

Being an Effective Change Agent

A GUIDE



Stephanie Bertels
Jess Schulschenk
Andrea Ferry
Vanessa Otto-Mentz
Esther Speck

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Prepared by Stephanie Bertels, Jess Schulschenk, Andrea Ferry, Vanessa Otto-Mentz and Esther Speck

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CEOs play a crucial role in fostering an environment that supports embedding sustainability into the strategies and day-to-day decisions of their organisations. This guidebook derives from a report we undertook for the [Network for Business Sustainability South Africa](#) that asked:

Why do some CEOs make the shift to incorporate sustainability
into their decision-making (and what holds others back)?

This guide is based on a review of prior academic research on CEO decision-making, combined with the practical experiences and insights gleaned from interviews with over 100 CEOs, board members, and sustainability executives from a range of global companies and industries including financial/insurance, extractives, retail, manufacturing, transport, logistics, utilities and agribusiness. We also engaged with companies with a range of ownership structures including public corporations, privately owned businesses and co-operatives. We share insights on how corporate change agents can help influence CEO thinking on sustainability. We presented and discussed our interim findings, our frameworks and resources in a series of three global workshops with 24 international companies, which supported the further development and refinement of these resources.

This guidebook compiles what we have learned, incorporating as much of these leaders' direct experiences as possible 'in their own words.'

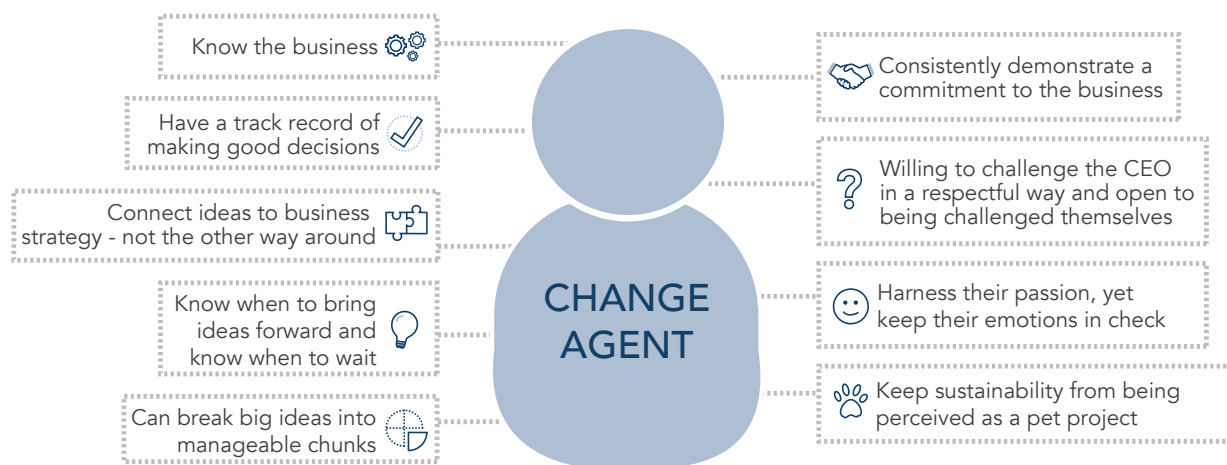
HOW CAN YOU PREPARE YOURSELF TO BE A MORE EFFECTIVE SUSTAINABILITY CHANGE AGENT?

- Demonstrate that you know the business
- Establish a track record of making good decisions
- Connect your ideas to the business strategy – not the other way around
- Know when to bring ideas forward and know when to wait
- Break things down into manageable chunks
- Consistently demonstrate a commitment to the business
- Challenge the CEO respectfully and be willing to be challenged yourself
- Harness your passion, yet keep your emotions in check
- Keep sustainability from being perceived as a pet project

We also developed [Being an Effective Change Agent – A Personal Inventory](#) to help sustainability change agents reflect on these tactics to support your CEO and to identify which of them might be most appropriate for your own setting.

How can Change Agents support their CEOs?

In our conversations with CEOs, we also asked them to describe the characteristics of effective sustainability change agents. In this section, we describe each of these characteristics in more detail to help sustainability change agents think about how to bolster their own readiness and effectiveness.



Effective change agents know the business



The number-one characteristic raised by CEOs, board chairmen and other sustainability change agents was the need to know the business. Because sustainability requires such a broad range of skills, many sustainability change agents come from outside the core business. Our respondents stressed that the most effective change agents knew the business inside-out.

"You cannot do it without a skilled champion. And I say skilled in a couple of senses. One, they've got to be skilled in integrating with the management teams, the operation teams, the finance teams - because they're the biggest cynics. Two, they've got to be skilled in sustainability. We've got a font of knowledge here in [our Head of Sustainability] and you cannot put an unskilled person in that role. When somebody comes and says 'I think we should, I don't know, paint everything green,' [they say] that's not going to work, [they know] it's not going to work."

(Chairman)

"It's really understanding the business, and thinking about what keeps the CEO up at night and what gets the CEO excited. I would sometimes imagine "What is hitting [their] inbox today? What's the language [they use]? What are the kinds of things short term and long term [are they] thinking about? I would just think about that and then I tied the sustainability conversations to those topics, if I could. I just think it's important to frame it, in terms of the business issues that are real for them. That provides more credibility." (Change Agent)

Effective change agents have an established track record of making good decisions



Linked with the first characteristic, effective change agents were seen to have a strong track record of making good decisions on behalf of the business.

"If you've got it [credibility] people respect you and if you can develop credibility within the business, that makes a massive, massive difference." (CEO)

"Over and above the basic things, track record is very important for us. What has this person actually done? That doesn't mean that they can't have failures in their life, failures are fine, but we like to back people who have a track record, who are great at building teams." (CEO)

"I think as a change agent, you need to be credible in what you do regardless of what it is. That way the CEO builds respect for your work. If you want to actually have conversations with them about this, they need to respect you for what you do." (Change Agent)

Effective change agents connect their ideas to business strategy - not the other way around



CEOs lamented that all too often, sustainability change agents approach the executive team trying to propose a new strategy instead of clearly articulating how sustainability ties into the existing business strategy.

"For me the key thing is to find a way to demonstrate that dealing with environmental and social issues is important to either making the organisation successful or guard against the risk of it becoming unsuccessful, instead of trying to widen the definition of what success is for the organisation." (CEO)

"My strategy has always been to start off with the views that you know people share. Then when you finally get to what you're about to share, they can't help but agree with the end result. Because it's very difficult to jump into a conversation and say to people, "You've got to change." (Change Agent)

"...you have to make sure that you paint the right longer-term picture of the importance of this for society, your business's customers, and therefore your business's long-term health and sustainability. I think you've got to frame it in that context." (CEO)

The challenge of triggering successful disruptive changes seems to be less about talented and visionary 'gurus' leading hordes of followers, and more about change agents that are able to read their environment, build innovative opportunities, and synthesise or improve change proposals that people value¹.

Effective change agents know when to bring ideas forward and know when to wait



Identifying 'transition stages' or time periods where change is more likely to take off requires patience on the part of change agents.

"One often gets despondent about all the work that gets done that doesn't lead to tangible outcomes. It's often that you just need to be ready for when the crisis hits, because unfortunately, it's probably applicable around the world, prioritisation of things often doesn't happen until a crisis does hit or some form of crisis. Normally, I find that these kind of crisis points will elicit a request for reporting and analysis. The first question that my CEO always throws at me is, "What are you going to do about this?" It's a question of drawing on all the initiatives that currently exist around that particular issue and then saying, "We could do A, B, C, D, E, F, G, and these would have these consequences or requirements, et cetera. Shall we reconsider some of these things that we have not been able to prioritise, possibly due to cost or effort or resources, or whatever." (Change Agent)

Effective change agents can break things into manageable chunks



CEOs pointed to the need to break big visions for change into more concrete, incremental steps that could be more readily absorbed by the business.

"Don't come and tell me about these very high level, very complicated, very theoretical things. Come and tell me this is what it means practically for the company, or the country, or, if we get to that level, the world. Practically this is what it means, and practically this is what our company can do. If you make it practical you will get a lot more attention and a lot more action, otherwise it's one of those things that floats around, let's tick the box, because it's too theoretical for us. The information need to be very much distilled, very specific and to the point. One needs to say, well this is what's happening, but link it to one or two things that people can really see that are happening ...things that people will know about if you can. Then clearly say what are the impacts of that for this company. Why is it important that we address it?

Then link that to what our company can do to address it. This is what we can do, we can fly once a month instead of twice a month. That's practical. Don't pick 20, pick three. Then measure those. Once that's vested in the company, then you can take the next two, but we use the expression in South Africa, eat the elephant bite by bite. I think we need to eat this elephant bite by bite as well. If you see the whole elephant you will never even try." (CEO)

"It can actually weigh you down so it's about being very resilient through times when people think that what you're saying are absolutely unimportant to them and nonsense. How are you so resilient so that you can be consistent with your message and what you stand for? Sometimes it is about breaking it down into achieving bit by bit."(Change Agent)

“I think one tactical strategy is to build in very manageable moments of time, in front of people that you need to have audience with and make sure that those moments always count, and that they add up over time.” (Change Agent)

Recent research into behavioural nudges suggests that simple and small changes that require minimal effort to be adopted have the potential to enable significant change² and as mentioned earlier, small initial commitments tend to generate more substantial future commitments.³

“As much as you need to have a big vision, you also need to start doing the little things that gets people to realise that it is possible. A couple of tweaks here and a couple of tweaks there.” (Change Agent)

Effective change agents consistently demonstrate a commitment to the business



The boundary-spanning role of change agents can sometimes cause organisational insiders to question their loyalty. It was recommended that change agents send clear signals about where their allegiance lies.

“I always remind myself through this process that it’s not about me, it’s about what’s best for the organisation because I often feel that when one has a responsibility like this, it’s a huge responsibility. You often have to remind yourself of just the magnitude of this responsibility to do what’s right. It can’t be change for change’s sake.” (Change Agent)

Effective change agents are willing to challenge the CEO respectfully and be challenged themselves



"That team that you have as your support team, you've got to be tight with, and they've got to be able to challenge you and you've got to be able to challenge them." (CEO)

Sustainability change agents need to recognise that their role may be to challenge how the CEO sees their own role in the organisation, or what the priorities of the organisation need to be at a given time.

"To bring about change, you sometimes need to destabilise your CEO because you know about something where [they don't] have the same expertise. When you destabilise that hierarchy, then you become the authority, then [they start] trusting you to make the right call. Often people that report in to a CEO are uncomfortable to do that. ...but it's in the how. You obviously have to be conscious of the fact that you don't take on every little battle and you don't fight every little one, you save it for the bigger one. Then you position the more important discussions and the more important things. You don't want to be labelled as someone who changes for the sake of change." (Change Agent)

"I think as a change agent, you also know how to take the risk that something could happen that could work against you. You can't play it safe. If you're always looking to play it safe and you're always looking for consent, you're not going to change anything. You have to be prepared to go alone, to walk a path that's a lonely path because often it is." (Change Agent)

But CEOs also described how they were looking to identify new ideas that challenge the status quo in the organisation.

"I'm actually looking to have contact with people two, three levels down. A CEO actually wants this and the opportunities are there. You bump into me at a cocktail function, you bump into me at the annual or six month results announcement, or in the passage... You just have to capitalise on the opportunity. You have to be opportunistic... and then you've got to make your point very quickly. It's just got to be in a way that it doesn't look like it's a reporting line challenge. Unfortunately sometimes this is a problem... Then when that CEO realises "you know what, there's an idea here" then that CEO will find the opportunity to follow-up with that person." (CEO)

"That is quite an important part of really making sure that it is fully adopted by the organisation. Inviting people to challenge you when they see things that they don't believe are consistent with that way of thinking, and they do." (CEO)

Effective change agents harness their passion, yet keep their emotions in check



Change agents were also cautioned that, while they needed to inspire their CEO with their passion and commitment to sustainability issues, they needed to steer clear of emotional pleas that could erode their credibility.

"We had a team that was investigating these issues. I think it was a mixture of their competence, and more their enthusiasm to be honest – their passion for the subject, which made me more curious. But if you are passionate and not competent, that's a non-starter. It is in that order - people who are confident that have passion. ...Once you've established that confidence piece and then you're seeing that they're honing in on a particular issue with energy that somehow makes it more intriguing. You have to believe that, first of all that they're being objective" (CEO)

"Look, you've got to bring me more than emotions, it's important to you sure, great, that's why we have you in this position, but channel that. When it comes to me, it needs to be about the business." (CEO)

"I've just found that business doesn't provide for space to express feelings and emotions, so it's almost about finding a comfort zone in the logical, the left brain type of approach to business. I haven't seen any leader who's stood up and said, 'This is how I really feel about it' and really just throw himself behind that feeling such that it's the feeling that's driving me to this action to get this result and these are the expected outcomes. It's almost to say if I push something because of how I feel about it, I'm being biased." (Change Agent)

Effective change agents keep sustainability from being perceived as a pet project



A final, but important characteristic was that effective sustainability change agents were able to keep sustainability from taking on the status of any one person or group's 'pet project.'

"I've seen a reasonable number of situations where an enthusiastic CEO starts some sustainability activity and the next CEO cans it. If you're creating something that is not really rooted in the business then it's just a personal hobby, it's got no roots." (CEO)

"I think the most important thing is that this is in the DNA of the organisation. It isn't seen by anybody as the sort of pet project of any particular CEO at a point in time at his tenure. [At our company,] this will survive many more CEOs to come because it's so ingrained in the organisation, and what we're about, and what our brand is about. [...] I think very many organisations in the world, who have a chief executive who's a very strong public spokesperson around this, run a huge risk that it isn't seen as something that's core to the organisation. It's seen more as belonging to the CEO's brand." (CEO)

"It's not only don't bring your own pet projects, but it's also be willing to challenge other people's pet projects... It's being able to respectfully explain why something that somebody else has pitched... isn't adding enough strategically."

(Change Agent)

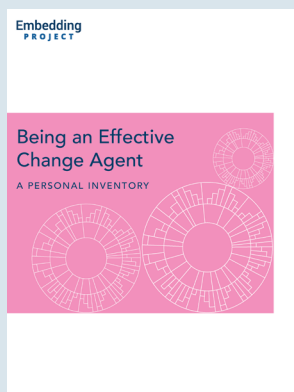
This guide is part of an online series of resources that we are developing for practitioners working to embed sustainability at their organisations.

Our resources are co-created with our members based on an extensive review of academic research, practitioner guidance and feedback from experts. Preliminary versions are trialled in workshops and in pilot projects in our partner companies, through working with global practitioners in executive, sustainability, operations, human resources, marketing, and communication roles in a range of industries. Feedback is then incorporated into successive versions of the resource.

It is important to note that our research is ongoing. We recognise that the knowledge presented here is provisional and we invite you to participate in improving these resources.

What next?

We also developed a personal inventory to help you be an effective change agent:



[Being an Effective Change Agent - A Personal Inventory](#)

This inventory helps you bolster your readiness and effectiveness as a change agent. We encourage you to use this as a tool to help reflect on and plan your personal development.

For more resources to help you embed sustainability, please visit us at:

www.embeddingproject.org

Endnotes

¹ Sosa, R. (2011). Understanding the future of change agency in sustainability through cellular automata scenarios: The role of timing. *Sustainability*, 3(4), 578–595.

² Sosa, R. (2011). Understanding the future of change agency in sustainability through cellular automata scenarios: The role of timing. *Sustainability*, 3(4), 578–595.

³ Freedman, J.L. & Fraser, S.C. (1966), Compliance without pressure: The foot-in-the-door technique. *Journal of Personality and Social Psychology*, 4, 195-203.

Acknowledgments

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