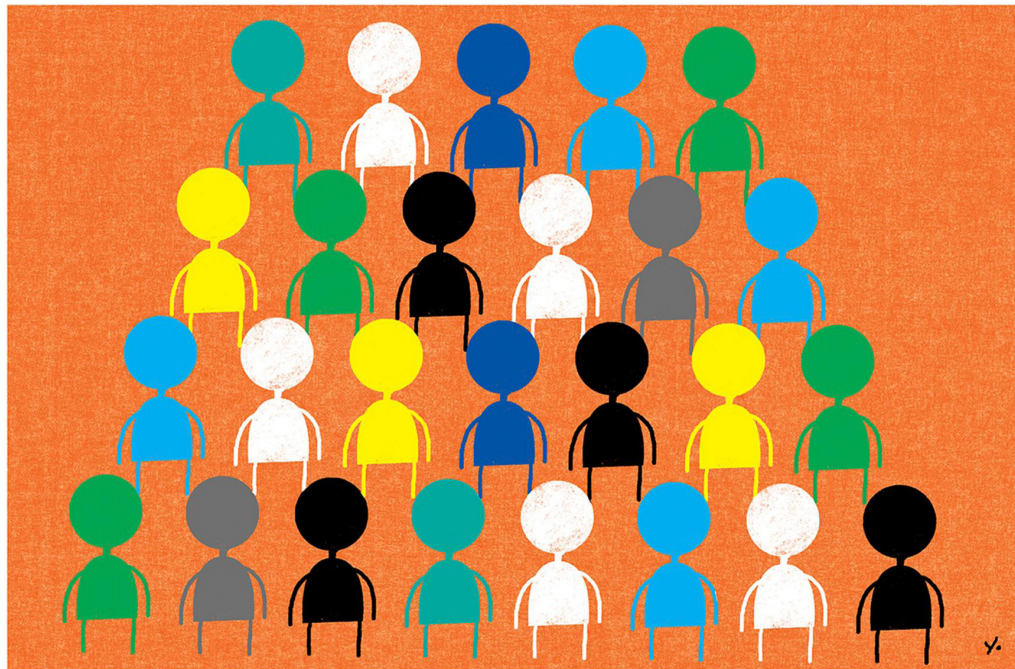




Inclusion: The *HOW* for the Next Organizational Breakthrough

Judith H. Katz and
Frederick A. Miller



What is Inclusion as the *HOW*®?

Organizations are typically good at defining **WHAT** they need to accomplish: their goals, metrics, and objectives. Inclusion is not another “what”—not another program or initiative. Rather, it is **HOW** the organization can best achieve all of the **WHATs**. When people have a mindset of **Joining** one another and interact according to Inclusion as the *HOW*—that is, when they feel respected, valued, and seen for who they are, when there is supportive energy and commitment from leaders, colleagues, and others—they can do their best work, both individually and collectively. Viewed this way, inclusion is not a “nice thing to do”; it is **an essential lever** for achieving higher operational performance and accelerating bottom-line results. It is a way of life that underpins everything the organization does: how it develops strategy, sets goals, makes decisions, runs meetings, solves problems, and engages people, and how people interact.

Every massive social change calls for a breakthrough in the way organizations work. Rarely has such a breakthrough been more urgently needed than today.

Why? Because the need for change is so profound. Competitive advantage is shifting fast, and the need for improvement is continuous. Being better, faster, and more user-friendly, with more direct connections between customer and provider, is essential for success. Today’s exceptional achievement and innovation are tomorrow’s baseline. Organizations face more unknowns and unknowables in their quest to achieve sustained results. As enterprises expand globally, they are challenged with the complexity of doing business in an environment where one size no longer fits all.

Most significantly, there has been a significant shift from an industrial-based economy, focused primarily on production—in which people had highly segmented,

routine tasks that required little brainwork—to a highly competitive knowledge era, in which the need for people to connect with one another and to unleash their ideas, thinking, and creativity are keys to success. In this new era of knowledge and connection, all people are needed to join together to contribute their thinking and abilities, together bringing the broadest range of perspectives to each issue.

Structural changes, such as Lean or Quality initiatives, have shaped the organizational redesign of processes and reduced waste, but they can only move an organization so far. The next breakthrough involves the interactions between people—**HOW** they **Join** together to have Right First Time interactions as they solve problems, make decisions, innovate, implement projects, and generally do business to optimize and accelerate organizational performance and results.



The Power of Inclusion as the *HOW*

One of the fundamental elements for sustainable transformation involves workplace interactions: how people interact with each other, the dominant styles that are reinforced in a million informal ways each day, and the mindsets and behaviors that drive people. These interactions define how the organization functions. No matter how much a new program or procedure is reinforced, it won't succeed if it is at odds with how people interact in the organization. The ways in which people are comfortable interacting will trump policy and strategy every time, unless people see it in their best interest to interact differently.

The preferred, known, comfortable ways of interacting are transferred from generation to generation. They are transmitted in the oral histories and stories that are shared about what and who is valued. People learn much more about an organization's environment and interactions by walking through the halls than through formal policies or onboarding programs. It is the general "vibe" one gets after spending time in an organization.

As a method for transforming the work environment and interactions, Inclusion as the *HOW* is a critical ingredient for breakthroughs that foster higher levels of performance. An organization that practices Inclusion as the *HOW* enables ideas, perspectives, and experiences to be fully leveraged, creating a wide bandwidth for problem solving and innovation.

Inclusion is...

A sense of belonging:

Feeling respected, valued, and seen for who we are as individuals;

There is a level of supportive energy and commitment from leaders, colleagues, and others so that we—individually and collectively—can do our best work.

In the past, people were rewarded for getting business results by any means; in contrast, an organization that implements Inclusion as the *HOW* recognizes that results are obtained through people. There is an acknowledgment that the more people are engaged, the more they will contribute not only their primary energy, but their discretionary energy and ideas.

An Inclusion as the *HOW* organization also recognizes that no one can succeed in today's environment through her or his efforts alone—or through the efforts of a select few. In the past, it was acceptable to utilize and "go to" the top 10 to 15 percent of people. But by overutilizing some and underutilizing others, organizations fail to tap into all existing talent, wasting some people's talent and overburdening others. The result is that some people

never receive opportunities to grow and develop, while others "burn out" or leave. With Inclusion as the *HOW*, by contrast, leaders recognize that talent and ideas reside at all levels and within all people. The challenge is how to tap into the wisdom that resides throughout the organization.

What prevents many people from being able to do their best work, both individually and collectively, is a sense of not being included in the flow of the organization. They feel their ideas and perspectives do not matter and are not particularly wanted. They experience pressure not to express a differing point of view, to simply do what they are told, to leave the thinking and decision making to those at the top or the "chosen few." At a time when organizations need everyone's ideas to address complex problems, where there are many unknowns and unknowables, that mindset is at odds with what is needed for success.

Several important hallmarks distinguish an organization that uses Inclusion as the *HOW*:

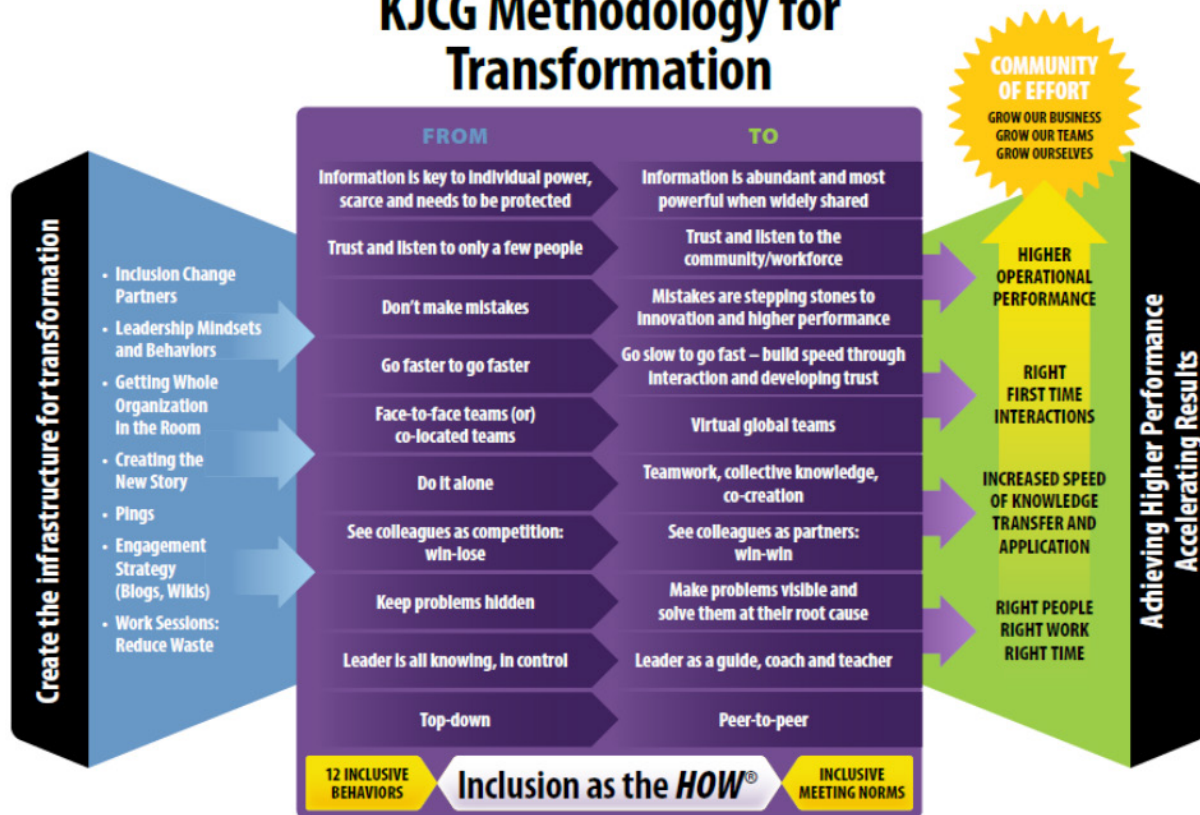
- **People adopt a Joining mindset.** In this mindset, people recognize the need to Join others to achieve goals, rather than to Judge others, which slows down actions and creates barriers to working effectively together.
- **People are respected.** Regardless of job title, seniority, identity, or other characteristics, everyone in the organization is treated with dignity and honor. There is respect for people's time, talents, needs, and life outside the organization.
- **People are valued.** All people are important members of the organization whose contributions are essential for overall success.
- **People are seen.** There is no need to hide elements of one's identity in order to "fit in" or "climb the ladder." People are not put in a box because of their title, role, or identity. Inclusion as the *HOW* acknowledges and values who people are, and sees their background and experiences as providing organizational capability.
- **People speak up.** People feel safe to share their ideas. Contributing ideas and perspectives is expected—it is seen as essential for leveraging the talents of all members of the organization.
- **People offer peer-to-peer leadership.** While a managerial hierarchy may still be in place, it is understood that leadership and expertise exist at every level in the organization—titled or non-titled—and that each member has influence and knowledge to bring to work teams and day-to-day interactions.
- **People are willing to Be BIG, step out, and be bold.** Individuals are no longer hiding and waiting for others to initiate. They take leadership where and how they can.

Breaking Through: Inclusion as the *HOW* for Higher Performance

A result of Inclusion as the *HOW* is that breakthroughs in operational, individual, and team performance occur



KJCG Methodology for Transformation



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daily. Inclusion as the *HOW* is not an endpoint in itself; it is a means to an end. It is how organizations can continually raise the bar on performance and perpetuate an environment that is as limitless and resourceful as the collective membership. It establishes new mindsets and expectations for how people treat each other, operate within the enterprise, and get results. A key outcome of these mindsets, behaviors, and practices is the creation of a workforce that is more connected, and in which people Join with one another to accomplish the organization's objectives.

Through Inclusion as the *HOW*, people focus on Joining with others to create the partnerships necessary to achieve collective goals, rather than primarily on reporting relationships, as the cornerstone of who and what matters. They no longer work in an organization where people treat one another with second guessing, caution, defensiveness, and Judging. Instead, with a Joining mindset in place, they are more concerned with the work to be done—and the connections required to do it—than with managing their bosses' expectations. As they make those connections, information flows across traditional organizational boundaries and establishes more holistic work interactions. People begin to value how their work connects to the work of others and how others'

work connects to theirs. Inclusion as the *HOW* is about partnership (individual to individual), collaboration (team to team), and a Joining mindset (the foundation on which the interactions are based).

Inclusion as the *HOW*, in short, breaks down the silos that so often divide individuals and groups. It also removes the walls that limit people's ability to engage effectively with others. In their place, the 12 Inclusive Behaviors and Inclusive Meeting Norms (see sidebar on following page) provide a common language that both clarifies and opens the door for more effective interactions.

Effective partnerships can only take hold when trust, valuing, and respect are a part of everyday mindsets and behaviors. Without a sense of belonging and a feeling that each person matters and makes a difference, connections cannot be formed, and collaboration and idea-sharing are hampered.

Knowledge Transfer

Historically, organizations have fostered the idea that operational and organizational knowledge is entrusted to a select group of people, typically highly tenured senior leaders. They are the carriers who keep, store, and



12 Inclusive Behaviors

1. Greet people authentically - say "hello."
2. Create a sense of "safety" for yourself and your team members.
3. Work for the common good and shared success.
4. Listen as an ally - listen, listen, listen and engage.
5. Be BIG: Lean into discomfort - be willing to challenge self and others.
6. Put your stake in the ground and be willing, eager, and able to move it.
7. Link to others' ideas, thoughts, and feelings - give energy back.
8. Create 360-degree vision: Ask others to share their thoughts and experiences, and accept their frame of reference as true for them.
9. Address misunderstandings and resolve disagreements.
10. Speak up when people are being made 'small' or excluded.
11. Ask who else needs to be involved to understand the whole situation to ensure Right People, Right Work, Right Time.
12. Build trust: Do what you say you will do and honour confidentiality.

dispense information as needed. Technical information, financial realities, organizational history, and other pieces of knowledge may be entrusted in turn to various subsets of people or subject matter experts—typically on a "need-to-know" basis—but the overall philosophy is that knowledge is power, and only the most "important" people in the organization have a right and need to know.

This antiquated paradigm gets one thing right: knowledge is power. But given the complexity of the challenges facing organizations today and the need for constant improvement, it makes no sense to restrict power (the power to contribute new ideas and alternative perspectives, the power to generate solutions, the power of knowing) to a select few. Organizations are learning that it is harder to keep secrets and tightly control information than it once was—and that, in any event, knowledge comes from many different "street corners" and experiences. Organizations need to see everyone as possessing knowledge, tap into that knowledge to gain a 360-degree vision of any situation,

and ensure that knowledge is available to everyone and freely shared and/or accessible so that breakthroughs and new opportunities can arise from every corner of the organization.

But even "freely shared," while necessary, is not sufficient. Rather, people must freely share knowledge in a way that anyone can find it and use it. Meanwhile, the recipient must be able to sort through the shared knowledge to find what is critical to her or his job. This requirement makes wikis or a collaboration site, for example, far more valuable than a stream of emails. The more I can share my knowledge, and the more you can sort that knowledge,

the closer we move to the breakthroughs that move the organization forward.

So the ability to find, share, and sort knowledge needs to become a core individual competency and organizational capability. How quickly can an organization transfer knowledge from individual to individual, across teams, and throughout the organization? How quickly can that knowledge be applied, acted on, expanded, and adapted to challenges and opportunities the organization is facing day to day? These are the metrics that will determine an organization's success.

On one level, this is a question of communications systems. A variety of formal and informal means for exchanging ideas and information is needed. But on a more fundamental level, this is a matter of partnership, collaboration, inclusion, trust, and the Joining mindset that supports it all. For transfer of knowledge and speed of application to take place, certain conditions are necessary.

The first involves trust and the conditions necessary to build it. Trust has to be in place if knowledge transfer is to happen at the speed that organizations require today. To build that trust, more interactions need to be created among teams, across groups, across departments. As people are included together, they learn to trust one another, and knowledge transfer begins to take place.

This sharing of knowledge is not a casual expectation, particularly in organizations where hoarding knowledge historically has been the means to individual success. It requires a new definition of partnership and a thorough buy-in to Inclusion as the *HOW*.

Another necessary condition is a mindset shift from knowledge as a zero-sum game to knowledge as an infinite resource that grows and replenishes itself when more people are involved. This makes sharing information an obvious goal, even when doing so requires an additional investment in time and resources.

Getting There: A Methodology for Transformation

So how can organizations and OD practitioners go about facilitating Inclusion as the *HOW* to generate organizational breakthroughs and higher performance? In our work, we have leveraged the following methods and strategies to create organizational transformation:

Inclusive Meeting Norms

1. Right People, Right Work, Right Time
2. Hellos
3. Standard Work Agenda
4. Safety Story (1)
5. Success Story
6. Buddy List (2)
7. A Moment for Focus
8. Connecting
9. Consciously apply the 12 Inclusive Behaviors to the work/task of the meeting
10. Review action items and how meeting went; offer appreciations

and ensure that knowledge is available to everyone and freely shared and/or accessible so that breakthroughs and new opportunities can arise from every corner of the organization.



- **Shift mindsets about how to achieve transformation.**
 - from training programs...to interventions
 - from senior leaders acting alone...to engaging in peer-to-peer leadership
 - from edicts and speeches...to collective input of all people
 - from incremental change... to bold leaps
- **Connect to the business imperative.** Inclusion as the *HOW* cannot be disconnected from the operations of the organization. It cannot be positioned as something “nice to do,” but instead must be seen as essential for *HOW* the organization achieves results and success. Its impact on the bottom line must be explicit and positioned as a *HOW*, not a what. As mentioned earlier, Inclusion as the *HOW* is a means to the end—not an end in itself.
- **Create the organizational infrastructure for transformation.** Few significant change efforts ever occurred through the current organizational chart. Similarly, with Inclusion as the *HOW*, the organization needs to create a temporary, enabling infrastructure to lead and implement the change effort. This includes the appropriate level of senior-leader sponsorship and resources.
- **Identify the current state through a process of discovery, and develop a vision of the TO state.** Critical to the success of the effort is a solid diagnosis of how people interact currently, as well as the establishment of appropriate metrics. The implementation of a Discovery Process that includes interviews (face to face as well as via telephone or Skype where needed) and a quantitative survey provides the foundation for the effort and for establishing a FROM→TO change vision. This Discovery Process itself is an intervention that begins to engage people in the effort and can identify early adopters. The discovery data must be shared with the senior leadership team as a way to create buy-in and identify the aspirational culture that the organization needs to move TO. This is critical for mapping out strategy and establishing a baseline against which to measure.
- **Create the New Story.** Ways of interacting are passed down as legacy—in the stories, mythologies, and histories that carry from generation to generation. The change effort has to generate new stories, with new messages that communicate how people need to operate in the future. The organization also needs to get creative about how it proliferates new stories. Critical to success is highlighting the ways in which Inclusion as the *HOW* has impacted results, making visible what is often invisible. It is essential to highlight both small and big successes in moving to the TO state. Communication channels might include wikis, blogs, or collaboration sites that enable co-creation of various elements of the message by everyone.
- **Utilize the FROM→TO change vision to provide a gap analysis.** All interventions need to be targeted to close any gaps in the FROM→TO (for example, FROM using rank and tenure to determine who gets heard TO using knowledge and ability as the determining factors). A list of 6-10 FROM→TO items needs to be developed with the input of senior leaders and then enhanced by the larger organization as the intervention rolls out. This creates the first clear understanding of the work at hand—how far the organization needs to travel along the change path to achieve its goals.
- **Align senior leaders to provide visible sponsorship for the effort.** Though the effort will need to engage people at all levels, getting senior leaders on board and on the same page is an essential early step. Leaders themselves cannot make change happen, but their buy-in, early adoption of the needed mindsets and behaviors, and active sponsorship for the effort as it moves forward are critical. Leaders must also understand the ways in which Inclusion as the *HOW* is foundational to accelerating results and to how they must grow themselves as leaders.
- **Identify the mindsets and behaviors necessary for the TO state.** Mindsets are one of the key underpinnings to the transformation process. Often, interventions have focused only on behaviors, thereby limiting success because the foundational mindsets have not shifted. Explicitly identifying the new mindsets is critical for creating a breakthrough, since moving to the TO state will not happen without the conscious shift to the foundational mindset of Joining, e.g., from “we compete against each other” to “we compete together against the competition”. In many organizations, mindsets have coalesced over the years without anyone paying attention to them. By identifying its cognitive cornerstones, and the behaviors that flow from them, the organization can begin to move forward.
- **Find the self-interest for change.** Everyone has something to gain through Inclusion as the *HOW*, even those who thrived in the old ways of interacting and who may feel threatened by change, because everyone is valued and respected in the TO state. And everyone benefits from increased performance and organizational success. Identifying and getting clarity on both the individual and organizational self-interest will enable people to buy into the “what’s in it for me” component of Inclusion as the *HOW* as a crucial step in reaching critical mass for change.
- **Support and reinforce application.** Also crucial is the ability to demonstrate and reinforce mindsets and behaviors for Inclusion as the *HOW*. This can be done through real-time coaching, which provides on-the-spot feedback on how individuals and teams are applying the 12 Inclusive Behaviors, and through Leadership Feedback Groups, in which a small group of people provides each leader with feedback on how she or he is living the behaviors.



- **Educate and disseminate the change through peer-to-peer leadership and accountability.** To ensure a critical mass for change, 15-20 percent of the organization needs to be engaged, creating advocates for change who can exercise peer-to-peer leadership and enroll their colleagues in the effort. Of that 15-20 percent, a small core group is educated in an intense, multi-part, multi-day education series to enable them to develop the new mindsets, create a supportive community, and learn and practice the behaviors needed for transformation. Part of the role of these individuals—known as Core Inclusion and Change Partners—is to reach out to colleagues with whom they work (a group of five people called Inclusion Change Allies, also known as a “Pod”) to begin bringing Inclusion as the *HOW* into the day-to-day operations and interactions of the organization. Pod members then similarly engage their colleagues, using peer-to-peer leadership as a way to create waves of change and to hold one another accountable for living the new mindsets and behaviors. Core Inclusion and Change Partners and Inclusion Change Allies are not expected to become trainers. At the same time, education sessions are needed to bring the entire organization together to provide information about why the change is needed (business imperative) and where the organization needs to go (FROM→TO change vision). At these sessions, leaders at all levels should also take care to hear people’s thinking about what needs to change in their areas of responsibility, and to create buy-in to the effort and shared accountability.

The formation of Action Teams and Application Teams helps to reinforce learnings from education sessions and to support the necessary changes to the organization’s ways of interacting. Action Teams are subgroups who take on organizational challenges using new mindsets and behaviors to create solutions. Application Teams are groups of participants who stay connected after a session to coach one another and share best practices as they apply what they learned. This is a way for individuals to continue their growth and development.

- **Educate and support manager-leaders.** Because managers have such a profound impact on how people experience the workplace, a crucial element of the change process is to help them shift away from mindsets that focus on “doing” and toward mindsets related to leading the organization—i.e., coaching, convening the Right People to do the Right Work at the Right Time, and giving energy back (appreciation, rewards, and constructive feedback to the people of the organization). This can provide one of the greatest opportunities to move change in a widespread way. It also highlights the role that organizations need leaders at all levels to take for success going forward—the role of manager-leader. Managers control and are accountable for resources, expenditures, and the direction of a team, function, or department. Leaders are accountable for the creation, development, and growth of an environment where all people can do

their best work, drive change, and inspire others. Manager-leaders do both.

- **Conduct ping surveys.** These are brief electronic surveys (typically five to eight questions) that provide quick feedback from a large range of people that can be used to monitor progress and help shape strategies going forward. They also demonstrate Inclusion as the *HOW* by soliciting the voices and opinions of people throughout the organization on substantial issues. Pings are conducted weekly or monthly and provide valuable real-time data to adjust the change strategy more rapidly.
- **Model and promote conscious inclusion by living the 12 Inclusive Behaviors.** These should be promoted as the way of interacting that everyone in the organization is expected to model and implement.

Summary

The kind of organizational transformation we have identified takes committed leaders who understand the goals of the effort and, most importantly, the business payoff for change. It needs people at all levels of the organization who are willing to change and grow themselves into new kinds of leaders. It also takes committed partners and colleagues—in short, a Community of Effort that includes all.

One of the central tenets of Inclusion as the *HOW* is the importance and competitive advantage of all people in the organization being able to contribute their best to create a whole much greater than the sum of its parts. It will take peer-to-peer leadership and accountability to create a truly collaborative, co-owned workplace in which all people are respected, seen, and heard. The crucial sense of belonging has to come from within the organization, not from above. It requires a critical mass of people moving in the same direction.

That critical mass can mean the difference between success and failure. In times like these, when businesses are going out of existence almost daily, Inclusion as the *HOW* can enable organizations to make full use of their valuable resources, including their best renewable resource—the people of the organization.

BIOGRAPHIES

Judith Katz

Judith Katz brings more than 30 years of experience to her work in strategic culture change. Her work is an extension of her lifelong commitment to championing fairness, respect for all people, and social justice, and she was recognized for this by *Profiles in Diversity Journal*, which named her one of 40 Pioneers of Diversity. Judith assists organizations to understand and appreciate the uniqueness that each associate brings as her or his

added value. She also assists organizations to create sustainable and highly successful inclusion change efforts that, when integrated with business strategies, can achieve enhanced bottom-line results.

She has consulted with many organizations, including: Allstate; Cisco Systems, Inc.; Dun and Bradstreet; E. I. du Pont de Nemours and Company; Ecolab Inc.; EILEEN FISHER, INC.; Singapore Telecommunications Ltd.; Toyota Motor Sales; and United Airlines. She is also the co-founder of the Covert Process Concept and Lab with Bob Marshak.

Judith began her career in academia, earning a doctorate in education from the University of Massachusetts in 1976. She served on the faculties of the University of Oklahoma (tenured associate professor) and San Diego State University.

She joined The Kaleel Jamison Consulting Group, Inc., in 1985 and currently serves as Executive Vice President and Client Brand Lead.

Fred Miller

Cited as a forerunner of corporate change in *The Age of Heretics: A History of the Radical Thinkers Who Reinvented Corporate Management*, Frederick A. Miller is the CEO of The Kaleel Jamison Consulting Group, Inc. With 30-plus years of experience in organization development and transformation, he has partnered with such renowned companies as Apple Computers, Allstate, DuPont, EILEEN FISHER, INC., FedEx Kinko's, Foxwoods Casino, Merck, Mobil, Omega Institute, Northeast Utilities, Singapore Telecommunications, Toyota, and United Airlines.

Fred specializes in using **Inclusion as the HOW®**—a foundational transformation mindset he co-created with Judith H. Katz—to accelerate results and achieve higher performance. His work has helped organizations turn around their operations and accelerate growth and bottom-line results. He also has assisted organizations in making the transition from “founder-centrism” to professional management.

In 1972, as a manager and then officer with Connecticut General Life Insurance Company (now CIGNA), Fred helped pioneer one of the nation's first corporate diversity and inclusion efforts. He has served on the boards of Ben & Jerry's Homemade, World Education Inc., the American Society for Training & Development, the Organization Development Network, and the NTL Institute. Currently he is a member of the boards of Day & Zimmermann (a \$3 billion family-owned business), Bainbridge Graduate Institute, One World Everybody Eats Foundation, The Sage Colleges, Seton Health Foundation, and the Center for Automated Technology Systems (CATS, the center for advanced manufacturing and robotics) at Rensselaer Polytechnic Institute.

Together with Judith H. Katz, Fred co-authored *Be BIG: Step Up, Step Out, Be Bold* and *The Inclusion Breakthrough: Unleashing the Real Power of Diversity*; their third book, *Opening Doors: Four Behaviors That Change EVERYTHING*, is forthcoming in March 2013. A regular speaker at international conferences and the author of more than 100 articles, he has published in such journals as *Chief Learning Officer*, *OD Practitioner*, *HR Professional*, and *Executive Excellence*. Under his leadership, The Kaleel Jamison Consulting Group, Inc., was named one of Consulting magazine's Seven Small Jewels in 2010.

May 2012

NOTES

1. No one can do her or his best work without a fundamental sense of safety (physical, psychological, and emotional). Safety stories address this issue by alerting people to specific safety concerns and heightening the awareness of safety's importance. Moreover, since concern for others' safety makes people feel seen and valued, these stories enable people to connect with one another—which in turn provides the emotional safety they need to share their street corners on other issues.
2. Before starting on the content of the meeting, the convener asks for volunteer “buddies,” pairing each absent person with an attendee who is responsible for telling her or him what happened. In fulfilling their responsibility, buddies transfer knowledge from the meeting so that the people who could not attend have the same information as the people who were in the room. Those who were absent can thus take action steps discussed in the meeting, and everyone is up to speed at the start of the next meeting.

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Thank you to John Shoolery of Datacycles (www.datacycles.com) for his groundbreaking work on using pings as a change facilitation tool.

A version of this article appeared as a chapter in William J. Rothwell, Jacqueline M. Stavros, Roland L. Sullivan, and Arielle Sullivan, eds. *Practicing Organization Development: A Guide for Leading Change*, 3rd ed. (San Francisco: John Wiley and Sons, 2010).