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Improving the Learning Environment Through Communication: A Systems Perspective

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WESTERN UNIVERSITY

Improving the Learning Environment Through Communication: A Systems Perspective

by

Allison Alexander

AN ORGANIZATIONAL IMPROVEMENT PLAN

SUBMITTED TO THE SCHOOL OF GRADUATE AND POSTDOCTORAL STUDIES

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE

DEGREE OF DOCTOR OF EDUCATION

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Abstract

The call centre can be best described as an organizational system with three sub-systems made up of 15 sections. Systems are impacted by their environment and respond by outputting their own impact onto the environment (Jones, 2013; Kast & Rosenzweig, 2017). In the case of the call centre's system, the environment is the caller (client), and the impact is the increased complexity in the types of questions asked. The call centre was impacted by clients who posed complex questions, and the system responded by outputting incorrect information to its clients (Internal Report, 2015). Internal research revealed that the system was unable to prepare its parts (sub-systems and sections) for the changes in the types of questions asked by clients (Internal Report, 2015). A solution was devised to transform the call centre into a system that is prepared to output correct information when impacted by changes to question types. The solution focuses on changing the formal learning process because its function is to prepare the system for outputting correct information. This organizational improvement plan (OIP) uses a transformational leadership approach to identify the problem, define the desired end-state, outline a strategy, and communicate the change plan.

Keywords: Call centre, call centre system, change path model, formal learning process, open system, organizational systems perspective, organizational system, transformational leadership

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This Organizational Improvement Plan is dedicated to so many people in my life who have lent considerable support and guidance over the years.

Executive Summary

Organization X provides business administrative services to Canadian businesses. It is made up of several branches that each provide a different function of business administration services. One of such branches is the call centre, which is the first point of contact connecting Organization X to the business community it serves. The call centre employees answer client questions around policies and procedures for products and services administered by other branches (Internal Report, 2017). Since the call centre is the first point of contact, it serves a critical role in helping Organization X achieve its vision, mandate, and goals.

The problem of practice (PoP) focuses on the call centre's current lack of consistency in how it delivers learning resources to employees. Since Organization X is a learning organization, it is expected to provide learning support for its employees; and at the call centre, this is through a formal learning process (Lipshitz, Popper & Friedman, 2002; Luhn, 2016). The call centre uses the formal learning process to outline procedures and practices for identifying learning trends and distributing learning resources (Internal Report, 2017). This process has the intended goal of centralizing learning resources to ensure that they are delivered to employees when needed (Lipshitz, et al., 2016; Internal Report, 2017). Furthermore, its procedures and practices are how the call centre leadership prepare its employees to provide correct responses to clients.

However, despite the formal learning process, the call centre is unable to meet its goal of providing correct information to its clients (Internal Report, 2017). Moreover, leaders can use their discretion to determine how formal learning resources should be allocated when preparing employees to provide correct information to clients (Internal Report, 2017). Therefore, this organizational improvement plan (OIP) looks to answer the following question: how can the call

centre improve its formal learning process so that employees have access to appropriate learning resources when needed?

The call centre embodies a conservative organizational culture and uses authority-compliance as its leadership style. The OIP uses transformational leadership principles to transform the call centre and presents a context through organizational systems theory. From organizational systems theory, the call centre is the system, it has three sub-systems with a total of 15 sections that make up the sub-systems (Jones, 2013; Kast & Rosenzweig, 2017). This theory suggests that when a system is impacted by its environment, it will prepare to respond by outputting its own impact onto that environment (Jones, 2013; Kast & Rosenzweig, 2017). The environment that is impacting the call centre is its clients and the changes to the types of questions they asked. The call centre system's parts have been unable to prepare the system to output correct information onto that environment (Jones, 2013; Kast & Rosenzweig, 2017).

The OIP identifies the problem, defines the desired end-state, and devises a solution to transform the call centre so that it is prepared to output correct information. The change plan considers the organization's cultural values, the importance of the formal learning process, and the organizational hierarchy to implement an appropriate change process. The proposed plan uses Cawsey, Deszca and Ingols's (2016) change path model to outline the stages of the change process. The chosen solution focuses on changing the formal learning process to better prepare the call centre's employees for responding to changes in client questions.

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Chapter 1: Introduction and Problem

Organizational Context

Canadian businesses who seek assistance managing their business administrative activities currently use pro bono services from for-profit and not-for-profit institutions, as necessary. Generally, such business administrative services include but are not limited to completing, reviewing, and providing guidance for the maintenance of business schedules, records, and payroll and accounting services (Internal Report, 2017). The institutions that provide these services generally do so via telephone through a call centre, in person via appointment, or via paper and electronic correspondences (Internal Report, 2015; 2017). These types of business administration services are generally applicable to all sectors of the Canadian economy (Internal Report, 2017). Organization X is one of such institutions that provide these business administrative services to Canadian businesses as a not-for profit institution (Internal Report, 2015; 2017). As is the case with many not-for-profit institutions, Organization X receives all its revenue from public funding sources and citizens (Internal Report, 2017). Therefore, the organization must remain a competitive and reputable choice for the business community to continue receiving its funding.

Although the business community can choose whom they utilize for business administrative services, Organization X has been and remains a first choice in the business community because of its trusted reputation (Internal Report, 2013; 2015). However, with growing availability of information on the internet, Organization X has found itself in a position where its trusted reputation has been called into question (Internal Report, 2017; Internal Quality Report, 2016; 2017). More specifically, the business community it serves is calling into question

the accuracy of the information provided to them by employees at the call centre of Organization X. As a result, Organization X is left focusing on how to transform its internal organization to remain a trusted and relevant source of information for the communities it serves (Internal Report, 2013; 2015).

Since Organization X receives all its revenue from public funding and Canadian citizens, program revenue is influenced by the volume of incoming calls made from the business community it serves. More specifically, Organization X requires that the business community's representatives contact the call centre about their related business administration questions regularly (Internal Report, 2017). This dependence represents a positive linear relationship between the number of calls answered and the amount of funding provided to the call centre for subsequent years (Internal Report, 2015; 2017). However, in the recent past, the Canadian business community has expressed concern over the accuracy of information they have received from employees at the call centre (Internal Report, 2017).

Organization X is in a position where it is providing a service to a specific population (the Canadian business community), and this population can receive similar services from competitor institutions (Internal Report, 2015). Furthermore, Organization X has been made aware of the community's concerns about the accuracy of information received from call centre employees (Internal Report, 2015). Therefore, to remain relevant to the community it serves, it must address the issue about the accuracy of information provided by the call centre employees.

Vision, mission, purpose, values, and goals

The organization is a large multifaceted institution with a vision of accurately servicing managing its clients' needs in a timely manner (Internal Report, 2015; 2017). Its purpose is to

provide business administration services free of charge to those who need it within the business community (Internal Report, 2015; 2017). The call centre within Organization X has a mission to respond correctly to questions received from the business community it serves (Internal Report, 2015; 2017). The aim is to fulfil these goals while upholding the values of integrity, respect, courtesy, and professionalism when communicating with clients and employees (Internal Report, 2015; 2017).

Within Organization X, the call centre's goal is to correctly answer questions it receives in a timely manner (Internal Report, 2015; 2017). Organization X also recognizes that to stay current and informative it must provide the employees and leaders with the appropriate tools to support ongoing learning (Internal Report, 2015; 2017). Moreover, Organization X has a strategic goal of maintaining and improving its status as a learning organization (Internal Report, 2015). This involves ensuring that employees have the appropriate on-the-job resources (such as equipment and manuals); access to learning resources (such as trainers and coaches); and learning materials (such as document guides), to provide accurate and timely responses to clients (Internal Report, 2015).

The call centre hierarchical leadership structure

Earlier I mentioned that Organization X is a large multifaceted organization, and the call centre is one of the branches within the organization. The call centre plays a unique role in connecting Organization X to its clients. The services that Organization X provides require that clients contact the call centre via telephone, electronically, or by mail to ask questions about how to apply policies and procedures related to business administration (Internal Report, 2015). These policies and procedures are delivered and monitored by other distinct branches within this large multifaceted organization (Internal Report, 2015). The information about branch specific policies

and procedures are then disseminated through to the call centre and used to identify learning priorities which will prepare the employees to answer related questions (Internal Report, 2015).

A large multifaceted organization is best suited with a hierarchical leadership structure that is represented through control of decisions and information (Keidel, 1995). Since Organization X is made up of many distinct departments and branches with different responsibilities, the decision-making process has a trickle-down effect. The decision making is controlled at the highest leadership levels, and information is disseminated downward (Keidel, 1995; Cameron & Quinn, 2011). A hierarchical leadership structure that reinforces control helps to coordinate responsibilities for various departments in large multifaceted organizations (Keidel, 1995; Ganesin & Bonaker, 2003; Pearce & Sim, 2002; van der Voet, 2015; Eti-Tofinga, et al., 2018). The emphasis on control in this hierarchical structure is further replicated within the branches and departments. Ganesin and Bonaker (2003) and Cameron and Quinn (2011) noted the need and typical requirement for branches to mimic the same leadership structure as the rest of the organization. As one of the branches that form Organization X's large multi faceted institution, the call centre also uses the same hierarchical leadership structure. The decisions about the call centre are made at the top leadership levels and information is delivered downward. Figure 1.1 displays the call centre's hierarchical structure.

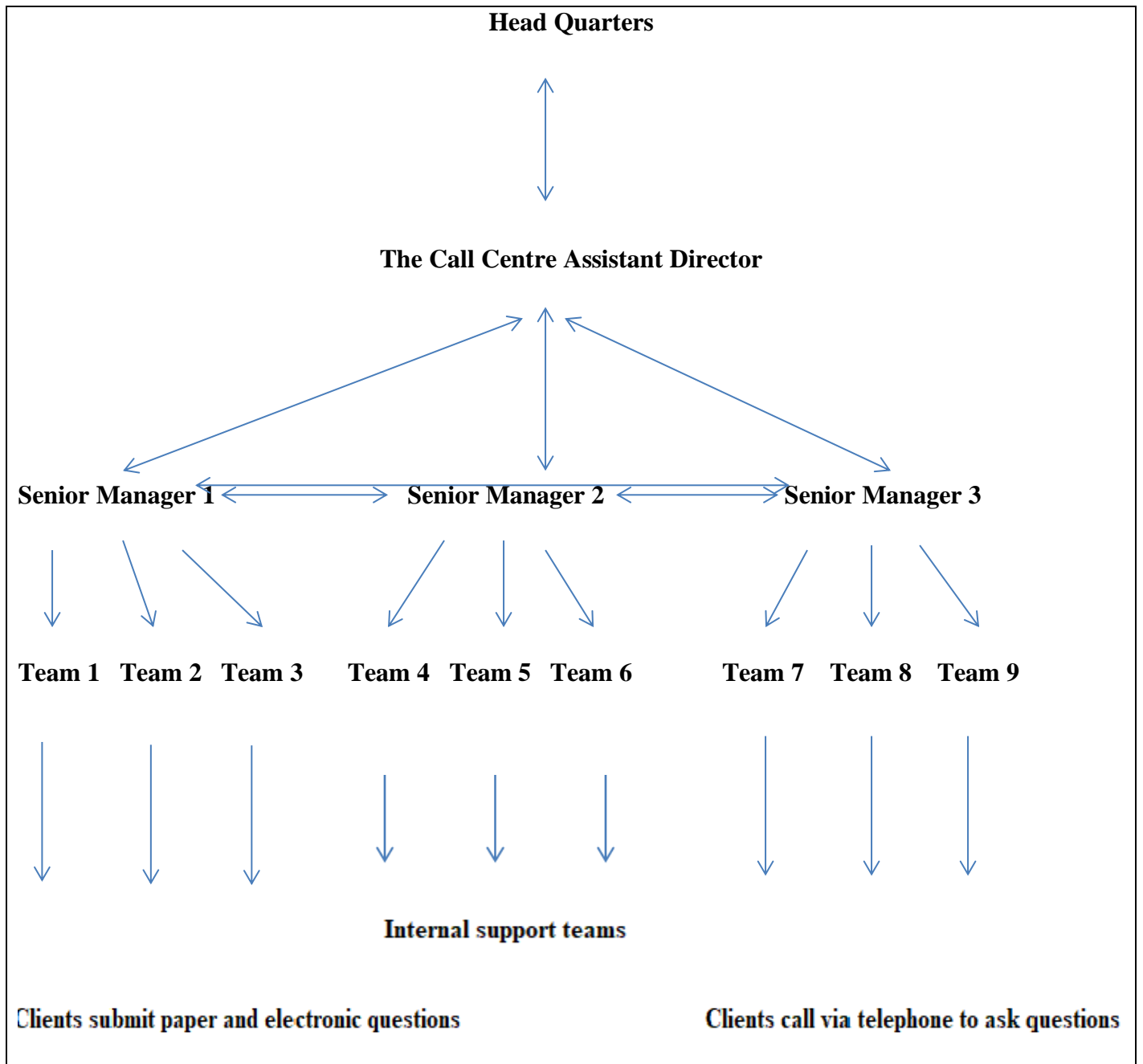


Figure 1.1. The call centre's hierarchical structure. The arrows represent the direction of information.

The executive level leadership of each branch within Organization X works together to make decisions for new policies and procedures (Internal Report, 2015). Once finalized, it is these policies and procedures that call centre employees will ultimately follow to answer client

questions (Internal Report, 2015). Representing a hierarchical leadership structure, the subsequent decisions are passed onto the senior level leaders at the call centre. The information is used to make independent decisions about how to manage their respective programs (Internal Report, 2015). Then the decisions are forwarded to the lower level leaders, who use it to make their own decisions for their respective teams (Internal Report, 2015). Finally, the call centre employees follow the direction from their respective lower level leaders (Internal Report, 2015). The flow of information and decision making generally occurs in a downward direction with each leader making their own decisions before disseminating instruction.

Organizational learning practices

The call centre acts as the first point of contact for Canadian businesses that are looking to gain guidance about business administrative services (Internal Report, 2015; 2017). Its employees communicate with these businesses by answering incoming calls or responding to correspondences about business administrative services (Internal Quality Report, 2017). The call centre's goal is to answer these calls correctly (Internal Report, 2015; 2017).

Historically, employees were hired to the position of a call centre employee with minimal consideration for education or customer service experience related to the duties of the position they would occupy. These employees were provided learning support for a position that they would hold for many years (Internal Quality Report, 2013; 2015). The learning support was assumed to prepare employees to achieve the goal of answering calls correctly for a position they would hold for several years. During the past decade, although the hiring practices have remained the same, employees are less likely to remain within the same position for many years (Internal Quality Report, 2016). This is because many branches within Organization X complete much of their hiring from within the organization, and typically value the experience of

professionalism and promptness that call centre employees possess (Internal Quality report, 2016). Additionally, due to the complex nature of the job, employees typically master the duties within 18 months (Internal Quality Report, 2016). However, because of attrition and the length of time to mastery, the call centres are required to hire for attrition each year. The result is a significant portion of telephone employees who have not reached mastery in their duties (novices) (Internal Report, 2015; 2017).

The term learning organization is used to refer to the formalized learning systems of people within the organization that implement formal learning processes (Lipshtiz et al, 2002; Luhn, 2016). Organization X and the call centre can be called a learning organization because they actively promote learning and provide considerable resources for their employees (Brookfield, 1996; Nilsen & Puro, 2005; Bootz, 2010; Hedden, Worthy, Akins, Slinger-Friedman & Paul, 2017). In following with the process of a learning organization, the needs for learning resources are determined by comparing employee feedback surveys with client feedback surveys, identifying trends, and disseminating the information to the respective branches (Internal Report, 2015; 2017). Once disseminated to the call centre, these trends are further categorized into question topics and types (Internal Quality Report, 2017). Then, the information about question topics are used by the leaders to plan how to allocate learning resources in preparation for a variety of potential question types on that related topic (Internal Report, 2015; 2017).

Once decisions are made, lower level leaders use their discretion to determine how and when to allocate learning resources such as trainers, coaches, and learning time to review guides and manuals within their respective team (Internal Report, 2015; 2017). The expectation is that

learning resources allotted will provide an explanation of principles and basic concepts for the question topic. This will prepare employees for the variety of question types they will encounter for the respective topic (Internal Quality Report 2016; 2017). Historically, this approach sufficiently prepared employees to answer the expected types of questions posed by callers (Internal Quality Report, 2017). However, for the past decade callers are less likely to ask general questions related to basic concepts, and employees are more likely to provide incorrect responses (Internal Quality Report, 2017). Figure 1.2 show the changes to the correct responses over the past decade, and in 2016, the rate of incorrect responses reached 26%.

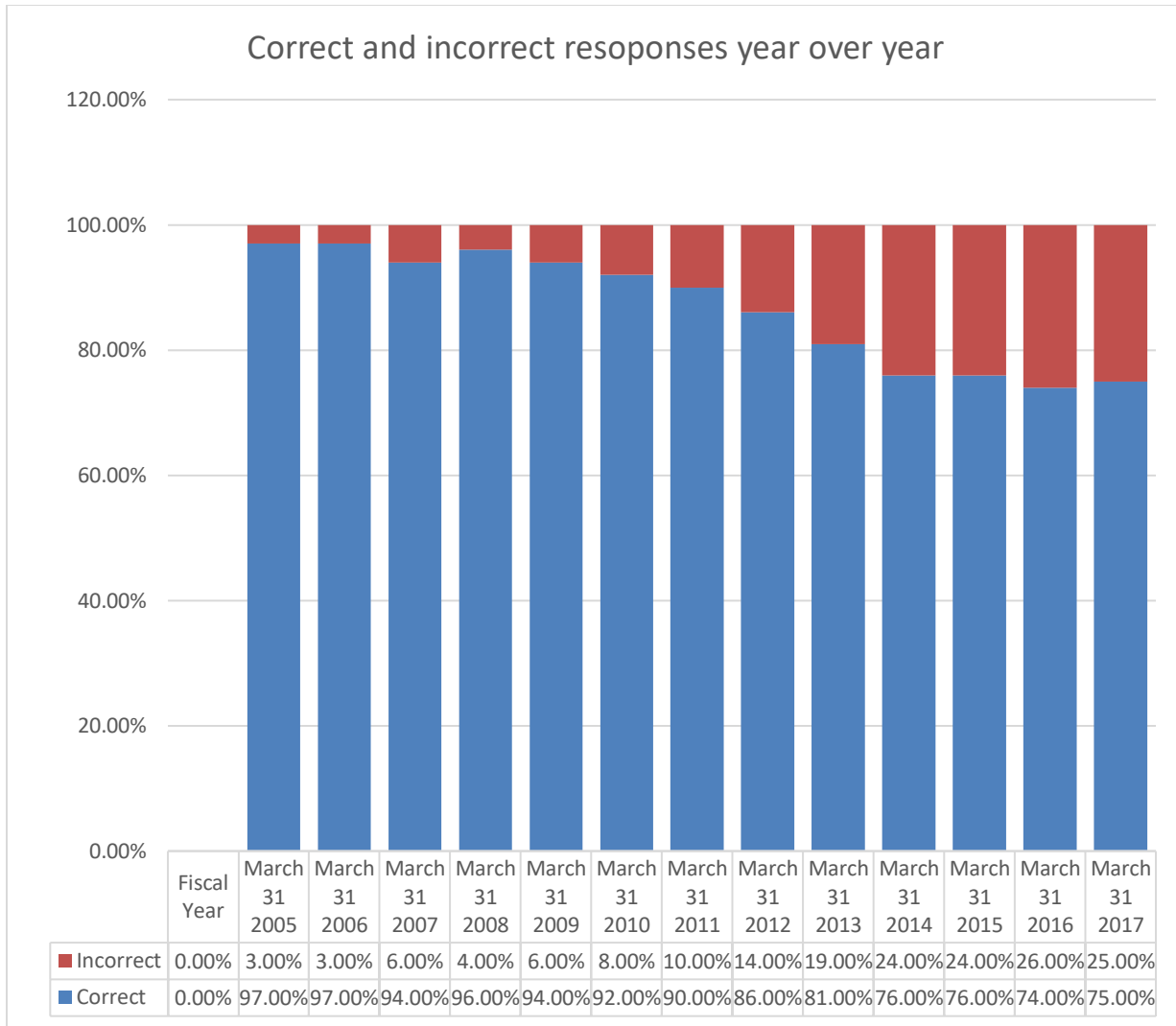


Figure 1.2. 12 Year comparison of correct response rates. It shows the Internal Quality Report survey results for the period of 2005 to 2015 (Internal Quality Report, 2017).

The rate of incorrect responses increased year after year, and business representatives use online tools to answer their general questions. Therefore, they only contact the call centre when they require an understanding of how the related principles and concepts apply in a more complex setting for the same topic (Internal Quality Report, 2017). The call centre conducts regular reports, and their analysis shows the 10 most common calls employees received during a 24-month period. A comparison between the periods of time of 2005-2007 and 2013-2015

revealed that the topics of the calls remained consistent, but the types of questions asked were increasingly more complex (Internal Quality Report, 2017). Figure 1.3 shows a comparison of question types by topic. Lipshtiz et al. (2002) and Luhn (2016) noted that an effective learning organization provides relevant learning support for employees when necessary. The call centre provides learning support for question topics, although question types have become increasingly complex over time.

Topic	Question type Year 2005-2007	Question type Year 2013-2015	Difference in for question type complexity
Payroll	“What is the current minimum wage rate for my province?”	“I’ve read the labour laws, and it appears that the location of headquarters determines the minimum wage for employees. What is the legal definition of headquarters?”	Topic of minimum wage remains; however, since the wage rates are readily available online, the questions become more complex, in this case around definitions.
	“What is the difference between hourly wages and salaried employees?”	“I have read the legal definition for hourly and salaried employees, but it does not exclude the option for rotating between the two for the same employee. Is this possible?”	Topic for the difference between salary and hourly wages is readily available, the question become more complex about how to appropriately apply each.
Research grants	“What are the different types of scientific research grants for which I can apply?”	“I’ve applied for a scientific research grant, and I must spend a certain amount on employee equipment, I would like to understand if the legal definition of employee equipment includes work shoes.”	Topic was about a type of grants, this information is readily available, now the topic has shifted specific interpretation of details within the grant.
	“My client would like to know if his small business is eligible for a small business grant.”	“My client would like to apply for a small business grant, and the legal definition of an automobile does not exclude food trucks, because it can be used to transport people. Is this a correct interpretation?”	Topic was about a type of grants, this information is readily available, now the topic has shifted specific interpretation of details within the grant.

Figure 1.3. Comparison for the change in complexity of calls. It shows examples of Internal Quality Report survey questions for the years 2005 and 2015 (Internal Quality Report, 2015).

Therefore, as a learning organization, the call centre's hierarchical structure has historically used business trends to determine learning needs and team leaders use their discretion to distribute learning resources to the employees. However, over time, the types of questions clients pose have become more complex, even though the topics have remained unchanged.

Leadership position and Lens statement

Like many large multifaceted institutions, Organization X utilizes a Head Quarters (HQ) to oversee each branch (Internal Report, 2017). I occupy the role of a learning consultant within Organization X at HQ. My responsibilities are to examine learning environments, identify departmental learning needs, and provide guidance and direction to departments about how to improve learning (Internal Report, 2017). This includes, providing direction and assistance in building an effective learning environment by developing formal learning processes. Such learning processes include learning networks, courses and manuals, and learning activities to ensure employees are prepared for their duties (Internal Report, 2017). Working from HQ, my position and responsibilities as a leader require that I examine the call centre's working and learning environment and provide specific direction for learning strategies to improve the accuracy of information provided to callers (Internal Report, 2017).

Transformational Leadership position

A transformational leader can transform an organization from within, by inspiring employees to follow the new vision (Wang, Law, Hackett, Wang & Chen, 2005; Northouse, 2016; Pasha, 2017). Although I occupy a position within HQ and outside of the call centre, I am in a unique position where I can transform the call centre from within by transforming the formal

learning process. Since my position requires that I provide leadership in the form of giving direction about learning strategies (Internal Report, 2017), I can create a vision for how transforming the formal learning process can transform the call centre.

Northouse cited the results of Bennis and Nanus' (1985) study where they noted that transformational leaders "...involve themselves in the culture of the organization and help shape its meaning." (Northouse, p.176, 2016). Also, these leaders rely on relationships to influence and inspire their followers (Wang, et al., 2005; Northouse, 2016; Pasha, 2017). I spent over 10 years at Organization X working within the call centre and held all positions before my transition to HQ. During that time, I have built working relationships with call centre leaders and employees. Pasha (2017) noted that transformational leaders who inspire employees do so by building relationships and communicating a message personally relevant to employees. My experience working within the call centre gave me a unique vantage point to consider the challenges and benefits of each position when communicating change. It is these strong existing relationships that provide a context for captivating an audience and applying appropriate methods of communication (Boga & Ensari, 2009; Carter, Achilles, Armenakis & Mossholder, 2013).

My existing working relationships with the call centre leaders and my current position as a leader in learning are the basis for a transformational leadership position. The call centre recognizes that it is not meeting its mandate of providing correct information to its clients (2015; 2017). Furthermore, the call centre provides learning resources for its employees, but the leaders use their discretion when allocating these resources (Internal Quality Report, 2013; 2015). My leadership position is to transform the call centre into an organization that provides correct response to its clients, by changing the formal learning process for how the employees learn.

Authority-compliance, the established organizational leadership practice

Organization X holds an authority-compliance approach with regards to how it manages its organizational structure, and this includes training and learning provided to employees. This approach relies heavily on recognizing and utilizing positional power (Boyle & Whitaker, 2001; Tanner, & Otto, 2016). Within a hierarchy, positional power can be defined as an ability to influence subordinates' behavior because of one's position (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Northouse, 2016). It is positional power that significantly influences one's ability to enforce change within the organization (Boyle & Whitaker, 2001; Tanner, & Otto, 2016). Middle level leaders typically occupy a unique role that includes following instructions and exerting influence to comply others to follow instruction (Floyd & Wooldridge, 1992). This mid-level hierarchical position allows these individuals to "...have the potential to exert both upward influence on top [leaders] and downward influence on [operations]." (Kealy, p.2, 2013). Middle level leadership has been typically held for leaders that exert influence on lower level leaders (Kealy, 2013). At the call centre, lower level leaders exert upward influence and use their discretion to make decisions for their respective teams. Therefore, within this context, they too can be categorized as middle level leaders.

At both the organizational and call centre levels, employees wait for directions from those with positional power and typically attempt to follow direction without wavering (Boyle & Whitaker, 2001; Ashikali & Groeneveld, 2015; Chang, 2015). In practice, the call centre follows a strict hierarchical compliance-to-authority structure, and the senior level leaders reinforce this by taking and following orders provided by higher level leaders at HQ. The day to day practice for implementing strategies can be summarized as senior and lower (middle) level leaders, who have positional power, seeking instructions from those (at HQ) with more positional power; then,

use their positional power to follow and relay instructions downward accordingly (Boyle & Whitaker, 2001; Ashikali & Groeneveld, 2015; Chang, 2015). A transformational leader must “involve themselves in the culture of the organization...” (p.176) to understand the employees and their roles (Northouse, 2016). As a transformational leader who holds positional power and is immersed within the organization, I understand that a part of influencing change requires working within the existing culture.

Consistent with the authority compliance approach, hierarchical approval for change must be steadily supported with an overwhelming need identified by the business community that uses the services (Gianesin & Bonaker, 2003; Hendry, Frommer & Walker, 2006). In the case of the call centre, the business community has renewed its concerns about the accuracy of responses received (Internal Report, 2017; Internal Quality Report, 2016; 2017). Thus, the hierarchical leadership recognizes Organization X’s mandate to provide accurate information to clients in a timely manner and the call centre’s role in achieving this goal.

As I mentioned earlier, with a hierarchical structure, decision-making and messaging is controlled at the top of the hierarchy to manage the dissemination of policies (Gianesin & Bonaker, 2003; Hendry, et al., 2006). Therefore, this structure requires an approach to change that considers and accounts for the policies and procedures that are currently in place to sustain and manage the hierarchy (Boyle & Whitaker, 2001; Tanner & Otto, 2016). Following the hierarchical structure, the call centre’s senior level leaders provide recommendations to HQ and the latter make the decisions about the call centre’s practices (Boyle & Whitaker, 2001; Tanner & Otto, 2016). Following authority-compliance leadership approach, those leaders follow the direction provided downward (Boyle & Whitaker, 2001; Tanner & Otto, 2016). Kealy (2013)

found that while synthesizing strategy, middle level leaders demonstrate a beneficial upward influence. Meanwhile, Floyd and Wooldridge (1992) and Salih and Doll (2013) found that middle level leaders were most inspiring in delivering downward instructions when included in the consultation process. One can conclude this is likely a result of the impact of having the day-to-day reality of middle level leadership included in the strategic plan. As a transformational leader, I recognize that the call centre leaders make decisions about how learning is applied based on their day-to-day reality. Including the middle leaders in the strategic process can increase the likelihood that these leaders will use their positional power to inspire compliance of the change process downwards.

The organization's overall approach to managing its learning resources cannot be ignored when looking at how to manage change to meet the needs of the population it serves. As a learning consultant, I am an external leader who occupies positional power to influence change at the call centre (Gianesin & Bonaker, 2003; Hendry, et al., 2006). Although my positional power is necessary in a hierarchical authority-compliance environment like the call centre, it is most impactful if the change strategy includes collaboration from senior and lower (middle) level leaders (Floyd & Wooldridge, 1992; Kealy, 2013; Salih & Doll, 2013). Most notable to include is the impact of upward feedback about the reality of how lower level leaders manage their responsibilities of allocating learning resources while managing competing priorities.

Structural theoretical Lens and lens statement

As a change leader my leadership position focuses on transforming the call centre by using the existing leadership structure and working within it to change the way employees learn. My transformational leadership position is best explained through a structural lens that examines

and uses the top down hierarchical structure to transform the call centre by changing formal learning process (Cameron & Quinn, 2011; Bolman & Deal, 2013). A structural lens affords me the opportunity to examine how Organization X and the call centre use the hierarchy to make decisions, disseminate information and promote compliance (Bolman & Deal, 2013). The structural lens examines how positional power influences messaging and the direction of information downward (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Bolman & Deal, 2013).

At the call centre branch, positional power is demonstrated with the senior leadership team that provides information to HQ and contributes to the decision-making process, before disseminating the information downward (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Bolman & Deal, 2013). Furthermore, positional power is also demonstrated through the lower level leaders who provide instruction to the employees (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Bolman & Deal, 2013).

The structural frame also represents a lens that examines the vertical and horizontal direction of information to improve the formal learning process (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Bolman & Deal, 2013). In this case, the vertical direction of information focuses on the top down process for disseminating information (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Bolman & Deal, 2013). Meanwhile, the horizontal direction focuses on information sharing at the same level (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Bolman & Deal, 2013). The horizontal direction of information is essential because of lower level leaders that use their discretion when allocating learning resources. Transformational leaders ensure that everyone understands "...their role and how it contributes to the greater purpose..." (Northouse, p.176, 2016). Understanding the roles within the vertical direction of information allows me to

consider the horizontal relationship among lower level leaders. The examination of both vertical and horizontal dissemination of information provides a complete structural lens. My leadership lens statement is to improve the formal learning process by examining the structure of the call centre to identify the leadership groups with positional power to help influence and create change.

Leadership Problem of Practice

The call centre acts as the primary point of contact for clients to communicate with the various branches and departments that form Organization X (Internal Report, 2015; 2017). The accuracy of information delivered by call centre employees has social and political implications for Organization X as a whole and the business community it serves. The social and political implication are rooted into the accuracy of information provided to businesses who can choose to receive the same services elsewhere (Boyle & Whitaker, 2001; Chang, 2015; Feng, Huang, & Zhang, 2016).

As it stands, Organization X is recognized as a reliable cost-effective source for accurate and timely financial information important to Canadian businesses (Internal Report, 2015). However, at a macro level, Organization X is providing a service that can be obtained through many other institutions (Boyle & Whitaker, 2001; Chang, 2015; Feng, Huang, & Zhang, 2016). To remain competitive, Organization X must ensure that the call centre provides correct responses in a timely manner (Boyle & Whitaker, 2001; Chang, 2015; Feng, et al., 2016). Therefore, each incorrect response provided from the call centre decreases Organization X's social standing as a trusted reliable source for accurate and timely information. Furthermore, since Organization X operates as a not-for-profit organization, the political implications for

incorrect responses may be seen through reduced funding for future services (Boyle & Whitaker, 2001; Chang, 2015; Feng, et al., 2016).

Organization X and the call centre are a learning organization, with a vertical hierarchical structure (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Cameron & Quinn, 2011; Bolman & Deal, 2013). The call centre's senior level leaders provide input about the branches learning needs and HQ uses this information to make decisions for funding (Internal Report, 2017). Moreover, the call centre's senior level leaders recognize that the existing formal learning structure and process no longer meet the learning needs of the employees (Internal Report, 2017).

Leadership Problem of Practice

This problem of practice addresses the lack of consistency in the process of how formal learning support for employees in the call centre is delivered. Organization X employed a learning consultant who examines the efficacy of the formal learning process for call centre employees and provides direction to executive and senior leaders (Internal Quality Report, 2017). The call centre's lower level leaders have autonomy and use discretion to decide how and when to distribute learning resources to their employees (Internal Quality Report, 2017). These lower level leaders use their discretion to balance their employees' learning needs with the requirement to answer the required number of calls and monitor compliance (van de Voet, 2016; Internal Quality Report, 2017). The senior leaders deliver information about learning trends to lower level leaders. The lower level leaders use that information to determine when and how to allocate learning resources to support their employees. Internal employee feedback surveys revealed that employees bring forward learning needs to their leaders and are provided with learning support but continue to provide incorrect responses (Internal Quality Report, 2017).

How can the call centre improve its formal learning process so that employees have access to appropriate learning resources when needed?

Framing the Problem of Practice

Over the decades clients that utilize Organization X's business administration services have become more reliant on using technological resources, like the internet, to answer their general questions about administrative policies (Internal Report, 2017; Internal Quality report; 2017). Then, these clients contact Organization X's call centre for complex questions where the answer is not clearly explained online (Internal Report, 2017; Internal Quality report; 2017). As a result, although the topics of questions have not changed, the complexity of the type of those questions has increased (Internal Report, 2017; Internal Quality report; 2017).

Organization X, the call centre, and their clients have acknowledged that the branch has been unsuccessful at meeting its goal of providing correct responses to callers in the business community (Internal Report, 2017; Internal Quality report; 2017). It also recognizes that the existing formal learning process may no longer be sufficient to prepare employees for the types of questions they receive from clients (Internal Report, 2017; Internal Quality report; 2017). Lastly, the hierarchical structure places decision making about how to use learning resources provided by HQ on the senior and lower leadership levels at the call centre. Therefore, since the call centre recognizes its need to improve the how learning is distributed to meet its goal, examining the organizational structure as it relates to learning is necessary for improvement.

The call centre through organizational system theory

Organizational systems theory was built as a bridge between explaining organizations through systems theory and examining approaches to analyze the organizational process (Jones,

2013). The organization can be considered as a system which has various components (parts or units) with a specific function that work together to achieve a goal (Jones, 2013; Kast & Rosenzweig, 2017). While examining the organization, this theory utilizes three perspectives; one of such is open systems perspective to organizations. Considering the role of systems, this perspective focuses on three significant components of an organization, the specificity of the organization's goals, the environment the organization influences and is influenced by, and the formalization process for how the organization achieves its goal (Jones, 2013; Kast & Rosenzweig, 2017). To summarize, an open organizational system examines the environment that influences the organization, the organization's desired output (or influence onto the environment), and the formalization process of achieving the system's output (or goals) (Jones, 2013; Kast & Rosenzweig, 2017).

Within Organization X, the call centre has these three significant components that represent the call centre as a system. For the call centre, the environmental influences are the types of questions received from the business community. The call centre's desired output is to positively influence its environment by providing correct information to the questions posed by the business community. Lastly, the formalization process of achieving the call centre's output is represented by the call centre leadership structure that makes decisions about how the goal of providing correct information is achieved. Like a system, these three components impact each other (Jones, 2013; Kast & Rosenzweig, 2017). Like within an open system, the environment impacts the system, the system responds to that impact, and changes its impact on the environment (Jones, 2013; Kast & Rosenzweig, 2017). The call centre as a system is impacted by the change in the quality of questions posed by the business community (Jones, 2013; Kast & Rosenzweig, 2017). As a system, the call centre is working to improve the formalization process

of how it provides correct information to the business community, with the goal of ensuring that call centre employees provide correct information to its clients (Jones, 2013; Kast & Rosenzweig, 2017).

Therefore, following organizational systems theory and the open systems perspective, we can examine how the call centre is impacted by, and works to impact its environment. Like a system, the call centre outputs onto its environment, through its specified goal of providing correct information to its clients (Jones, 2013; Kast & Rosenzweig, 2017). Historically, the call centre system achieved its specified goal through a formalized process of functions. The functions consisted of sections and their various leaders who made decisions about how to contribute to the call centre's specified goal (Jones, 2013; Kast & Rosenzweig, 2017).

The formalization process of a system can be described as an open system with many parts or units that work together to complete the systems specified goal (Jones, 2013; Kast & Rosenzweig, 2017). When examining the internal organizational structure, the call centre's units or parts can be categorized into three units or major components of the system (sub-systems). The three sub-systems are represented through the senior management level. The call centre has three senior level leaders who each separately manage a program, and these three programs make up the three sub-systems that together impact the system's ability to achieve its output on the environment (specified goal) (Jones, 2013; Kast & Rosenzweig, 2017). These three sub-systems have their own subsystem goals that directly contribute to the organizational system's specified goal (Jones, 2013; Kast & Rosenzweig, 2017). The three sub-systems are made up of several parts (or sections) that are led by lower level leaders who are all working to achieve their subsystem's goal.

To summarize, the call centre as an organizational system, uses its formalization process to achieve its goal of impacting the environment by providing correct information to its clients (Jones, 2013; Kast & Rosenzweig, 2017). The call centre's formalization process is composed of many units and parts that are represented as three sub-systems (Jones, 2013; Kast & Rosenzweig, 2017). Each sub-system is comprised of many sections that work to achieve the sub-system's goal and contribute to the system's specified goal of providing correct information to its clients (Jones, 2013; Kast & Rosenzweig, 2017). The parts that make up the sub-systems will be referred to as sections, and these sections are run by lower level leaders. These lower level leaders each manage a team of telephone or correspondence employees who answer the questions posed by the business community.

The call centre's internal system

Organization X and its call centre is a learning organization that is best described as an organizational system. Organizational systems theory provides considerable context to the organization's structure because it is rooted in systems theory (Jones, 2013; Kast & Rosenzweig, 2017). Furthermore, organizational systems theory also considers an open systems perspective which encompasses the call centre's context (Jones, 2013; Kast & Rosenzweig, 2017). As is the case with a open systems perspective, the specified goal at the call centre is to provide correct responses to questions posed by the business community it serves, and the formalized process to do this is made up of the departments and teams that provide this formalization (Jones, 2013; Kast & Rosenzweig, 2017). Over the years, the historical process of the formalized learning practices and types of questions posed by clients has not prepared employees for providing correct responses. Therefore, the call centre is no longer achieving its specified goal.

The symbiotic relationship between the open system and its environment

The call centre's internal system works to impact its environment by providing responses to questions posed, and the environment impacts the system by increasing the complexity of the question type (Jones, 2013; Cawsey, et al., 2016; Kast & Rosenzweig, 2017). The mutual impact of the system on its environment can represent a symbiotic relationship (Velenturft & Jensen, 2016). In this case, the system and its environment experience an interdependence, that "...is essential to the development of [the] relationship." (Velenturft & Jensen, p.700, 2016). Velenturft and Jensen (2016) explain that each species must have a goal for, and equally benefit from the symbiotic relationship.

Although mutual symbiosis is typically described in the context of species, Velenturft and Jensen (2016) applied the concept to an industrial organizational system. They did so because the foundation of this concept is one where both parties depend on each other for essential elements, up to and including survival (Velenturft & Jensen, 2016). Both parties directly impact each other while extrapolating the resources they need (Velenturft & Jensen, 2016). The call centre represents one party that has the goal of extrapolating funding from the other party, and this funding is necessary for survival. The Canadian business community represents the other party, with the goal of extrapolating specialized knowledge necessary for its survival. Hence, for a mutually effective symbiosis, the call centre's internal system's parts must work together to provide correct responses for extrapolation by the business community.

In summary, the call centre is impacted by its clients because the clients are posing complex question types. The call centre impacts the clients by providing incorrect responses to their questions. Historically, the call centre and its clients have a symbiotic relationship where

they depend on each other for necessary resources. The call centre's specified goal is to provide correct responses, and the goal of the business community is to fund Organization X because it provides correct responses to related questions (Internal Report, 2015; 2017). If the call centre is impacting the business community by not meeting its specified goal of providing correct responses, the business community will not receive the mutual benefit from the symbiosis (Velenturft & Jensen, 2016). Therefore, the call centre's internal system must work to improve its impact on its environment.

The call centre's internal system is its parts (departments) and units (sections) (Jones, 2013; Kast & Rosenzweig, 2017). Decisions about learning trends and distribution of learning resources occurs within an authority compliance hierarchical structure. Furthermore, client question topics have remained consistent, but the types of questions have become more complex (Internal Quality Report, 2017). However, the formal learning process within the hierarchical structure has not changed. Therefore, it is important to pay close attention to the existing hierarchical structural as a frame to examine how to change the formal learning processes. With the existing structural frame in mind, I have explained other frames to identify the most appropriate method of presenting, gaining support, and compliance for implementing a change plan.

The Human Resources frame

With the Human Resources (HR) frame, the emphasis is on how employees are completing their duties, and how efficacy can be improved by considering the individual or group needs (Lepak & Snell, 1999). It examines the type of duties, the skill set of the employees, the learning resources (trainers and coaches) available to the employees, and how these elements interact (Bolman & Deal, 1991; 2013). At the call centre, the human resources are the lower

level leaders. They work independently to manage the human elements (employees and their trainers and coaches) to provide direction for how these elements interact with each other.

Lepak and Snell's (1999) study of human capital allocation noted that the organization's goals can be understood and further applied to various departments by understanding the requirements of the duties, the actual capabilities of the employees, and learning resources available to meet the goals. According to Lepak and Snell (1999), the lower level leaders will also need to consider the actual capabilities of the employees by considering their level of experience before deploying learning resources.

Rogers and Wright's (1998) article discussed the effectiveness of human resources within organizations and recognized the importance of identifying the specific skills necessary to complete duties. The problems identified within the call centre are related to the effectiveness of how employees answer calls. From the HR frame, leaders would examine the impact between how the employees complete their duties (the steps taken to provide a correct answer), their skill sets (the level of knowledge), capabilities, and the resources available to assist employees (the trainers and coaches that deliver learning) (Rogers & Wright, 1998). Leaders who examine the organization through this frame may gain a strong understanding about the interconnected relationship between the skills necessary for completing duties with the actual skills employees possess and how the resources impact this relationship (Rogers & Wright, 1998; Vandenberg & Lance, 2000). As a result, the leaders can focus on identifying the skills and capabilities of the current employees and how these attributes effectively align with the skills required for the job.

Some benefits of this approach are that leaders may easily recognize gaps in skills and can consider strategies about how to address such gaps while developing new or existing employees

(Rogers & Wright, 1998; Vandenberg & Lance, 2000). Although the HR frame can provide leaders with a great deal of insight into the human element of the workforce, this frame has its limitations; most notably Bolman and Deal's (2013) suggested assumptions associated with it. One of such assumptions is that the leaders will have resources needed to identify, address and support employees to ensure the success of the organization's goals. The call centre currently recognizes that it is not meeting its specified goal (Internal Report, 2015; 2017). Since a symbiotic relationship exists between the call centre and the business community, it is reasonable to assume that the call centre will contribute the appropriate human resources (trainers and coaches) to maintain the symbiosis. However, despite the likelihood that resources may be allocated accordingly, the call centre may have limited resources in comparison to what may be needed to resolve the problem.

The Political Frame

Bolman and Deal's (2013) political frame considers that in most cases, resources for organizations are scarce, and the hierarchical structure is one that is top down with multiple levels of leadership. This frame would suggest that since the lower level leaders work independently and use their discretion to allocate learning resources, one can assume that work related relationships and exchanges can influence how and when resources are allocated. Furthermore, the call centre is funded exclusively by the business community it serves and related citizens, and the business community acknowledges the lack of correct information received from the call centre (Internal Report, 2017). With this frame, funding may further impact the availability of learning resources for leaders to allocate. Since the financial resources control the human capital and the availability of learning resources, the senior leaders must prioritize all their resources. From this frame, leaders must compete for and trade amongst each

other for learning hours, trainers, and coaches to support their employee's learning (Bolman & Deal, 1999; 2013). Therefore, in these instances, each leader who attempts to exchange favors or services to gain portions of funding or other services would represent a solution for the political frame.

Some assumptions about the political frame is that each leader has the tools to be equally motivated to compete for scarce resources (trainers, coaches, and learning time) (Bolman & Deal, 2013). Although this may be true, at the call centre leaders must have first appropriately identified learning trends before competing for resources such as trainers, coaches, and learning time. This assumption does not address the structural process of how learning trends are disseminated.

Political, Economic, Social, and Technological Factorial Analysis

The call centre utilizes a systems approach to the organizational structure and an authority-compliance leadership approach within the hierarchy. The PoP discusses the lack of consistency in the distribution of learning resources within the formal learning process. The OIP focuses on transforming the call centre by improving the formal learning process so that the employees have the learning resources (such as trainers, coaches, and learning time) needed to answer calls correctly. Furthermore, since Organization X is a not-for-profit institution, the political and social factors that guide the need for change and the change process are impacted by, and have an impact on the business community which the organization serves (Cawsey, et al., 2016).

For the call centre, the leaders are faced with the challenges of determining how and when to appropriately allocate the learning resources to prepare employees for the topics and

types of questions received (Internal Quality Report, 2017). Since the leaders use an authority-compliance leadership approach, and are responsible for allocating and overseeing the human capital and learning resources, they will likely require negotiation, bargaining and other skills to effectively prioritize these resources (Cawsey, et al., 2016). Therefore, the political factors determine which competing issues will take precedence over others (Cawsey, et al., 2016). As a change leader with influence in this environment, I recognize the competing priorities that the call centre faces. In the case of allocation of learning resources, the leaders must also consider the likelihood of the requirement to allocate the limited resources to other priorities outside of learning (Cawsey, et al., 2016).

Furthermore, focusing on the current skill set of the employees, and reinforcing the impact of providing incorrect responses on the organization further highlights the need for prioritizing learning resources when resources are limited. These social factors focus on the affected people (Cawsey, et al., 2016). For the call centre, the issue which is given precedence is the affected people and the business community. In the case of this OIP, the affected people are the employees who are providing incorrect responses to the business community, and the business community who are receiving incorrect information. These social factors considerably influence the likelihood that the organization remains a trusted and competitive institution in the community (Gianesin & Bonaker, 2003).

A symbiotic relationship exists between the business community and Organization X. Moreover, the business community may use other institutions for similar services; to remain competitive, Organization X is motivated to contribute to the economic resources for learning (dollars to pay the trainer, coach, and learning time). Consider Gianesin and Bonaker's (2003)

conservative perspective, which in this case suggests that the business community generates significant revenue in the form of taxes and employment for the community. When the business community collectively believes that they are underserved, this community can choose another party to fulfill that symbiotic relationship. Thus, the business community can resort to paying another business to provide correct responses to business tax and administrative questions.

Cawsey, et al. (2016) states that technological change factors also directly contribute to the change environment for the call centre at Organization X. The role of technology in the modern era has allowed novices within the business community to become more informed before they seek out services from Organization X (Internal Quality Report, 2017). The increased availability of information has left the typical customer asking more complex questions about their original topic (Internal Quality Report, 2017). Therefore, Organization X is not seeing a reduction in calls because of questions answered via the use of the internet. Instead the business community members are asking more complex questions and having more methods for asking their complex questions (Internal Quality Report, 2017). Additionally, cell phones and car speaker phones have made it possible for patrons to contact Organization X at any time to pose questions (Internal Quality Report, 2017). As a result of the technological influences, Organization X needs to adapt to continue to remain relevant within the new technological society. Considering the ever-increasing availability of technology to the business community and the role of technology in the call centre, the change process must effectively consider the impact of ever-changing technology.

The change process for Organization X is heavily influenced by the increased access of technological resources available to the business community. It is also influenced by the affected

employees who are providing incorrect answers and the resources that are available to those employees. Since the senior leaders recognize the problem, bargaining and exchange of services may influence the call centre's ability to regain its function as a whole system (Cawsey, et al., 2016). The organizational change factors discussed in Cawsey, et al. (2016) also examine economic change and how this factor is also influenced by the political, social, and technological factors discussed above.

Gianesin and Bonaker (2003) notes that communities are attracted to resources that are competitively priced and sufficiently meet their needs. Communities are also susceptible to brand power and are more likely to remain loyal over the years to resources that meet their needs (Gianesin & Bonaker, 2003). This is especially important to Organization X because they are currently considered as a reputable business, but one has not been able to sufficiently meet the community's needs. Therefore, every incorrect response delivered (outputted) to the business community negatively impacts the likelihood that Organization X remains competitive. This increases the likelihood of businesses using similar competitor institutions to meet their need. Since Organization X's funding is related to the volume of calls it receives, the economic factor may impact the organization's ability to remain relevant (Gianesin & Bonaker, 2003).

In summary, technology has changed the business community, and although the topics for clients' questions are consistent, the complexity of the types of questions has increased (Internal Quality Report, 2017). This change in question complexity has an impact on the call centre's ability to output correct information about business administrative services (Internal Quality Report, 2017). Although the impact of the business community on the call centre is recognized, the structure and use of human resources related to the distribution of learning

resources to address the issue has not changed. Therefore, the call centre as a system, has been impacted by its environment, and is impacting its environment by outputting incorrect information (Jones, 2013; Kast & Rosenzweig, 2017). The call centre must therefore address the formalized distribution of learning resources before a negative economic impact occurs.

Guiding Questions Emerging from the POP

As a result of the symbiotic relationship between Organization X and the business community, Organization X must meet the needs of its clients to continue to receive funding year after year (Internal Report, 2017). Organizational and change leaders may likely become concerned with having the following questions answered:

- Will a change to the formal learning process improve the accuracy of employee responses?

Earlier, I explained the role of technology and its impact on the symbiotic relationship between the call centre and its clients. I explained that the availability of content on the internet provided clients with a way of gaining answers to typical questions and they now pose more complex questions (Internal Quality Report, 2015; 2017). However, although technology has impacted how clients pose questions, the formal learning process used to prepare employees to answer client questions has not changed (Internal Quality Report, 2015; 2017). In addition, Organization X's hiring practices have also changed which resulted in many more novice call centre employees (Internal Quality Report, 2015; 2017).

Learning organizations adapt to provide regular learning support for employees as their and the organization's needs change (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). A characteristic of a learning organization is a formalization of learning practices within the organization (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). The call centre

utilizes a formal learning process; however, it has remained unchanged while the environment it impacts has changed. As a learning organization, Organization X must adapt its formal learning process to meet the new needs of its employees (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). Therefore, changing the formal learning process, will help the call centre adapt to the changes in its environment.

- Will changing the formal learning process improve how learning resources are distributed?

Keidel (1995) and Cameron and Quinn (2011) explained that large multifaceted organizations benefit from a strict hierarchy. At the call centre, the strict hierarchy distributes information about learning trends downwards, and each leader uses their discretion when distributing learning resources (Internal Quality Report, 2015). Furthermore, although the question types have become more complex, the formal learning process used to distribute learning resources to address questions has remained the same. Okun (2015) argues that efficiency and effectiveness are interdependent, and improving one, increases the likelihood of improving the other. The call centre recognizes that it is not effective in meeting its specified goal of providing correct responses to clients (Internal Report, 2016). Brookfield (1996) noted that learning organizations must adapt to continuously meet their learning needs. Since the formal learning process is the structure that is used to distribute learning resource and it is not preparing employees to answer complex types of calls correctly, the call centre must adapt its formal learning process.

- Will a change to the formal learning process impact existing middle leadership priorities and responsibilities?

Senior and lower level (middle) leaders at the call centre are most effective in delivering a strategic message when they are included in the strategic process (Floyd & Wooldridge, 1992; Kealy, 2013; Salih & Doll, 2013). Strategic consultation typically allows for upward input about day-to-day realities involved in completing responsibilities (Floyd & Wooldridge, 1992; Kealy, 2013; Salih & Doll, 2013). Within the framework of the formal learning process, leaders currently use their discretion about when and how to use learning resources when balancing competing priorities (Internal Quality Report, 2015). Upward input into the strategic process increases collaboration and compliance for strategic change (Floyd & Wooldridge, 1992; Kealy, 2013; Salih & Doll, 2013). Thus, one can assume that upward input into the strategic process of the change plan can minimize the impact of the change on competing priorities.

Leadership focused vision for change

Present and envisioned future state

The current state of the call centre is an open system that is being impacted by a change in the type of questions asked by its clients. Currently, the system's parts are unable to effectively generate correct information to its clients. Thus, the system is not meeting its specified goal of outputting correct responses to its clients (Internal Report, 2017). This is meaningful because the call centre's system has a mutual symbiotic relationship with its clients. Since the call centre is the primary point of contact for the business community and Organization X, the accuracy of responses influences the desire to continue utilizing the services (Internal Report, 2017). Moreover, Organization X is a not-for-profit institution that receives all its funding from the business community and individual clients (Internal Report, 2017).

Within the system are parts that are working to meet the system's specified goal of providing correct responses to its clients (Jones, 2013; Kast & Rosenzweig, 2017). This includes

a formal learning process where information about learning trends and direction about how to address learning trends are disseminated in a downward direction. The formal learning process is the system that is used to prepare employees for answering calls correctly (Lipshitz, Popper & Friedman, 2002; Luhn, 2016). This process is led by senior leaders and implemented by lower level leaders (Internal Quality Report, 2015; 2017). However, despite having a formal learning process to prepare employees for answering calls correctly, the call centre is unable to meet its goal.

The envisioned future state of the call centre is an open system that is impacted by the types of questions its clients pose, and its internal parts are prepared to effectively output correct responses to those clients (Jones, 2013; Kast & Rosenzweig, 2017). The envisioned future state of an effective open system requires a formal learning process that appropriately addresses learning trends when preparing employees for calls. This will become an effective open system that can maintain the symbiotic relationship it has with the business community.

Priorities for change

To achieve the envisioned future state, the priorities for change must consider the likelihood that the type of change can occur within the existing organizational culture and structure (Gianesin & Bonaker, 2003). Therefore, the priorities that will encompass the existing structure are the change vision, stakeholder engagement, and a change model.

Change vision: The change vision is a powerful message that explains the current and future state of the organization, and most importantly, how we get there. This vision must consider the structure and unique needs of a call centre and its demands. Gianesin and Bonaker (2003) noted that when rebranding organizations, close attention must be paid to the identity and

ideology of the company. Organization X and its call centre have operated for many decades and have already established cultural ideologies. Pasha (2017) noted that transformational leaders can only inspire change with a deepened understanding of the organization they wish to transform. Meanwhile, Wang, et al. (2005) noted that transformational leaders build relationships by building a vision that enables followers to understand their role and how to achieve the new vision. Therefore, the change vision is one that must describe the method of achieving the envisioned future state while preserving the call centre's identity and ideology.

Stakeholder engagement: Stakeholders provide change leaders with strategic information about their organization (Hartge, Callahan & King, 2015). Floyd and Wooldridge, (1992) and Kealy (2013) noted that middle leader involvement in the development of change strategy increased the likelihood of stakeholder support. Furthermore, Northouse (2016) and Pasha (2017) noted that effective transformational leaders must build relationships with affected people within the organization they are transforming. Therefore, engaging middle level leaders will help build stakeholder support. Engaging leaders and employees will ensure that the change strategy includes the views and realities of the people who will be affected by the change plan.

Change model: Cameron and Quinn (2011) and Tanner and Otto (2016) noted that hierarchical organizations place considerable emphasis on policies and procedures when outlining responsibilities and duties. Owen and Rogers (1999) noted that when changing a program, there must be opportunities to evaluate the progress before finalization. So, a change model must easily incorporate policies and procedures and allow opportunities for amendments when necessary. Cawsey et al. (2016) presents change models that allow for the flexibility of implementing policies and procedures and amending them after future review.

Change drivers

At the call centre, some of the most impactful change drivers are the types of questions posed by clients and the organization's consideration as a learning organization. The most significant change driver is the increase in complexity of questions asked. Currently, call centre employees are unable to answer these questions (Internal Report, 2015; 2017). Secondly, the organization considers itself as a learning organization and provides resources to prepare employees for their duties (Lipshitz, et al., 2002; Luhn, 2016). Learning organizations recognize the need to adapt learning as the environment changes (Lipshitz, et al., 2002; Luhn, 2016). Although providing learning resources is essential to being classified as a learning organization, the ability to adapt those learning resources becomes essential for efficacy (Lipshitz, et al., 2002; Luhn, 2016).

Both, the change in the types of questions posed and the learning resources used to prepare the employees, are controlled within the call centre's formal learning process. As I mentioned earlier, this formal process requires senior level leaders to interpret learning trends gathered from executives and disseminate decisions to lower level leaders (Internal Quality Report, 2015). Then, the lower level leaders independently use their discretion to manage and distribute learning resources to their employees (Internal Quality Report, 2015). Furthermore, the call centre's goal is to provide correct information to its clients, and these drivers directly inhibit the organization from meeting that goal. Owen and Rogers (1999) noted that successful strategies for implementing change in programs require identifying the variable that inhibit the desired outcome. Wang et al. (2005) noted that leaders were successful in inspiring employees to follow the change message when they identified the specific reasons for change. As a

transformational leader, I have identified the change drivers and their relationship to the existing formal learning process.

Organizational change readiness

A transformational leadership approach will allow the organization to approach organizational change by inspiring its employees, leading by example, and influencing through transparency (Boga & Ensari, 2009; Carter, et al., 2013; van de Voet, 2016; Eti-Tofinga, et al., 2018). This approach will also allow the change leader to change the existing learning environment while continuing to embrace the ideologies that the call centre and its employees hold. A significant focus of the transformational approach is to ensure that the change process can receive buy-in from the employees and organization (Wang, et al., 2005; Northouse, 2016; Pasha, 2017). Therefore, the change process must consider both the employees' and the call centre's readiness and motivations for change. Employee readiness theory considers the employees' current attitudes about their jobs and their desire for change in order, to determine the likelihood of their being motivated for change.

Employee motivation through willingness and desire

Wang et al. (2005) argues that an employee's readiness for change must consider factors that influence the employee's willingness to change. A willingness to change is most successful when employees have a positive working relationship with their leaders (Bommer, et al., 2005; Wang, et al, 2005; Feng, et al, 2016; Petrou, Demerouti & Schaufeli, 2018). In environments where the job requires a great deal of structure (task specific) the employees are most willing to change when the leaders are very familiar with the change process (Feng, et al, 2016; Shah, Irani, and Sharif, 2017; Petrou, et al., 2018). So, at the call centre a change plan which includes regular

informative downward communication between the leader and employee may increase the employee's willingness to participate in the change process.

Hartge, et al. (2015) noted that a clear vision articulated from the top and reinforced by an immediate supervisor increased employees' interest in changing their working environment. Also, the employees' desire to participate in changing the organization is most successful when leadership outlines the stages of change and demonstrates transparency during the stage of the change process (Bommer, et al., 2005; Wang, et al., 2005; Feng, et al., 2016, Shah, et al., 2017; Petrou, et al., 2018). At the call centre, employee feedback surveys revealed that employees indicated they were willing to ask for learning support when they believe they need it (Internal Quality Report, 2015). The employee's recognition of the need for more learning support, coupled with downward informative information may increase an employee's desire to participate in a change plan.

The impact of the change process also influences an employee's motivation to embrace change and the change process (Wang, et al., 2005; Northouse, 2016; Pasha, 2017). Shah, et al. (2017) examined employee readiness within the context of organizational change and discovered that the employee's perspective of the existing organizational structure and the possibility of change had an influence on the change process. Shah, et al. (2017) and Aslam, Ilyas, Imran, and Rahman (2016) noticed that the employee's attitude (positive and negative) about employment significantly impacted the employee's perception about the organizational change process.

The employee's attitude and perspective about their own role within the organization, the perception of the change leader, the organization as a whole, and the perceived personal benefits or losses of change contribute to the employee's motivation to accept or support the change

process (Shah, et al., 2017; Aslam, et al., 2016). At the call centre, employee feedback surveys revealed that employees feel a personal sense of responsibility when they provide incorrect information to clients (Internal Quality Report, 2015). One can assume that such employees will become motivated for change because they can perceive a direct personal benefit with a change plan.

Employee motivation for support for change

Organizational employee buy-in is essential to successfully implementing change. At the call centre, employee buy-in must consider senior leadership, lower level leadership, and telephone employees. Within each group, motivation for change will likely be influenced by the perceived personal benefits to the change process (Shah, et al., 2017; Aslam, et al., 2016). Floyd and Wooldridge (1992) and Kealy (2013) noted middle level leaders were most accepting of a change plan when included in the strategy. At the call centre, involving senior and lower level leaders in the strategy for the change plan may increase acceptance.

Aslam, et al. (2016) and Shah, et al. (2017) noted that employees who had a positive perception of the change leader and believed that personal benefits resulting from the change would outweigh the negative components of change are more likely to be ready for and support organizational change. Aslam, et al. (2016) and Shah, et al. (2017) noted that employees who demonstrated cynicism toward their organization, position, or change leaders were less likely to demonstrate agreeable traits during the organizational change process. Findings such as these demonstrate that employee's attitudes about their organization and its leader can positively correlate to the employees' buy-in of the change process. Hence, as a transformational leader it becomes essential to build and utilize my existing relationships to enhance the positive and empathetic relationship with the call centre.

Some of the strengths of employee readiness in the context of organizational change are that it focuses on the people who are expected to implement the desired change (Shah, et al, 2017; Aslam, et al., 2016). Considering employee readiness provides change leaders with an insight into gaining employee buy-in and support in successfully implementing the change (Shah, et al, 2017; Aslam, et al., 2016). A weakness of this approach is that it cannot ensure how employees will react to change during the change process (Shah, et al, 2017; Aslam, et al., 2016). Moreover, the theory does not consider employees who have a positive perception of their organization but disagree with the organizational change process for another reason, perhaps based on the individual's own experience with past change processes.

Overall, the findings suggest that employees who have a positive impression of their organization may be more likely to support the organizational change process sooner than those who have a negative perception of their organization. Organization X and the call centre do not have a method to assess employee readiness for change but have one method to assess employee motivation (Internal Report, 2017). Nationwide employees participate in a feedback survey to assess motivation and job satisfaction, among other things. This national annual survey provides the change process with valuable information about employee job satisfaction related to perceived relationships with direct leadership and other motivations for improvement (Internal Report, 2017). This tool can further filter information specifically from within the call centre, to provide unique information about employees' attitude and perceived benefits in the workplace.

Conclusion

At the call centre, each part of the system has been working to complete its function. As technology and questions have changed, the system has become strained and is no longer functioning as an effective system (Jones, 2013; Internal Report, 2015; Kast & Rosenzweig,

2017). Thus, when one subsystem or section of the system is not working effectively, the entire system may be unable to achieve its desired output on its environment (Jones, 2013; Kast & Rosenzweig, 2017).

Since the call centre is a part of a learning organization, it allocates financial and human resources to support employee learning to help achieve the system's goal. However, the changes in the types of calls employees most often receive, has created a unique challenge for the call centre. Once employees begin accepting calls, they are required to answer an increased number of complex topics than before (Internal Quality Report, 2017). However, for many years, the formal learning process has remained unchanged (Internal Quality Report, 2017).

The formal learning process is managed by the lower level leaders to use their discretion as to when and how to distribute learning resources (Internal Quality Report, 2017; Internal Report, 2017). These leaders do not consistently utilize these resources among all the call centre employees (Internal Quality Report, 2017; Internal Report, 2017). As a result, the call centre may be ill-equipped to prepare employees to respond to the increasingly complex questions, thus no longer meeting its specified goal.

This OIP focuses on transforming the call centre by improving the formal learning process to increase the likelihood of employees providing correct responses to their clientele. Chapter two will further examine the leadership approaches and outline a framework for organizational change to improve the function of the call centre system.

Chapter 2: Planning and Development

Introduction

Chapter two will explore the process of transforming the call centre into a learning organization that adapts to changes in client question types (Lipshitz, et al., 2002; Luhn, 2016). As an open system, this process will ensure that when the system is impacted by its environment, it is prepared to effectively output correct information onto that environment (Jones, 2013; Kast & Rosenzweig, 2017). The transformational leadership approach will leverage the existing leadership practices and cultural perspective already embraced by the call centre. The organizational analysis will explore changes to the formal learning process within the transformation process (Lipshitz, et al., 2002; Luhn, 2016). This information will be used to evaluate the most appropriate change types for the organizational change plan. Lastly, the organizational change plan will be reviewed through two leadership models (Cawsey, et al., 2016), and further defined with three different change frameworks along with ethical considerations.

Leadership Approaches to Change

Transformational leadership is the ideal approach for an external leader like me who holds positional power to create and lead a change process. Its principles of creating a clear vision, building trust, and inspiring others can be used alongside existing leadership approaches (Northouse, 2016; Pasha, 2017). From an open systems perspective the call centre's system is impacted by its environment (types of questions clients pose) (Jones, 2013; Kast & Rosenzweig, 2017). However, the system's internal components are unable to work effectively to respond to the environment's impact; so, the system is outputting incorrect responses onto its environment (Jones, 2013; Kast & Rosenzweig, 2017). The transformational process focuses on changing the

way the system's internal components work. From my position, this requires leveraging the existing authority-compliance leadership practices to implement a clear vision, collaborate to build trust, and leverage the existing cultural ideologies and structure to inspire employees.

Implement a clear vision

Authority-compliance leadership is a behavioural approach to explain a vertical direction-focused type of leadership (Pearce & Sim, 2002; Northouse, 2016). It is ideal in a hierarchical organizational structure, where there is a need for compliance of the same practices throughout the organization (Keidel, 1995; Pearce & Sim, 2002; Ganesin & Bonaker, 2003). In this approach, it becomes effective for decisions to be made at the top and instruction and disseminated downward (Keidel, 1995; Ganesin & Bonaker, 2003; Pearce & Sim, 2002; van der Voet, 2015; Eti-Tofinga, et al., 2018). A vertical direction focus of information allows for control of messaging, which in large organizations improves efficacy in production centred environments (Keidel, 1995; Pearce & Sim, 2002; Cameron & Quinn, 2011). The call centre uses authority-compliance leadership principles to promote organization wide compliance by controlling the message when delivering instruction downward.

A fundamental principle of transformational leadership is the leader's ability to create a clear vision (Wang, et al., 2005; Northouse, 2016, Pasha, 2017). For transformational leaders, a clear vision requires a deep understanding of the organizational hierarchical structure, culture, and roles of leaders and employees (Wang, et al., 2005; Northouse, 2016, Pasha, 2017). This deeper understanding is achieved through building relationships and meaningful connections with employees who will be implementing the change plan (Hartge, et al., 2015; Pasha, 2017). This ensures that the change leader's vision is applicable to its intended followers (Wang, et al., 2005; Pasha, 2017).

The call centre embodies conservative ideologies where compliance and tradition are virtues (Gianesin & Bonaker, 2003). In such environments, although change can occur, radical change is typically met with resistance (Gianesin & Bonaker, 2003). Gianesin and Bonaker (2003) noted that within such cultures, appropriate small changes can generate a significant impact. So, understanding the call centre's structure and culture means recognizing its virtues. Creating a vision that is applicable to the intended followers means embracing its ideologies and working from within it to create relatable messaging. This clear vision focuses on using the existing method of communication (vertical direction focused messaging), to articulate a series of small changes made to each of the components of the call centre's internal system.

Build trust

Transformational leaders build trust with their intended followers by strengthening relationships through collaboration (Wang, et al., 2005; Northouse, 2016, Pasha, 2017). A part of this process requires the leader to have a deeper understanding of employees' roles and current responsibilities (Wang, et al., 2005; Northouse, 2016, Pasha, 2017). Wang, et al. (2005) noted that leaders who have significant insight into employees' expectations of how to improve their duties gained more support from employees overall throughout the change process. Furthermore, Salih and Doll (2013) and Hartge, et al. (2015) noted that middle level leaders who were involved in the change strategy were able to communicate and recommunicate the change plan, gaining more followers with each reiteration.

Since I have held all the positions within the call centre, I have already built relationships with leadership and employees to uniquely understand each of the roles. Wang, et al. (2005) noted that transformational leaders collaborate with employees to identify gaps and determine realistic ways of achieving the vision. Therefore, collaboration can occur by gaining input from

leadership and employees about the realities of their duties and their expectations for how change can occur within their roles. Salih and Doll (2013) noted that leaders who participated in collaboration as part of the change strategy motivated others to support the change plan. Including leaders and employees in the change strategy ensures that I accurately identify the gaps and determine how to achieve that future state, while those leaders motivate others to support the change plan.

As a learning organisation the call centre provides learning support for employees to effectively complete their responsibilities (Lipshitz, et al., 2016; Luhn, 2016). The formal learning process requires that learning trends be identified at HQ, and lower level leaders use their discretion to determine when and which employees receive learning accordingly (Internal Quality Report, 2015). The formal learning process is the internal component within the call centre's system. It determines employees' preparedness for the types of questions they receive from clients. Since the change plan intends on changing this practice, building trust requires collaborating with the leaders involved in this process.

Inspire employees

An essential principle needed as a transformational leader is the ability to inspire followers (Northouse, 2016; Pasha, 2017). Moreover, "to create change, transformational leaders [must] become strong role models" (Northouse, p. 175, 2016). Since I held all the positions at the call centre, I have built strong relationships with employees at all levels. Therefore, my ability to relate to the roles and responsibilities and my position of influence creates a unique opportunity to act as a relatable role model for employees.

Wang, et al. (2005) noted that inspiring employees to follow a change plan can be best achieved by motivating managers to support the change plan. Furthermore, Wang, et al. (2005)

noted that when managers and employees have a trusting relationship, they can inspire their employees to follow the change plan. I can use my relationship with leaders to ensure strategic collaboration to create a realistic change plan. The collaboration will lead to support among the leaders, and then I will use the existing hierarchical structure to disseminate the change message. Once I have inspired the leaders, I can leverage their relationship with their employees to effectively communicate the change message.

To summarize, I plan to use transformational leadership principles to transform the call centre's system, so it is prepared for incoming changes from its environment. I plan to use my existing relationships to build trust for a collaboration process. The collaboration with stakeholders such as managers and employees will ensure that the vision for the end state appropriately represents a realistic practice that embraces the call centre's culture. Lastly, I plan to use the existing leadership approach to disseminate change messages to inspire and build trust for the change plan.

Although researchers of this leadership approach argue that a transformational leader should challenge the status quo (Pearce & Sim, 2002; Wang, et al, 2005; Northouse, 2016; Pasha, 2017), a part of my transformational plans is a vision that embraces the effective parts of the status quo and make changes around it. LePine, et al. (2002) suggested that employees will consider the impact and benefit of change based on perceived personal advantages and disadvantages. The call centre embodies a conservative cultural perspective and believes in tradition (Gianesin & Bonaker, 2003). Therefore, a change process that preserves the best parts of the culture and structure can lead to a perceived positive impact to the change process. Using existing leadership principles will help me build trust, help others understand the various roles with the call centre system, and inspire change accordingly.

Framework for Leading the Change Process

Organizational framework

In chapter one I focused on describing the organization through the human resources and political organizational frames. The human resources frame considers the needs of the employees (at all levels) to complete their specified tasks (Bolman & Deal, 2013). This OIP looks at the human resources frame to analyze the type of work responsibilities leaders and employees currently have and compare it to the desired future state. The political frame focuses on how these resources are allocated (Bolman & Deal, 2013).

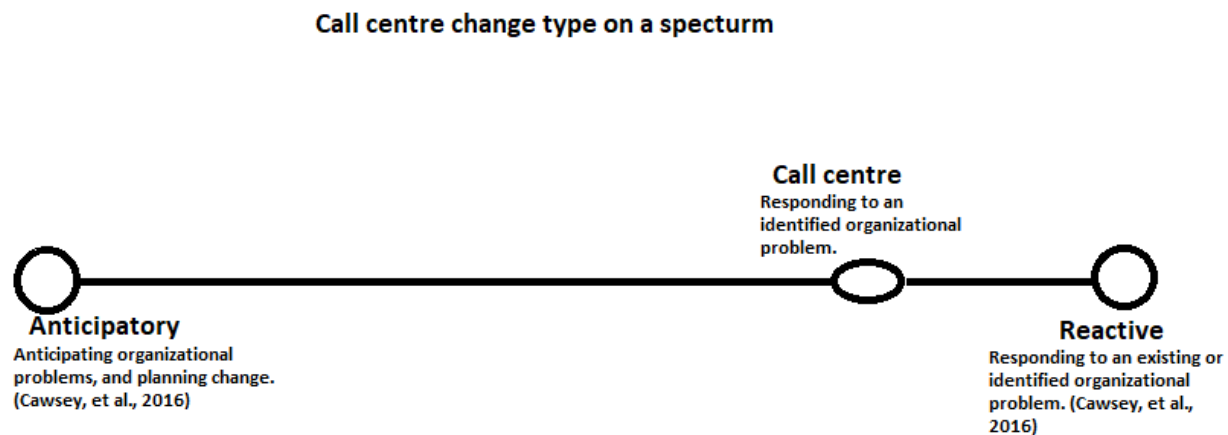
In chapter one the structural frame was described as hierarchical with decision making power at the top levels of the organization and compliance at the bottom (Keidel, 1995; Cameron & Quinn, 2011; Bolman & Deal, 2013; van der Voet, 2016). Leaders in the middle experience a degree of autonomy in the form of when and how they utilize learning resources while also complying with how to achieve their section's goals. The organization's structural frame is a significant part of how the call centre's system components determines how to address the impact of the changes in the types of questions received (environment's impact on the system) (Keidel, 1995; Cameron & Quinn, 2011). So, embracing and retaining the existing structure is essential to working within the organization's system to transform it.

Each of the frames have key assumptions that must be acknowledged or addressed in the change plan. A key assumption of the HR frame is that the most suited individuals are available to complete the various functions required of any position, and the political frame assumes that resources are always scarce (Bolman & Deal, 2013). The change plan does not have any influence on the existing hiring practices; therefore, it is critical that the plan acknowledges these

limitations. However, the change plan creates more opportunities to prevent scarcity of resources by enhancing the communication between leaders.

Since I plan to retain the existing organizational structure and the structural frame as a lens to promote the change plan, I must pay close attention to the types of change processes that are most appropriate for the hierarchical structure. Cawsey, et al. (2016) explained that the change process can be reactive or anticipatory, and incremental or discontinuous. Cawsey, et al. (2016) argued that these change types were best described as perspectives on a continuum, and most organizational change types would occupy a place on both spectrums. The call centre can be categorized into a spectrum where the change process can appear more reactive and incremental or anticipatory and discontinuous depending on the audience and timing of the change process. Figure 2.1 below shows the call centre depending on the audience.

Spectrum 1- Anticipatory/ Reactive



Spectrum 2- Incremental/ Discontinuous

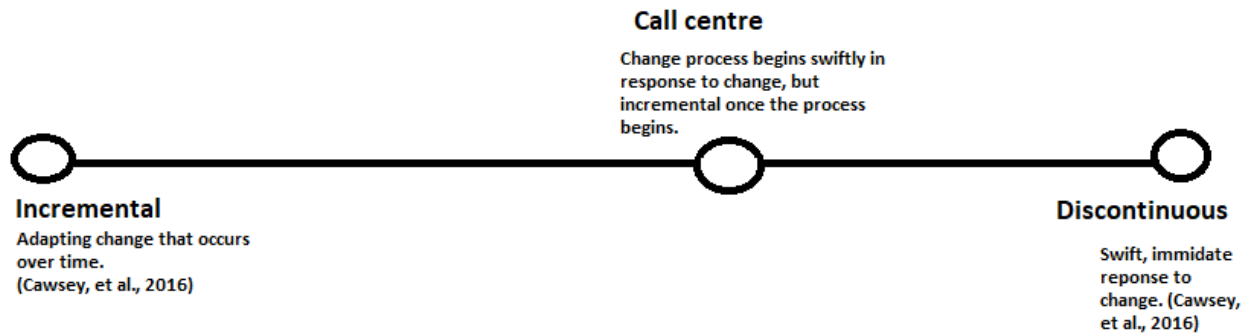


Figure 2.1. Represents the call centre organizational change type on two spectrums.

The Change Type Spectrum

The call centre follows a structure where adherence to one's role is paramount to understanding and succeeding (Kiedel, 1995; Cameron & Quinn, 2011; van der Voet, 2016). Since change can appear as sudden or gradual, depending on the type and stage of the change process, it is important that my change plan consider the type of change that best suits the organization's needs (Cawsey, et al., 2016). Organizational readiness theory suggests that employees are likely to support the change process if they receive regular instruction from their leaders (Bommer, et al., 2005; Wang, et al., 2005; Feng, et al., 2016; Shah, 2017; Petrou, et al., 2018). Feng, et al. (2016) argued that a clear and relatable organization plan is necessary for buy-in, along with regular communication from senior or executive level leaders. So, a change type that emphasizes senior level leaders' delivering regular instruction in the familiar downward direction can help improve the employee's likelihood in adopting the change early.

The first dimension on the change spectrum that best represents the OIP is a reactive change type. A reactive change type has been described as a "response to a significant

performance crisis” (Cawsey, et al., p. 21, 2016). Or as “[reacting] in response to eternal events.” (Cawsey, et al., p. 20, 2016). The call centre recognizes its need for change. It is aware of the performance crisis of the system not meeting its goals of outputting correct information to its clients (environment) (Internal Report, 2017). Furthermore, the decision for change has occurred in response to the environmental changes (external events). Cawsey, et al. (2016) considers the process of determining the need for change after the problem has occurred, as a reactive; so, the call centre’s change type is reactive.

In the case of this OIP, the type of organizational change must embrace the existing organizational structure and styles. To meet the needs of the call centre’s system, the second dimension of the change type must be episodic, in that the change style is infrequent (discontinuous) (Cawsey, et al., 2016). According to Cawsey, et al. (2016) episodic or discontinuous change is ideal when there is a need for a new organizational shift that is immediate. In the case of the call centre, the need for a new shift is represented by its inability to meet its specified goal. Changing “programs are examples of this type of change and can be seen as planned examples of injecting significant change into an organization.” (Cawsey, et al., p.20, 2016). Changing the formal learning process is an example of re-engineering a program to inject significant change into the organization. The significant change would be the system’s ability to react appropriately to the changes in the types of questions posed by clients.

A key assumption of the reactive and discontinuous change types is that the focus of strategic change is at the middle and upper levels of leadership, and it does not pay much attention to employee buy-in at lower levels (Feng, et al., 2016; Northouse, 2016). Hartge, et al. (2015) and Feng, et al. (2016) point out that senior leaders have a unique position to frame a

positive change message through consistent communication with subordinates. Hence, employee buy-in below senior level leadership can still be achieved with a discontinuous change type through the messaging and trust that is built from regular communication between the employee and leader.

These change types best represent the call centre's current structure, while also allowing for change in an organization that values structure and procedures above all else. Nadler and Tushman (1998) consider reactive and discontinuous organizational change as an overhauling or re-creating type of change. This approach also focuses on the overall organizational processes to make swift changes throughout, while management motivates (Cawsey, et al., 2016). For the call centre, an overhauling change focuses on the overall call centre's system components to make swift changes throughout. The swift changes are in the form of changing the formal learning process embedded within the system. The change occurs while also using the top down hierarchical structure to disseminate information and build trust among leaders and employees.

Furthermore, the existing culture and structure are a part of the organizational system's identity. A swift discontinuous approach to changing the formal learning process will rapidly change how each component within the system works to prepare for changes from the environment (Cawsey et al., 2016). In an overhauling fashion, the swift discontinuous change can occur using the existing authority compliance hierarchical structure, because it focuses on change messaging disseminated downward (Cawsey, et al., 2016).

The call centre's swift discontinuous change is best explained through a structural lens because of its specific hierarchical structure that represents control and stability within the open system (Keidel, 1995; Bolman & Deal, 2013). The structural frame also allows the change leader

to gain support for change by using the hierarchical structure as a conduit for the change message (Keidel, 1995; Cameron & Quinn, 2011). As a transformational leader my goal is to work with the existing structure, and this can be achieved with the overhauling change.

The Lewin Model

The purpose of the change plan is to complete an overhauling change to an organizational system. The change model must also support an overhauling change type. The Lewin model for organizational change frames the change process through a series of stages: unfreeze, change, refreeze (Cawsey, et al., 2016).

The Stage theory of change, or the Lewin model, frames an organization as static, where the first stage is the unfreezing stage (Cawsey, et al., 2016). This stage captures the reactive period where the organization discovers a need for change; it also captures the creation of the change process (Cawsey, et al., 2016). The second stage is called the change stage, and during this stage change occurs, and the change implementation plan is in place (Cawsey, et al., 2016). Once the change implementation plan is completed, the third and final stage of change occurs, the refreeze stage. The refreeze stage focuses on reinforcing the change implemented (Cawsey, et al., 2016).

This model allows for a reaction to the change to occur during the unfreeze stage (Cawsey, et al., 2016). It also allows for the opportunity to apply a swift and discontinuous change during the change stage (Cawsey, et al., 2016). It emphasizes swift, discontinuous, and immediate change, while also generally requiring a hierarchical structure to enforce the change during the change stage.

Despite its clear strengths, this change model does not ideally frame the call centre's system. The three-stage process leaves too many elements of the change process in the unfreeze stage. With its hierarchical structure, the call centre's system uses considerable policies and procedures to manage the large scale of the organization (Keidel, 1995; Cameron & Quinn, 2011; van der Voet, 2016). This structure requires several levels of buy-in at the leadership and then through to the employee level before implementation (Keidel, 1995; Cameron & Quinn, 2011). A change plan for the call centre must also consider these elements, and the Lewin model does not.

Lastly, the refreeze stage of the Lewin change model focuses on a change process that becomes complete and no other change is necessary (Cawsey, et al., 2016). Although this can apply to the call centre, a change plan for this system requires a stage for assessing the impact of the change process and making changes accordingly. Therefore, although the Lewin model may be ideal for an organization that is placed as an overhauling change type, it does not sufficiently meet the needs of my organization.

The Change Path Model

The change path model was selected for my OIP because of its four-step model. Each of the steps allows for an overhauling change while preserving the existing organizational structure.

Cawsey, et al. (2016) explained the first step of the change process as awakening. This step represents when a need for change is identified, confirmed, and a vision for change is created (Cawsey, et al., 2016). The call centre's system recognizes that its components are not working effectively to meet the specified goal of outputting correct responses (Internal Report, 2015). This means that a need for change has already been identified. Since the organization

relies on data and employee performance tools to identify performance gaps, it has sufficient information necessary to identify the gaps in the system and the need for change (Eti-Tofinga, 2018). Therefore, the awakening step can easily accommodate the call centre's system and structure.

The mobilization step is the second stage of the change path model (Cawsey, et al., 2016). Cawsey, et al. (2016) explains that the mobilization step focuses a great deal on understanding the population within the organization, to better understand and communicate the need for change and the change plan. It is at this step where a transformational leader, like me, will assess employee readiness for change, and how to gain employee buy-in (Cawsey, et al., 2016). Organization X and the call center utilize their own structural order. The mobilization step allows me to consider the existing environment, including the dynamic of influential individuals to improve employee readiness for the change process.

Once the change plan is underway, the acceleration step allows for a change leader to implement the change structure. This step can be described as the implementation of the actual change plan over the prescribed period (Cawsey, et al, 2016). At the call centre, it is at this step where I would implement the changes to the formal learning process. As an open system, the changes to this process will impact how each component of the system works to output correct responses (Jones, 2013; Kast & Rosenzweig, 2017). The acceleration step allows for a detailed examination of how the changes to the formal learning process are preparing the system to meet its specified goal, while change is underway (Cawsey, et al, 2016). It is at this step where I, as a change leader, will be able to use the results of monitoring tools to prepare and make appropriate changes to the plan before the final stage of the change plan.

The last step of the change path model is the institutionalization stage (Cawsey, et al., 2016). During this step, the change plan has been completed, and the remaining process is to monitor the new environment with the goal of maintaining the change plan. This step allows for Organization X and the call centre to monitor the progress of the change plan implemented and continue to utilize its best practices.

The change path model is an ideal framework for leading the change process at the call centre because of its structured step dynamic. Each step builds on the results of the earlier steps, and as a result, shortcomings of prior steps can be easily revealed and addressed (Cawsey, et al., 2016). Furthermore, this model can easily be integrated into the call centre's cultural style without unnecessarily exacerbating its structure and ideologies. The mobilization step creates a unique opportunity to maximize the existing leadership approaches (Cawsey, et al., 2016).

The call centre can be best described with an overhauling change type. Its cultural style is conservative and hierarchical, so a need for change through a performance gap must be quite evident (Tanner & Otto, 2016). In the case of the call centre, the performance gap has been identified, thus leaving the change type as reactive. Lewin's change model at first glance appeared to fit the call centre's change process; however, it does not allow for backward movements between each stage (Cawsey, et al., 2016). The change path model addresses these problems, thus making it a better fit for the call centre.

Critical Organizational Analysis

The call centre system's internal components have the responsibility to prepare the system for incoming changes from its environment, so that the system can effectively output correct information on that environment (Jones, 2013; Kast & Rosenzweig, 2017). As a learning

organization, the call centre has the learning resources to prepare its employees to compete their duties (Lipshitz, et al., 2016). Moreover, client's question topics have remained consistent, but the question types to become more complex (Internal Report, 2015). The call centre has availability of accurate web content (about business administrative services) and learning resources (Internal Quality Report, 2015). Therefore, one can argue that if employees are providing incorrect responses, an internal component is not preparing the system to output correct information onto its environment. The system is being impacted by changes from its environment (changes to types of questions), and that system is unable to appropriately respond to those changes (Jones, 2013; Kast & Rosenzweig, 2017).

The hierarchical structure requires that learning trends be identified at HQ and then filtered downward to the call centre (Internal Quality Report, 2015). The formal learning process requires that once learning trends are identified, call centre senior level leaders categorize them into question topics and then disseminate this information to their respective lower level leaders (Internal Quality Report, 2015). Then, the lower level leaders use their discretion to allocate the learning resources such as hours for trainers, coaches, courses, and manuals related to the question topics (Internal Quality Report, 2015; 2017). The formal learning process represents an essential internal component of the call centre's system. This essential component requires that each part of the system work together to appropriately distribute the learning resources to prepare the system to output correct information to its environment (Jones, 2013; Kast & Rosenzweig, 2017).

The Call Centre Through Systems and Role Theory

Jones (2013) and Cawsey, et al. (2016) explain organizational systems as interrelated parts demonstrating interdependence by working together for the goal of the organization. Jones (2013) and Cawsey, et al. (2016) go on to explain that systems can represent various social entities, including organizations; and the parts of the system work to impact, and are impacted by its environment. Within organizational systems theory, interrelatedness means that each sub-system is affected by the actions of the other sub-systems (Jones, 2013; Kast & Rosenzweig, 2017). Interdependence requires that each sub-system function efficiently for the other sub-systems to function efficiently (Jones, 2013; Cawsey, et al., 2016; Kast & Rosenzweig, 2017).

To summarize, each sub-system cannot function independently, and the actions of each sub-system impact the other sub-systems (interrelated). Most importantly, each sub-system's ability to achieve its goal is dependent on the other sub-system's ability to achieve its goal (interdependence) (Jones, 2013; Cawsey, et al., 2016; Kast & Rosenzweig, 2017). An open system is impacted by its environment and achieves its specified goal by impacting its environment (Jones, 2013; Cawsey, et al., 2016; Kast & Rosenzweig, 2017).

The call centre's open system is made up of 3 sub-systems and each sub-system work independently to achieve its goal (Jones, 2013; Kast & Rosenzweig, 2017). Each of the sub-system's goals uniquely contributes to the system's specified goal (Jones, 2013; Cawsey, et al., 2016; Kast & Rosenzweig, 2017). Each of these sub-systems relies on other system components to connect and communicate information necessary to achieve its goal (Jones, 2013; Kast & Rosenzweig, 2017). A component of the system that each sub-system relies on to output correct information is the formal learning process. This component uniquely impacts all three of the sub-

systems differently. The lower level leaders within each of the sub-systems use their discretion on how to allocate learning resources based on the information received and procedures in place for the formal learning process. Appendix A provides a summary of responsibilities of each of the call centre's sub-systems. Figure 2.3 demonstrates the system parts reliance on the formal learning process.

Since each sub-system is using the information from the formal learning process differently to achieve its own sub-system goals, it is not considering the impact of its decisions on the other sub-systems (lacking interrelatedness) (Jones, 2013; Cawsey, et al., 2016; Kast & Rosenzweig, 2017). However, each sub-system does depend on the other sub-systems achieving their goals to achieve the systems specified goal (interconnectedness) (Jones, 2013; Cawsey, et al., 2016; Kast & Rosenzweig, 2017). The formal learning process is an essential component that is used by all the sub-systems and provides information necessary for the effective functioning of each sub-system; its process is essential for the system's efficacy.

Role theory can be summarized as individuals occupying an identity and behaving in accordance with said identity (Guttek, 1997; Kellerman, 2012; Matta, et al., 2015). Since the call centre is a part of a large multifaceted organization, with a conservative ideology and a hierarchical structure, employees each occupy a specified role. Within their role, the employees only focus on filling that related function without consideration for other functions (Guttek, 1997; Ganesin & Bonaker, 2003; Kellerman, 2012). Currently, at the call centre, within each sub-system are several sections and each section has one leader who oversees approximately 15 employees. Within this hierarchical structure, understanding or considering the various roles of other sections and sub-systems is unnecessary, unless it is essential to fulfilling one's own role

(Keidel, 1995; Cameron & Quinn, 2011; Matta, et al., 2015). At the call centre, each section has a leader and employees who occupy specific roles. These employees fulfill only their specified role without an understanding for the impact of their role on their section, and without consideration for their impact on the other sections, sub-systems or system.

As is the case with many large multifaceted organizations, solely identifying with one role allows an employee to maximize efficiency in that role (Keidel, 1995; Cameron & Quinn, 2011; Matta, et al., 2015). Within hierarchies where compliance is expected, a strong identity with one role can improve dissemination of messaging, because communications are role specific (Matta, et al., 2015). Since the call centre has three distinct sub-system each contributing differently to the system's specified goal, maximizing understanding of only one's role appears beneficial. However, the environment is impacting the call centre's system by changes to the types of question posed. The internal system component that prepares the system for this impact emphasizes roles in its process for how to distribute learning resources. So, learning trends are identified by a role within HQ, and resources are distributed based on the section leader's role in fulfilling the sub-systems goals.

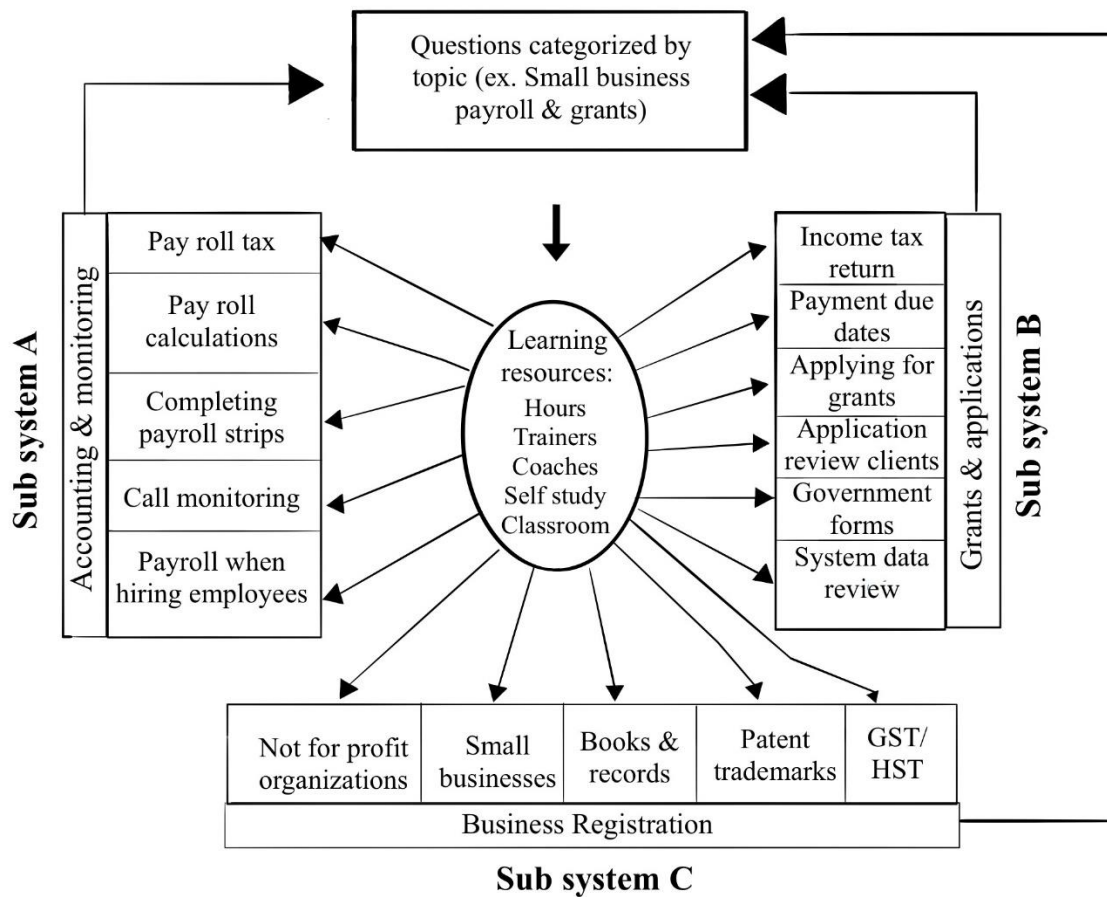


Figure 2.2. Lists each sub-system's sections and their responsibilities. It also shows how each section independently uses learning resources, without consideration for the other sections in the system (Jones, 2013; Matta, et al., 2015; Kast & Rosenzweig, 2017).

Limitations of systems and role theory at the call centre

Both systems theory and role theory can be used to describe the call center's theoretical internal structure. More specifically, each section is made up of employees who occupy a particular role, and they work to fulfill that role within their section, without consideration for the sub-system or larger system (Keidel, 1995; Cameron & Quinn, 2011; Matta, et al., 2015). However, an effective system requires that the parts be interrelated and interdependent, but the

call centre's parts work independently. That is, the call centre's sections work independently to complete their own functions without consideration for the larger structure. Therefore, although the call centre's system is interdependent, it is not interrelated.

Role theory requires that employees occupy and fulfill a role without consideration for other roles, unless it is necessary to complete one's own role (Matta, et al., 2015). Call centre employees and their leaders have little understanding about the roles outside of their own section (part or unit) (Matta, et al., 2015). Although, the call centre recognizes the interdependence, the interrelatedness has been overlooked, thus impacting the effectiveness of the system's ability to achieve its specified goal. Therefore, the call centre's gap is represented by a lack of interrelatedness. This is represented by each of the sections using the formal learning process independently without considering the impact of their roles on the other parts of the system.

The Call Centre as a Learning Organization

Currently, the literature that discusses learning organizations, defines it as a concept of an organization that focuses on the process of hiring and retaining knowledgeable employees through continuous opportunities to learn (Lipshitz, et al., 2002; Steenekamp, Botha, & Moloji, 2012; Rivera-Vargas, 2013; Hotho, Lyles, & Easterby-Smith, 2015). Typically, learning organizations contribute and promote employee learning and development through formal learning support in the form of courses, trainers/ instructors, and other related resources (Lipshitz, et al., 2002; Steenekamp, Botha, & Moloji, 2012; Rivera-Vargas, 2013; Hotho, Lyles, & Easterby-Smith, 2015). Organizations which do not make a commitment to continuous learning and do not provide formal learning support are not considered learning organizations (Limwichitr, Brady-Preston & Ellis, 2015; Carswell, 2012). Furthermore, a learning

organization does not refer to the organization as a body (or entity) separate from its employees (Lipshitz, et al., 2002; and Luhn, 2016). That is to say, the entire structure, including the individuals who manage the support, or are provided such support make the organization a learning organization.

Organization X provides the call centre with its funding, and within this funding is a budget for learning hours, courses, and related resources that are expected to be allocated to each employee throughout the year. It uses a formal learning process to manage the identification, classification, and distribution of learning resources. The training and learning section is a section within a sub-system that is responsible for monitoring the process for the formal learning (Internal Quality Report, 2015; 2017). This section provides guidance on procedures for requesting learning resources and provides learning support to employees upon request by the employee's direct leader (Internal Quality Report, 2015; 2017). Since the call centre allocates funding for learning, actively promotes learning, and has a formalized process to manage the learning, it fits the description of a learning organization.

One of the ways the call centre actively promote learning is by encouraging employees to self-identify learning needs (Internal Quality Report, 2015; 2017). Once these needs are identified, the employee must discuss the concerns with their direct leader, and the leader will seek out learning support if he, she, they choose to do so (Internal Quality Report, 2017). Moreover, the call centre's leaders work independently to lead their respective sections (Internal Quality Report, 2017). Since the call centre utilizes authority-compliance leadership with leaders and employees, employees are expected to identify and abide by the role of complying with instruction as it relates to the learning resources received.

When employees receive training, it is typically delivered by a facilitator or peer coach (Internal Report). The conservative culture and strong identification with ones' role, typically results in an objectivist form of delivering and receiving instruction. Objectivist approach to learning requires that the learner receive instruction by listening (Hendry, et al., 2006; Hedden, et al., 2017). It emphasizes formal and direct instruction where learners are passive participants in their own learning (Hendry, et al., 2006; Hedden, et al., 2017). Knowledge is constructed and retained through information and examples provided in the course or facilitator and assessments (Taylor, Fraser, & Fisher, 1997; Rovai, 2003; Hendry, et al., 2006).

After participating in objectivist form of learning, the telephone employee actively attempts to apply the learning provide to answer to callers' questions accurately (Internal Quality Report, 2017). The learning received was passive (facilitator explained employee listened), so, when attempting to apply learning, the employee does not consider context outside of the instruction received (Taylor, Fraser, & Fisher, 1997; Rovai, 2003; Hendry, et al., 2006). Following their role, employees answer client questions without consideration for context of how other sections in the system answer similar questions.

The Analysis

The call centre's system has a specified goal of providing correct information to its clients (Internal Report, 2015; Internal Quality Report, 2015; 2017). The system uses a formal learning process uses to identify learning trends, categorize learning trends into topics, and distribute learning resources to employees as needed (Internal Quality Report, 2015; 2017). Each leader at each level of the hierarchy uses their role to make decisions with the information provided, and then direct information downwards about how to proceed with learning resources

(Internal Quality Report, 2015; 2017). Executive leaders use internal employee feedback surveys and external client surveys to identify learning trends. Once trends are identified, they disseminate information downwards. The senior leaders receive this information and comply with the identified trends and categorize these into question topics, before disseminating their decisions downward. Then, the lower level leaders comply with the question topics from above and use their discretion to determine how to use the learning resources. Figure 2.3. summarizes an example of each level complying with the superior's determination for learning resources.

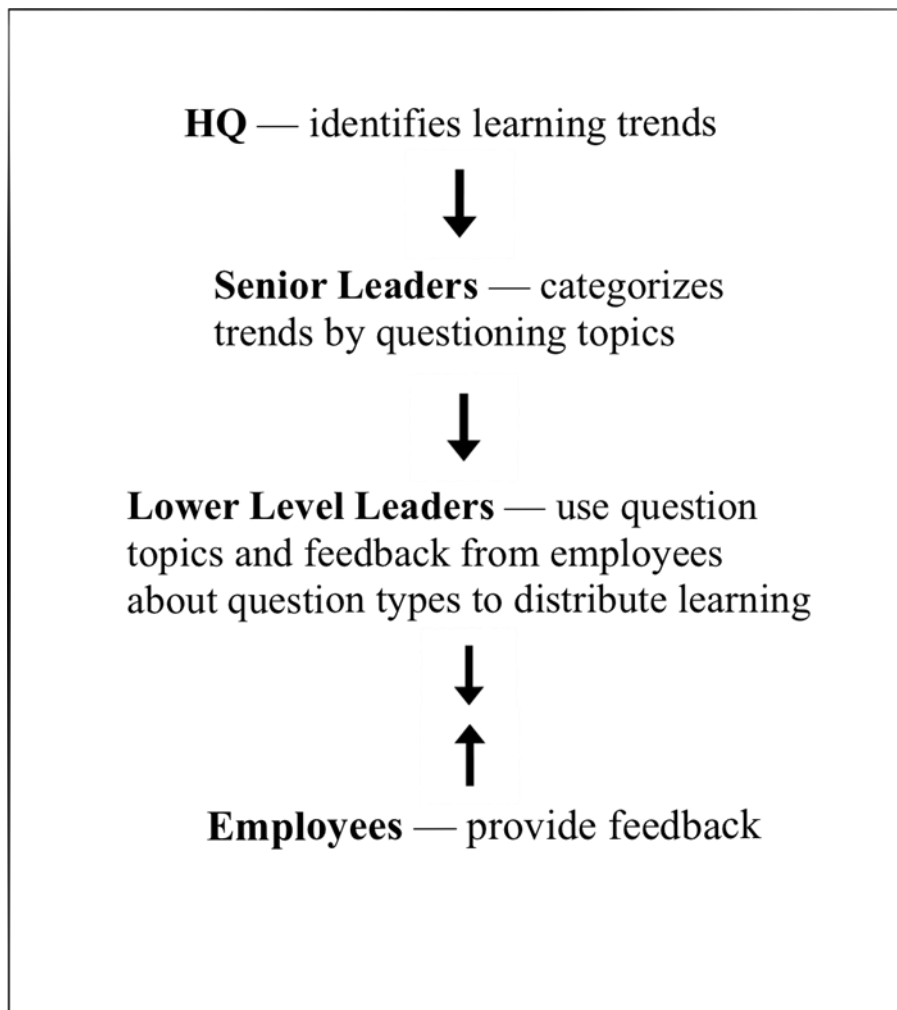


Figure 2.3. Summarizes the practices for identifying trends, categorizing learning needs, and distributing learning resources.

The current standing of this practice is that needs are identified, resources are available and used, but the system is not outputting correct information (Internal Quality Report, 2015; 2017). Leadership acknowledges that technology has changed the types of questions posed by clients (Internal Quality Report, 2015). They also acknowledge lower leader discretion in how learning resources are used (Internal Quality Report, 2015). The process is that the call centre's system is being impacted by its environment, and the internal system's component is not preparing the system to output correct information onto its environment (Jones, 2013; Kast & Rosenzweig, 2017). The systems require interrelatedness and interdependence to optimally prepare for and impact their environment (Jones, 2013; Kast & Rosenzweig, 2017). The gap is represented by the emphasis on compliance and lack of interrelatedness between the sub-systems. The formal learning process relies on downward dissemination of information with each leader using the associated resources without considering its impact on the other sections and sub-systems.

Possible Solutions to Address the Problem of Practice

The formal learning process is a set of procedures within the call centre to ensure the learning is applied to employees who need it (Internal Quality Report, 2017). It is this process that supports all parts of the system in achieving its goal (Internal Quality Report, 2017). Each of the sub-systems rely on this process to categorize and determine the topics to address for learning. Other system parts (like the sub-system's sections) rely on this information for distributing learning resources at their discretion (Internal Quality Report, 2017). The gaps

identified in this OIP are specifically related to how information disseminated downwards in the formal learning process is used by senior and lower level leaders. More specifically, the inconsistency in how learning resources are allocated when preparing employees for providing correct information to clients. When transforming the call centre, solutions must consider the organizational culture and structure, as well as the impact of the formal learning process on the whole system (Pasha, 2017). Below are three possible solutions that can address the gaps identified.

Possible Solution 1: Equitable distribution of learning resources framework

An element of being a learning organization is that the organization must not only promote learning, but also provide resources for all its employees (Lipshitz, et al., 2002; Steenekamp, et al., 2012; Rivera-Vargas, 2013; Hotho, et al., 2015). At the call centre, learning resources are provided in the form of instructors, classroom courses, and hours devoted to self-study and peer support. The goal of learning organizations is to provide resources to help employees succeed within the organization (Lipshitz, et al., 2002; Steenekamp, et al., 2012; Rivera-Vargas, 2013; Hotho, et al., 2015). Edwards and Whitty (1994) and Okun (2015) noted that equally distributing educational resources promotes opportunities for growth in organizations. As a learning organization, the call centre can promote organizational growth and employee success by equally distributing its learning resources. Equally distributing learning resources ensures that each employee receives an equal amount of available learning resources (Edwards & Whitty, 1994; Okun, 2015). This solution focuses on changing the formal learning process to address inconsistency in how learning resources are allocated. It requires each section leader to allocate the same number of learning hours and/or resources to each employee. This will eliminate the problem related to inconsistent allocation of learning resources.

Objective: Create policies to equally distribute learning resources. The transformational leader changes the formal learning practice by leveraging the existing authority-compliance practices and disseminating instructions downwards. The changes require lower level leaders to equally distribute the learning resources among all employees throughout the year.

Resources needed: This plan can be completed using the existing resources currently in place at the call centre. Currently, each employee at the call centre utilizes a desktop computer, with two monitors, a mouse, and a keyboard (Internal Quality Report, 2015). These technological resources in the current state are necessary for a learning organization (Lipshitz, et al., 2002). Additional technological resources will include an electronic organizational learning chart and schedules for leaders to track their used and available employee learning hours. The Financial and human resources costs remain the same, except for an organizer or coordinator to maintain the schedules and track the hours.

Plan: The learning resources will be equally distributed so leaders can continue working independently to determine and identify when the hours for their teams are utilized. The leaders will be required to focus on how responsibilities are distributed among each other to ensure that each leader equally utilizes learning hours when necessary (Nilsen & Puroo, 2005; Amundsen, 2014). This means ensuring classrooms, facilitators and other learning resources are available when needed. Over the course of the cycle of the plan, employees will eventually all have the same amount of learning time designated to them.

Do: The leaders follow the downward instructions from the transformational leader, and update and monitor the electronic learning forecast plan. The lower level leaders determine when each

employee can utilize their learning time during the year. The call volume team monitors the volume of calls to identify the periods when employees are required to take calls.

Study: The transformational leader provides direction downward for leaders to follow. This includes monitoring the process of how the shared resources are allocated once learning needs are identified. Employees who have not identified learning needs will still receive their portion of the learning resources (Edwards & Whitty, 1994; Okun, 2015). The internal employee performance support surveys are used to monitor the effectiveness of the correct responses provided to clients (Internal Quality Report, 2017). Monitoring continues to occur quarterly and annually (Internal Quality Report, 2017). Immediate post-learning feedback to assess employees' perceived benefit of the learning will also be used and monitored (Lipshitz, et al., 2002; Steenkamp, et al., 2012). Lastly, a comparison of post-learning feedback with quarterly annual quality performance surveys will monitor progress and identify new collective learning objectives (Lipshitz, et al., 2002; Steenkamp, et al., 2012).

Act: Use Cawsey. Et al.'s (2016) change path model, shortcomings are reviewed during the Acceleration step and altered accordingly before the Institutionalization step.

Benefits: This solution addresses the lack of consistency in how learning resources are distributed. It also honors the organization's culture and authority compliance principles by continuing the practice of identifying learning trends at the top of the hierarchy and disseminating the information downwards (Cameron & Quinn, 2011). This solution reinforces role theory because the lower level leaders will continue to manage their sections autonomously and continue to focus exclusively on their role and achieving their sub-system's goal (Matta, et al., 2015).

Senior leaders will only require minor changes to the way they categorize the learning trends identified, thus only requiring small changes throughout the various parts of the systems. This includes small changes to the communication process, to increase how often leaders and employees discuss learning needs. Regular communication with their employees about the change process will ensure that hours allocated are used to address individual learning needs (Nilsen & Puro, 2005; Amundsen, 2014; Feng, et al., 2016).

Shortcomings: The small changes to how learning resources are distributed does not transform the call centre. Although the changes to the formal learning process will change how each part of the system uses learning resources, the system will remain unchanged. The existing process for allocating formal learning can be described as an adhocracy because each leader uses their discretion with little collaboration (Cameron & Quinn, 2011). This solution will continue with adhocracy and will decrease the communication among leaders (Cameron & Quinn, 2011).

Although leaders are regularly communicating with employees, the likelihood for miscommunication is high since employees may not receive appropriate learning when needed (Nilsen & Puro, 2005; Amundsen, 2014). The equal distribution does not consider employees' individual learning needs which may not promote growth in the long-term (Okun, 2015). Thus, the long-term financial cost to the call centre and quality of services it provides will likely be high. Furthermore, this solution addresses the lack of interrelatedness among the sections and sub-systems by removing its necessity (Jones, 2013; Kast & Rosenzweig, 2017). However, interrelatedness is essential for the system's effective functioning (Jones, 2013; Kast & Rosenzweig, 2017).

Possible Solution 2: Redesign the learning products currently available to employees

The call centre currently provides extensive learning products in the form of classroom, online and peer support to help employees to complete their duties (Internal Report, 2017). Since the call centre embodies a conservative culture, the learning approach currently used is an objectivist style to learning (Hendry, et al., 2006; Hedden, et al., 2017). The objectivist learning emphasizes passive learning with a facilitator-centred approach (Hendry, et al., 2006; Hedden, et al., 2017). Although the call centre uses an objectivist approach, the hierarchical style requires that employees self-identify their own learning needs and bring that information upwards. Therefore, employees must self-identify learning needs and then passively receive instruction.

Feng, et al., (2016) noted that regular communication between leaders and employees improves the quality of communication and the relationship between the leader and employee. Bellefeuille (2006) and Reigeluth (2009) note that adults learn best when they can apply their knowledge in a practical setting while learning. Adults also construct knowledge when they can problem-solve with peers while learning (Bellefeuille, 2006; Reigeluth, 2009). This is known as a social constructivist approach to learning. Changing the learning approach from objectivist to social constructivist will change the form of instruction after learning resources are allocated. This will change the formal learning process and transform the system. This will change how the system prepares its employees to output accurate information onto its environment.

Objective: Redesigns the formal learning practices to include regular group learning sessions where employees work together using a social constructivist approach to learning.

Resources needed: The human resources element will require a team of leaders and employees with skills related to training and adult learning principles (Brookfield, 1996; Nilsen & Purao,

2005; Hedden, et al., 2017). It will also require personnel to manage and monitor the preparation and delivery of the products and activities (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). The transformational leader must acquire the appropriate financial resources. This includes full salary for the staff over the course of the redesign process and pre-set regular designated learning hours for employees to learn in groups. Other resources include space, equipment, and technical information available for the learning products. Currently, the call centre has these elements available at their disposal, except for the human resources for such an undertaking.

Plan: Change to the learning approach from objectivist to constructivist to allow for more opportunities for group knowledge construction before answering calls (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). To change the learning approach the design plan must focus on adult learning principles (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). Some learning principles that are unique to adult learners are ones that focus on practical learning while doing the job since adults learn by doing (Bellefeuille, 2006; Reigeluth, 2009). Also, adults require a relatable context that they can use for further reference when applying the learned information (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). Currently, employees receive minimal opportunities to learn by doing the job while in the learning environment. Also, with the existing objectivist approach, learning does not provide realistic and relatable examples for applying the concepts learned to situations they will encounter on the job (Internal Report, 2017). The change can address this issue by overhauling the design of the learning products currently in use to allow for more practical learning, and practice before and while on the job (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017).

The constructivist approach continues to promote a learning organization, and encourages employees to self-identify learning needs, while also minimizing the impact of change on the organization as whole (Bellefeuille, 2006; Reigeluth, 2009). It also allows for the employees to understand their role and the role of other employees from other sections, sub-systems, and systems within the organization (Jones, 2013; Matta, et al., 2015; Kast & Rosenzweig, 2017). The plan requires the transformational leader to inspire and organize leaders to manage the new formal practices. This includes distributing the learning hours into pre-set intervals that allow for groups of employees to collaborate on problem-solving, practicing, and utilizing the learning sources while learning from each other (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). All learning sessions will occur in group settings to allow employees to work together to problem solve and practice (Brookfield, 1996).

Do: Each employee will be given a pre-set number of learning hours per month, and must work with their group to problem solve and practice either in person or in online classrooms (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). The facilitators (for classroom) and guides (for online) provide scaffolding support to learners when needed (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). Leaders organize the learning hours allocated for the employees to allow for group learning or follow-up in learning communities to raise, pose and answer questions.

Study: Monitoring of this plan can be completed by utilizing the existing quarterly employee performance surveys (Internal Report, 2017). The purpose of the surveys is to review the effectiveness of employees providing correct responses to clients (Internal Report, 2017). It can also monitor the leader feedback about the process of the new learning approach. Lastly,

employee feedback upon completion of each learning activity will allow for monitoring of employees' immediate understanding and skills retention (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017).

Act: Leaders can compare employees' immediate feedback to their survey results to determine if more learning is needed. Leaders will be able to use the immediate feedback and quarterly surveys to submit the concerns to the learning team to adjust the learning content accordingly.

Benefits: An overhaul of the existing learning approach allows for the organization to focus on the learning needs and reduces the burden on leaders for allocating learning hours. The social constructivist approach focuses on groups learning and practicing together in a practical environment (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). This overhaul helps improve the functioning of the overall system because employees work together to understand their role and the role of their peers. The group social construct for learning also allows employees to learn about how to address different question types from their peers (Brookfield, 1996; Nilsen & Purao, 2005; Hedden, et al., 2017). It transforms how the system prepares its employees for the questions posed by clients. This also impacts each part of the system by having employees discuss their learning together since allocation of learning will be predetermined in group format. Lastly, since employees are learning in groups, the inconsistency of how the resources are allocated is reduced because employees learn from each other.

Shortcomings: This plan will change the learning approach from an objectivist to constructivist learning approach and allow employees to become active participants in their own learning (Bellefeuille, 2006; Reigeluth, 2009). This plan does not address how the multiple parts that make-up the subsystem and system interact. Although the lack of interrelatedness is addressed at

the employee level, it is not addressed at the leader level. The hierarchical structure remains unchanged, but authority compliance leadership requires direction for the social constructivist approach to learning to occur from a leader downwards (Kiedel, 1995). The emphasis on learning from each other is not consistent with this hierarchical structure.

Possible Solution 3: Improve learning networks to improve how learning resources are allocated

At the call centre, the employees occupy various roles and do not consider other roles outside of their section or sub-system when completing their responsibilities (Matta, et al., 2015). The lack of interrelatedness of the sub-systems is demonstrated with the lack of consistency of how formal learning is practiced. The sections are led by lower level leaders, and these leaders work independently to complete the functions of their section and contribute to their sub-systems goal (Internal Quality Report, 2017). Since the call centre's system lacks interrelatedness, the sections do not communicate how and when learning resources are utilized.

At the call centre, employees respond to client questions that require research and interpretation of various laws, procedures, and policies (Internal Report, 2017). Feng, et al. (2016) argued that employees who have regular communication with their employees perceive a better working relationship with their leader. Furthermore, leaders who work together to share leadership responsibilities learn from each other and benefit from diverse perspectives (Billsberry & van Meurs, 2009). Carswell (2012) argued that environments that emphasize control but require timely learning support can benefit from a plan that coordinates the timing and relevance of learning to determine the method of learning. So, a plan that focuses on how leaders allocate resources while promoting communication can prove effective in transforming how the system prepares its employees to output correct information.

Objective: Create a learning environment where each lower level leader regularly communicates the needs and problems encountered and use this information to distribute resources accordingly.

Resources needed: The human resources needed are already in place; lower leaders (section leaders), senior leaders (sub-system leaders), assistant director and director (system leaders). The financial resources necessary for this plan are consistent with the existing resources already in place. The resources of leaders' time and commitment are the most extensive resource. The change plan will require time daily, weekly, and quarterly. The lower level leaders will require an additional 15 minutes of time each day, an additional 30 minutes weekly, and 1 additional hour quarterly. Technological and sociological resources are currently already available and only require the existing resources available such as a computer, two monitors, a keyboard, a mouse, and a telephone. Meeting rooms must also be available for meetings.

Plan: The change plan includes creating two communication networks. Network One among leaders as a group (senior communication network), and Network Two among leaders and employees (leader-employee communication network). Carswell's (2012) article proposes a strategy for maximizing organizational learning. This model is based on three key aspects: moment, place, and relationship. The senior communication network lets the leaders collaborate to ensure that they include all the learning needs and address appropriately. They will use this information to consider the moment the learning need arises, the place to complete and address the learning, and the content's relationship to various positions (Carswell, 2012). Figure 2.4. explains the process for collaboration.

The plan requires regular meetings among leadership (Senior communication network) with the goal of actively preparing for learning needs as they arise. With the leader-employee

communication network (Network Two), leaders must meet regularly with each employee in their section to gain for substantive information at the leadership meetings (Feng, et al., 2016). Leaders will use the information gathered from one-to-one meetings with their employees for discussion with other leaders as a group to identify trends and determine how and when to use the learning hours.

Carswell's Modified Framework for Relationship, Moment, and Place of learning

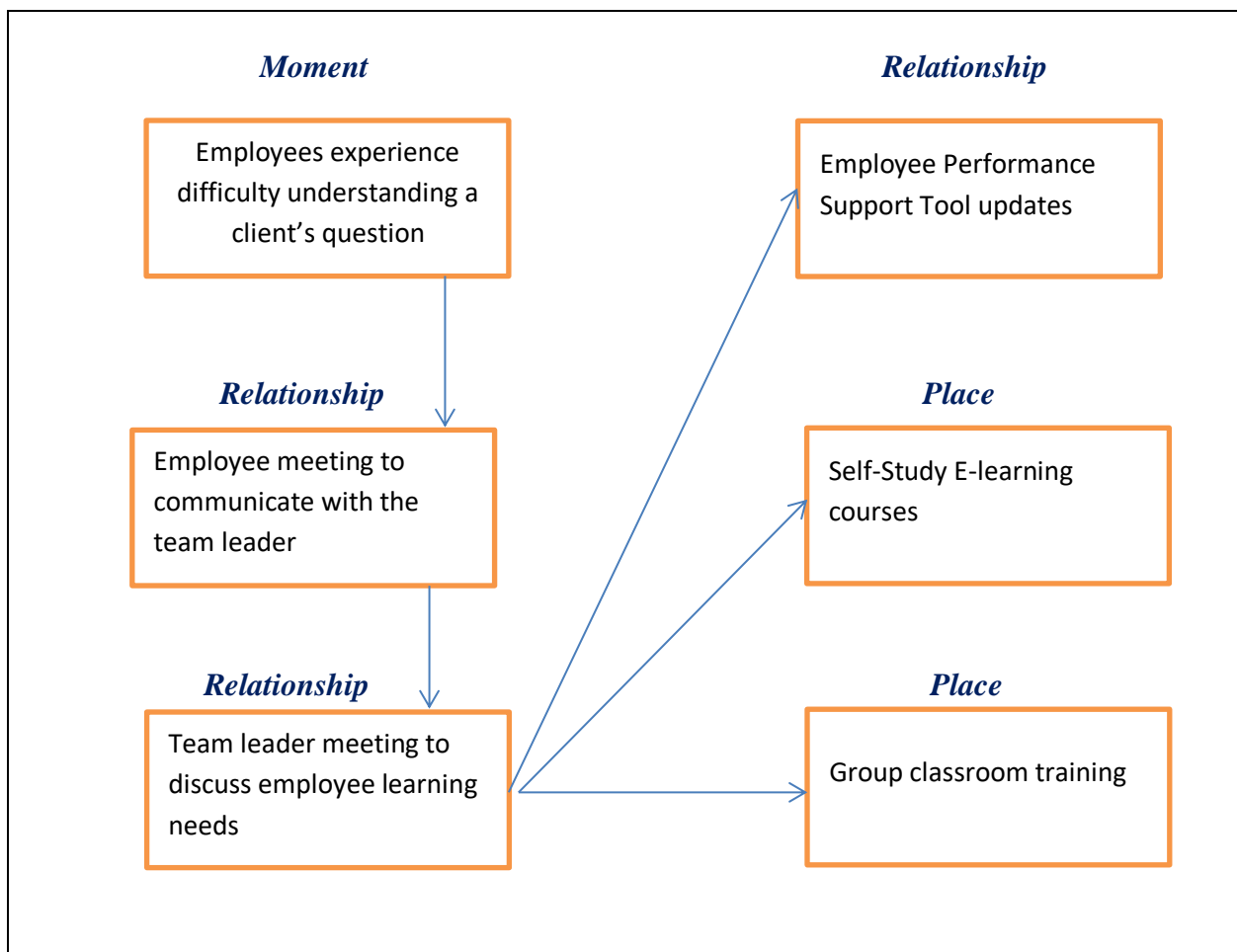


Figure 2.4. Represents the structure of Carswell (2012) Moment, Place, and Relationship

Organizational Learning framework.

Do: Implement weekly one-to-one meetings with leaders and their employees (Feng, et al., 2016). Use the information at the regular meetings among leaders, for the purposes of discussing and sharing the current trends related to employees learning needs (Billsberry & van Meurs, 2009). The leader meetings are required daily for 15 minutes to discuss learning needs and call centre trends, weekly for 30 minutes to manage learning resources, and hourly every quarter to monitor trends and make changes to the plan regularly.

Study: The quarterly meetings are for the purpose of progress reports about how learning has been utilized and for reviewing the correctness of responses provided in earlier quarters. The Employee performance tools are currently in use quarterly to measure accuracy of responses (Internal Report, 2017). The tools from earlier years will be used during these periods as a quarter by quarter or year by year comparison.

Act: This plan requires regular conversations between each leader and employee to gauge employees' understanding of their work and learning needs. It also requires regular conversations among leaders and with senior managers as groups to ensure that resources are used effectively to meet the specific goal. Leaders must also distribute responsibilities to coordinate and organize the learning events.

Benefits: This solution requires considerable involvement from a transformational leader. When creating a clear vision, they must consult the leaders and key employees to build a strategic change plan (Wang, et al., 2005; Pasha, 2017). The consultation ensures that the vision is relatable to the intended followers. If the transformational leader leverages the existing authority-compliance hierarchy, then vision must be stated at the top and the change plan disseminated downward (Boyle & Whitaker, 2001; Tanner & Otto, 2016). The transformational leader must

also motivate leaders by insuring they are included in the change process to help inspire them to motivate others (Wang, et al., 2005; Pasha, 2017).

This solution also ensures that the call centre continues to be a learning organization, by promoting continuous learning (Lipshitz, et al., 2002; Steenekamp, et al., 2012). Carswell's (2012) Organizational learning plan for organizational learning requires a platform which focuses on when the learning is needed and how to effectively deliver it in an appropriate and timely manner. This framework addresses the lack of interrelatedness of information between the sub-systems because it requires leaders share information before distributing learning resources (Carswell, 2012). It also works with the existing authority-compliance leadership and cultural structure. It keeps top-down dissemination of instruction, while also allowing for compliance at each hierarchical level (Boyle & Whitaker, 2001; Tanner & Otto, 2016).

This approach transforms the system because changes are made to how each sub-system functions to achieve goals. With this process, senior and lower level leaders each use the formal learning process in different ways prepare their respective employees for the different question types posed (Jones, 2013; Kast & Rosenzweig, 2017). The system becomes a learning organization that, when impacted by its environment, is prepared to output correct information onto that environment.

Shortcomings: Although interrelatedness is addressed at the leadership level, Carswell (2012) framework does not assist employees with understanding the roles of others in other sections. This plan also changes the organization's conservative ideology because it will require significant changes to the existing policies and procedures for formal learning practices and how the systems parts interact.

Comparison of Possible Solutions

Overall, the possible solutions presented above address some or most of the problems identified by the PoP. The PoP is focusing on the lack of consistency in how formal learning is allocated throughout the system. The call centre has struggled with meeting its specified goal of providing correct responses to its clients (Internal Report, 2015; 2017). Furthermore, the call centre embodies a conservative culture with hierarchical values and utilizes authority-compliance practices. The chosen solution must transform the call centre's system so that it can effectively output correct responses onto its environment.

Possible solution 1 eliminates the lack of consistency in distributing learning resources by enforcing equal pre-set learning hours to all employees regardless of need (Edwards & Whitty, 1994; Okun, 2015). This approach is consistent within a hierarchical structure that emphasizes control (Keidel, 1995; Cameron & Quinn, 2011). This solution, however, may not help improve the interrelatedness of the call centre's system. Leaders will continue to work autonomously. Leaders and employees alike may become more disconnected in their understanding of their role on other sections and sub-systems. Employees who require less learning support may receive too much, thus promoting idling (Okun, 2015). Employees who require more learning support may receive too little, thus continue the struggle to provide correct responses, and inhibiting the call centre from meeting its goal.

Possible solution 2 eliminates lack of consistency in allocating learning resources and promotes self identifying learning needs to an extent that shifts the responsibility of learning onto the employees. This solution will also improve the interrelatedness of the sections with the group learning sessions since employees will work together to learn and practice. However, it shifts

responsibility for identifying learning trends, question topics and types away from the leaders and onto employees. The constructivist learning approach may help employees develop strategies and tools for answering difficult questions and may even assist in meeting the call centre's goals; but it changes the organization's culture and hierarchical structure (Bellefeuille, 2006; Reigeluth, 2009).

Possible solution 3 provides a framework that focuses on communication. The lack of consistency in how the learning resources are distributed is addressed with the communication networks. The leaders are required to communicate with each other on a regular basis to improve interrelatedness between the sections and sub-systems. The communication network between the leader and employees allows the leader to provide substantive feedback about learning needs when meeting with colleagues and executive leaders (Feng, et al., 2016). The framework allows for changes to the learning approach from objectivism to constructivism. This helps with interrelatedness among the sections at the employee level if or when necessary. Carswell's (2012) framework focuses on ensuring that leaders are allocating learning based on trends and collective needs while coordinating timing. This plan places considerable burden onto the leaders to coordinate and effectively utilize resources. Therefore, this solution requires a charismatic transformational leader to inspire leaders "to transcend their own self-interests for the sake of others." (Northouse, p. 175, 2016).

Solution 2 addresses some of the shortcomings noted with solution 1. However, solution 3 meets most of the organization's needs. It creates an opportunity to improve the consistency in how formal learning occurs while also allowing for interrelatedness among the parts of the system. Each solution addresses the lack of consistency in how learning resources are allocated,

but solution 3 is most suited for a transformational leader, the existing hierarchy and the organizational culture.

Leadership Ethics and Organizational Change

So far, I have put forward a change plan to transform the call centre into a learning organization that is prepared for changes in the client question types it receives. The focus has been on changing the formal learning process because it encompasses a set of policies, procedures, and practices determining how learning trends are identified and resources are distributed (Internal Quality Report, 2017). The formal learning process impacts each part of the call centre's system and is an essential component in preparing the system to output correct information. So, it must ensure that its policies, procedures, and practices induce the system's specified goal (Jones, 2013; Kast & Rosenzweig, 2017). The main concern regarding this process is the lack of consistency in how its resources are distributed to employees.

Although Cawsey, et al.'s (2016) change path model is an ideal model for implementing my chosen change solution, as a change leader I must consider ethical implications that can arise during the change plan. The role of ethical behavior during the change process cannot be underestimated or undervalued (Bassa, & Steidlmeiera, 1999; Ciulla, 2014). Some of the ethical considerations centre on interpreting findings, as they relate to the perceived or desired success of the plan, and the employee motivations and attitudes surrounding the plan.

Interpreting findings

When it comes to results of any study or plan, the efficacy and reliability of the results can be called into question if the interpreters overlook their own sensitivities and biases (Bassa, & Steidlmeiera, 1999; Chan, McBey & Scott-Ladd, 2011; Ciulla, 2014). For the purposes of my

OIP, the sensitivities and biases I must consider are my own and those of the leaders around me who are early adopters of the change plan. Sensitivities and biases focus on the interpreters' personal understanding of the findings with or without context (Bassa & Steidlmeiera, 1999; Chan, et al., 2011; Ciulla, 2014). The context, or lack of context can influence, or form intended conclusions about results (Bassa & Steidlmeiera, 1999; Chan, et al., 2011; Ciulla, 2014). The process of observation and evaluation can generate contextual sensitivities and biases in the form of influencing the findings (Bassa & Steidlmeiera, 1999; Chan, et al., 2011; Ciulla, 2014).

During the change process, the change path model requires leaders to evaluate each step of the change plan to recognize shortcomings and make appropriate changes as necessary (Cawsey, et al., 2016). This means that at each stage during the change process, I, and other leaders can monitor and form conclusions about each step. The second step of the change path model is the Mobilization step. Here I articulate a change plan to the senior and lower level leaders with a goal of gaining early adopter and early majority buy-in (Cawsey, et al., 2016). During this stage I must monitor and evaluate the effectiveness of employee-readiness for the change plan. This is when considering the context of information may help me avoid overlooking ethical considerations.

Employee Performance Tools

Employee performance tools are used as an internal evaluation tool to assess if employees are regularly providing correct information to the call centre's clients (Internal Report, 2015; Internal Quality Report, 2016). These tools require leaders to listen and monitor employees while answering calls and then making assessments of the employees' ability to output a correct response (Internal Report, 2015). It requires close attention through observation

by the lower level leaders (Internal Quality Report, 2016). Both tools are used at the Acceleration step of the change path model; and during this step, the organizational learning framework is in process.

Two types of employee performance tools:

- Employees quality review surveys examine how the employees are utilizing the resources available to them. A team monitors how these tools are being used, and gains feedback from employees, clients, and team leaders about its efficacy (Internal Quality Report, 2016).
- Employee Performance tools examine how the employee performs his or her duties. This tool is used exclusively by the leaders as a progress of employee's performance on the job (Internal Quality Report, 2016).

The change proposed requires a transformational leader who can inspire and persuade leaders to change their behavior for the sake of transforming the organization (Northouse, 2016). If I am indeed successful at inspiring change, the desire for success among some employees may result in biases when determining the correctness of an answer. Furthermore, the change path model allows for monitoring at each step of the change plan before moving onto the next step (Cawsey, et al., 2016).

Treviño, Brown, and Hartman, (2003) and Ciulla (2014) noted that participants who are aware that they are being evaluated may behave differently than if not being evaluated. This can be extended to both the leaders following instructions for implementing the change plan, and employees who have been inspired by either the vision or their relationship with their direct

leaders. Accordingly, leaders and employees who are resistant to change may follow the plan while being monitored but revert to their old practices when not being monitored (Treviño, et al., 2003; Ciulla, 2014). Employees may try to apply their new training to calls if they expect the results to affect the applicable stage of the change plan (Treviño, et al., 2003; Ciulla, 2014).

As it relates to the employee performance tools, the sensitivities and biases are in how information is interpreted (Treviño, et al., 2003; Ciulla, 2014). The motivation to please an inspiring leader creates its own bias where leaders may misinterpret correctness in calls, to ensure the success of the plan (Treviño, et al., 2003; Ciulla, 2014). Meanwhile other leaders and employees may be influenced by the sensitivity of only following the plan when they perceive a personal benefit for them to do so (Bassa & Steidlmeiera, 1999; Chan, et al., 2011; Ciulla, 2014).

Although it is difficult to control the impact of ethical implications, it is important to identify these implications to ensure that they are considered during the change process (Bassa, & Steidlmeiera, 1999; Treviño, et al., 2003; Chan, et al., 2011; Ciulla, 2014). My goal is to leverage the existing organizational culture during the change process to gain support among employees who are resistant to change (Wang, et al., 2005; Feng et al., 2016). Therefore, the necessity to utilize existing and effective tools and resources is paramount. However, noting researcher and participant bias must also be considered (Bassa, & Steidlmeiera, 1999; Treviño, et al., 2003; Chan, et al., 2011; Ciulla, 2014).

Conclusion

The call centre's specified goal is to provide correct responses to its clients (Internal Report, 2015; Internal Quality Report, 2015; 2017). However, over the past decade, the clients have changed the types of questions posed, and the call centre has responded to such questions

incorrectly (Internal Report, 2015; Internal Quality Report, 2015; 2017). From an open system's perspective, the system is being impacted by its environment, and is unable to appropriately prepare its parts to output correct information (Jones, 2013; Kast & Rosenzweig, 2017). The formal learning process is an essential component in the system that impacts all the system's parts. The PoP notes the problem with the formal learning process is a lack of consistency in how the learning resources are distributed throughout the system. Transforming the call centre into a system that is prepared to output correct information in response to changing environment requires changing the formal learning process.

My goal is to inspire employees to follow the change plan through collaboration and communication (Northouse, 2016; Pasha, 2017). A change plan within an organization that is sensitive to the cultural ideologies must note and incorporate these ideologies when planning for change (Gianesin, 2003). Therefore, to be successful at transforming the organization, I must build relationships and trust to inspire employees by embracing the parts of their culture that is essential to their identity (Gianesin, 2003; Pasha, 2017).

Since the call centre recognizes the need for change, on a change spectrum, the change is reactive (Cawsey, et al., 2016). A change type that is overhauling in nature will allow for a discontinuous and swift transformation while also leveraging the call centre's hierarchy (Cawsey, et al., 2016). This requires that I use transformational leadership principles to inspire and motivate employees by leveraging my existing relationships through communication and examples (Northouse, 2016; Eti-Tofinga, 2018).

My leadership approach and my chosen change solution focus on changing the formal learning process to ensure the parts of the sub-systems are interdependent and interrelated (Jones,

2013; Kast & Rosenzweig, 2017). The chosen change path model is a linear four step model where each step builds on the information from the existing step and allows extending of any given step before moving onto another step (Cawsey, et al., 2016).

The four stages of the change path model are ideal for transforming this system because its steps allow for rotation between the mobilization and acceleration stages (Cawsey, et al., 2016). This will allow me the flexibility to implement and monitor the change process during the acceleration stage, while making the necessary changes, before implementing the best practices of the change plan during the institutionalization stage (Cawsey, et al., 2016).

As a change leader, I am aware of, and must consider the ethical implications of change on the environment. Employees or participants in a change process may have their own biases and sensitivities that can impact how they interpret and respond to information when being evaluated (Bassa, & Steidlmeiera, 1999; Treviño, et al., 2003; Chan, et al., 2011; Ciulla, 2014). Since inspired and resisting employees may influence the results of the change process it is important to acknowledge and monitor our role in interpreting information during the change process.

Chapter three: Implementation, Evaluation and Communication

Change Implementation Plan

In chapter two I noted a change solution that will address the lack of consistency in how learning resources are allocated. By focusing on the formal learning process, this solution can transform the call centre into a learning organization that is prepared to respond to changes from its environment. This solution also works well within the context of a four-step change path model, because the steps can easily be incorporated into an authority-compliance hierarchy (Cawsey et al., 2016). I will be able to use transformational leadership principles and leverage the existing hierarchy when implementing change at each step of the change path model.

The formal learning process impacts each part of the system, and the policies, procedures, and practices are built around downwards focused direction and discretion at each leadership level (Internal Quality Report, 2016). Changing this process will significantly impact how each system and its parts interact with each other. The chosen solution addresses the lack of interrelatedness of the system's parts so that the system can achieve its specified goal (Jones, 2013; Kast & Rosenzweig, 2017).

Chapter three will explain how I will use transformational leadership principles, the chosen solution, and the change path model to implement, evaluate, and communicate the change plan (Wang, et al., 2005; Cawsey, et al., 2016; Northouse, 2016; Pasha, 2017). I will describe the goals and strategies that I will use to implement the transformation through the chosen solution (Wang, et al., 2005; Carswell, 2012; Feng, et al., 2016). I will explain how I will use the chosen solution to monitor the change plan (Carswell, 2012; Cawsey, et al., 2016). Lastly, I will demonstrate how I will use transformational leadership principles to communicate the need for

change, and initiate next steps and considerations for the future (Wang et al., 2005; Feng, et al., 2015; Northouse, 2016; Pasha, 2017).

Strategy for implementing change: Goals and Priorities

The lack of consistency in how the call centre allocates learning resources can be described as a breakdown of the interrelatedness between the parts of the call centre's organizational system (Jones, 2013; Kast & Rosenzweig, 2017). The call centre sufficiently meets the requirements of a learning organization because it has a formal learning process that provides learning resources and focuses on continuous learning (Lipshitz, et al., 2016). However, its formal learning process is founded within a top-down hierarchy focusing on downward instruction (Boyle & Whitaker, 2001; Tanner, & Otto, 2016). It is designed around executive leaders making decisions about learning trends; senior leaders categorizing that information into question topics; and lower level leaders using their discretion when allocating learning resources for these topics (Gianesin & Bonaker, 2003; Hendry, et al., 2006; Northouse, 2016). Over the past decade the question topics have remained consistent, but the types of questions clients pose have changed (Internal Quality Report, 2015; 2017). Since each leader exclusively follows the information from above, question topics are examined without consideration to question type. However, lower level leaders allocate learning resources based on individual employee needs identified through question types.

The chosen solution focuses on creating a formal learning process that requires leaders to work together to examine both the question topics and types before allocating learning resources (Carswell, 2012). Thus, eliminating the lack of consistency in how learning resources are allocated. This will prepare the call centre's system to output correct information when impacted by its environment (Jones, 2013; Kast & Rosenzweig, 2017). Since the call centre already

recognizes the need for change, most of the goals and strategies for implementing the change occur within the mobilization and acceleration step of the change path model (Cawsey, et al., 2016). The goals focus on how to implement the changes to the formal learning process while also preserving the call centre's conservative ideology. The strategies for each of the goals focus on applying transformational leadership principles to implement each goal, while also monitoring the progress. The change implementation process will include the following goals:

- **Goal 1:** Create a change working group
- **Goal 2:** Create a communication network between senior leaders and lower level leaders.
- **Goal 3:** Create a communication network among lower level leaders and their subordinates.
- **Goal 4:** Create a just-in-time learning forecast plan.
- **Goal 5:** Implement milestones for monitoring learning.

The changes to the formal learning process focus on improved communication, so the leaders will gain more information about the needs and demands of other sections (Carswell, 2012; Hartge, et al., 2015). This allows for each section to consider how their individual contribution to the sub-system's goals can impact other sections (interrelatedness) before determining how learning resources are allocated (Jones, 2013; Kast & Rosenzweig, 2017). With stronger communication, the leaders can make collective decisions about how and when to utilize the learning resources based on achieving the organizational systems goals. Figure 3.1. summarizes the expected outcome after implementing each goal. This contrasts the current state with the desired future end state. Figure 3.2. below summarizes the strategy for the goals, priorities, and the expected outcome.

Current state- Call centre system	Goals	Future state- Call center system
<ul style="list-style-type: none"> Identify problems with how the system prepares to output correct information. Formal learning process is process that prepares system to output correct information. Formal learning process includes hierarchical policies and procedures. 	Create a change working group.	<ul style="list-style-type: none"> Stakeholders collaborate. Identify best practices. Analyze existing formal learning process.
Senior leaders categorize learning trends into question topics.	Create a senior communication network.	<ul style="list-style-type: none"> Senior leaders categorize learning trends into question topics. Lower level leaders compare question topics with question types (from employees). Leaders collaborate to share information about question types.
Leaders use discretion in distributing resources.	Create a communication network.	<ul style="list-style-type: none"> Leaders meet with employee for real-time information about question types. Leaders use information to compare to question topics.
Leaders distribute learning resources at their discretion.	Create learning forecast plan.	<ul style="list-style-type: none"> Leaders input question topics and types into learning forecast plan Plan learning hours based on question topic trends. Plan learning training based on question types.
This is not a part of the current state.	Implement milestones for monitoring learning.	<ul style="list-style-type: none"> Monitor each goal weekly and monthly. Use qualitative feedback and performance support tools to monitor progress. Make changes as necessary.

Figure 3.1. lists the current state of the call centre and how the goals will transform the call centre's system (Williams & Rosenbaum, 2004; Internal Report, 2015; Internal Quality Report, 2015; Pasha, 2017).

Goal	Priority	Strategy	Expected outcome
Create change working group	Form a group that will assist in implementing, monitoring, and modifying the change plan.	Identify key stakeholders with different expertise.	To monitor the progress of the change plan.
Communication network for senior and lower level leaders.	All sections within each sub-system use the communication network to share information about learning that impacts other sections and sub-systems.	Meet to gain understanding of day-to-day limitations.	Collaboration with leaders to ensure effective changes to formal learning process.
		Use trust and existing relationships to relate to leaders when explaining the benefits of the new networks.	Build a trusting relationship necessary to gain support before implementing the change.
		Use current position in existing hierarchy to implement communication network.	Leaders to participate in communication networks before distributing learning resources.
Communication network between leaders and subordinates.	<ul style="list-style-type: none"> • Increase the volume of communication between leaders and employees. • Leaders learn directly from employees about client question types. 	Use my position in the hierarchy to explain how the communication networks assist duties.	Leaders have substantive information for learning meetings with other leaders.
		Use relatable examples of how it will help the call centre meet its specified goal.	Leaders are motivated to follow the new procedure.
		Introduce weekly one-to-one meetings.	Leaders follow the new procedure.
Learning forecast plan.	<ul style="list-style-type: none"> • Create a learning forecast plan. • Implement the learning forecast plan as the new way to distribute learning resources. • Organize the learning hours through sharing of resources based on group needs. 	Use existing information about learning trends.	Learning trends are still analyzed at HQ where they appropriate information accordingly.
		Continue to categorize the learning trends into topics.	Learning trends are categorized into topics so the information from HQ is still applicable.
		Compare question topics to information gathered from one-to-one meetings.	Formal learning process procedure- leaders use communication networks to analyze learning.
		Distribute learning resources.	The learning forecast is the new tool used to distribute learning resources.
Implement progress milestone.	Information gathering about: <ul style="list-style-type: none"> • Employees preparedness to answer calls correctly. • Leaders preparedness to use learning forecast to distribute learning resources. 	Monitor how the changes in the formal learning process are working to prepare employees for answering questions correctly.	Milestones to collect information about effective the learning was for answering the changes to question types.
			Milestones to collect information about how learning resources were distributed.

Figure 3.2. Summarizes the goals, priorities, and strategies for change implementation (William & Rosenbaum, 2004; Internal Report, 2015; Internal Quality Report, 2015; Pasha, 2017).

Goal 1: Create a change working group.

Goal 1 Priorities: The change plan requires a team to assist in implementing, monitoring, and amending as needed. Salih and Doll (2013) noted that implementing change requires strategic consultation from leaders and other affected members of the organization. William and Rosenbaum (2004) noted the necessity to monitor change during and after implementation. Therefore, the priority for goal one is to identify key stakeholders who can uniquely contribute to the change process and assist with implementing and monitoring the change.

Goal 1 strategy: This will be the only goal to occur during the awakening step of Cawsey, et al.'s (2016) change path model. The creation of this group will help ensure that I have accurately identified the organization's gaps. Northouse (2016) and Pasha (2017) noted that inspiring and building trust requires a deepened understanding of the anticipated followers. Also, Ganesin and Bonaker (2003) noted conservative cultures place value on following tradition. Therefore, while working within a conservative culture, inspiring, and building trust requires understanding the values of followers and incorporating them into the change process. The strategy is to leverage the collaboration process at this stage, to inspire individuals to adopt the change plan (Salih & Doll, 2013).

Goal 2: Create a senior communication network between leaders.

Goal 2 Priorities: The senior leaders make decisions about how and when to utilize the current resources available to the call centre (Internal Report, 2013; 2015; 2017). These leaders not only work together to oversee various program areas, but they also communicate directly with other branches within the organization (Internal Report, 2013; 2015; 2017). The priority is to ensure that senior leaders are prepared to extrapolate the appropriate information from lower level leaders about real time needs of employees. Then collectively, lower level leaders use the question topics and information gathered from employees to identify question types before allocating resources (Internal Report, 2013; 2015; 2017).

Goal 2 strategy: This goal will be created during the mobilization step and implemented during the acceleration step (Cawsey, et al., 2016). The senior communication network will leverage the existing hierarchy by having senior leaders provide direction about information gathered and lower level leaders collaborating with that information (Wang, et al., 2005; Amundsen, 2014; Tanner & Otto, 2016). The focus is on maintaining a learning plan, defining upcoming priorities, identifying the impacted sections, and analyzing the options to ensure employees receive the appropriate support in a timely manner (Wang, et al., 2005; Tanner & Otto, 2016).

The meetings for the network must be brief and include an agenda and an opportunity for round table discussion (Carswell, 2012; Weick, 2013). The agenda must focus on the existing learning plans, time for courses, and volume of calls, including availability of employees to meet the organization's immediate needs (Carswell, 2012; Weick, 2013). The senior leaders will have the opportunity to make and communicate decisions about how to utilise existing resources.

To leverage the cultural ideology, the brief meetings will be added as a topic to the call centre's daily meetings (Mir, Bobby-Banerjee & Mir, 2008; Weick, 2013). The existing daily leadership meetings will be lengthened from 15 minutes to 30 minutes or longer depending on the needs identified. Increasing the length of the daily meetings also serve as an opportunity to meet Carswell's (2012) framework for a timely response to learning needs without attempting to organize another meeting. The purpose of adding the network to the daily meetings is to discuss immediate learning needs with all leaders who are already present. The learning network meetings will also be added to the monthly meetings between senior leaders and the program leaders they oversee. The purpose of this is to identify current trends and obstacles encountered. These meetings ensure that senior level leaders are informed and in touch with the authentic needs of their sections and have relevant and meaningful information to use for decision making processes (Wang, et al., 2005; Carswell, 2012; Tanner & Otto, 2016).

Goal 3: Create a communication network among lower level leaders and their subordinates.

Goal 3 priorities: This communication network will be created during the mobilization step and implemented during the acceleration step (Cawsey, et al., 2016). The call centre currently has 9 lower level leaders who each supervise a section of approximately 15 employees (Internal Report, 2013; 2015; 2017). As discussed in chapters one and two, increasing communication between leaders and employees builds trust in the change process (Wang, et al., 2005; Feng, et al., 2015; Salem, 2016). A trusting relationship between leader and employee increases the leader's understanding of employees' needs (Hao, et al., Shen, et al., 2015). The priority is to increase the volume of communication among these leaders and their employees to ensure that the group of leaders are all familiar with the needs and challenges facing their

employees in preparation for the senior communication network meetings (Carswell, 2012; Weick, 2013; Amundsen, 2014).

Goal 3 strategy: Currently, the type of learning employees receive is dependent on the individual team leader's understanding about the need for the learning support (Internal Report, 2015). These weekly meetings will create a dialogue between the employees and their team leaders, promoting and encouraging the self-identification of one's own learning needs (Carswell, 2012; Shen, et al., 2015). The strategy is to enhance the existing relationships between leaders and employees so that substantive information is presented at the learning working group meetings (Carswell, 2012; Weick, 2013; Amundsen, 2014). It focuses on ensuring that employees have regular opportunities to bring forward immediate concerns, desired activities, and the learning needs discovered during that week (Williams, 2008; Mir, Bobby-Banerjee & Mir, 2008; Carswell, 2012; Weick, 2013; Amundsen, 2014). The regular communication allows for a perceived benefit to employees that their needs are seriously considered, which will aid in gaining support for following the change plan (Elving, 2005; Wang, et al., 2005; Amundsen, 2014; Bringselius, 2014; Hartge, et al., 2015; Tanner, 2016). Figure 3.3. combines both communication networks to display the flow and responsibilities of each meeting.

Meetings schedules		
Responsibility	Task	Duration
Employee self-identify	Employees self-identify their learning needs in preparation for meeting	On going
Lower leader and employee meet	The leader meets with each employee to discuss learning needs	15 minutes per employee; minimum of 1 meeting per month
Lower leaders meet as a group	The leaders discuss the learning needs identified at the meetings (above); Identify trends and compare to earlier years.	30 minutes per week; minimum one meeting per month
Lower leaders meet with senior leaders	The leaders meet with findings from earlier meetings to discuss availability of learning resources.	1 hour; minimum one meeting per quarter

Figure 3.3. Explains the schedule for regular meetings within the communication network.

Goal 4: Create a just in time learning forecast plan.

Goal 4 priorities: This goal will be created during the mobilization step and implemented during the acceleration step (Cawsey, et al., 2016). The priority is to allow for learning to begin at the time the learning need has occurred (Carswell, 2012; Shen, et al., 2015). Krueger and Dickson (1994) and Shen, et al. (2015) focused on a framework that requires regular communication between leaders, and between leaders and their employees. Employee training will be organized around a collective understanding about upcoming learning trends coupled with learning needs identified by employees during the weekly one-to-one meeting (Carswell, 2012). The learning forecast plan requires leaders host regular meetings with their employees and meetings with each other to discuss the learning needs before prescribing solutions (Carswell, 2012). Thus, creating consistency in the information and improving the learning environment (Krueger & Dickenson, 1994; Carswell, 2012; Shen, et al., 2015). The just-in-time learning environment will allow team leaders to organize and prioritize immediate and upcoming learning needs based on self-identified trends and upcoming demands. Learning resources will be allocated based on the needs included in the learning forecast plan.

Goal 4 strategies: The strategy for implementation is to use the communication networks to monitor changes in question types from clients before distributing learning resources. I have modified Carswell's (2012) framework for an emphasis on communication. This framework works well as a learning forecast plan for the call centre. It requires the learning working group to track upcoming learning events and identify the appropriate resources considering the moment, place, and time (Carswell, 2012). Appendix 4 explains how the learning forecast plan is used to plan the distribution of learning resources.

Carswell's (2012) framework uses a strategy for maximizing organizational learning through knowledge management. The learning forecast plan will utilize knowledge from the learning working group to identify the available learning hours and analyze when or how additional learning hours should be utilized to meet the needs of employees. It also allows lower level leaders to share identified learning needs brought forward during the one-to-one meeting (Carswell, 2012).

This information can be used to identify trends in question types among employees (Krueger & Dickenson, 1994; Carswell, 2012; Shen, et al., 2015). The information identified at the meetings will allow lower level leaders to identify the most pressing learning needs that are common among staff and require attention soon; this represents the time learning will occur (Carswell, 2012). The information will also allow for the leaders to determine the type of learning support possible (classroom or online learning) based on availability of resources; this represents the place learning occurs (Carswell, 2012). The learning forecast plan will also allow team leaders to compare the availability of learning resources with the volume of employees who require that support (through peer coaching or self study); this represents the place learning will occur (Carswell, 2012).

Goal 5: Implement milestones for monitoring learning.

A milestone is a point where participants input information about the change process (Williams & Rosenbaum, 2004). It can be in the form of qualitative and quantitative tools that allow the researcher to gather information from participants (Williams & Rosenbaum, 2004).

Goal 5 priorities: The milestones are going to be used to monitor the progress of how the communication networks and learning forecast plan are working (Williams & Rosenbaum, 2004). The priority of the milestone is as a qualitative and quantitative information gathering tool (Williams & Rosenbaum, 2004).

Goal 5 strategy: The milestones will be implemented during the acceleration step and used to analyze the effectiveness of information before the institutionalization step (William & Rosenbaum, 2004; Cawsey, et al., 2016). The qualitative and quantitative feedback tool will employees and leaders to share their thoughts during or after completing any goals (William & Rosenbaum, 2004; Cawsey, et al., 2016). The data from the milestones will be tabulated monthly, while it will be open for participants to provide feedback at anytime during the month. The acceleration step is where the change process is occurring with the participation of the entire call centre system. Therefore, during that time, participants have the most information about the change plan (William & Rosenbaum, 2004). They will be implemented monthly, then gradually phase into quarterly when the plan has reached the institutionalization step. This process allows participants time to follow each goal before providing thoughts.

This change plan removes the need for a new organizational chart because it focuses on improving the existing organizational chart by improving the communication networks and creating the learning forecast plan. Each goal uniquely contributes a significant change within

the formal learning process and the organization’s procedures. Each goal changes how leaders follow the formal learning practices to make decisions about learning. The changes require consideration to be paid to the types of questions posed by clients by gathering information from employees answering the calls (Krueger & Dickson, 1994; Shen, et al., 2015).

Change process	Future state of formal learning process
Goals: <ul style="list-style-type: none"> • Change working group. • Senior communication network. • Leader-employee communication network. • Learning forecast plan. • Milestones. 	<ul style="list-style-type: none"> • Hierarchy remains. • Senior and lower leaders share information about question topics and types. • Leaders share insight from employees about question types. • New learning forecast plan to track trends and distribute learning resources. • Progress is monitored.
Priorities goals: <ul style="list-style-type: none"> • Daily meetings (leaders). • Weekly meetings (leaders). • Weekly meetings (leader-employee) • Compare question topics to related question types. • Learning forecast plan to input learning hours before distribution. • Leaders and employees provided feedback about goals. 	<ul style="list-style-type: none"> • Senior and lower leaders receive real-time information about types of questions asked by clients. • Senior and lower leaders compare analyze weekly learning needs • Employees provide regular feedback about types of questions posed by clients. • Learning forecast plan shows hours available, current question types and related topics. • Leaders use learning forecast plan to distribute learning hours in groups.
Monitor plan: <ul style="list-style-type: none"> • Leadership quarterly meetings. • Existing employee performance surveys. • Examine feedback from milestones. 	<ul style="list-style-type: none"> • Analyze results from employee performance surveys. • Look for trends in incorrect responses. • Compare trends with learning forecast plan inputs. • Compare results from employee performance surveys with milestone feedback.
Finalize plan: <ul style="list-style-type: none"> • Identify best practices. • Implement changes, as necessary. 	<ul style="list-style-type: none"> • Call centre system’s parts are prepared for different question types posted by clients. • Call centre system’s sub-system works together to prepare to output correct information.

Figure 3.4. Outlines the goals and priorities and how they will change the formal learning process of the call centre’s system (Mager, 1999; William & Rosenbaum, 2004; Carswell, 2012; Cawsey et al., 2016).

Figure 3.4. is an example of how the goals and strategies outlined in the change plan above, will improve how leaders communicate between the sections and sub-systems. As a

change leader, I can build trust with influential leaders and leverage the existing hierarchy to disseminate direction downward (Wang, et al., 2005; Feng, et al., 2015; Northouse, 2016; Pasha, 2017). Creating communication networks ensures that leaders collaborate and share real time substantive feedback about question types before decisions are made (Straatmann, Kohnke, Hatstrup & Mueller, 2016). The information becomes essential to help senior leaders determine when additional learning funds may be needed. Goal one is the first to be implemented, then, goals two and three occur simultaneously and are antecedent to goals four and five.

The success of goal four, the learning forecast plan, relies heavily on the relationship between the leader and employee. More specifically, employee readiness theory suggests that employees are more likely to comply and support organizational changes when they have a positive relationship with their direct (leaders) (Salem, 2013; Straatmann, et al., 2016; Tanner & Otto, 2016). Furthermore, in environments where employees receive regular instruction, employees are more likely to support organizational changes when the direct supervisor provides regular and consistent instruction during the change process (Hao, Ziyue & Xiuyun, 2015). The changes to the formal learning process ensure that employees communicate regularly with their leaders for the purposes of articulating their perceived level of self-efficacy (Krueger & Dickson, 1994; Shen, et al., 2015). If the regular communication improves the relationship between the leader and subordinate, then it may help employees feel at ease to self-identify their learning needs (Krueger & Dickson, 1994; Shen, et al., 2015). Goal four allows the change leader an opportunity to gather and analyze information about the change plan during the acceleration step and make changes before institutionalization (Cawsey, et al., 2016).

In summary, the change goals outlined above focus on creating networks that will become a part of the formal learning process. This creates new formalized procedures, policies,

and practices for identifying, categorizing, and distributing learning resources. These goals are designed to ensure that each part of the call centre's system works together to prepare employees for outputting correct information to clients (Jones, 2013; Kast & Rosenzweig, 2017). Along with a system for analyzing data while collected and making changes before finalizing the plan. Changing the formal learning process transforms how leaders work to achieve goals and how the sub-system's work to prepare to respond to changes to the types of questions posed by clients (Jones, 2013; Kast & Rosenzweig, 2017).

Understanding stakeholder reaction to the change process

As a change leader, I am using a transformational leadership approach to understand and implement the change plan at the call centre. Martin and Barber (2006) and Northouse (2016) suggested that employees are likely to embrace a change process when the vision is communicated from an inspirational leader who leads by building a relationship with the employees. As mentioned in chapters one and two, I have existing relationships at the call centre. I developed a reputation as a leader with a desire for improving the performance and development of employees to the fullest while working within the context of the existing call centre environment (Boga & Ensari, 2009; Carter, et al., 2013; Northouse, 2016; van de Voet, 2016; Eti-Tofinga, et al., 2018).

My goal is to understand the impact of the change process on the various stakeholders. I will use the hierarchical culture so that we can continue to allow the department to continue functioning while change is ongoing. Cameron and Quinn (2011) suggest that a hierarchical culture succeeds with control and stability within its environment. In such environments, well defined procedures, and processes (programmatic) is essential for a successful change (Hartge, et al., 2015; Cawsey, et al., 2016). Therefore, as a transformational leader, when gaining insight for

the stakeholders' reaction to the change process, I must emphasize my known interest in developing staff and provide well defined instructions to ensure that I am in a position to be receptive to the stakeholders' reactions to change.

Earlier, I presented goals two and three as creating communication networks that includes monthly meetings that allow for the leaders to gather and discuss the learning needs identified and/or addressed during the past month (Carswell, 2012). Leaders who have control over the outcome of information (influence) are likely to mentally frame the change process as positive and disseminate the positive message to their staff (Hartge, et al., 2015). The communication networks allow leaders and employees to share feedback among each other about the change implementation plan. Hartge, et al. (2015) found that leaders who mentally framed the change process positively, were also able to positively frame responses to employee questions to encourage adoption to the change process.

The communication network is essential because it serves multiple purposes, the first is building a stronger relationship between the employee and leader (Hao, et al., 2015; Shen, et al. 2015). It also increases the employee's ability to self-identify their own learning needs to provide leaders with immediate substantive information about question types (Carswell, 2012; Mager, 1997; Williams & Rosenbaum, 2004; Straatmann, et al., 2016). My established relationship with the organization and the communication networks should provide me with a foundation to understand stakeholder feedback.

Knowledge mobilization and stakeholder reaction

Milestones are ideal for a learning organization "that [is] clear and well defined and where the magnitude of the change is programmatic in nature" (Cawsey, et al., p. 302, 2016).

Goal five of the change plan focuses on a way to gather information about the success or failure

of the changes to the formal learning process (Williams & Rosenbaum, 2004). These milestones are assessed by me and the change working group at regular intervals at the acceleration step of the change plan (Williams & Rosenbaum, 2004; Cawsey, et al., 2016). At this step, the information gathered from the milestones can be used to make the appropriate changes before finalizing the new formal learning process.

Since the change process is discontinuous and programmatic, milestones collect data and uphold the call centre's existing hierarchical conservative structure. Cawsey, et al. (2016) described the programmatic change type as a straightforward change solution. A discontinuous and programmatic change allow me to monitor the change process and related perspectives by reviewing progress through the milestones (Cawsey, et al., 2016). Since the milestones are straightforward and used at specified times within the organizational change process, it is in line with the existing conservative culture (Gianesin & Bonaker, 2003).

As a knowledge mobilization tool, the milestones are in the form of qualitative and quantitative feedback about the employees' ability to provide correct information to their clients and the leaders' ability to analyze question topics and types (Williams & Rosenbaum, 2004). The milestones are included at the acceleration step because they can only be assessed after most of the change goals have been implemented (Cawsey et al., 2016). This also allows me time to review the qualitative and quantitative feedback to determine if the change plan should revisit the mobilization step for further collaboration with leaders and key stakeholders (Cawsey, et al., 2016).

Communication and Reward theory

In addition to regular communication, I must also anticipate and address stakeholder concerns to maximize the effectiveness of the change plan. Hartge, et al. (2015) argued that to

gain stakeholder buy-in, the leader must consider the types of stakeholders and their reasons for supporting or not supporting the change process. There are different types of stakeholders, such types include those who embrace the change implementation plan immediately (early adopters), those who will follow along (early and late majority), and those who will resist the change process (resisters) (Steenekamp, et al., 2012; Hartge, et al., 2015; Straatmann, et al., 2016). The early adopters and early majority perceive a personal benefit to the change implementation process and can therefore easily support the change (Steenekamp, et al., 2012; Hartge, et al., 2015; Straatmann, et al., 2016). However, late majority and resisters are the stakeholders who struggle to embrace the change process (Steenekamp, et al., 2012; Hartge, et al., 2015; Straatmann, et al., 2016). Late majority and resisters may require personal external motivation to gain buy-in for the change process (Steenekamp, et al., 2012; Hartge, et al., 2015; Straatmann, et al., 2016).

Salem, (2013), van de Voet (2016), and Shah, et al. (2017) argue for communication and rewards to motivate employees to support organizational change plans in large multifaceted businesses. External rewards in the form of bonuses, promotions, and special projects are unique incentives if, and when plausible (Salem, 2013; van de Voet, 2016; Shah, et al., 2017). However, in conservative hierarchical organizations, the formalized structure limits the use, and thus effectiveness of external rewards to motivate and gain buy-in during a change implementation plan (Lewis, Schmisser, Stephens, Weir, 2006). Therefore, understanding the types of stakeholders and the related intrinsic and extrinsic motivators is essential to gaining support from late adopters. The communication process will be most successful if the communicators (leaders) understand the motivating factors that create acceptance and resistance to the organizational change processes (Lewis, et al., 2006; Salem, 2013; van de Voet, 2016; Shah, et al., 2017).

Intrinsic motivation for stakeholders: When identifying early adopters and early majority, I must consider how to leverage the existing conservative culture to assist in framing the change process positively. Intrinsic motivation theory states that individuals will derive a sense of internal satisfaction from behaving in a certain way (Bransford, et al., 2000; Bates, 2005; Schunk, 2012; Cooper, Reimann, Crown, & Noessel, 2014). Since the conservative culture makes it difficult to utilize external rewards, I must focus on maximizing the intrinsic motivation of employees. Hartge, et al. (2015) noted that leaders who receive transparent and complete information and have a personal stake in the success of the change plan are more likely to mentally frame the change plan as positive. Furthermore, the more information leaders are presented with and the more upward feedback is available, leaders and subordinates are more likely to frame or reframe the change process positively (Hartge, et al., 2015).

So, as a change leader, working within the call centre's conservative culture, I can inspire early adopters to the change plan by delivering a clear vision with transparent messaging (Wang, et al., 2005; Northouse, 2016; Pasha, 2017). Furthermore, individuals whose behavior is intrinsically motivated can be rewarded with an internal sense of accomplishment, even in the absence of an external reward (Bransford, et al., 2000; Bates, 2005; Schunk, 2012; Cooper, et al., 2014). Schunk (2012) and Cooper, et al. (2014) noted that key roles and responsibilities were more likely to be motivated intrinsically than others. Hence, in this case, once inspired, early adopters who are given key roles and responsibilities can emphasize an internal sense of accomplishment with the success of the change plan (Bransford, et al., 2000; Bates, 2005; Schunk, 2012; Cooper, et al., 2014).

Rewards: The element of effective and allowable rewards in any environment may be subject to ethical implications (Treviño, et al., 2003; van de Voet, 2016). However, relying on intrinsic

motivation, the leadership models, and the communication networks to gain stakeholder support will not address the late majority and resister stakeholders. The organizational change plan requires a great deal of additional work, in an already busy schedule for the leaders. Furthermore, call centre employees are other stakeholders who are influenced by the change process (Hartge, et al., 2015). Their adoption to the change plan may be impacted by struggles or fears of the consequences of self-identifying and articulating their learning needs. These fears may result in rendering some to become resisters to the change process. An element for a transformational leader is to sufficiently inspire change resisters into late adopter supporters (Hartge, et al., 2015). Rewards lend for many forms of external motivation (Salem, 2013), even in a conservative hierarchy.

Researchers appear to agree that generally, recognizing and congratulating individuals for contributions made serves as an effective external reward when other rewards are not available (bonuses, promotions) (Salem, 2013; van de Voet, 2016; Shah, et al., 2017). Furthermore, Lewis, et al., (2006), Salem, (2013) and Hartge, et al. (2015) argue that rewards are most effective when the reason for the reward is clear and the benefits of the reward are immediate and long lasting. van de Voet (2016) also states that in the public sector, the concept of rewards must be transparent, and prove a benefit for the organization. Therefore, the concept of rewarding stakeholders must be carefully framed as a general gain to the organization and stakeholder.

For the call centre's system, the sub-systems and its many individual sections are essential to the success of the change plan. These leaders hold positions which are most impacted by the change plan. Therefore, a recognition program can be utilized to appeal to the personal and organisational benefits these stakeholders can receive because of following the change plan.

(Lewis, et al., 2006; Salem, 2013; Hartge, et al. 2015). This approach can assist in gaining support with both the early adopters and early majority, but also with the late adopters and resisters.

Stakeholder feedback and appropriate adjustments

Change working group team: The awakening step is an important step because it allows me to articulate the vision and collaborate with stakeholders to form a deep understanding about culture, structure, and best practices (Cawsey et al., 2016). As a transformational leader, the deeper understanding of the intended followers is necessary to create relatable change messaging (Pasha, 2017). It is at this step that identifying key stakeholders and creating a change working group team can ensure that I use a deeper understanding to inform the change plan (Hartge, et al. 2015).

This team will be responsible for helping to monitoring the milestones results for the acceleration and institutionalization steps of the change plan. Beatty, Shim, and James (2001) noted that effective organized change includes a team that can provide the organizations stakeholders with timely details about the change process. Beatty, et al. (2001) and Hartge, et al. (2015) both note that effective messaging for change includes a leadership team that can deliver transparent information about the change process in a timely manager. Hence, the change working group team can regularly provide relevant real time feedback about the impacts of the change plan to all staff.

The change working group team will follow my transformational leadership. Hence, it is essential that I am also prepared to inspire and motivate this team to continue through the change process, during times where strategies were unsuccessful (Northouse, 2016; Pasha, 2017). Unsuccessful strategies will impact the change team and call centre alike. In such instances I will

leverage my existing relationships and experiences to build trust in my vision (Wang, et al., 2005; Feng, et al., 2016). Leveraging the existing relationships to build trust requires effective transparent communication (Wang, et al., 2005; Feng, et al., 2016). Transparency of information can be demonstrated through messaging and sharing a clear change plan (Hartge, et al., 2015). In this case, transparency will be achieved through building a webpage about the change process that includes a comment box for individuals to provide thoughts about the change process.

In addition to transparency, building trust also requires collaboration with key stakeholders (Wang, et al., 2005; Hartge, et al., 2015; Feng, et al., 2016; Pasha, 2017). The milestones not only gauge progress of the goals, it also allows for collaboration about necessary changes. Bransford, et al. (2000) and Schunk (2012) noted that individuals were motivated for the success with a change plan when they perceived a personal benefit. Also, input from individuals during strategic planning forms an intrinsic motivation in the success of the change plan (Bransford, et al., 2000; Schunk, 2012). Therefore, collaborating about milestone results with key stakeholders can motivate interest to modify strategies when necessary. This intrinsic motivation can encourage solutions for unsuccessful strategies.

Webpage for change implementation plan: Building and maintaining a webpage for the change implementation plan and the desired future state will allow employees to see and read about the change plan (Beatty, et al., 2001). This promotes transparency and generates stakeholder engagement into the change plan process (Beatty, et al., 2001; Hartge, et al., 2015). The webpage lists the steps of the plan while also allowing a spot for comments. Beatty, et al. (2001) discuss the value of webpages in corporate cultures and focus on their value for sharing immediate information about the change plan. The information presented is from a perspective of promoting website use in corporate cultures to communicate with employees (Beatty, et al.,

2001). Although this paper represents the early stages of website usage in corporate culture, the comments and rationale for using websites remain relevant today for transparency during change processes.

Qualitative milestones: This is a process for the employee to provide feedback about their progress and ability to apply the information learned to duties soon after receiving instruction (Williams & Rosebaum, 2004). The qualitative information gathered serves multiple purposes (Williams & Rosebaum, 2004). It is an opportunity for leaders to provide their thoughts about how they were able to follow the goal. It also provides an opportunity for employees to provide their thoughts about their perceived ability to articulate their learning needs and apply their learning to the questions posed by clients.

Quantitative milestones: Unlike the qualitative milestones that gather written thoughts about the process, quantitative milestones focus on the learning forecast tool and employee performance support tools (William & Rosenbaum, 2004). These provide quantitative information about the application of goals. The change working group compares the information from both qualitative and quantitative milestones to employee performance tools. Both qualitative and quantitative milestones will use Q-builder surveys as the method of gathering feedback.

Q-builder survey: The call centre currently utilizes technological resources such as Q-builder surveys. These surveys can be developed, maintained, and monitored at the call centre by the change working group. Surveys are a reliable method to gather upward feedback about the attitudes towards the change process (Spracklen, Hylton, & Long, 2006; Hartge, et al. 2015). The Q-builder surveys give all staff an opportunity to provide feedback at any stage and of the change implementation plan. Spracklen, et al. (2006) noted that surveys require anonymity and

voluntary compliance to preserve its accuracy. Therefore, the surveys will be voluntary and placed on the home page of the change plan webpage. Furthermore, questions must remain short (one to five), and the ability to complete within one to three minutes.

Fluidity between the stages of the plan: Cawsey, et al.'s (2016) change path model utilizes the mobilization and acceleration stages to regularly review and adjust the change plan based on milestone information and feedback before reaching the institutionalization stage. This allows for the change plan and change group to regularly move back and forth through the mobilization and acceleration steps before implementing the best practices into the institutionalization step. Promoting fluidity between these two steps will help to reduce the likelihood of the change plan negatively impacting the call centre (Hartge, et al. 2015). It also promotes transparency, which is necessary when transforming the call centre system.

Shot-term implementation goals:

- Frame the change implementation plan to the call centre leaders by focusing on the benefits of the change plan.
- The Assistant Director to present and the change implementation plan to the call centre.
- Identify early adopters, early majority adopters, late adopters, and change resisters using the feedback information from the change website.
- Frame the change plan using analogies in all staff employee emails about the 'next steps' of the change plan.
- Increasing regular communication between the leaders and their employees. The increased communication helps the leaders better understand their employees.

Medium- term implementation goals:

- Create meetings among the section leaders to discuss and organize the availability, quality, and use of the learning resources.
- Meet with change leaders to continue to frame the benefits of the change plan completed to that point.
- Promote upward feedback about the change plan from the comments section of the change plan website.

Long-term implementation goals:

- Quarterly group meetings with senior and lower level leaders for the purpose of discussing the resources and budget for needs already identified.
- Monthly and quarterly meetings between lower level leaders and employees with the goal of discussing learning needs as they occur.
- Weekly meetings with the lower level leaders to discuss the learning needs of their team and the existing resources available to meet such needs.
- Short daily meetings with the leaders to discuss the list of learning needs and when or how these needs can be best addressed considering the call volume.
- Update learning forecast plan before allocating learning hours.

Limitations and barriers:

- The leaders are required to contribute approximately two hours of additional time each week to meetings. Leaders are already busy completing many other responsibilities, this may result in resistance to the change plan.
- Employees may struggle or fear communicating learning needs with their leaders in fear of losing opportunities or employment.

- Frustration among leaders may grow due to in-group disagreement about how and when to allocate the learning resources to employee needs.

The path to achieving the future state of the call centre requires regular communication between the employees and their leaders, and leaders with their peers (Hartge, et al., 2015; Feng, et al., 2016). The system can only effectively respond to changes to its environment when all its parts are working together (Jones, 2013; Kast & Rosenzweig, 2017). Communication is the way that each system part understands how they impact each other (Matta, et al., 2015). Furthermore, the future state centres around a formal learning process that has policies and procedures that will ensure that the system meets its specified goal. The transformation of the formal learning process requires goals that impact each part of the call centre's system. Along with a change plan that gains support through building trust, leveraging relationships, and inspiring others to follow the change plan (Northouse, 2016).

Change Process Monitoring and Evaluation

The goals outlined earlier are designed to establish consistency in how formal learning is distributed within the call centre system. The chosen solution changes the policies and procedures in the formal learning process. Each goal changes how the leaders communicate with each other and employees, so that the call centre system is prepared for incoming changes from its environment (Carswell, 2012). Figure 3.5. summarizes the chosen solution and its expected contribution to changing the formal learning process.

	Solution 3 (Chosen solution)	The new formal learning process
Plan	Create formal learning process that focuses on the moment, relationship, and relevance for learning: <ul style="list-style-type: none"> • Senior communication network. • Leader-employee communication network. • Learning forecast plan. • Shared training courses, self-study, peer groups, etc. 	<ul style="list-style-type: none"> • Hierarchy remains. • Senior and lower leaders share information about question topics and types. • Leaders share insight from employees about question types. • New learning forecast plan to track trends and distribute learning resources. • Employees receive learning support.
Do	Implement: <ul style="list-style-type: none"> • Daily meetings (leaders). • Weekly meetings (leaders). • Weekly meetings (leader-employee). • Compare question topics to related question types. • Learning forecast plan to input learning hours before distribution. • Set up learning activities based on trends. 	<ul style="list-style-type: none"> • Senior and lower leaders receive real-time information about types of questions asked by clients. • Senior and lower leaders compare analyze weekly learning needs • Employees provide regular feedback about types of questions posed by clients. • Learning forecast plan shows hours available, current question types and related topics. • Leaders use learning forecast plan to set up group learning activities.
Study	Monitor plan: <ul style="list-style-type: none"> • Website feedback. • Learning review feedback. • Existing quality review surveys. • Quarterly Milestones. 	<ul style="list-style-type: none"> • Analyze results from employee performance surveys. • Look for trends in incorrect responses. • Compare trends with learning forecast plan inputs. • Examine Q-builder responses.
Act	Finalize plan: <ul style="list-style-type: none"> • Identify best practices. • Implement changes, as necessary. 	<ul style="list-style-type: none"> • Call centre system’s parts are prepared for different question types posted by clients. • Call centre system’s sub-system works together to prepare to output correct information.

Figure 3.5. Summarizes how the goals and priorities of the chosen solution will be applied

through the PDSA cycle to change the formal learning process (Carswell, 2012; Jones, 2013; Internal Quality Report, 2015; Kast & Rosenzweig, 2017).

The chosen solution has the goal of improving communication to address the lack of consistency in how learning resources are distributed (Carswell, 2012). Since the formal learning process impacts each part of the call centre’s system, it is necessary to ensure that its changes enforce policies and procedures around communication. Furthermore, the chosen solution’s communication networks prepare the call centre system’s parts to respond correctly to the changes in types of questions posed (Carswell, 2012). The monitoring and evaluation discussed below are designed to review whether the goals are achieving their expected outcome onto the

formal learning process (William & Rosenbaum, 2004). Each goal is specifically designed for its role in applying elements of the chosen solution.

The chosen solution transforms the call centre's system by changing the process of preparing employees for the types of questions they receive. Carswell's (2012) modified framework focuses on providing a method for employees to share learning needs about the types of questions posed with leaders. The expectation is that leaders will work together with learning trends from HQ and real-time feedback from employees to make informed decisions about how to apply learning resources in preparing employees for client questions (Carswell, 2012).

Current standards for monitoring process

The call centre has its own practices for monitoring the system's performance (Internal Quality Report, 2013; 2015). This includes assessing the employee's ability to provide correct information to clients, client feedback surveys, and evaluating the effectiveness of learning provided (Internal Quality Report, 2013; 2015). Together, each assessment and evaluation tool look at a different part of how the system works to output correct information (Internal Quality Report, 2013; 2015).

Quality Review survey: The quality review surveys are used as a primary monitoring tool to assess the employees' ability to output correct information to clients (Internal Quality Report, 2013; 2015). The process requires examining learning trends and creating simulated caller questions based on actual questions from previous years (Internal Quality Report, 2013; 2015). These surveys are used to approximate the topics and types of questions employees are likely to answer correctly (Internal Quality Report, 2013; 2015). The program monitoring these surveys is overseen by a leader and a group of certified employees (Internal Quality Report, 2013; 2015). These quality review surveys require a certified employee with considerable

subject-matter experience to pose as a client calling the telephone line requiring assistance (Internal Quality Report, 2013; 2015). To ensure validity, new questions are added to the rotation at the end of the month, and analyzed for level of correctness, common areas for confusion, and any additional feedback from the rater and employee (Internal Quality Report, 2015). To ensure relevance employees are given feedback immediately after the call (Internal Quality Report, 2015).

Learning related feedback: Since employees are encouraged to self-identify learning needs, they are also encouraged to provide feedback about their perceived ability to apply their knowledge to the questions posed (Internal Quality Report, 2013; 2015). Participation is voluntary, and feedback is used to consider approaches to question topics for future training (Internal Quality Report, 2013; 2015).

New standards of monitoring and evaluating progress

As a change leader, I recognize that I am transforming an organization with conservative ideologies that values tradition (Gianesin & Bonaker, 2003). To effectively inspire my intended followers and reach out to change resisters, I have chosen to embrace the best parts of this culture (Hartge, et al., 2015). Gianesin and Bonaker (2003) consider best practices within conservative cultures as practices that are effective in achieving the desired outcome. The call centre's existing monitoring processes have proven relevant in providing the same results as external reports (Internal Quality Report, 2015; Internal Report, 2015). It was these processes that ignited the need for change at the call centre. Therefore, continuing to use the existing monitoring processes will increase the support among change resisters and build trust as a reliable tool for evaluating the effectiveness of the change plan.

In addition to using the existing methods for monitoring and evaluating processes, I have introduced surveys to monitor progress while implementing the chosen solution. The qualitative and quantitative surveys are used by the change working group to monitor and track feedback (Straatmann, et al., 2016). The Q-builder method of these tools allow for quick data gathering and will be used in conjunction with the existing tools to ensure a full understanding for the change plan (Hartge, et al., 2015; Straatmann, et al., 2016).

Learning related feedback: The existing purpose of this feedback is voluntary and only to be completed after training (Internal Quality Report, 2013; 2015). This tool gauges perceived progress after support is provided, but before employees can apply learning. This tool helps gauge the relevance of learning support to the learning needs (Carswell, 2012; Internal Report, 2015). Since goals one to four must have occurred before this monitoring is necessary, it is also best suited for the acceleration process.

Qualitative surveys: Milestones represent a new monitoring tool that will be used to assess the progress of Carswell's (2012) modified framework during the mobilization and acceleration step. The qualitative surveys are used to track feedback about telephone employees' and leaders' perceived thoughts about their ability to complete each goal (Spracklen, 2006; Hartge, et al., 2015). Although the surveys are available to upload feedback at any time, the results are tabulated monthly. Tracking the results monthly gives leaders and employees an opportunity to provide thoughts during and after a full cycle of goals has been implemented (Spracklen, 2006; Hartge, et al., 2015). The anonymity of the Q-builder form gauges progress by allowing participants to provide honest perceived feedback (Spracklen, 2006; Hartge, et al., 2015).

Quantitative surveys: The Quantitative surveys are also a part of the milestones. The quantitative form of the Q-builder surveys assesses the leaders perceived ability to follow the goals correctly (Spracklen, 2006; Hartge, et al., 2015). The quantitative portion asks leaders and employees questions about their ability to follow the directions for the goals (Spracklen, 2006; Hartge, et al., 2015). Milestones will be used as the monitoring tool to assess progress during the change plan.

Quality review survey: The call centre's current method of assessing the employees' ability to output correct information has yielded the same results as the client surveys (Internal Report, 2017). Since these surveys are designed to simulate client questions, and since question types and topics are rotated monthly (Internal Quality Report, 2015; 2017), it can continue monitoring the employees' ability to answer client questions correctly. Furthermore, the responses employees provide when asked the simulated questions are categorized by correctness (correct/incorrect), question topic, and type (Internal Quality Report, 2015; 2017). Both correct and incorrect responses will be tracked by question type and compared to the learning forecast plan history to determine if learning support was requested and provided. This will allow me and the change team to gauge the progress for how the formal learning process prepared employees for clients' questions (Internal Quality Report, 2015; 2017). Examining the responses provided by employees gives the change team an opportunity to gather information for identifying best practices and adopting changes accordingly (Owen & Rogers, 1999). This monitoring tool will yield the best results if it is used after employees have identified learning needs, leaders have met to discuss learning, and learning support has been provided (Carswell, 2012). Since this tool requires that goals one to four of the change plan are completed, it is best suited during the acceleration step of the change path model.

The existing monitoring approach requires that employees participate in these assessments several times quarterly, and they are called at random and asked a series of questions that rotate to ensure reliability (Internal Quality Report, 2013; 2015; 2017). To maximize trust with the change plan, I have chosen to keep the existing approach to monitoring and its quarterly interval (Gianesin & Bonaker, 2003).

Monitoring to gauge for success

The change plan working group has the unique role of monitoring and tracking each step of the change plan. Immediate feedback helps researchers reduce the impact of other variables impacting their findings (Mager, 1994; Owen & Rogers, 1999; William & Rosenbaum, 2004; Straatmann, et al., 2016). In this context, immediate feedback helps the change group identify the applicable unsuccessful processes soon after the experience. The chosen solution requires many goals to occur one after the other. So, immediate feedback from leaders and employees allows for feedback to be applied at the appropriate goal, and before moving on to the next (Mager, 1994; Owen & Rogers, 1999; William & Rosenbaum, 2004; Straatmann, et al., 2016).

Tracking the feedback allows for transparency throughout the change process (Mager, 1994; Owen & Rogers, 1999; William & Rosenbaum, 2004; Straatmann, et al., 2016). Hence, results after each goal can be displayed on the change website. This allows me, as a change leader to build trust through transparency. Tracking also allows the change plan group opportunities to collectively make strategic decisions about ways to improve ineffective strategies (Sahil & Doll, 2013). The sharing and tracking of the data provide late majority change adopters with information about successes along the change process. Seeing successes can help turn change resisters into late majority change adopters (Martin & Barber, 2006; Straatmann, et al., 2016).

Plan to communicate the need for change

The desired future state at the call centre is a system that is prepared to output correct information onto its environment (Jones, 2013; Kast & Rosenzweig, 2017). Each step of Cawsey, et al.'s (2016) change path model allows a unique opportunity for me to use transformational leadership principles to create change within the call centre's system. The model also allows me to specifically outline how goals and priorities will be established within the chosen solution during the transformation. Although the acceleration step is uniquely important for monitoring change, the awakening and mobilization steps have considerable impact to communicate the change plan (Mager, 1997; Cawsey, et al., 2016). Communicating information about the change plan is essential at each step of the change path model (Mager, 1997; Cawsey, et al., 2016). Figure 3.6. below summarizes each step of the change path model and the method for communicating change.

	Communication plan	Role of stakeholders
Awakening	<ul style="list-style-type: none"> • Identify the problem. • Identify key stakeholders who understand the gaps • Determine the specified goal. • Communicate the need for change. • Design a change message. • Delivered by highest level leader. 	<ul style="list-style-type: none"> • Key stakeholders provide data. • Communicate desired specified goals. • Recognize the gap. • Provide a platform for communicating the change message. • Listen to the change message.
Mobilization	<ul style="list-style-type: none"> • Work with key stakeholders to create a change plan. • Identify early adopters. • Collaborate with early adopters. • Establish ways to communicate wins, losses, and resulting changes. 	<ul style="list-style-type: none"> • Communicate the change process to gain support for an early majority. • Communicate wins, losses, and resulting changes.
Acceleration	<ul style="list-style-type: none"> • Transparency of information. • Communicating the wins, losses, and process for change. 	<ul style="list-style-type: none"> • Deliver positive communication during the change process. • Deliver acknowledgement through recognition reward structure.
Institutionalization	<ul style="list-style-type: none"> • Deliver results. • Share desired future end state. 	<ul style="list-style-type: none"> • Deliver positive communication during the change process. • Deliver acknowledgement through recognition reward structure.

Figure 3.6. Summarizes the communication plan per step from within the change path model

(Wang, et al., 2005; Feng, et al., 2016; Cawsey, et al., 2016; Northouse, 2016; Pasha, 2017).

Communicating the change process to the leaders

Awakening

Any communication plan for change begins with identifying a potential need for change (Bransford, Brown & Cocky, 2000; Hartge, et al., 2015). The call centre acknowledged a problem after three years of being unable to achieve its specified goal of providing correct information to clients (Internal Quality Report, 2017). Acknowledgement of the problem is an essential step in recognizing a need for change (Bransford, et al., 2000; Hartge, et al., 2015). Following Cawsey, et al. (2016), the acknowledgement of a problem commences the awakening step of the change path model. It is at this step where a change leader must identify the problem

and compare it to the specified goal (Bransford, et al., 2000; Hartge, et al., 2015).

Communication during the awakening step requires explaining the gap between the problem and the desired goal (Cawsey, et al., 2016). This process requires understanding how the expected stakeholders will construct and deconstruct the message (Bransford, et al., 2000; Hartge, et al., 2015). Consideration to how the stakeholders will interpret the message during the awakening step will help me, as a change leader, formulate a clear message for change.

Hartge, et al. (2015) focused on the stakeholders' behaviour when initially receiving information about a change plan. They recognized that when explaining the reason for the change, it was necessary to consider a cognitive approach to change (Hartge, et al., 2015). This consideration focuses on the individual hearing the change message and its rationale, and then connecting the rationale to schemata to support the change vision (Bransford, et al., 2000; Hartge, et al., 2015). As is the case with storing information into long-term memory and forming schemata, information that is not consistent with the existing schema can be dismissed (Bransford, et al., 2000; Hartge, et al., 2015). Essentially, Hartge, et al., (2015) explained that to form an understanding of the change message the individual will use information from their existing schemata as they try to make sense of the change.

These findings are especially relevant to the call centre because it embodies conservative ideologies (Gianesin & Bonaker, 2003). This includes a strong sense of tradition, and schemata with unsuccessful results after attempting change (Bransford, et al., 2000; Gianesin & Bonaker, 2003; Hartge, et al., 2015). This means that the change message must be formulated in a way that emphasizes the working parts of the organization and the benefits to changing the parts that are not yielding success (Bransford, et al., 2000; Gianesin & Bonaker, 2003; Hartge, et al., 2015). Furthermore, Hartge, et al. (2015) explained that how information is delivered impacts how the

stakeholder receives and encodes the message. Therefore, considering the call centre's conservative ideology and individual propensity to search schemata to make sense of the message, the Assistant Director is ideal for delivering the change message (Bransford, et al., 2000; Gianesin & Bonaker, 2003; Hartge, et al., 2015).

Mobilization

During the mobilization phase the need for change has already been communicated, and the change process and plan for change needs to be established (Cawsey, et al., 2016). For the call centre, it is at this time that change vision, including the path to the desired future state is determined. This process requires identifying key stakeholders and collaborating with them to establish a realistic change plan that can achieve the desired future state (the change vision) (Cawsey, et al., 2016). This stage also includes creating a plan to communicate change stages, gain support for the change process and share best practices, losses, and the resulting changes (Cawsey et al., 2016).

At the call centre, gaining support for the change process requires identifying key stakeholder that will help me gain early support. Gilley, Gilley, and McMillan (2009) argued that people within the organization can be categorized into various groups based on their opinion about the change process. One of such categories includes what is known as early adopters and early majority (Gilley, et al., 2009). Coupling the works of Bransford, et al. (2000), Gilley, et al. (2009), and Hartge, et al. (2015), one can argue that the early adopters are individuals who will use their existing schemata to construct a positive position about the change process. The early majority are individuals who will be likely to construct and reconstruct the change process until it fits the schemata which supports the organizations new vision. For the call centre, this means identifying individuals who have existing positive schemata about organizational change. Then

working with these individuals to continue to reinforce the change message with others. Thus, establishing early adopters and early majority supporters.

Acceleration

For the call centre, most of the change plan is implemented at the acceleration step (Cawsey, et al., 2016). In this case, as a change leader, I have already identified the problem and defined the desired end state (the vision). Furthermore, the change plan has been developed and communicated with the call centre. The implementation process for the change plan is predicated on the idea that leaders and employees follow the change plan (Hartge, et al., 2015). My change process encourages transparency by revealing the successes, losses, and methods for changing on our change website. It is at this stage where I leverage early adopters and other influential stakeholders to motivate employees to continue with the change process even during unsuccessful periods (Hartge, et al., 2015).

Motivating employees requires stimulating their personal motivational factors (intrinsic/extrinsic) (Bransford, et al., 2000; Gilley, et al., 2009). Straatmann, et al. (2016) argued that individuals will adapt their behavior in a way that they perceive will lead to the best possible outcome. Furthermore, Bransford, et al., 2000 and Martin and Barber (2006) argue that individuals are motivated to succeed if the outcome appears possible to achieve. These findings suggest that during a change process, employees will adapt their behavior if they perceive success as possible (Bransford, et al., 2000; Martin & Barber, 2006; Straatmann, et al. (2016). Communicating the process of how to succeed and sharing successes at during the change process will help employees continue to follow the change process.

Institutionalization

The change process is finalized during the institutionalization step (Cawsey, et al., 2016). The message for how best practices will be adopted must consider not only the adopters to the change plan, but also the resisters (Gilley, et al., 2009). At the final stage of the change plan, the resisters play a key roll in determining the continued success or dissolution of the change plan (Gilley, et al., 2009). Therefore, communicating the effectiveness of the change plan and parts of the plan that were most enjoyable may help resisters accept the changes to the organization.

Framing the communication plan

Bommer, Rich, and Rubin (2005), Wang, et al., (2005), Feng, et al. (2016), and Petrou, et al. (2018) explained that an employee's readiness for change is heavily based on his or her relationship with the change leader. They, and Shah, Irani, and Sharif (2017), noticed that employees who regularly communicated with their leaders were more likely to positively support the organizational change process. Furthermore, change messages are processed through existing schemata when formulating an understanding of the change (Hartge, et al., 2015). This means that the frame for which change should be communicated ought to consider the relationship between the messenger and receiver, and the receiver's past experiences with change (schemata).

At the call centre the change vision must be delivered by the top leader (Assistant Director), and then embraced by senior leaders who have a positive relationship with their superior. These senior leaders become the early adopters who will disseminate the details about the change steps downwards (Hartge, et al., 2015; Feng, et al., 2016). Furthermore, considering individuals are likely to change their behavior if they believe that in doing so success is possible, the message must also be framed around the benefits to employees for following the change process (Martin & Barber, 2006; Straatmann, et al., 2016). This process helps ensure that the

change message and process is framed around the context relevant to the receivers. Figure 3.7.

below summarizes a frame for the change message.

Framing the communication plan	Objective	Strategy
Positive messaging of embracing our strengths (Hartge, et al., 2015).	Demonstrate positive relationships between leaders and employees (Hartge, et al., 2015; Feng, et al., 2016)	Messaging of embracing our strengths (Gianesin & Bonaker, 2003).
Introduce the need for change (Hartge, et al., 2015).	Reinforce positive messaging and meeting organization's goal (Feng, et al., 2016).	State the problem and the goal (Hartge, et al., 2015).
Introduce the change plan	Outline the overview of the change plan (Cawsey, et al., 2016).	Delivered by highest level of leadership at the call centre (Hartge, et al., 2015).
Introduce the communication strategy	Reinforce positive communication between leaders and employees (Feng, et al., 2016).	Communication webpage and Q-Builder survey (Internal Report, 2015).

Figure 3.7. Provide a frame for the change plan and its objectives.

A shortcoming of how I have framed the need for change and the change plan is that is that it does not allow considerable promotion for resisters of the change (Hartge, et al., 2015). Resisters of the change plan may be motivated by events outside of the control of this OIP, but the Q-builder surveys allow opportunities for resisters to provide feedback to determine the reason for resistance (Hartge, et al., 2015). Jacobs, van Witteloostuijn, and Christe-Zeyse (2012) and Straatmann, et al., (2016) noted the importance of external environment factors which can impact employee readiness even when a positive relationship exists between the leader and employee. Such external environmental factors include things such as a vibrant job market.

Next steps and future consideration

Next steps

Once the change plan has been finalized, the next step is to monitor the successful parts and best practices implemented. The goal for monitoring is to ensure that the transformed system will continue to adapt appropriately to the changes from the environment (Jones, 2013; Kast & Rosenzweig, 2017). Although the call centre uses strict processes, as required for a large multifaceted organization (Cameron & Quinn, 2011), resisters or others who do not follow the new formal learning process can render the changes useless. From my position at HQ, monitoring the progress of the plan can include reviewing if the call centre is on track to meet its goal of providing correct information to clients.

Role of other branches

The goal of the OIP was to transform the call centre's system by change the formal learning process. Variables outside of the research setting, when not considered, can impact reliability and the effectiveness of results (Elving, 2005; Lewis, 2006). In an organizational setting, external variables are influences that are outside of the researcher's control (Armenakis, Harris & Mossholder, 1993; Shah, et al., 2017; Petrou, et al., 2018). The call centre is one part of a large multifaceted organization, and occupies a unique role connecting clients with information from each of the branches (Internal Report, 2017). Each of Organization X's other branches are outside of my control and influence. So, areas for future research must consider external factors that may impact the success of the change plan presented. This OIP does not consider external variables within the larger context of Organization X and other private businesses. This means that the OIP provides a solution to a problem without including the variable of other branches that could influence the correctness of the responses for which employees are required to provide.

More specifically, branches that do not update their policies, or that provide clients with incorrect information can, and may also influence the correctness of responses provided by the call centre (Internal Report, 2017). An example of such an impact can be seen when written communication is delivered to customers with incorrect information (Internal Report, 2017). This can generate calls to the call centre for clarification (Internal Report, 2017). Although it appears evident in impacting the efficacy of the learning environment, I could not produce data specific from my organization, to suggest that incorrect responses were attributed to the inadequacy of resources available at the time of the call between the client and employee. However, further research about the role branches play in the call centre's ability to provide correct responses may prove helpful for Organization X.

Leaders who are resisters to change

Another area for further research is considering the relationship between the leaders and employee. My OIP focuses on transforming the call centre by changing the formal learning process to improve communication within the system. This plan relies heavily on the assumption that all of the leaders who will be involved in the learning plan are effective leaders who are eager to communicate and provide their employees with the support necessary to complete their duties (Bommer, et al., 2005; Shah, et al., 2017; Petrou, et al., 2018). The plan does not recognize leaders who are struggling to communicate with their employees, or who are uninterested in providing accurate learning support through communication.

The concerns related to the employees' change readiness and its impact on communication are further emphasized with Gilley, et al. (2009), who argue for the role of all leaders during the change process. In the case of the call centre, the formal learning process is designed for the employees who answer the incoming calls (Internal report, 2017). However,

these employees are assessed by their leaders, who may not embrace the change plan or may not communicate effectively with their employees. Gilley et al (2009) argue that all the change leaders must be identified and categorized into various types of change leaders (for example, early adopters, early majority, late majority etc.). My OIP does not address the laggards or steadfast resisters to change who, as leaders may influence employees to resist the change process. Examining consequences for employees with leaders that resist change may prove helpful in gaining support from change resisters.

Hiring and downsizing

Lastly, I mentioned the role of other departments and their lack of representation within the OIP. This includes the Human Resources (HR) branch which currently controls the hiring practices for the call centre employees and to a lesser extent the leaders who will be monitoring these employees (Internal Report, 2017). The hiring practices are outside of my area of control and my OIP assumes that only qualified and effective employees are appointed to the position. Furthermore, my OIP does not consider employees who are unable to meet the employer's requirements of the job (unfit for duty). Although not considered, qualitative data from internal surveys have suggested that some employees may struggle to perform the duties for other reasons, such as ability to effectively communicate in English (Internal Quality Report, 2013; 2015).

Due to my lack of influence over the hiring practices, employees who may not be suitable for the duties may be hired for such positions anyway. This also applies to downsizing practices. Aggerholm (2014) argues that employees may obstruct or resist organizational change in response to the very real fear of downsizing within the organization. Since downsizing has occurred in the past, a real fear of downsizing may impact how employees communicate with

their leaders. Salem (2013) and Bringselius (2014) noted that an employee's readiness can be negatively influenced by the fear of losing one's position because of organizational change. Although this fear is significant within the context of employee readiness to change, my OIP does not focus on the role of downsizing since it is outside of my control.

The variables described above may influence the correctness of the employees' responses. However, the chosen solution proposed focuses on meeting the employees' needs based on the current structure, while assuming that the variables listed above will have a minimal influence on the call centre system. These variables can help provide context and clarity to other areas of improvement needed outside of the call centre during a larger organizational change process (Bringselius, 2014). Since the call centre acts as the frontline connecting clients to other departments, such other departments may benefit from understanding how their departments impact the call centre when undergoing their own organizational change processes.

Conclusion

The call centre system's parts have been unable to prepare the system to output correct information (Jones, 2013; Kast & Rosenzweig, 2017). This resulted in the call centre being unable to meet its specified goal of providing correct information to its clients (Internal Report 2015). I chose to transform the call centre's system by changing how it prepares employees for answering client questions. The chosen solution focuses on changing the formal learning process because it impacts each part of the call centre's system (Carswell, 2012; Jones, 2013; Kast & Rosenzweig, 2017). The change path model, and its four steps were used to implement the change plan, because of the fluidity between the steps (Cawsey, et al., 2016). The result of the transformed call centre system is one that uses communication networks to prepare the system to output correct information (Carswell, 2012).

Chapter one of the OIP explained that the organizational context can best be described as a conservative hierarchical institution that utilizes authority-compliance leadership practices (Gianesin & Bonaker, 2003; Hendry, et al., 2006). My goal was to inspire change by gaining a deeper understanding of the culture, building trust with employees, and leverage my existing relationships to create change (Boga & Ensari, 2009; Bommer, et al., 2005).

Chapter two outlined the proposed plan and the methods for delivering the plan. One of the proposed plans was based on Carswell's (2012) framework for organizational learning. It was also modified with Shen, et al.'s (2015) organizational approaches to enhance communication through regular meetings. Chapter three outlined the methods of delivering the plan. Finally, the OIP outlines next steps, areas for further research that could not be considered within the context of this OIP but can impact the learning environment.

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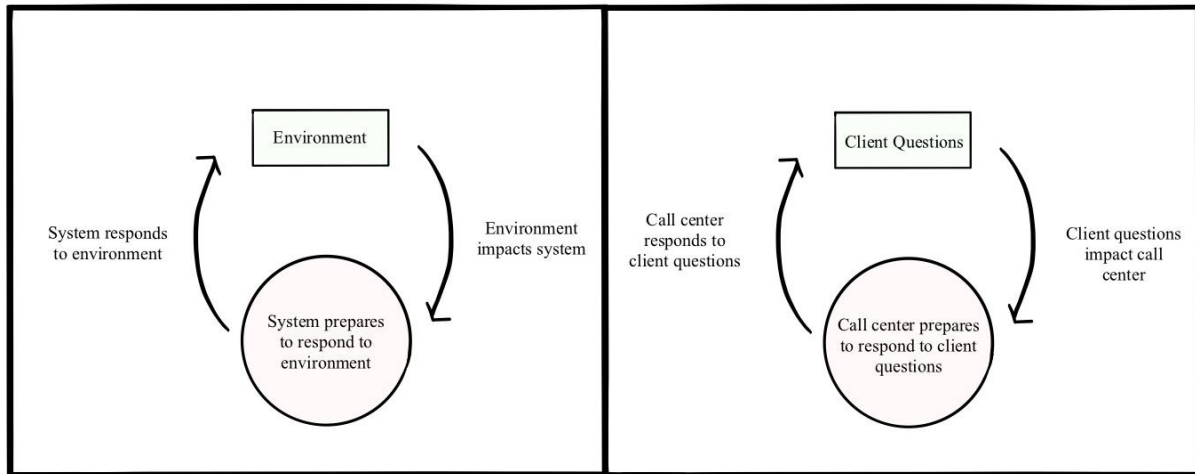
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Appendix

Appendix 1. The call centre's system.



Appendix 1 demonstrates how the call centre system is impacted by and impacts its environment (Jones, 2013; Kast & Rosenzweig, 2017).

Appendix 2. Roles of the call center sub-system and sections.

Sub-system A Accounting and monitoring		Sub-system B Grants and applications		Sub-system C Business registration	
Payroll tax	Payroll requirements when hiring employees	Payment remitting due dates	Completing government forms	Becoming a small business	Responsibilities for small businesses
Payroll calculations	Completing payroll slips	Applying for grants	Understanding your income tax return	Not-for-profits and for profits	Patents and trademarks
Collecting and reporting taxes	Call monitoring team for accuracy	Review client application before submission	Review system data imputed by employees	Books and records review	Expenses
Each section must output a correct response for questions posed.					

Appendix 2 shows each sub-system is responsible for a series of section each with their own responsibilities. Each section completes a different function, and the sections are expected to work together to achieve the sub-system’s goal (Jones, 2013; Matta, et al., 2015; Kast & Rosenzweig, 2017).

Appendix 3. Change path model, transformational leadership, and chosen solution.

Awakening		
Transformational principle	Change plan	The call centre’s system
<ul style="list-style-type: none"> • Create a clear vision • Inspire the shared vision 	The call centre system recognizes it is not meeting its specified goal of providing correct information to clients.	<ul style="list-style-type: none"> • Call centre’s system is unable to output correct information. • Formal learning process prepares system to output information. • Change formal learning process to transform how call centre system parts prepare to output information.
Mobilization		
Transformational principle	Change plan	Tools to move to next step
<ul style="list-style-type: none"> • Build relationships. • Collaborate for inspiring messaging. 	<ul style="list-style-type: none"> • Develop and define change plan around understanding of organization cultural ideology. • Create learning working group. • Design milestones. • Design learning forecast plan. • Identify potential early adopters. 	<ul style="list-style-type: none"> • Analyze how leaders use formal learning process. • Analyze how formal learning process impacts the system’s parts.
Acceleration		
Transformational principle	Change plan	Tools to move to next step
<ul style="list-style-type: none"> • Inspire early adopters and early majority. • Influence resisters. 	<ul style="list-style-type: none"> • Create change plan working group. • Implement new senior communication networks. • Implement new leader communication network. • Implement learning forecast plan. • Install milestones. • Use milestones to make changes before institutionalization. 	<ul style="list-style-type: none"> • Implement changes to how leaders use the formal learning process. • Formal learning process continues to impact all system parts. • Monitor how formal learning process is used.
Institutionalization		
Transformational principle	Change plan	Tools to move to next step
<ul style="list-style-type: none"> • Use relationships to leader by example. • Reinforce inspired vision. 	Finalize best practices of from the change plan.	Call centre system is prepared to output correct information.

Appendix 3. summarize the transformation leadership principles used at each of the change steps within the change path model (Carswell, 2012; Cawsey, et al., 2016; Feng, et al., 2016; Northouse, 2016; Pasha, 2017).

Appendix 4. Learning forecast plan.

Learning forecast plan	Learning hours available	Quarter 1 total	Status of completion
		Annual total	
Learning trends identified by HQ	26% of calls about due dates were incorrect		Addressed
	15% of calls about registration were incorrect		On going
Learning trends into topics	Due dates		On going
	How to register a business		On going
Leaders input question types from leader-employee one-to-one meetings	Self employed filing due dates		Completed
	Circumstances to register a business		On going
	First time filing due dates for not-for-profits		On going
	Due dates first time after reregistering a business		On going
	Filing due dates after changing business status		Not started
Consider methods of delivery based on common need	Classroom, self study, peer coaching, other.		On going

Appendix 4 provides an example of a learning forecast plan, where information is inputted.

Leaders are expected to collaboratively determine the appropriate way to distribute learning.

Appendix 5. Sample questions used to gauge progress during the change plan.

	Leaders	Employees
Qualitative question for all participants	What are your thoughts about the change plan?	What are your thoughts about the change plan?
Quantitative questions	The leader/employee communication network gave me real time information about question types posed by clients. <ul style="list-style-type: none"> • Always • Often • Sometimes • Never 	The leader/ employee communication network helped me explain the topics and types of questions that created confusion. <ul style="list-style-type: none"> • Always • Often • Sometimes • Never
	The senior leader communication networks gave me an opportunity to share question types that create confusion for employees. <ul style="list-style-type: none"> • Always • Often • Sometimes • Never 	The learning tools provided were related to identified learning needs. <ul style="list-style-type: none"> • Always • Often • Sometimes • Never
	The learning forecast tool helped me allocate learning resources. <ul style="list-style-type: none"> • Always • Often • Sometimes • Never 	The learning tools provided were delivered in a timely manner. <ul style="list-style-type: none"> • Always • Often • Sometimes • Never
	I used the learning forecast tool to identify other employees with similar learning needs. <ul style="list-style-type: none"> • Yes • No • Not applicable 	I provided my leader with feedback about difficult question types. <ul style="list-style-type: none"> • Yes • No • Not applicable

Appendix 5 provides examples for types of questions asked during the monitoring process of the change plan (during the steps of the change path model) (Cawsey, et al., 2016).

Appendix 6. S.M.A.R.T Chart for the change implementation plan.

S.M.A.R.T	
Specific	The plan has the specific focus of improving the consistency of how the learning resources are delivered at the call centre. The call centre is considered a learning organization. Therefore, promotes learning and allocates funds for learning for each employee every year. The specific strategy used is to increase communication among leaders as a group and subordinates by enhancing the focus of meetings.
Measurable	The plan is measurable using the existing monitoring evaluation systems currently in place. Q-builder surveys allow for upward and anonymous feedback as an opportunity to accurately monitor and assess the leader's needs is the additional monitoring criteria. It is important to note that upward feedback must only be voluntary to ensure authenticity (Hartge, et al., 2015). Feedback must be examined in a timely manner to ensure the most efficacy (Hartge, et al., 2015).
Attainable	The plan is realistic because the goal is changing the formal learning process within the existing system. The plan can also be implemented and assessed within 6 months and revised and fully implemented within one year. Using Cawsey, et al. (2016) change path model allows for monitoring and modification of each step before moving on to another step.
Results	The result of the plan should be improved communication networks so that leaders can address learning needs within a timely manner using Carswell (2012) Organizational learning framework. The regular meetings ensure that the leaders have substantive information about learning needs within a timely manner.
Test	The plan is tested and assessed during each stage of implementation. The Q-builder surveys allow for upward autonomous feedback about employees' impressions for the stages in the change plan (Hartge, et al., 2015). The existing monitoring tools allow for review to ensure that the employees can accurately apply their learning to the duties. The acceleration stage of the change path model allows leaders an opportunity to identify concerns after implementation and return to the mobilization stage for appropriate plan revisions (Cawsey, et al., 2016).