

Reflections

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on Knowledge, Learning, and Change



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30 Years of Building Learning Communities

A Dialogue with Peter Senge, Otto Scharmer, and Darcy Winslow, Part 2

Choice As a Leadership Capability

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Teaming Is a Verb

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30 Years of Building Learning Communities*A Dialogue with Peter Senge, Otto Scharmer, and Darcy Winslow, Part 2*

What story will children 75–100 years from now tell about how our current generation managed the tremendous large-scale challenges we face? And how can we – as individuals and communities – begin to change our trajectory so that the narrative our descendents weave is one of renewal rather than of destruction? In part two of their dialogue on the role of cross-organizational communities such as SoL and the Presencing Institute in a changing world, Peter Senge, Otto Scharmer, and Darcy Winslow look at the need to renew civilization from its roots rather than attempting to fix our broken institutions. They explore ways we might join together to “open a crack to a future that is different from the past” – and in the process create a genuinely “flourishing” society.

Choice As a Leadership Capability*Rawlinson Agard*

Many people in organizations today live a dual life: they understand the power and importance of new ways of leading – such as those based on the principles of organizational learning – but they are hesitant to rock the boat by introducing these concepts in their organizations. For many years, Rawlinson Agard found himself in this same situation. Even as he worked to bring large-scale change to the complex systems he was a part of, he found that his actions and purpose were out of sync. A health crisis prompted Rawle to reflect on his choices – and set a new course of action that would bring together the two disparate threads in his career. In this article, he asks us to consider our own choices as we strive to make this world better for all.

Is Moving Too Fast Slowing You Down? How to Prevent Overload from Undermining Your Organization's Performance*David Peter Stroh and Marilyn Paul*

Organizational overload is a problem confronting people across all industries and sectors. People have too much to do in too short a time with too few resources to accomplish their goals. The result is that managers find it difficult to sustain focus on and implement top organizational priorities. This article uncovers the root causes of organizational overload and targets the ways in which organizations unwittingly increase overload and crises in their continuous efforts to accomplish more with less. In particular, it exposes the ironies of a “can-do” culture that leads people to work harder at the expense of achieving consistently strong results. The authors conclude by recommending how to build a “results and renewal” culture to achieve higher, more sustainable performance.

From Automatic Defensive Routines to Automatic Learning Routines: The Journey to Patient Safety*Michael Sales, Jay W. Vogt, Sara J. Singer, and Jeffrey B. Cooper*

Patient safety in hospital settings is a major public health problem. Several distinctive challenges combine to create a high-risk environment for patients that can result in grave – and costly – personal and organizational consequences. The authors hypothesize that defensive behaviors among hospital leaders, managers, and staff aggravate the dangers implicit in these settings. In this article, they describe a multidimensional training program, Healthcare Adventures™, in which the exploration of so-called “automatic defensive routines” figures as an important focus. This intervention combines a simulation of a traumatic patient safety event with structured reflection. Taken together, these kinds of learning opportunities support collaborative inquiry and appreciative engagement, which in this case can improve outcomes for patients.

EXECUTIVE DIGEST 13.1

Teaming Is a Verb

Amy C. Edmondson

Organizations thrive, or fail to thrive, based on how well the small groups within them function. In most organizations, the pace of change and the fluidity of work structures mean that success no longer comes from creating effective teams but instead from leading effective *teaming*. Teaming occurs when people come together to combine and apply their expertise to

perform complex tasks or develop solutions to novel problems. Fast-moving work environments need people who have the skills and the flexibility to act in moments of potential collaboration when and where they appear; that is, people who know *how to team*. As summarized in this excerpt from *Teaming: How Organizations Learn, Innovate, and Compete in the Knowledge Economy*, four behaviors – speaking up, collaboration, experimentation, and reflection – are the pillars of effective teaming.

Is Moving Too Fast Slowing You Down?

How to Prevent Overload from Undermining Your Organization's Performance

DAVID PETER STROH AND MARILYN PAUL

Organizational overload is a problem confronting people across all industries and sectors. People have too much to do in too short a time with too few resources to accomplish their goals. The result is that managers find it difficult to sustain focus on and implement top organizational priorities. This article uncovers the root causes of organizational overload and targets the ways in which organizations unwittingly increase overload and crises in their continuous efforts to accomplish more with less. In particular, it exposes the ironies of a “can-do” culture that leads people to work harder at the expense of achieving consistently strong results. The authors conclude by recommending how to build a “results and renewal” culture to achieve higher, more sustainable performance.



David Peter Stroh

Organizational overload is a troubling fact of today's business culture. Market pressures intensified by global competition and the economic crisis, as well as the advent of technology that makes people accessible 24/7, have exacerbated the drive to produce results faster and with fewer resources. Recent research reported in *Harvard Business Review* found that of 600 organizations surveyed, half suffered from overloading (insufficient resources to meet demands), multi-loading (shifting and competing expectations that undermine focus), and perpetual loading (constant pressure that allows people little opportunity to recharge their batteries)¹



Marilyn Paul

Organizational overload takes a dramatic toll on employees, who experience a relentless sense of overwhelm and urgency. Our own research suggests that managers today spend at least half of their time fighting fires, doing work others should have done, trying to stay on top of email, and sitting in unproductive meetings. Failed communications, missed deadlines, poor quality work and resulting rework, and customer dissatisfaction are growing problems for businesses. Stress-related illness, burnout, and low morale are increasing signs of employee dissatisfaction. The more chaotic and unproductive the organization, the more difficult people find it to do their best and most important work.

Although many managers blame individual employees for not working as productively as possible, we suggest that organizations themselves can be the source of overload. Recognizing this possibility enables

managers to create an environment where people can *collectively* manage their time better and work more effectively, efficiently, and sustainably.

Root Causes of Organizational Overload

It is tempting to conclude that the primary causes of organizational overload are market pressures that require people to do more with less and technologies that enable them to work around the clock. However, this analysis misses a key point: while both of these factors affect all organizations, some organizations maintain high levels of energy and focus, while others devolve into vicious cycles of expanding workload, frequent crises, and diminishing productivity. Clearly, something about *how* organizations respond to these challenges affects their propensity to overload and, ultimately, their productivity over time.

While highly functional organizations respond to external pressures by focusing on their most important work, overloaded organizations respond *by unwittingly manufacturing more work* through a focus on problem symptoms, inadequate planning, disruptive resource allocations, and rework of poorly executed assignments. We call this phenomenon “phantom workload,” because much of it would be unnecessary if people recognized at the outset the root causes of overload.²

Those root causes emerge out of underlying organizational norms. Organizations most vulnerable to overload exhibit a “can-do” culture that emphasizes increased *effort* under the assumption

that greater effort always leads to better results. The executive recruiting firm Korn/Ferry once gave companies a hypothetical choice between a candidate who would do a great job in 80 hours per week and one who would perform equally well in only 40. Nine out of 10 companies indicated that they would select the former worker to set an example of hard work for others.³

Some organizations maintain high levels of energy and focus, while others devolve into vicious cycles of expanding workload, frequent crises, and diminishing productivity.

Recent research challenges the core assumption of a “can-do” culture that greater effort always leads to better results. Findings from high-performing athletes note that success comes from alternating bursts of intense activity with periods of recovery, and this approach is now being used effectively to structure work and renewal in several organizations.⁴ Other research indicates that multi-tasking reduces productivity and fails to increase output, even among younger people who have grown up in the digital age.⁵

By contrast, a “results and renewal” culture focuses on *outcomes* achieved through sustainable effort. Effort matters to the degree that it produces results,

TABLE 1 **A Tale of Two Cultures**

“Can-Do”	“Results and Renewal”
Being a good team player means always saying yes.	Being a good team player means making and keeping agreements.
Because performance is based on effort, everyone must always be “on call.”	Contributions are measured by results on key strategic initiatives – not constant availability.
People do their best work under pressure.	People do their best work when they can sustain energy and focus over time.
We can always “pull the rabbit out of the hat.”	Pulling the rabbit out of the hat means we have to plan more carefully going forward.
Failure is never acceptable.	Failure is an opportunity to learn.

supports individuals and groups to work strategically, and leads to learning from mistakes instead of repeating them. Table 1 (p. 15) lays out the difference between these two cultures.

Burnout reduces productivity and increases turnover, creating an ongoing sense of crisis and additional work for everyone.

In a “can-do” culture, three vicious cycles amplify organizational overload and slow an organization down.

1. Overload Creates More Overload

Though it may sound counterintuitive, overload directly increases overload, with resulting high costs for both individuals and organizations. When people are expected to do more than they can effectively accomplish over long periods of time, the resulting high stress erodes morale, motivation, and physical and mental health – all of which make it more difficult for employees to meet expectations. In the long run, increased stress and its consequences eventually lead to burnout. Burnout, in turn, reduces productivity and increases turnover, creating an ongoing sense of crisis and additional work for everyone.

In response to high demand, people tend to take on more work than they can handle. At one company, for example, computer programmers were

expected to work seven productive hours per day, when everyone knew that the more realistic estimate was five hours. Despite research indicating that productivity usually declines after 50 hours per week and that engineers can only work effectively on two projects at a time,⁶ organizations in thrall to the “can-do” culture hold that no demand is unreasonable and employees should do whatever it takes to make things happen. Add to this the fear of losing one’s job in today’s economy, which increases employee reluctance to challenge unrealistic expectations, and we find people underestimating resource requirements, deliberately or unconsciously, to prove they are responsible team players.

When people underestimate resource requirements, lower quality and productivity become the norm for two reasons. First, when everyone has more to do than they can accomplish, they collude around allowing things to fall through the cracks: not responding to emails, starting meetings late, breaking agreements, and missing deadlines. When dropping the ball is acceptable, people don’t hesitate to take on even more work because they know they won’t be held accountable for lapses, and the cycle continues. Second, managers tend to interpret the use of fewer resources as a sign that an organization is learning to be more efficient, rather than as a red flag showing that people are cutting corners and eroding quality. They feel justified in continuing to tighten resource requirements, with the unintended effect of further lowering quality and generating additional problems.

FIGURE 1 **Overload Creates More Overload Directly**

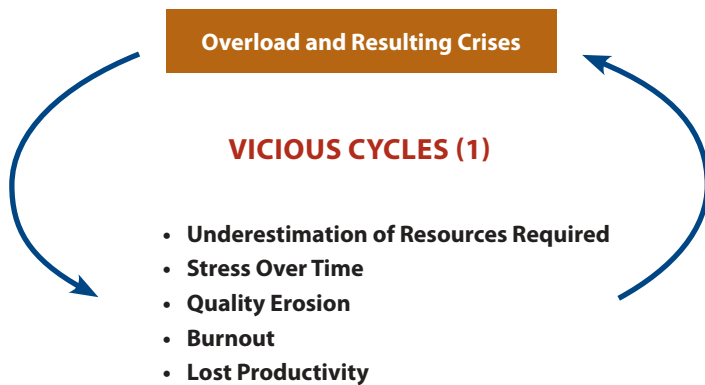


Figure 1 shows how the direct consequences of overload serve to increase overload, in a quintessential vicious cycle.

2. A Culture of Continual Crises

When people experience too much stress and continually try to compensate for insufficient resources, they think less clearly. The result is a crisis culture in which unanticipated problems show up at the last minute, tempers fray, quality suffers, deadlines are missed, and upset customers

must be appeased. Managers tend to deal with crises in three ways: firefighting, pressuring managers of failing projects, and/or asking everyone, including themselves, to work longer hours and forgo time for renewal. These quick fixes may mitigate crises in the short run, but they also make it more likely that new crises will emerge (see Figure 2).

In firefighting, managers allocate resources to fix immediate problems. Although firefighting can work in the short run by resolving problems and rewarding “firefighters” for their heroic efforts, it usually ends up starting new fires. Firefighting often entails rework, which adds to organizational overload and stress. Allocating resources to fight a fire on one project tends to disrupt resources assigned to other projects, which increases overload elsewhere in the organization. Moreover, people who learn that crises attract more resources often wait until the last minute to deal with problems, which inevitably leads to more crises. Finally, firefighting draws capacity away from the strategic planning that can prevent future crises.

Putting pressure on managers of failing projects can also work in the short run by emphasizing accountability, encouraging closer monitoring,

FIGURE 2 **A Culture of Continual Crisis**



and giving managers more attention, but it sends the message that overload problems are caused by poor performers instead of organization-wide norms, policies, and processes. This focus leads to a culture of blame and defensiveness. When

Although firefighting can work in the short run by resolving problems and rewarding “firefighters” for their heroic efforts, it usually ends up starting new fires.



people feel defensive, the quality of individual and collective thinking deteriorates. The resulting unproductive meetings, tendency to react to problem symptoms rather than deal with underlying causes, and recurrent problems further increase overload.

In a culture of crisis, employees usually work long hours and allow themselves little time for self-renewal. This pace can have short-term rewards, as people keep at it by convincing themselves that their intensive efforts are temporary. However, extended work hours can become addictive and eventually take a toll. The adrenaline and caffeine that keep many people going are unsustainable energy sources that can lead to serious health problems. Working nights and weekends combined with not taking vacations increase stress over time and undermine long-term productivity.

Technologies that enable 24/7 accessibility further erode time for self-renewal. When people are constantly available on email or by text message, stress and distractibility increase. People often turn to email when they are overwhelmed or fatigued, thinking that responding to messages will give them a hit of success, but the resulting short-term

release of dopamine in the brain provides erroneous reassurance that they are doing something constructive. A brief break to renew and refocus on important tasks would be more productive.

In short, when managers spend too much time firefighting, overseeing poorly performing projects and people, doing work others should have done right the first time, dealing with recurrent problems, sitting in unproductive meetings, and managing email, they reveal how organizations can inadvertently increase overload.

3. No Time for Management

The same managers who report spending too much time dealing with crises also say that they spend too *little* time reflecting and planning, developing people, building new business, and leading innovations in product or process improvement, that is, on the core management activities that offer fundamental, long-term solutions to the overload problem.⁷

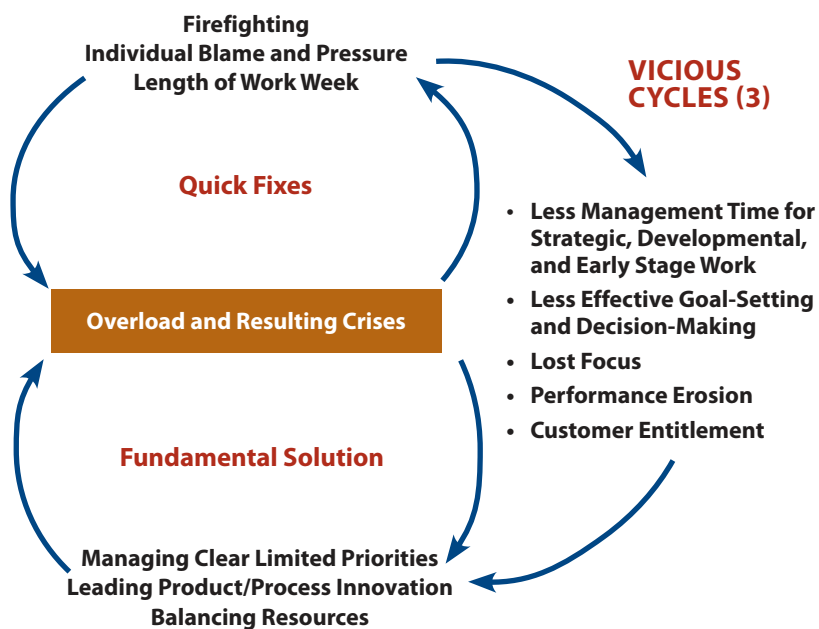
Indeed, the quick fixes that unintentionally increase overload also directly undermine the ability of managers to think and act strategically (see Figure 3).

When managers spend their time creating quick fixes in a culture of crisis, they have little time and few personal or organizational resources left for strategic planning, developmental and early-stage work, and strategy execution. Instead, they tend to:

- Avoid hard decisions about priorities
- Set ambiguous or conflicting goals
- Add or shift priorities instead of staying the course or eliminating what is no longer working
- Let attention drift away from longer-term initiatives for innovating and increasing system efficiency
- Tolerate slowly eroding performance

In this context, problems tend to be addressed with “one-off” solutions that are difficult to integrate into a streamlined product portfolio or process. The result is complicated product lines, systems,

FIGURE 3 **No Time for Management**



processes, and lines of authority, which lead to still greater inefficiencies. Meanwhile, the expectations of the “can-do” culture make it difficult to push back on unrealistic or ambiguous expectations, increasing the likelihood of continued overload. This trade-off between short-term and long-term solutions to overload is the core irony of the “can-do” culture: the effort people put into fighting overload is exactly what makes it impossible to eradicate it (see “The Ironies of a ‘Can-Do’ Culture”).

Changing Organizational Culture

The most profound and challenging task facing leaders in overloaded organizations is to change their underlying beliefs and expectations from those of a “can-do” culture to those of a “results and renewal” culture. One way of framing this shift is to think in terms of “achieving more by doing less.”

Culture change begins when senior executives or key opinion leaders acknowledge that the organization cannot continue to operate the way it has been. They are concerned that people are too stressed, too many tasks are falling through the cracks, credibility and collaboration are strained, systems are broken, customers are upset, new client opportunities are being missed ... and *there is no time* to resolve these issues and achieve strategic results. The champion may be a hard-driving CEO who is not getting the results he wants, a visionary leader who recognizes that the rest of her organization cannot keep up with her new ideas, or senior executives concerned about not having enough time to drive their organization’s highest strategic priorities.

The champions sense that there must be an alternative way of working that will produce better and more lasting results. They want to understand why priorities are not being achieved and what they and others need to do differently. Most important, they want the organization to achieve results that will have the greatest positive impact on customers/clients, support staff effectiveness, and ensure financial viability.

The Ironies of a “Can-Do” Culture

1. People do more but do not necessarily accomplish more.
2. In their efforts to cut costs, organizations incur additional and often hidden costs.
3. Trying to make the most of existing resources, organizations drain or waste the resources they have.
4. By trying to move too quickly on too many initiatives, organizations slow down work on their most important projects.
5. By using time-saving devices to take advantage of 24/7 online accessibility, people have less time and are less available than ever before.
6. Rewarding firefighting leads to more fires.
7. Addiction is confused with commitment.

The most profound and challenging task facing overloaded organizations is to change their underlying beliefs and expectations from those of a “can-do” culture to those of a “results and renewal” culture.



To achieve these goals, we recommend that champions follow a four-stage change process:

1. Build a foundation for change
2. Understand why you and others are not getting the results you want
3. Make an explicit choice about a new way of working
4. Bridge the gap between what you want and the current situation

When people learn that continuing to work harder and harder will not produce a different or better result, they realize that they have a choice and that alternative ways of working might be more productive.

1. Build a Foundation for Change

The first steps in moving toward a more sustainable organizational culture are to make the business case for a new way of working and to engage a leadership coalition to catalyze change.

Begin by documenting the negative consequences of the status quo. Consider the unsustainable costs to your organization in terms of:

- *Ineffectiveness*, e.g., poor quality work, missed deadlines, angry customers, and failure to develop new business
- *Inefficiency*, e.g., people's lack of focus and follow-through, frequent unproductive meetings, recurrent unresolved problems, interpersonal conflicts, the inability to update outmoded systems and processes, health costs, low morale, and turnover

At the same time, articulate the significant benefits of change. These may include:

- Implementation of important projects more quickly and with higher quality
- Increased reliability and customer satisfaction
- People who are more available mentally and

emotionally and thus more engaged

- More productive conversations and meetings resulting in more effective problem solving
- The elimination of work that doesn't add value

The initial leadership coalition might be the senior management team or a group of middle managers who recognize the need to work smarter, not harder, and can influence upward by demonstrating the benefits of a new way of working in their own divisions. Engaging senior managers early in the process is vital because they are the ones who are ultimately responsible for strategy development and embody the culture. Organizational overload prevents them from achieving the results they want, so they have both the most at stake and the greatest capacity to influence change.

2. Understand Why You Are Not Getting the Results You Want

The next step is to understand the organization's responsibility for the very problems it is trying to solve. It is tempting to think that change is not possible because market pressures and technology are not going away. However, managers can increase organizational effectiveness and efficiency by reducing the overload they themselves create.

The three types of vicious cycles explored in the first section represent composites of how organizations manufacture their own overload and crises, but every organization has its own particular dynamic. At one small investment bank, senior managers were concerned about the time they spent redoing their staff's poor quality work because it took valuable time away from new business development. They learned that the source of their problem was ironically their own strong commitment to customer responsiveness, which meant they frequently asked staff to drop what they were doing in favor of more urgent tasks. This behavior in turn led staff to produce poor quality work.

In addition to uncovering the dynamics that lock overload in place, organizations must surface the underlying assumptions that reinforce it. Members of the clinical informatics group of a major hospital

chain discovered that their diminishing credibility with internal customers resulted from an unquestioned commitment to the company's "can-do" culture. Because they believed that "being a team player means always saying yes," and "if I push back I might lose my job," they frequently over-committed and under-delivered.

Identifying the dynamics and exposing the assumptions that contribute to them is both humbling and freeing. When people understand their own role in their work challenges and learn that continuing to work harder and harder will not produce a different or better result, they realize that they have a choice and that alternative ways of working might be more productive.

3. Make an Explicit Choice About a New Way of Working

Why don't people change? One reason is that the current system has payoffs, no matter how dysfunctional its behavior appears. A system organized around customer responsiveness pays off in customer enthusiasm in the short run, even though it tends to undermine the organization's ability to deliver on these commitments over the longer term. Similarly, the ways in which an organization responds to crises pays off in short-term crisis resolution at the expense of more serious problems over time.

In addition, the costs of change can be significant. Visionary leaders may need to think strategically about sequencing priorities over time instead of following each new possibility they see. A hard-driving executive might need to shift her focus from doing whatever it takes to achieve results to creating an environment where other people in the organization can succeed. The tough decisions required to limit priorities can create conflict and lead people to fiercely protect themselves against perceived losses of status and jobs.

When people recognize that there is a case for the status quo as well as a case for change, they are confronted with a choice. Choice is the place to get traction in shifting what people want, how



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they think, and how they act. They can choose to move toward a more sustainable way of working – and enliven it by creating a shared vision of what that would look like. Alternatively, they can decide to conduct business as usual, while acknowledging they have a hand in creating the way it is.

Choice is the place to get traction in shifting what people want, how they think, and how they act.

Many of us find altering deeply ingrained beliefs and habits painful. Research into changing habits shows that people must make the same choices time and again over a prolonged period to sustain an initial commitment to working differently.⁸ When the next business opportunity presents itself, people need to pause and consider how taking it on would affect their current priorities as well as those of others in the organization and at home. They may need to decide whether they can make a reliable new agreement in the face of the ones they have already made.

4. Bridge the Gap

When organizations make a conscious, firm commitment to achieving sustainable productivity in service of a few meaningful results, several strategies help move them forward:

- Approach individual overload problems systemically
- Concentrate resources on achieving a limited number of priorities at any one time
- Support people to make conscious agreements
- Cultivate sustainable organizational energy
- Increase email and meeting productivity
- Reinforce the “results and renewal” culture

Approach Individual Overload Problems Systemically

As we have said, overload problems are systemic: they are created more by complex organizational dynamics than by the failures of individuals. Therefore, when quality suffers, deadlines are missed, and customers complain, managers must look first for structural inadequacies. These might include unrealistic or ambiguous goals, unclear or conflicting roles, unwieldy processes or procedures, and inappropriate rewards. Because the root cause of many project shortfalls is organizational, common solutions such as time management training and individual coaching often miss the point and fail to solve the overload problem.

Overload problems are created more by complex organizational dynamics than by the failures of individuals.

At the same time, it is important to recognize that organizational dynamics affect (and are exacerbated by) some people more than others. Some individuals tend to make unreasonable demands, while others find it hard to keep up because of disorganization or family commitments. People in both groups can benefit from coaching on how to set clear and realistic expectations, manage time effectively, remain focused, become more reliable,

and stay on top of important details. Effective coaching is best structured around a proven behavior change process that helps people make necessary changes in patterns of thinking as well as action.⁹

Concentrate Resources on Limited Priorities

Focus is critical to achieving high performance.¹⁰ People need a clear organizational strategy that focuses priorities and translates into a limited number of goals at any one time. For example, people are more productive when they work on two key projects over six months followed by another two key projects over the next six months than when they are responsible for four major projects over 12 months. It is also important to commit to developmental goals that (1) generate new sources of revenue in a dynamic and increasingly competitive environment, (2) increase the efficient use of existing resources through streamlining organizational systems and processes, and (3) help people continuously learn and grow.

The exact number of desirable annual goals varies depending on the organization. Following norms established by the U.S. Marines and Hewlett Packard, Hans Schulz, the CEO of the leading industrial coatings company Balzers, asks people to designate three “must-win battles” per year. The CEO of another large company recognized for both outstanding economic performance and commitment to its people expects to accomplish one key goal every four to five years.

In the course of identifying goals, people will often defend their own priorities out of fear of losing jobs or status. One way to address this tendency is to structure a *sequence* of priorities, with initiatives designed to build on each other. This means that a low-priority goal today might become a higher priority later on, and vice versa. People not involved in current high-priority initiatives can still provide valuable support for existing projects. However, some projects will probably be pruned in the prioritization process, and individuals need to accept that doing so is best for the organization’s overall health.

Once managers establish limited goals, they must align them with resource capacity. Doing so means developing realistic estimates based on past experience, including all aspects of the work (e.g., preparation and completion time, time for managing interdependencies and allowing others to contribute, transitions, delays, and unforeseen circumstances) and using back-casting (i.e., plan from the desired end point backward rather than from the present forward).¹¹ Managers should in turn reconcile these projections with a top-down assessment of available resources to ensure that individual estimates do not exceed organizational capacity. Clear goals supported by appropriate resources are crucial to achieving the “results” in a “results and renewal” culture.

Support People to Make Conscious Agreements

An organization sometimes needs to shift its priorities to accommodate changes in the external environment. The challenge is to make this shift consciously, as part of a process of adaptation, rather than assuming that people can take on yet another initiative without deferring, adjusting the scope of, or eliminating current commitments.

In practice, this means that managers who delegate new initiatives and people who agree to implement them are supported in making conscious agreements. One senior management team developed guidelines for making reliable agreements that meet the following criteria:

- New requests are clear in terms of their scope, relevance, standards, roles, and timelines.
- These requests are compatible with current work. Resource requirements and potential impact on existing initiatives are understood and needs to rebalance resources across these initiatives are addressed explicitly.
- All parties have an opportunity to negotiate expectations, consider alternatives, and make deliberate trade-offs with respect to current commitments.

In other words, people who take on new projects are expected to interpret “being a good team

player” as committing only to what they can reliably accomplish and pushing back responsibly and creatively when that is not the case. It is not a license to back down from challenging tasks, but rather a new challenge to confront tasks that risk taking people off purpose.

Taking on new priorities also challenges people to weed out projects that are no longer appropriate to their goals. Regular weeding requires the cultivation of a learning orientation and eradication

Clear goals supported by appropriate resources are crucial to achieving the “results” in a “results and renewal” culture.



of the stigma of failure that hampers many organizations.¹² When managers want to disengage from unproductive projects, they have several options: they can ask themselves if they would take on the project if it did not already exist, they can clarify which priorities are being under-resourced to keep this project alive, and they can determine if the work is a candidate for outsourcing. Each of these steps supports the thoughtful governance of organizational resources.

The best way to generate organizational energy is to connect people with a meaningful purpose by keeping the organization's mission, vision, and values in the foreground.

Cultivate Sustainable Organizational Energy

Though the stimulation created by organizational overload may be exciting, it is not sustainable. The best way to generate organizational energy is to connect people with a meaningful purpose by keeping the organization's mission, vision, and values in the foreground. But it is also important to create and support programs targeted toward renewing people's energy on the physical, emotional, mental, and spiritual levels. In-house wellness programs and work-life balance policies reduce health costs, increase productivity, improve morale, and attract talent. Such efforts have increased productivity at companies like Wachovia Bank, Sony Europe, and Ernst & Young.¹³

Formal "time-outs" to reflect and regenerate are essential elements of a "results and renewal" culture. Sonova Group, the world market leader in hearing aids, found that the practice of scheduling deliberate lulls after each of its two annual product launches increased the timeliness and quality of the releases. Microsoft has annual "Think Weeks" where 40 of the company's

thought leaders take time away from the office to absorb employee inputs on technology and business strategy. Engineers who reduced interruptions by establishing formal quiet times during working hours reported a 65% increase in productivity,¹⁴ and consultants in a high-powered professional services firm who experimented with taking one full work day or evening off each week reported a 10% increase in a range of performance indicators.¹⁵

Increase Email and Meeting Productivity

Email is still the Wild West of organizational life, and most meetings waste enormous amounts of time and energy. Organizations increase the productivity of these resources when they manage them collectively instead of expecting people to master them on their own.

The most significant challenge to managing email is the organizational assumption that people should always be available by email or text message. Email is used indiscriminately as the dominant mode of communication when it is best suited for brief messages around familiar routines. Other simple techniques for managing email include checking it only 2-3 times daily (and after establishing your personal priorities for the day), using the Subject Line feature descriptively, and limiting the number of emails sent. People can





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be encouraged to use face-to-face, phone, or videoconference conversations for challenging and nuanced communications, such as launching projects, dealing with conflict or emotionally sensitive information, managing recurring problems, and coaching junior staff. By contrast, approaching email as primarily a technical problem to be contained by limiting personal IT capacity and creating server space for managing shared documents tends to mask the cultural issues.

Similarly, meetings are often a microcosm of the problems associated with organizational overload. Nothing is as wasteful and frustrating as a poorly run meeting. When people try to rush through too many agenda items, they often agree to things they have no intention of doing, which means that problems recur and the same issues show up as additional agenda items again and again (a dynamic identified by our colleague Jennifer Kemeny). On the other hand, nothing is as productive as a well-managed meeting, particularly when it harnesses the collective intelligence of diverse stakeholders around a complex issue.

We recommend that organizations begin by auditing these two forms of communication and examining their purposes, including what is and isn't working about each, and listing ways to increase their productive use. This information can be used to develop new organizational norms and protocols that will transform emails and meetings from frustrating impediments to powerful tools.

Reinforce the "Results and Renewal" Culture

The best way to promote a "results and renewal" culture is to run limited experiments based on the five strategies above. At the same time, an organization must commit to achieving outstanding results by managing all of its resources, including its people, in sustainable ways. This commitment encompasses everyone, from the most senior managers, who must be supported in developing new values and attitudes – or shown the door – to employees, who are encouraged to share their own stories, aspirations, and proposals for new ways of thinking and acting. Strengthening or redesigning underlying processes for strategic management, problem solving, and human resource management

Doing Less and Achieving More: A Case Study

Managers of a leading global health care supplier recognized the need to reduce overload and increase throughput in the new product development process of its US consumer health care organization. Project hit rates on milestones were running at 43%, and the company recognized several problematic patterns:

- People were juggling too many projects, which resulted in extensive multi-tasking, high mental changeover costs, lack of focus on strategic work, slow ramp-up times, and relentlessly high workloads that led to burnout.
- Because expectations always exceeded capacity, managers were continually reprioritizing projects, something that led to chaos.
- People tended to skip over early tasks on a checklist under the assumption that they could easily address these at a later time if necessary.
- Likewise, to save time, developers were downplaying the likelihood and severity of risks at the beginning of the process, only to be surprised and unprepared later when full-fledged crises emerged.
- Knowing they were expected to do more with less, people often asked for fewer resources than they actually needed. They also overestimated what others could actually deliver. As a result, everyone was overloaded, and both higher-level managers and stakeholders in related functions were not aware of the pervasiveness and seriousness of the problem.
- Managers often jumped in to help junior people on tactical work and at the same time delegated strategic assignments, such as process improvement, to junior people who were not equipped to manage them. The reversal of roles frustrated both managers and those who worked for them.

The company is in the process of making several key changes in how it prioritizes work and allocates limited resources:

- Existing workloads have been carefully calculated, and senior management has determined that people have 60% more work than they can manage.

- People now question the norm that “we have six top priorities – but everything must launch on time.” “Wishful thinking” is being replaced by rigorous project assessment. Saying “no” to projects is becoming acceptable because more people understand the problems caused by failing to balance workload with capacity.
- Capacity modeling based on realistic resource estimates enables management to accurately balance expectations with capacity. All stakeholders are asked to estimate their own resource requirements instead of making assumptions about what others can do.
- Projects are prioritized in such a way that *not all projects* are put on the development list in the first place. Projects placed in a “parking lot” expose the gap between what people want to get done and what they can do, thereby signaling the level of additional resources required to bridge the gap.
- Teams are designing high-priority projects to be achieved as quickly as possible using sufficient resources. Although fewer projects than before are in the pipeline, *the number of completed projects over time is greater*. This means that, instead of trying to achieve six top priority projects in 12 months, the company might now plan to achieve three top priority projects in six months before targeting three more top priority projects over the next six months.
- New projects are no longer introduced until old ones are cycled out.
- All stakeholders across functions, including senior managers, are involved in understanding, supporting, and acting on the capacity-modeling project.
- An initial result of this capacity-modeling project is that the company is achieving more of its most important work. Meetings have become more effective, because agendas now focus on what is being accomplished instead of what is not being done due to insufficient resources. In addition, teams are more effectively engaged in refining the product development process and optimizing capacity management. ■

will help shape new ways of working and make overload a distant memory.

“Doing Less and Achieving More: A Case Study” tells how one global health care supplier adapted the four-stage change process to nearly double its project “hit rate” on milestones, improving from 43% to more than 80% of milestones completed on time.

Improving Strategic Effectiveness

Overload is a deeply embedded way of life in many organizations and a significant obstacle to

strategic clarity and execution. It increases organizational costs, reduces speed, renders people less available, and hurts performance – all in the name of doing exactly the opposite of what is intended. However, organizations can improve their strategic effectiveness by looking systemically at the root causes and negative effects of overload, explicitly choosing to shift how they operate, and implementing strategies to move from a dysfunctional “can-do” culture to a powerful “results and renewal” culture. The outcome will be the elimination of overload and an organization that works effectively, efficiently, and sustainably. ■

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Commentary

RABBI MARC BAKER



Rabbi Marc Baker

Most of us are familiar with Aesop's fable, *The Tortoise and the Hare*, which, according to at least one interpretation, teaches us that the fastest runner does not always win the race. Likewise, in the Bible, God created the world in six days and the Sabbath on the seventh, for even the Divine Creator needed rest and renewal. The sages of the Jewish tradition taught: "If you take on too much, you have taken on nothing at all."

What is it about human nature that requires our wisdom traditions to continually bombard us with a similar message about the relationship between pace or workload and productivity?

Surely, we *know* somewhere in our heads and hearts that we cannot do it all and, that at some point, there is a diminishing return to what David Peter Stroh and Marilyn Paul call our "can-do," 24-7 culture. Yet, the fact that we know this is precisely what makes the phenomenon of "overload" and its deleterious effects on individual and organizational performance so ironic.

As a school leader – in an environment that can often feel akin to working in a hospital emergency room – I have found that interventions to reduce overload require people to change their beliefs and to act in ways that are counterintuitive for those of us in a society so focused on productivity. Making this shift is incredibly difficult.

Through their systems thinking perspective on the overload phenomenon, Stroh and Paul make the case for change by illuminating the unintended consequences and ripple effects of taking on too much with too few resources. They emphasize the need for us to slow down and acknowledge the costs of our learned behaviors, which include high stress, low morale, high turnover, avoidance of hard decisions, ambiguous or conflicting goals, and overall eroding performance.

Their "Ironies of a 'Can-Do' Culture" sidebar on page 19 succinctly captures the core problems with overload. One of Miriam Webster's definitions of irony is "incongruity between the actual result of a sequence of events and the normal or expected result." Day after day, those of us who struggle with overload live with these ironies, this incongruity, and *we know it*. So, why is it so hard for us to change?

Rethinking Deeply Held Beliefs

In their books *How the Way We Talk Can Change the Way We Work* and *Immunity to Change*, Robert Kegan and Lisa Lahey describe how people's "hidden immune system" fights their noble impulses to change for the better. Underlying values and beliefs that have helped many people survive (and made some quite successful) might actually impede growth and change. This, to me, lies at the very heart of why it is so difficult to overcome our "can-do" mentality.

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The fear of letting people down by setting boundaries and saying no is scary. What if I set limits and people stop trusting me, needing me, praising me for accomplishing so much? A look-over-the-shoulder mentality pervades many workplaces where a subtle or not-so-subtle competition takes place over who works the hardest, the longest, the craziest hours – who lives the least balanced life.

Many professional cultures reinforce the unstated beliefs that saying no, acknowledging limits, and prioritizing rest and life outside of work are signs of weakness, or that renewal and sustainability are inherently conservative, passive, and growth-averse. In fact, prioritizing rest and renewal, as Stroh and Paul prescribe, takes extraordinary courage, which leaders and organizations need to expect and celebrate. Developing a culture that is sustainable, adaptive, generative, and self-renewing requires vision, creativity, and the capacity to inspire and motivate people.

Underlying values and beliefs that have helped many people survive (and made some quite successful) might actually impede growth and change.

Many people learn their beliefs about what it means to be productive and successful as early as elementary school, where a “race to nowhere” culture pressures students to be what one *New York Times* editorial called “super people.”¹ These ideas are deeply ingrained in our society and our professional culture and, for many of us, our sense of self.

With their results and renewal model, Stroh and Paul offer an important framework for unlearning and relearning a new set of beliefs about productivity. Just as Stephen Covey’s concept of “sharpening the saw” serves the ultimate goal of “effective living,” results and renewal principles lead to more than healthy, fulfilling, and sustainable living and working (because these would not be enough in our results-oriented culture!). Counterintuitively, these principles make people and organizations more productive. Less is actually more, and slower is ultimately faster.

Priorities and Focus

One of the fundamental misconceptions that Stroh and Paul address is the belief that people and organizations truly can do it all. They remind us that leaders and institutions need to make difficult, sometimes painful choices about what we can and cannot do. Saying yes to one thing necessarily means saying no to something or someone else, whether we want to acknowledge it or not.

I loved Stroh and Paul’s description of Hans Schulz’s approach of asking people to “designate three ‘must-win battles’ per year.” This implies, of course, that Schulz gives implicit permission for his people to lose – or at least not to fight – many other battles. As I understand it, the work of prioritization and focus requires at least three steps: First, people need the *permission to prioritize* that Schulz gives his employees and that Stroh and Paul call for. Second, people need *clarity* about what their goals and priorities are and how they align with their organization’s goals and priorities. Third, people need to develop the *discipline* to stay focused on these priorities, even at the expense of others.

In my experience, different people and different organizations will struggle with one or more of these steps at different times. Some will struggle mightily with winnowing a list of 20 goals down to three. Others will have no

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trouble identifying which battles they must win but will wrestle with triaging stakeholder needs, competing demands, or even day-to-day tasks.

I have seen firsthand how tools such as the “conscious agreements” that Stroh and Paul describe can help individuals, teams, and organizations become more reflective, explicit, and communicative about their priorities. They also empower individuals to help themselves and to help others stay focused and follow through on their most important commitments.

Teams of Learners vs. Silos of “Gofers”

Ultimately, the only way our organizations will combat overload is by strengthening people’s capacities to work together and support each other toward a shared vision. This includes not only *what* we aim to produce but also *how* we aim to work together.

One of the most insidious effects of overload that I have observed is its impact on teams and their capacity to collaborate effectively. So often, when work becomes stressful and demands pile up, people hunker down and teamwork erodes. Rather than being united by the centripetal force of shared vision, values, and good agreements, people are split into silos by the centrifugal force of overload.

The results of this go beyond individual burnout and lack of personal productivity. People get lost (hopefully not trampled) on what leadership expert Ron Heifetz refers to as the “dance floor” and can’t even locate “the balcony,” let alone climb up to it. That is, instead of seeing the big picture, people become gofers,² chasing after the task of the moment and putting out fires. As this happens, they get in each other’s way, lose sight of commitments and priorities, and damage their own trustworthiness and the overall trust in their organization.

On the contrary, in a results and renewal culture, stress and workload can actually strengthen teamwork and leadership. They create opportunities for people to improve their relationships with one another by refocusing and doubling-down on core commitments and priorities, acknowledging fears and vulnerabilities, asking for help, and supporting one another in reaching collective goals. Organizations that prioritize learning and renewal even in the face of mounting pressures to produce will remain generative, creative, and forward-looking toward a productive, successful, and sustainable future. ■

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