How to Initiate Change

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Sometimes, things need to change. Perhaps a process might not be as efficient as it could be. Or maybe you've noticed an issue that's undermining your team's well-being.

If you're not in a leadership role, you might not feel like you can push for these necessary changes. But anyone can and should advocate for positive change in the workplace.

This lesson will examine why change might be needed and how you can advocate for progress.

Together, we'll explore how you can identify potential areas for change, evaluate the possible consequences, and then suggest changes in a way that will get people onside.

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The first step is to identify areas that could benefit from change.

These might be obvious: maybe a tool is causing constant frustration for you and your teammates. Or perhaps a particular task is taking far more time than it should.

You might also be inspired to push for changes based on wider issues, like sustainability or inclusivity.

But other valuable changes are less apparent. That's particularly the case when you don't have a clear idea of your needs and how they can best be met at work.

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As career coach Rachel Montañez explains to The Harvard Business Review: "If you're not clear on what you want, it's harder to advocate for yourself and ask others to speak up in your absence. And it's impossible to know what you want unless you know what you're good at, what you like, and what type of environment enables you to do your best work."

She suggests looking for things that energise and drain you, both in terms of the work you're doing and the environment you're doing it in.

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To make this easier, try keeping a work journal where you document what happened and your feelings about it. As the team at Mind Tools put it: "Calmly recording the details of an event after it happens can provide you with valuable "mental space," allowing you to assess – objectively and dispassionately – what has just occurred."

Having a clear record of how you work, your needs and your feelings will make identifying helpful changes a lot easier.

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Even if you identify some changes, you might still feel reluctant to go ahead with them. That's completely normal.

One reason is a cognitive bias called the status quo bias. This causes us to want to keep things the same and to perceive change as a possible threat, even if we know it could do us a lot of good.

Staff at the University of Pennsylvania's Wharton Business School explain why this can make thinking about change more difficult: "Your ingrained preference for stability keeps you from judging different options fairly, which may cause you to miss out on valuable opportunities."

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Writing for Forbes, executive coach Jamie Lee says we also avoid pushing for change due to our fear of rejection and of being selfish, both things that are closely linked to our evolutionary drive to stay on other people's good sides.

If you can label these fears and understand them for what they are, it should be a little easier to look at the situation more objectively.

Try to remind yourself that your needs are valid and that you need to communicate them to other people so that they know how they can support you. As Lee puts it: "When we think that what we are asking for is selfish, in essence we are being biased against ourselves."

As for the fear of rejection, do your best to contextualise it. Someone saying 'no' will feel awful in the moment, but the rejection itself is very unlikely to affect you in the long term.

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Once you've identified a change and worked through your feelings about it, you need to understand the possible consequences.

To help with this, people use a concept called “Chesterton’s Fence”. This was a metaphor created by the writer G. K. Chesterton in his 1929 book "The Thing".

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Here, Chesterton asks us to picture a gate or fence blocking a road. He writes that one type of reformer would walk up to the fence and say, “I don’t see the use of this; let us clear it away.” To which a more intelligent type of reformer would reply: “If you don’t see the use of it, I certainly won’t let you clear it away. Go away and think. Then, when you can come back and tell me that you do see the use of it, I may allow you to destroy it.”

In other words, you have to understand why the fence is there (why things are the way they are)before trying to change things. That way, you can make sure you’ve taken into account as many variables as possible and that your change is actually going to be an improvement.

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Next, you should compare your solution to other possible approaches. In an article for HBR, Peter Mulford from the Management Consultancy BTS offers this advice: “Take some time to [consider] all possible solutions so that you can weigh their pros and cons. As you’re [doing this], think about your company’s values, mission, and resources.”

That way, you can be sure your solution is the best one. It also means you’re in a better position to explain to other people why you chose the solution you did.

There are changes you can enact yourself without needing anyone else to get on board. But for some changes, you might need to be able to make your case to other people.

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Whether you’re trying to convince your colleagues to adopt a different meeting style or asking your manager to invest in some new project management software, you need to convince them. After all, they’ll be subject to the status quo bias as well: you need to show them that your change represents a benefit rather than a threat.

To do this effectively, you should gather your facts first.

Peter Mulford suggests formatting this as an “idea résumé”. As he explains: “It’s essentially a document that shares your initial thoughts in a clear, concise, and controlled way, while explicitly connecting your idea to the broader goals of the company, as well as the pain points you’re trying to soothe.”

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Try to use data, your personal experience and/or the voices of others to back up your suggestions. For example, if you’re asking your boss to invest in a tool

to help automate a time-consuming task, you should gather information on exactly how much time it's wasting and what you could be doing instead.

Make sure you link everything back to the benefit it will have for the organisation. That's even the case when you're advocating for something that will benefit you as an individual - chances are, it will boost your performance and productivity, too.

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While it's important to have your facts in order, don't just rely on those to make your case for you. Storytelling and emotive language can be just as important when it comes to convincing people to embrace change. Developing your suggestion into a narrative will help you to win them over emotionally as well as intellectually.

Paul J. Zak, founder of the Center for Neuroeconomics Studies, shared some of his findings in an article for HBR. As he explains: "my experiments show that character-driven stories with emotional content result in a better understanding of the key points a speaker wishes to make and enable better recall of these points weeks later."

According to Zak, a story needs to develop some kind of tension in order to get a person's brain to focus on it. It also means they're more likely to share the emotions of the characters in the story and to keep doing that once it ends.

So, if you're trying to convince your boss that a second monitor would make you more effective at your job, you should explain exactly how uncomfortable and inefficient it is working with one. Then, you can move on to how much smoother things would be with two.

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But what if you can see a change needs making but don't have the knowledge, resources or lived experience to suggest a definite course of action? Some issues are just too big or too nuanced for you to tackle alone, and that's okay.

In situations like this, you can still help to initiate change by starting conversations. As Emilie Shoop explains to Forbes: "If you take the time to ask good questions of your peers and leaders, it will get their wheels spinning. (...) People are less resistant if you help them find the change needed, instead of trying to just tell them to change."

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Initiating change as an individual involves keeping an eye out for where change could help, thinking through the possible ramifications, and presenting people with the factual and emotional insights they need to make an informed decision.

Once you finish this lesson, think about a small change you'd like to make in your professional or personal life. What facts and emotional insights could you use to convince someone else that it's a change worth making?