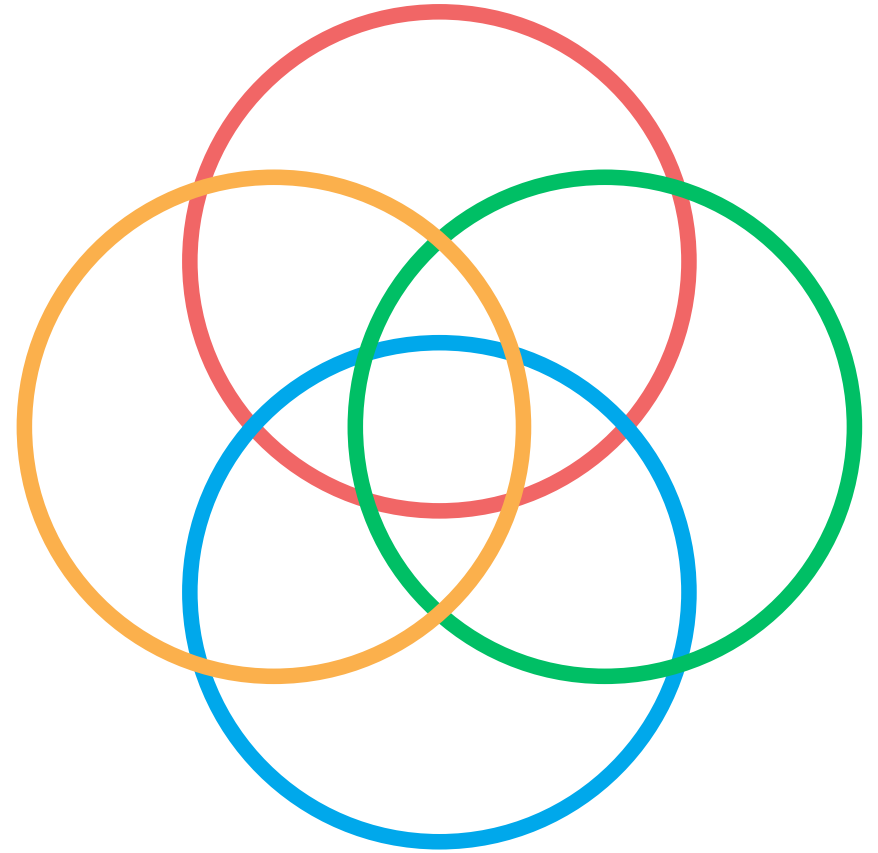

The Change Methods Handbook

Effective approaches for
complex, systemic and
organisational change

Dirk Vos





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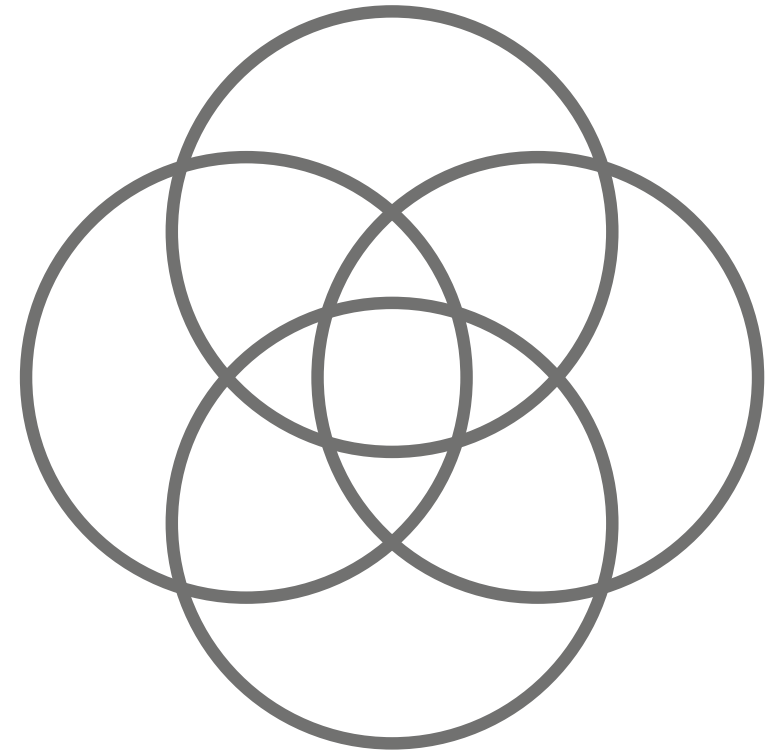
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Foreword

Right now, there is no shortage of big, complex and messy social, political and environmental problems that need to be addressed. From climate change to homelessness, technological advancements and the changing nature of work, to changing consumer demands.

The current business landscape is characterised by increasing complexity, interconnectedness, and uncertainty. Organisations are operating in a world where disruptions are more frequent, and the need for agility and flexibility is crucial. They need to monitor and respond to market trends faster, address regulatory changes with more transparency, and face market dynamics head-on to remain resilient.

Organisations navigate change and almost constant transformation to remain competitive and adapt to new challenges. Taking the right approach requires a dynamic and intimate understanding of the elements and agents at play, enabling us to identify opportunities and how to best navigate the liminal space.

The intent of this book is to simplify the process of selecting the best methods and tools in the context of change.

At Collaboration Campus, we have created a holistic framework that we call the 'Collaboration Rose' (page 46). The *Collaboration Rose* provides direction to a range of methods from which readers can draw inspiration. It will help you select the most appropriate method, or combination of methods, to ensure quality outcomes.

Our *Method Book* serves as an invaluable resource for leaders, managers, and change agents seeking effective approaches, leading practices, and a deep understanding of the most commonly used methods to drive successful organisational change.

"I suppose it is tempting, if the only tool you have is a hammer, to treat everything as if it were a nail."

Abraham Maslow

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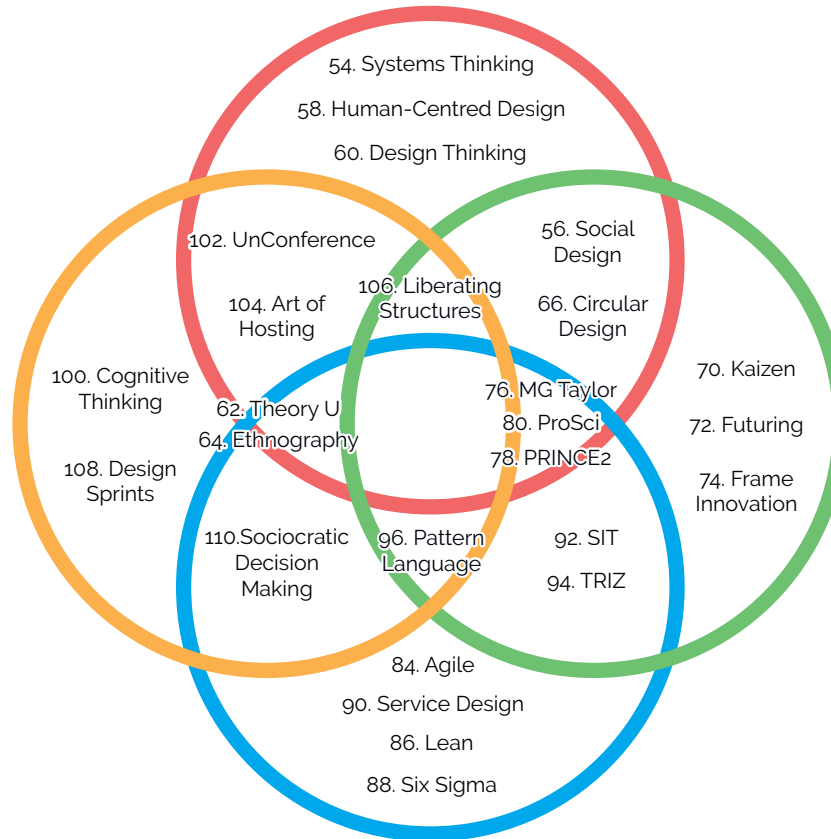
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Visual index

Transformational

Outcome driven, people & culture focused change



Tactical
Short term,
action oriented
change



Strategic
Long term
change
& reform



Transactional

Driving outputs that involve a tangible or measurable change



Method summaries

Transformational Change Methods

Systems Thinking	Focuses on understanding complex systems and their dynamics, enabling transformational change in organisational structures and processes.	54
Social Design	Explores how design can address social issues and create positive societal impact, contributing to transformative changes at a broader level.	56
Human-Centred Design	Puts people at the center of design processes, leading to transformative changes in creating user-friendly and meaningful solutions.	58
Design Thinking	Emphasises user-centric problem-solving and innovation, which can lead to transformative changes in products, services, and experiences.	60
Theory U	A systematic process for thinking about and picturing possible outcomes, and planning for the future.	62
Ethnography	Provides deep insights into people's behaviors and cultures, enabling transformative changes in how organisations understand and address user needs.	64
Circular Design	An approach to minimise waste, maximise resource use, and foster sustainability by designing products and systems for prolonged use and recyclability.	66

Strategic Change Methods

Kaizen	A philosophy of continuous improvement, supporting strategic changes by fostering a culture of incremental and sustainable enhancements.	70
Futuring	Aims to envision and shape future scenarios, supporting transformational changes by fostering a forward-thinking mindset.	72
Frame Innovation	Focuses on reframing challenges and opportunities, facilitating strategic changes in problem-solving and strategic decision-making.	74
MG Taylor	Offers a holistic approach to strategic change through collaborative and visual methods, facilitating comprehensive transformations.	76
PRINCE2	A project management method that supports strategic changes by providing a structured approach for planning, controlling, and delivering projects.	78
Prosci	A change management methodology that focuses on people's roles in driving successful organisational change initiatives.	80

Transactional Change Methods

Agile	Promotes iterative and adaptive project management approaches, enabling teams to achieve short-term goals with flexibility and responsiveness.	84
Lean	Aims to eliminate waste and optimise processes, resulting in tangible and measurable improvements in efficiency and effectiveness.	86
Six Sigma	Uses statistical methods to reduce defects and variability, leading to quantifiable improvements in quality and process performance.	88
Service Design	Focuses on improving service experiences and interactions, resulting in measurable enhancements in customer satisfaction and service delivery.	90
SIT	Systematic Inventive Thinking helps generate innovative solutions by systematically applying different thinking techniques, supporting tactical changes in problem-solving and creativity.	92
TRIZ	A problem-solving methodology that helps generate innovative solutions by analysing and leveraging patterns and principles, supporting strategic changes in product development and engineering.	94
Pattern Language	Provides a set of design principles and patterns for creating built environments that support human activities and well-being, contributing to strategic changes in architecture and urban planning.	96

Tactical Change Methods

Cognitive Thinking	Enhances individual and collective thinking processes, enabling tactical changes through improved problem-solving and decision-making skills.	100
UnConference	An open and participant-driven event format that encourages tactical changes by promoting peer-to-peer learning and emergent discussions.	102
Art of Hosting	Offers participatory methodologies for hosting meaningful conversations and engagement, facilitating tactical changes in team dynamics and collaboration.	104
Liberating Structures	Provides facilitation techniques for engaging and empowering teams, fostering tactical changes in collaboration and decision-making.	106
Design Sprints	Facilitates rapid prototyping and validation of ideas, supporting tactical changes by quickly iterating and testing solutions.	108
Sociocratic Decision Making	A governance approach that promotes inclusive decision-making and consent-based decision processes, supporting strategic changes in organisational governance.	110

Context



Acknowledgements

Over the past two decades, TwoCollaborate is proud to have worked with, and learned from, many thousands of very clever people from across the globe.

We've gained priceless insights and successfully applied them to the benefit of 40+ clients in all major industries. Global consulting companies, like BCG, McKinsey & Company, Oliver Wyman, PwC, KPMG, EY, Capgemini, and Business Models Inc. have been instrumental in the exchange of thought leadership, shared projects and industry insights.

We'd also like to acknowledge our fantastic contractor network of 'knowledge workers', made up of hundreds of like-minded, creative people from around the world. By sharing risks, pooling knowledge and working together to solve problems at all stages and levels in the production system – a process conceptualised as 'knotworking' by some theorists – our knowledge workers created cultures where their expertise often trumped traditional hierarchical structures.

More than anyone else, we'd like to thank Matt and Gail Taylor. Pioneers in this field since the 1980s, their work and documentation has influenced the world. Their skills at the World Economic Forum in 2005 paved the way for what most thought leaders now call 'Collaboration by Design'.

“The art of life is a constant readjustment to our surroundings.”

Kakuzo Okakura

Who should read this book?

The intent of this book is to simplify the process of selecting the best methods and tools in the context of change projects. This book will help you to understand how you can use these methods effectively to gain the right balance of both transactional and transformational change.

Audience	Benefits
Leaders	<p>Strategic guidance: The book provides leaders with strategic guidance on how to effectively lead and manage change within their organisations. It offers insights into different change management models, communication strategies, and stakeholder engagement techniques, enabling leaders to make informed decisions and drive successful transformations.</p> <p>Sustainable results: Leaders who read this book gain knowledge on sustainable change, such as continuous improvement, monitoring and evaluation, and organisational processes. This enables them to ensure that change initiatives produce long-lasting and positive outcomes for their organisations.</p>
Change champions	<p>Methodological insights: The book offers a wealth of methodological insights into various change management approaches and techniques. It equips change agents with a diverse toolkit, providing them with a range of options and strategies to effectively plan, implement, and evaluate change initiatives.</p> <p>Practical guidance and tips: The book offers practical tips and best practices based on real-world experiences, case studies, and research. Change agents can learn from the successes and challenges of others, gaining valuable insights that can enhance their own change management efforts.</p>
Students	<p>Critical thinking and analysis: The book stimulates critical thinking and analysis among students by presenting different change management approaches and discussing their strengths and weaknesses. This encourages students to evaluate, compare, and synthesise various methods, enabling them to develop their own perspectives on change management and contribute to the field through research or practice.</p> <p>Understanding change management: The book provides students with a comprehensive understanding of change management theories, concepts, and methodologies. It serves as a foundation for students studying organisational behaviour, human resources, or business management, helping them grasp the intricacies of managing change within organisations.</p>

About this book

Why this book is relevant now

It couldn't be more obvious that change is an omnipresent marker of our time. This book offers clear and effective methods and activities to navigate this change.

It provides timely insights and strategies to help individuals, teams and organisations effectively navigate and lead successful transformations in today's dynamic and evolving world.

The aim is for you to be able to identify the right tools that will allow you to contextualise and structure the change(s) with which you are faced.

Why we wrote this book

We have observed that many organisations default to a single change method with which they have long been familiar, suits their cultural norms or is the best fit with their available resources.

Each change initiative should be evaluated on its unique characteristics and requirements. Organisations should consider a range of change methods and select the one that best aligns with their specific needs, context, and desired outcomes. Flexibility and adaptability in choosing change methods can lead to more successful and tailored change efforts.

Therefore, we highly recommend systems, organisations and teams to familiarise themselves with multiple methods which can be utilised in different scenarios.

In this book, we have drawn together a collection of the most used, and most successful, strategies for change, innovation and collaboration. We have also outlined their individual strengths and limitations. A deeper understanding of the nuances of these methods (approach, process, principles, etc.) as well as the common elements which sit across methods (collaboration, facilitation, iteration, visualisation, etc.) create the ability to draw elements from multiple frameworks in a fit-for-purpose approach.

How this book will help you

This book was written to educate, facilitate and enable its readers. Whether you are on your personal learning journey from novice to master, or whether you are a visual, theoretical, practical, or exploratory thinker, you will find the content accessible, informative and useful.

This book was born out of a collaboration between the author and a larger community of experienced practitioners, researchers, educators and academics. Bringing both practitioner experience and academic integrity together will help you to understand the complexity of change, the changing nature of projects and methodologies, and how to draw holistically from the most successful methods out there.

Each method has been carefully selected to address specific aspects of change, providing a rich toolkit to drive successful transformations in your organisation. By exploring these methods, you will gain valuable insights into their underlying principles, practical applications, and the benefits they offer:

- Explore a range of established methods supported by the *Collaboration Rose* (page 46), a new framework to help match your strategic needs.
- Determine how these methods might be used by you in part, whole, or concert to suit your particular needs.
- Deep dive into the origins and evolution of practices or skim straight to the leading practices to get your hands dirty.

Goal
Best use of the Method and contextual position to other methods

Title
Most commonly used name

Justification
Why you would use this method

Value proposition
The 'so-what' statement explaining the value of the method

Method explainer
What this method is

Leading practice

Visual model or framework
To ground the theory or method

Method icon

Advantages + Disadvantages

Page tracker + colour
Easy & quick page reference

Transformational
Tactical Strategic
Transactional

Who created it & when?

Austrian biologist, Ludwig von Bertalanffy, was one of the first to conceptualise Systems Theory through his 'Organismic Biology' theory. In the early 1920s, he came to the realisation that you cannot explain biological phenomena in parts, without thinking about how interactions of the different parts influence the behaviour as a whole.

It was Professor J.W. Forrester from Sloan MIT who coined the term 'systems thinking' when he created the Systems Dynamic Group in 1953. It used computer simulations to illustrate and predict systems behaviour.

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Systems Thinking

Systems Thinking is a holistic approach to understanding dynamic ecosystems to deliver systemic change.

Why use it?

Systems Thinking is useful for solving complex problems by analysing the effects of change within an ecosystem. It increases the successful delivery of sustainable outcomes by allowing you to identify systemic cycles and patterns of evolutionary behaviours. It helps to identify places for intervention, as well as causal effects to avoid any unintended consequences.

What is it?

It is a process often used by academics and governments. It focuses on understanding circular, interrelated and independent parts within a system to understand the broader context and anticipate the impacts of any changes in the system. It is used as a diagnostic tool to distinguish patterns and behaviours over time and identify points of intervention within a complex ecosystem.

Process:

Example tools & techniques:

<p>Events</p> <ul style="list-style-type: none"> Identify the scope Align on the scale Observational research Analytics 	<p>Patterns</p> <ul style="list-style-type: none"> Stakeholder map Interviews Identifying patterns 	<p>Structures</p> <ul style="list-style-type: none"> Identify relationships Circular loops Whole parts 	<p>Models</p> <ul style="list-style-type: none"> Flow chart Logical frameworks Theory of change
--	--	--	---

Advantages

- Can help identify the real issue, rather than responding to the symptom.
- Helps identify patterns and feedback loops.
- Allows you to not sweat the detail while scoping the issue.

Disadvantages

- Can be difficult and resource-intensive in the context of a large or complex organisation.
- Not good to use in a crisis or emergency scenario.

Further reading

Anderson, V. & Johnson, L. (1997). Systems thinking basics. Cambridge, MA: Pegasus Communications, pp1-14.

Cabrera, D. Colosi, L. & Lobdell, C. (2008). Systems thinking: Evaluation and program planning, vol. 31, no. 3, pp. 299-310.

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Context
Origin and source of the method

Process
High level description of approach

Signature activities
Tools and activities supporting the method
The most important activities are organised and detailed in the **Activity Book**

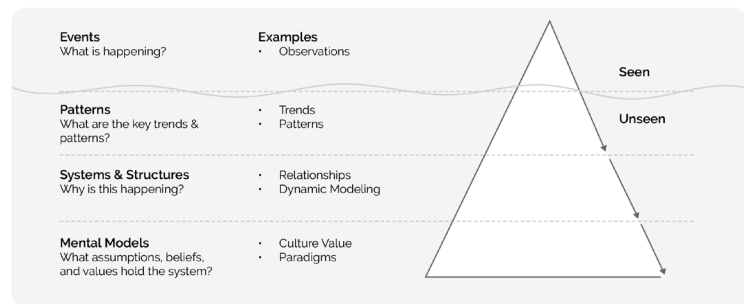
Framework or Model explainer

Further reading
Resources that provide more detail

Page number

Systems Iceberg model

Underlying Systems Thinking is the Systems Iceberg Model that helps to explain how complex systems interact. Complex issues are often viewed at an observational 'event' level. However, these 'events' are a result of deeper systematic 'patterns', 'structures', and 'mental models'. These systems have unseen components similar to an iceberg: an iceberg contains 10% of its mass above water and 90% below which drives the ocean currents. Often 'events' drive decision making as they are the only ones visible; however, the events are results of a deeper systemic structure.



How does it work?

Systems Thinking can be visualised through two frameworks of soft systems mapping (qualitative) and hard systems mapping (quantitative) to capture:

- Key events in the system
- Patterns of repeating behaviour
- Underlying structures
- Mental models and assumptions

How to read this book

To help you navigate this book, we have developed a consistent visual language using symbols and layout to tie together concepts and content.

We have also provided two index formats: alphabetical, and by strategic intent, so you can use the book synchronously to gain a complete perspective, or asynchronously by concept, tool or strategic need. In addition, we have divided the book into sections to provide another way to explore its contents by interest or need.

In the first section of the book (pages 03-15), we provide written & visual indexes for navigational ease of use, the target audiences for this book, as well as how our *Method Book* fits into the grand scheme of the Collaboration Campus *Change Toolkit*.

In the second section of the book (pages 16-39), we outline the changing nature of change, the case for collaboration, patterns of change and why they are so important to the success of any organisation.

The increasing complexity of change requires a multifaceted approach. No longer can organisations rely on a one-size-fits-all solution. Instead, they must embrace a strategic blend of methodologies tailored to their unique contexts, challenges, and goals. The 26 methods presented in this book have been chosen for their proven track records, wide-ranging applicability, and ability to address the nature of change.

This section provides a solid foundation to understanding how each organisation is different and, as such, requires a unique approach. This is also a great refresher for the more experienced change leader and provides valuable context to those newer to the process.

The third section of the book (pages 40-51) introduces the *Collaboration Rose*, a tool developed by TwoCollaborate to identify and scaffold the creation of collaborative cultures within teams and organisations to address change.

The Collaboration Rose is a holistic landscape that maps collaborative and innovative methodologies and identifies where each sits along the dimensions of strategic versus tactical outcomes, and transactional versus transformational outcomes.

Understanding the purpose and outcomes of each gives you the ability to know when and how to apply them to best effect. A deeper understanding of the nuances of these (e.g. approach, process, principles), as well as the common elements which sit across methods (e.g. collaboration, facilitation, iteration, visualisation) create the ability to draw elements from multiple frameworks in a fit-for-purpose approach.

This delivers more impact for organisations through:

- Creating tailored and innovative solutions.
- Developing flexible approaches.

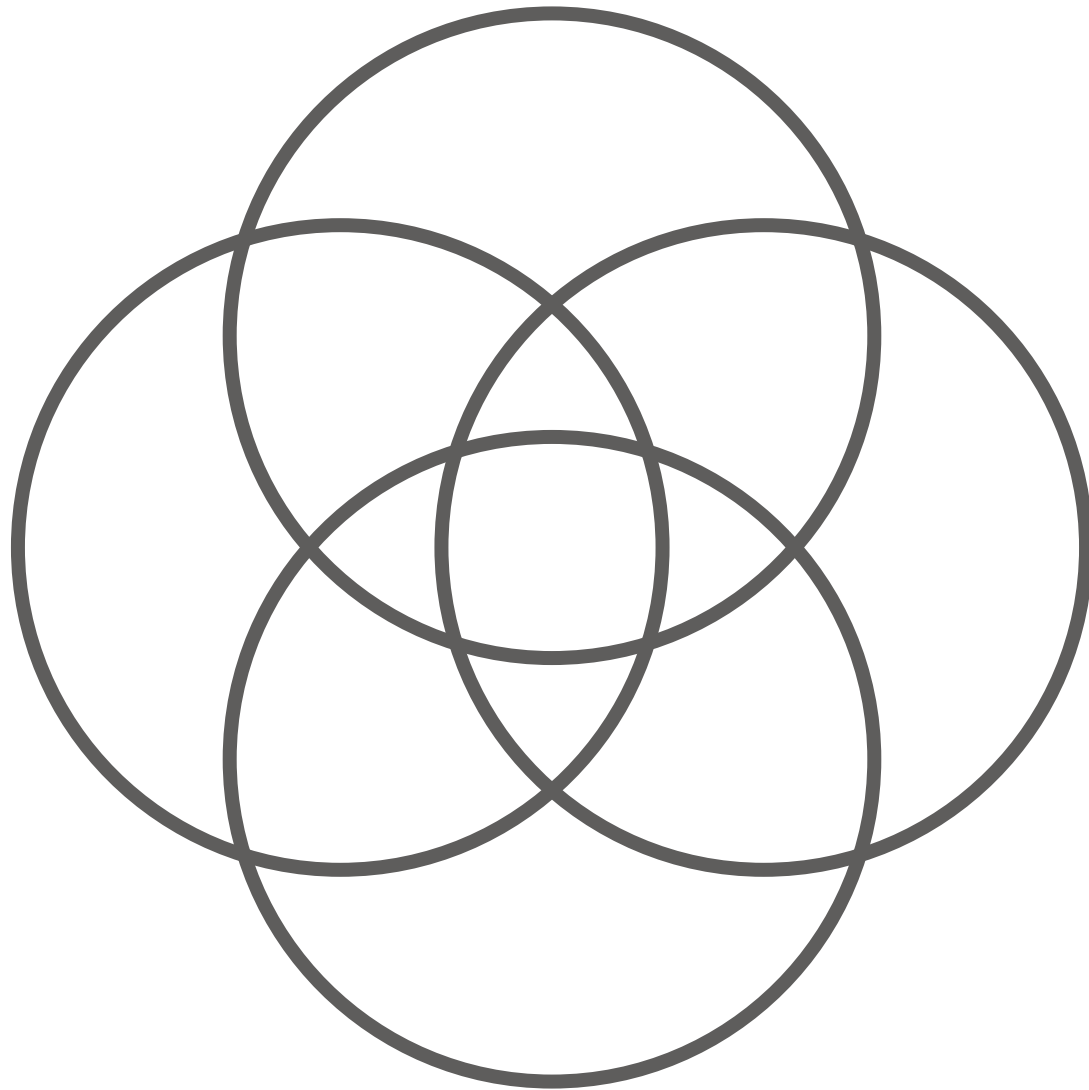
The fourth section of this book (pages 52-111) details 26 contemporary methods, frameworks and models used in change contexts. It complements section two, the *Collaboration Rose*. It is here that you will learn about the detailed origins, strengths and benefits of each model and how to draw on the aspects most suited to your strategic goals.

The fifth section of the book (pages 112-133) provides detailed case studies documenting the application and outcome of implementing the *Collaboration Rose*. Each case study presents the organisational needs and culture, the integrated strategic approach, its implementation, and its results. These illustrate the broad and practical applications of the *Collaboration Rose*.

The sixth section of the book (pages 134-143) contains a visual timeline that outlines the evolution of change methods, and how the great minds of the last centuries documented their experiences and inspired others.

The seventh section of the book (pages 144-160) contains a glossary aligning the definitions and meanings of all of the different terms used throughout this book.

Introduction



Introduction

Why we see value in this book?

Even under normal circumstances, collaborating with your team and delivering projects on time is challenging. However, the considerations of change have evolved and the volume of change continues to increase at an alarming rate. As a consequence, we can't deal with change in traditional ways.

Many large organisations have tedious and bureaucratic processes that can affect their viability. Further, many leaders who are schooled in one particular methodology tend to get lost in the mechanics associated with implementing it, or think that traditional, plan-driven, control-oriented approaches are the only way to conduct change.

Being unaware, ignoring or over-relying on a familiar or favourite method relates to a cognitive bias that is famously quoted by Maslow as the law of the instrument: *"I suppose it is tempting, if the only tool you have is a hammer, to treat everything as if it were a nail."*

Achieving a more balanced approach might mean rethinking the way projects are managed. When done correctly, it should not sacrifice control over costs and schedules in order to achieve agility. On the contrary, it is likely to accelerate outcomes down the track. It is also likely to enhance stakeholder ownership, buy-in, engagement and adoption.

There is a need to fit the methodology (or combination of methodologies) to the business environment as well as the risks and complexities of typical projects, rather than trying to force-fit projects to a standard methodology (Waterfall, Agile or other).

To do that, a broad-based understanding of different methodologies and practices is required. A deeper understanding of the principles behind them is also needed, in order to tailor an approach to fit the business environment and address the risks and complexities of individual projects.

A major goal of this book is to help build a bridge between traditional and modern project-management approaches, and to help people see these methodologies in a very different light. Using the right method is an extremely strategic and important topic for the change-management professional.

Why us?

For a very long time, we have managed projects in product, service, market development, organisational optimisation, joint ventures and partnerships. We've been involved in compliance, commercial and purpose-driven initiatives, short- and long-term projects, worked across all industries, and helped businesses from start-ups to monolithic agencies, e.g. government.

This has given us a very broad view of what does and doesn't work in various situations, and we've learned that there is no single 'text-book' methodology that works for every project. In fact, over relying on a single method increases the likelihood of project failure significantly.

"Change the way you look at things, and the things you look at change."

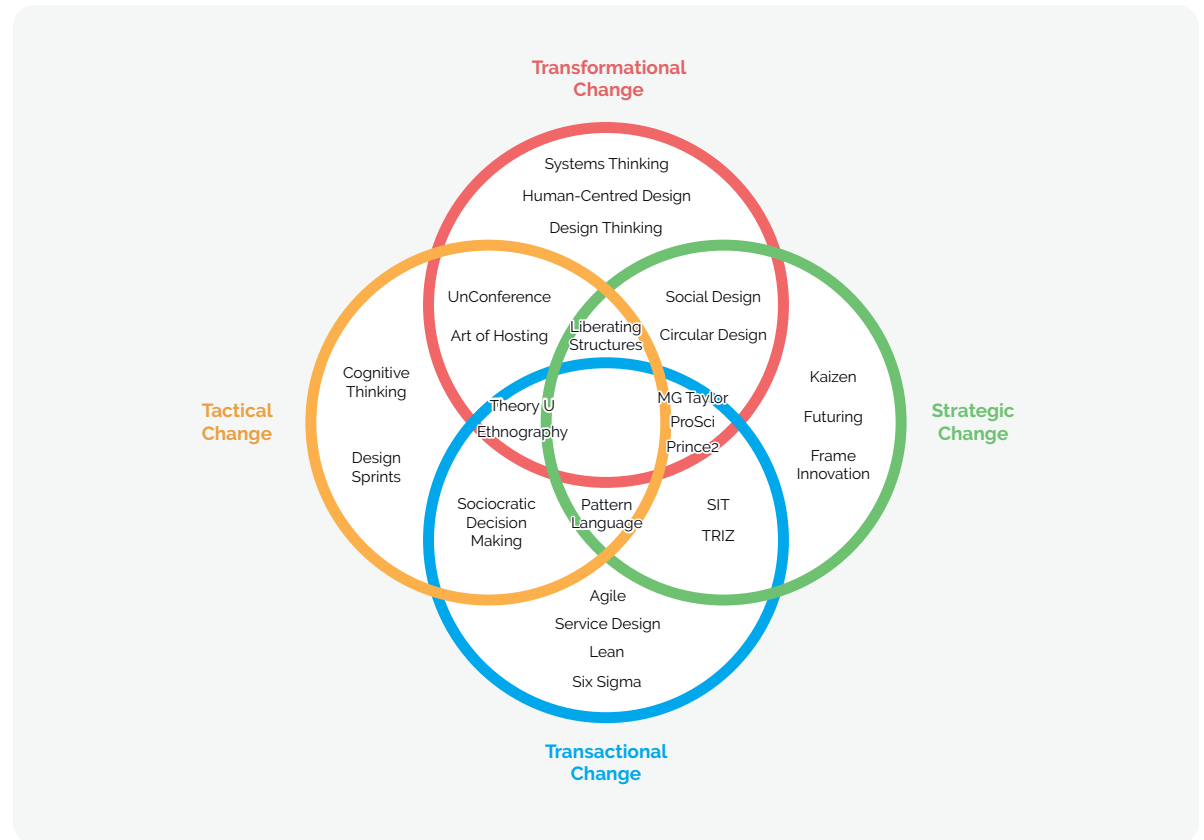
Wayne Dyer

In today's fast-paced world, organisations face ever-evolving challenges, making effective change management critical. Leaders and managers often struggle to choose the right methods, risking solutions that fail to deliver lasting results or meet strategic goals. This book is a practical guide to navigating these complexities, introducing 26 change management methods grouped into four key goals: transformational, transactional, strategic, and tactical.

Each method is unpacked with its purpose, workings, pros and cons, historical roots, and tools for success. The book includes five case studies and a timeline of change management's evolution, offering both theory and hands-on strategies. It empowers readers to think critically about change and implement the best methods for their organisations.

Packed with actionable insights and a focus on real-world impact, this guide equips leaders to create meaningful, sustainable change programmes. Turn challenges into opportunities and drive long-term success!

Dirk Vos is a seasoned consultant with 17+ years of experience in change management across industries and geographies. A visiting lecturer and former expert in residence at UNSW, he is the founder of TwoCollaborate and Collaboration Campus, specialising in Creative Leadership and Collaboration.



"I've found the Change Toolkit to be an absolute goldmine when it comes to designing ways of working for teams involved in change programs of all sizes. It's been put together with such a love of the craft and attention to detail. It does the hard work for you, to work out which methods, tools and techniques to use, and not use."

Ben Crothers

Author, Good Design Award judge, former Atlassian head of design

"As an executive of a listed MNC, I know how challenging and complex organisational change can be. This book provides excellent insights, tools and context to navigate through change in a meaningful and time effective way."

Fred van der Tang

Former CEO, Randstad Australia

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