

COMPETENCY REQUIREMENTS FOR FIRST-LINE MANAGERS TO DEAL WITH RESISTANCE TO CHANGE

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ABSTRACT

Continuous changes in the needs of markets require effective change management at all levels in organisations. First-line managers are directly responsible for meeting the demands of clients and resistance to change at this level could result in sub-standard outputs. The effectiveness of change interventions will be largely determined by the competence of first-line managers to facilitate the desired change taking into account resistance to change. The purpose of this article is to identify competencies required by first-line managers to deal with resistance to change. The findings are based on a literature study and functional analysis.

OPSOMMING

Kontinue verandering in die behoeftes van markte vereis effektiewe bestuur van verandering in alle vlakke van organisasies. Eerstelinge bestuurders is direk verantwoordelik daarvoor om aan verwagtinge van kliënte te voldoen, want weerstand teen verandering op hierdie vlak kan tot sub-standaard uitsette aanleiding gee. Die effektiwiteit van veranderingsintervensies in organisasies sal grootliks afhang van die bevoegdheid van eerstelinge bestuurders om die verwagte verandering te weeg te bring met in agneming van weerstand teen verandering. Die doel van hierdie artikel is om bevoegdhede te identifiseer wat eerstelinge bestuurders sal benodig om weerstand te kan hanteer. Die bevindinge is gebaseer op 'n literatuur studie en funksionele analise.

The establishment and maintenance of organisational effectiveness has, in contemporary management science, become more complex and dynamic (Zeffane, 1996; Hudson, 1999; French & Delahaye, 1996; Weber & Weber, 2001; Kinnear & Roodt, 1998; Appelbaum, St-Pierre & Glavas, 1998). The complexity emerges from greater interdependence among world economies, while the dynamism is a direct result of the information age as well as the global arena organisations operate in. The complex, dynamic and competitive nature of business requires that organisations cannot remain stable for long as constant change external to organisations require constant change within. In fact, it is argued, that organisations are only as successful as their efforts to respond to changes in the environment and adapt accordingly. This requires effective change management at all levels in the organisation, but nowhere is this more important than at the interface with customers and clients. For change efforts to be regarded as truly successful, one cannot only measure how effective the change strategy is or how well it is led, but rather the extent to which the change efforts have led to improved service delivery and increased client satisfaction (Appelbaum et al, 1998; Moran & Brightman, 2001).

A critical factor in the provision of excellent service delivery is the first-line manager, as their influence and responsibility extends to operative employees – those people responsible for ensuring high quality service and products. The effectiveness of change interventions in organisations will thus largely be determined by the competence of first-line managers to facilitate the desired change through and with operative employees (Moran & Brightman, 2001). This view is supported by Katzenbach (in Appelbaum et al; 1998) who stresses that the most difficult aspect of change efforts lies in changing people and their skills, knowledge and behaviour. This is particularly challenging given the natural tendency of people to resist change. Most people are suspicious about the unfamiliar; and are naturally concerned about how to get from the old to the new, especially if it involves learning something new and risking failure (De Jager, 2001). The danger however lies in the fact that resistance to change, particularly at operative levels

manifests in the delivery of sub-standard outputs, which can drive customers to the competition. It is thus crucial that first-line managers should be able to deal with resistance to change in an effective manner. Given the importance of first-line managers and their capacity to manage resistance to change, the focus of this paper is on the identification of competencies required by first-line managers to effectively manage resistance to change. To derive these competencies, it will be necessary to discuss the concept of resistance to change in greater detail as well as consider the requirements for successful change, as these pertain to first-line managers.

RESISTANCE TO CHANGE

Resistance refers to any opposition to a shift in the *status quo*. In physical terms, resistance means “to slow a process down” or to “put obstacles in the way of goal achievement” (Mariotti, 1998, p.140). Resistance to change thus refers to an expression of reservation that arises as a response or reaction to change (Mabin, Forgeson & Green, 2001). This response is viewed as natural as change involves unlearning habitual patterns and learning new ways of thinking and feeling which result in new behaviours (Claxton, 1999; Gratton, 2001). This process is obviously anxiety provoking and hence the resistance (Kets de Vries, 2002). Two terms closely associated with describing resistance to change, are “fear of loss” and “fear of the new” (Coker, 2000, p. 24). The aspect of loss is particularly pertinent and the following factors may contribute to a fear of loss (Coker, 2000; Mabin et al, 2001; Kets de Vries, 2002; Seely, 2000; Pheng, 1999):

- **Individual factors** (personality factors such as a high need for control, locus of control, need for achievement, etc.; attitudes based on previous experiences of change)
- **Economic loss** (loss of job, reduction in earnings or less opportunity for economic growth)
- **Inconvenience** (more work for the same pay, more effort for the same output, greater responsibility and no additional rewards)
- **Threats** (increased insecurity, anxiety or worry)
- **Power** (loss of control and having inferior knowledge or levels of competence)

- **Social disruption** (group cohesiveness; reduced contact with trusted friends or family)
- **Losing face** (the fear of appearing foolish in the face of new demands)

Resistance to change can furthermore be distinguished at three different levels (Mariotti; 1998, Maurer, 2000). **Level 1** resistance is based on a lack of information or on honest disagreement over the facts. **Level 2** entails personal and emotional resistance and manifests because people are afraid that change may cost them their jobs, reduce their control, or cause them to lose face. Finally, **level 3** is associated with employee's managers or what these managers represent. In these situations, people will resist almost any changes that are suggested to them, as they link "change" and "management" with one another.

Managing resistance to change

There are two crucial aspects that underlie the successful management of resistance to change. Both an understanding of individuals and the differences that exist between employees together with knowledge of the behaviour underlying the resistance to change are required.

George and Jones (2001) stressed that change efforts should be focussed on an individual level as change is initiated and implemented by individuals, despite organisations being collective entities. Managers interested in successfully managing change must learn how to encourage individuality, and need to legitimate, respect, and value diverse individual experiences (Steiner, 2001). This includes being aware of the abilities and strengths of each individual and the capacity to capitalise on these in the context of work team. First-line managers should be able to support employees on an individual basis to deal with the envisaged change (Kets de Vries, 2002). Dealing with the concerns of employees will help identify the reasons for resistance and enable managers to deal with these proactively (Bechtel & Squires, 2001; Coker, 2000). Ignoring people issues can lead to failure in achieving successful change (Bechtel & Squires, 2001; Folger & Skarlicki, 1999). In managing resistance to change, first-line managers may also be required to deal with resistant behaviour in the team context, for example group decision-making sessions (George & Jones, 2001; Mabin et al, 2001).

The first-line manager should also have a basic understanding of what underlies and influences employee behaviour in the context of change. It is recognised that human behaviour is complex and the factors influencing it, extensive. Nevertheless, it is necessary that the first-line manager be aware of the factors influencing behaviour and learning, as a basis for managing the change process. As stated, change involves learning new ways of thinking and feeling, which result in new behaviours. The relationship between these factors in behaviour and learning is complex and an in-depth analysis is beyond the scope of this article. For this reason, the assumption is made that emotions and cognition interact and mutually influence each other and result in behaviour. (Kets de Vries, 2002; Kotter & Cohen, 2002). A brief discussion of each of these factors and their role in the change process follows.

Cognition is shaped by perceptions as individuals filter and selectively process information from their environments. In this way, people choose from available information that which they would like to believe and may ignore information that challenges the world as they wish to perceive it. An important aspect with regard to change is the degree to which employees perceive the organisation to be ready for change. Defined as "*the cognitive precursor to the behaviours of either resistance to, or support for, a change effort*", these perceptions can facilitate or undermine the effectiveness of a change intervention (Eby, Adams, Russel & Gaby, 2000, p. 419). Employees respond to what is happening in their environment and based on their perceptions, make assumptions about the change process. These

may be accurate or inaccurate but will influence whether change is resisted or not. For this reason, understanding employees' perceptions regarding the readiness for change is necessary in dealing with resistance to change.

Emotions are relatively intense affective states that interrupt ongoing thought processes and behaviours. They arise when discrepancies are encountered that are relevant to one's personal well-being or goals and objectives. Emotions are thus functional and adaptive in that they provide signals of situations that are personally relevant and in need of attention. Emotions are triggered by thought processes, which in turn motivate cognitive activity and behaviour to deal with the emotion-triggering situation (Goleman, 1996; George & Jones, 2001). Behaviour that manifests itself as resistance to change is thus not only based on what people think, but the feelings they experience during the change process (Kotter & Cohen, 2002).

The afore-mentioned discussion suggests that first-line managers should guide the individual through a cognitive process to ensure an understanding of what the change entails and the impact thereof on the individual. This impact should be defined in terms what the person will need to let go of, what competencies will be required to be effective in the new environment, and what support will be needed to achieve personal success. In addition, the individual must be supported on an emotional level as they confront natural feelings of fear and loss.

SUCCESSFUL CHANGE

In addition to understanding resistance to change, it is also necessary to identify characteristics of successful change efforts as these provide further guidelines in the successful management of resistance to change.

Successful change can be described as the flexibility that organisations show to be able to proactively respond to changes in the market or external environment (Appelbaum et al, 1998). The following characteristics are regarded as crucial in successful change efforts.

Overcoming managerial resistance to change

The misconception exists that managers do not resist change and that resistance only comes from operative employees. Van Buren and Werner (in Appelbaum et al, 1998) stated that the resistance of middle and first-line managers is often identified as a major implementation barrier. These managers are afraid of losing their jobs and are threatened because of pressure applied by senior management to redefine their roles from primarily directing to coaching and counselling. It is however crucial that managers are willing, able, allowed and supported in dealing with change first before they attempt to facilitate change in the lower levels of the organisation. First-line managers should have a comprehensive understanding of the envisaged change and not allow their own fears to influence the way they communicate change to their areas of responsibility. In doing so, they take personal responsibility for change in their areas of responsibility and influence.

Business case for change

Once the triggers for change have been identified, successful change is characterised by a strong business case for the proposed change. In this instance it is important for managers to be able to see the bigger organisational picture to be able to determine which success criteria will be most important for their area of responsibility and influence. Supporting the business case for change should be the strategic direction of the organisation in the form of a vision and mission (Clarke & Meldrum, 1999; Mabin et al, 2001; Bechtel & Squires, 2001; Corporate Executive Board, 2001c). Although senior

management develops the organisational business case, first-line managers should be able to cascade change strategies to their areas of responsibility and derive a business case for their area of influence. This should encourage first-line managers to take ownership of the envisaged change.

In addition, the first-line managers should also be able to encourage change from the bottom up, as successful change efforts need not always be top-down (Zeffane, 1998). Organisations would benefit from first-line managers that are able to identify potential areas of change through and with their teams that can improve the product or service delivery of the organisation.

Focus on the customer

Organisations that facilitate effective change manage to focus on customers and their needs. They invest in ways to improve sales, provide superior service to clients, and they do not forget that their customers and their needs underlie the organisation's existence (Appelbaum *et al*, 1998). First-line managers should continuously strive to address the following seven questions in their operational areas of responsibility (Rampersad, 2001):

- Who are my customers?
- What do they need?
- What is my product or service?
- What are my customers' expectations and measures?
- Does my product or service meet their expectations?
- What is the process for providing my product or service?
- What action is required to improve my process?

By addressing these questions the first-line manager can identify opportunities for change and increasing the economic value of products and services. It can also serve as impetus for first-line managers to formulate a business case for change at their level.

Effective communication

A strong business case for change without an effective communication strategy will result in haphazard change efforts (Buckingham & Coffman, 2001; Mabin *et al*, 2001; Bechtel & Squires, 2001; Corporate Executive Board, 2001b; Seely, 2000; Zeffane, 1996). The communication strategy should include information on what will happen, when it will happen, and how it will happen. By describing step-by-step what will take place, management will be more apt to gain support from others and reduce resistance. Because change is most effectively facilitated one person at a time (Corporate Executive Board, 2001b; Buckingham & Coffman, 2001; Zeffane, 1996) communication should be cascaded through the organisation to various levels and areas of responsibility. The goal is to ensure that all people receive the communication and to facilitate a process of change, one person at a time (Appelbaum *et al*, 1998; Seely, 2000). Furthermore, managers need to listen to the views, protests and problems of subordinates who are likely to understand the implications of the changes in their areas of influence.

To ensure effective communication, managers should communicate what they know, and assure employees that they will never be intentionally deceived. Managers can offer to answer questions and explain why some questions cannot be answered, as the information may not be available (Lewis, 1998; Kotter, 1996; Kotter & Cohen, 2002). This implies that first-line managers should be empowered to answer questions on a needs basis and only do so once they fully understand the process.

Leadership

In a study conducted by the Corporate Executive Board (2001a) it was evident that the leadership competencies of relevant people should be at higher than acceptable levels before any attempt to change is made. Though the leadership does not always initiate successful change, it should be owned and driven by them (Walker, 1999; Kotter & Cohen, 2002). Leadership

during times of change requires courage as the leader may be required to do the following (Burdett, 1999):

- Stand alone
- Take tough decisions
- Say "no"
- Stand up against unnecessary bureaucracy
- Admit to making mistakes
- Admit that he or she is part of or the source of the problem
- Overcome fears of making mistakes
- Lead from the presumption of truth

The first-line manager should demonstrate an ability to lead their teams towards goal achievement. In doing so, they will have to live their personal visions of the change and lead their teams through effective communication, motivation and influence.

People development

The next requirement, individual and team development, is often neglected by organisations in attempting to implement successful change (Bechtel & Squires, 2001; Corporate Executive Board, 2001a; Kotter & Cohen, 2002; Seely, 2000). Change efforts require from individuals new skills and competencies, which can only be developed if the necessary ability, motivation and self-esteem are present. Where the challenges posed by the proposed change appear to outweigh the capacity of individuals to develop, resistance to change is likely to occur. For this reason, the first-line manager must be able to identify and facilitate the development of the requisite skills in the individuals in their team. This should be done on an individual basis, in conjunction with each team member, and should result in a development plan of action that will clearly indicate the commitment of the organisation and the individual to ensure competence.

Structured implementation of change

Another requirement for successful change is the application of structured approaches to change implementation. The most effective methods typically integrate attention to human issues (commitment, resistance, follow-through, etc.) with attention to the technical issues usually incorporated into project management methods (Hoopes & Hale, 1999; Seely, 2000). This will require managers to have both excellent human relations and project management skills. They will require a clear understanding of the change supported by project management competencies to implement the change. They will also need to make time allocations for attending to the human issues involved and ensure that all the people dimensions are addressed.

Effective monitoring and control

Hoopes and Hale (1999) identified the necessity for monitoring and evaluation as a key principle in successful change, to ensure a results-based focus. The aim is to determine the payoffs achieved from the initiative and to learn valuable lessons about implementation that can be used to strengthen future changes. The goal of effective monitoring and control is to develop desirable behaviour and overcome those behaviours that may jeopardise change efforts. The first-line manager is responsible for coaching employees in this regard. Crucial in monitoring and control is the perception of fairness as in creating a fair workplace, resistance can be limited (Lewis, 1998).

Structure to support strategy achievement

Successful change in organisations requires structures that meet the needs of the organisational strategic direction. Appelbaum *et al* (2000), and the Corporate Executive Board (2001a) found that the involvement of employees in determining appropriate structures to facilitate change leads to effective structures that work. This will require first-line managers to design a team that will effectively facilitate change and allocate resources within their area of influence. First-line managers may also advise decision-makers regarding more appropriate organisational structures from their experience of successful change.

Mutually agreed performance goals

Managers in successful companies improve performance by achieving agreement or consensus with employees in setting mutually agreeable performance goals. Employee suggestions are actively sought and a positive work-group spirit, serves as a basis for enhanced motivation (Appelbaum, et al, 1998; Seely, 2000). Such an approach can also secure ownership for performance goals as it comes from within and is not simply forced from the top. This will require of first-line managers to facilitate group decision-making and problem solving sessions to ensure optimal input and buy-in from team members.

DEDUCTION OF COMPETENCIES

Competence is defined as the skills, knowledge, attitudes, attributes and values required in performing a task and the ability to apply them in the work environment (Lindsay & Stuart, 1997; Garavan, Barnicle & O’Suilleabhain, 1999). For the purpose of the study, competence was viewed based on the framework outlined in Figure 1.

The deduction of competencies was based on the work of Fletcher (1997) and the National Examination Board for Supervisors and Management (1998). Fletcher (1997) is of the opinion that a functional approach reflects a broader concept of competence. This implies a focus on tasks as well as the way these are organised in the work role and management contingencies. Competence-based standards for effective performance are derived through a process of functional analysis. This is a top-down analytical approach of what the target group of employees should be able to do in the work environment and begins with the key purpose of the designated position in an organisation. In the context of this study, the key purpose of first-line managers is to deal with resistance to change. Analysis of the key purpose should result in the identification of key work roles, which are derived from the key purpose. Key roles are determined by asking the question: ‘what has to happen for the key purpose to be fulfilled?’ (National Examining Board for Supervisors and Management (NEBS & M), 1998, p. 8). This approach will support a clear focus on the roles that should be performed rather than only the “the job” (Fletcher, 1997).

To formulate the competencies listed in Tables 1 to 14, it was necessary to consider the theory of resistance to change and the management thereof as well as the requirements for

successful change. The functional analysis of the information from the literature study resulted in the identification of key roles that first-line managers will perform to manage resistance to change effectively.

Fletcher (1997) suggests that the analytical process continues until “units of competence” are identified. These are described as activities that can be undertaken by one individual that have real meaning in the workplace (Fletcher, 1997; NEBS & M, 1998). Each key role was analysed to determine the units of competence that comprise of specific work activities that are grouped together with other related work activities. To define units of competence, the question “What has to happen for this key role to be achieved?” was asked.

The next step in the functional analysis process is the identification of “elements of competence”. Elements of competence can be described as detailed steps or descriptions of performance expected to ensure the delivery of a unit of competence (NEBS & M, 1998). These are broad steps that can be followed to ensure the achievement of the related unit of competence. Stated differently, elements of competence are the things that responsible people should be able to do in the workplace in order to complete functions. In the functional analysis the question is asked: “What has to happen for the unit of competence to be achieved?”

To derive the competencies from the elements of competence, a functional analysis was conducted within the framework of a business process to determine the specific inputs required to be successful in the work environment. These inputs are the skills, knowledge, and behaviour (attitudes, attributes and values) that will have to be applied in the work environment to effectively deal with resistance to change. These inputs are, however, not sufficient, as there are organisation specific control guidelines (policies, procedures, rules, legislation, etc) that govern the performance of employees in organisations. There are also tools and equipment that the person should be able to use in the workplace that may be specific to the organisation. Of importance is that all applications of the required competencies take place within organisation-specific conditions and circumstances and that no two organisations are the same in this regard.

It is evident that the term first-line manager can be used to describe a broad spectrum of people. For the purpose of this paper the term is used to denote those people assigned with a

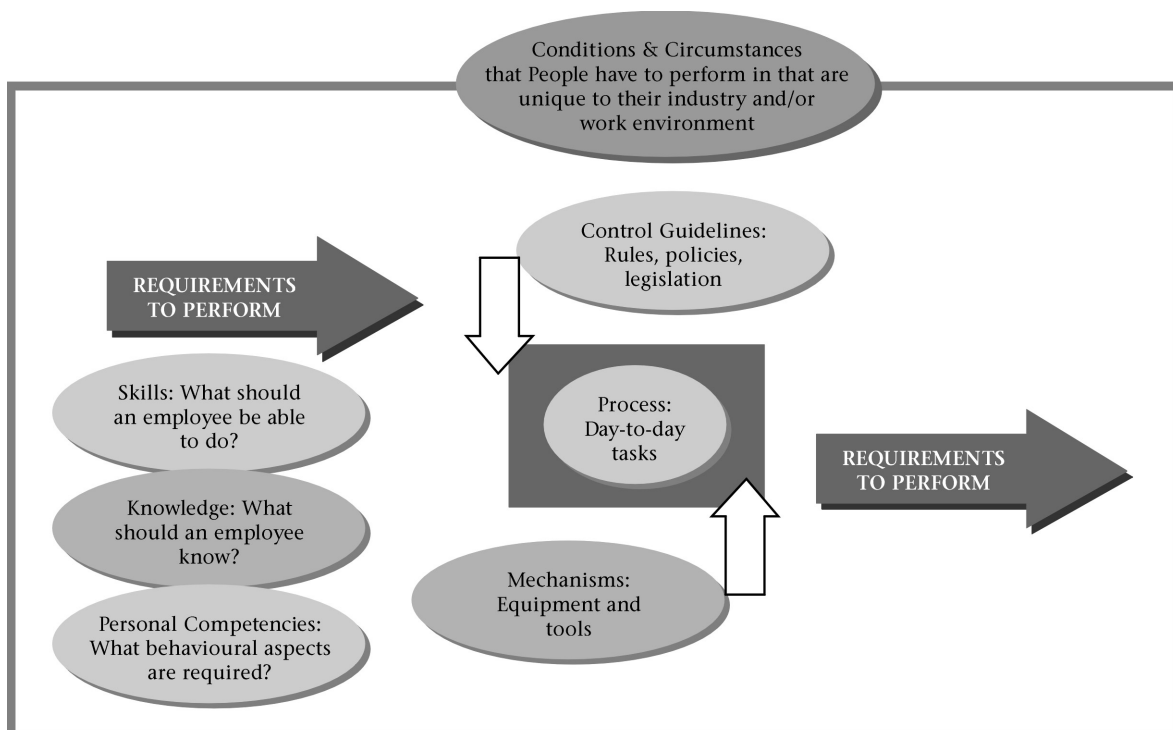


Figure1 Competency framework (©Chris Lombard, 2002)

managerial title and responsibility. The competencies listed will apply to people in this group, but may vary depending on the complexity and diversity of their specific tasks.

Outcome of the Functional Analysis

During the functional analysis process the following four key roles were identified:

- Align the change strategy of the area of responsibility with that of the organisation.
- Ensure personal readiness for change.
- Minimise resistance to change.
- Act as a continual catalyst for change.

Although the four key roles are not in a particular sequence, the second key role (Ensure personal readiness for change) should precede the third key role (Minimise resistance to change) as one can only manage change in others when one is prepared oneself.

It should also be noted that the manifestation of the last key role in organisations would be ideal for any organisation, as this implies that first-line managers and their teams take ownership for continuous improvement of systems and processes to the benefit of customers and clients.

In the discussion that follows each key role is highlighted and the units of competence are given. A breakdown of each unit of competence is provided in the tables following each paragraph.

The first key role first-line managers should perform is to align the change strategy of their areas of responsibility with that of the organisation. The units of competence that comprise the first key are listed below. The first-line manager should:

- Obtain a comprehensive understanding of the target state of the envisaged change.
- Obtain an understanding of customer needs/potential target market.
- Conduct a strategic plan for personal area of responsibility
- Facilitate planning to determine best-practice solutions

These are reflected in Tables 1 – 4.

**TABLE 1
COMPETENCIES TO OBTAIN A COMPREHENSIVE
UNDERSTANDING OF CHANGE**

Key role: Align change strategy of area of responsibility with that of the organisation

Unit of competence: Obtain a comprehensive understanding of the target state of change

Elements of competence **Competencies**

- | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> ● Schedule meetings with relevant stakeholders that understand the envisaged target state ● Formulate suitable questions to obtain answers to concerns ● Facilitate an information session with relevant stakeholders ● Analyse information provided ● Identify additional gaps in information ● Ensure all questions regarding the envisaged change are answered ● Ensure open lines of communication for further enquiries | <p>Skills</p> <ul style="list-style-type: none"> ● Networking ● Identifying sponsors in organisation ● Scheduling ● Questioning ● Analytical ● Determining trends and tendencies ● Obtaining commitment from seniors <p>Knowledge</p> <ul style="list-style-type: none"> ● Organisational structure ● Stakeholders and their role in the organisation ● The core business processes of the organisation <p>Behaviour</p> <ul style="list-style-type: none"> ● Assertive ● Honest ● Persuasive ● Resilient ● Proactive |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Control guidelines

- Organisational communication policy

Conditions and circumstances

- Deal with senior decision-makers
- Deal with diverse people
- Deal with stakeholders that may not interested in sharing information

**TABLE 2
COMPETENCIES TO OBTAIN AN UNDERSTANDING OF
CUSTOMER NEEDS/POTENTIAL TARGETS**

Key role: Align change strategy of area of responsibility with that of the organisation

Unit of competence: Obtain an understanding of customer needs/potential target market

Elements of competence **Competencies**

- | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> ● Formulate own understanding of changes in customer target market needs ● Formulate questions regarding your understanding of the change in customer needs ● Identify stakeholders that can provide solutions to concerns ● Schedule meetings with informed stakeholders ● Clarify personal understanding of the envisaged changes ● Obtain requirements and suggestions from stakeholders ● Document findings | <p>Skills</p> <ul style="list-style-type: none"> ● Analytical ● Questioning ● Networking ● Scheduling ● Business writing ● Information processing ● Communication <p>Knowledge</p> <ul style="list-style-type: none"> ● Customer needs and requirements ● Core business processes <p>Behaviour</p> <ul style="list-style-type: none"> ● Assertive ● Professional ● Persuasive ● Attention to detail ● Resilient |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Control guidelines

- Prescribed company policies and procedures stipulating behaviour when dealing with stakeholders

Conditions and circumstances

- Dealing with people external to the organisation
- Dealing with senior decision-makers
- Dealing with diverse people
- Dealing with demanding people

**TABLE 3
COMPETENCIES TO CONDUCT A STRATEGIC PLAN FOR
PERSONAL AREA OF RESPONSIBILITY**

Key role: Align change strategy of area of responsibility with that of the organisation

Unit of competence: Conduct a strategic plan for personal area of responsibility

Elements of competence **Competencies**

- | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> ● Ensure a comprehensive understanding of intended organisational change ● Ensure a comprehensive understanding of impact of change | <p>Skills</p> <ul style="list-style-type: none"> ● Analytical ● Conducting a strategic analysis ● Goal/objective formulation ● Resource allocation ● Networking ● Determining trends and tendencies |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

- in own area of responsibility
- Conduct a strategic analysis to determine the gap
 - Formulate strategic objectives for short, medium and long term
 - Allocate resources per strategic objective
- Knowledge**
- Outcome of the envisaged change
 - Outputs and standards in own area of responsibility
 - Definition of own area of influence
 - Aspects that you can change and those you cannot change in own area of influence during the change process
 - Strategic analysis techniques
 - Requirements for effective objective formulation
 - Requirements for resource allocation
- Behaviour**
- Attention to detail
 - Resilient
 - Creative
 - Objective
 - Realistic
- Equipment**
- Personal computer
- Control guidelines**
- Organisational change parameters
- Conditions and circumstances**
- Work in potentially uncertain conditions
 - Need to process large quantities of information
 - May have to take decisions that will limit or terminate other people's jobs

**TABLE 4
COMPETENCIES TO FACILITATE PLANNING SESSIONS
TO DETERMINE BEST-PRACTICE SOLUTIONS**

Key role: Align change strategy of area of responsibility with that of the organisation

Unit of competence: Facilitate planning to determine best-practice solutions

Elements of competence	Skills
<ul style="list-style-type: none"> ● Formulate the scope of the change (problem statement) ● Confirm accuracy of problem statement with internal/external client ● Analyse the problem statement ● Determine all the elements that should be addressed to solve the problem ● Compile a suitable task team to take part in the problem solving process ● Facilitate best practice solutions for each element of the problem statement ● Draft a contingency plan for each element of the problem ● Draft a project plan to phase in best practice solutions ● Schedule activities ● Formulate performance standards for each deliverable ● Allocate responsibilities 	<ul style="list-style-type: none"> ● Formulation of a problem statement ● Project scoping ● Analytical ● Organising ● Facilitation ● Problem solving ● Decision-making ● Conflict resolution ● Planning ● Contingency planning ● Drafting project plans ● Scheduling ● Business communication ● Formulation of performance standards ● Formulation of responsibilities ● Information processing ● Resource allocation ● Obtaining commitment from team members ● Obtaining commitment from seniors ● Listening <p>Knowledge</p> <ul style="list-style-type: none"> ● Client requirements ● Group problem solving techniques ● Conflict resolution techniques ● Capabilities of team members <p>Behaviour</p> <ul style="list-style-type: none"> ● Assertive ● Resilient ● Transparent ● Objective ● Fair ● Responsible

- Communicate standards and deadlines to the people responsible
 - Allocate resources
- Equipment**
- Presentation media
- Conditions and circumstances**
- Need to take responsibility for decisions
 - Deal with diverse people
 - Deal with conflict

Note: The group activities are aimed at achieving a high quality and high ownership solution

The second key role is to ensure a personal readiness for change. The unit of competence required is to prepare themselves for change, as outlined in Table 5.

**TABLE 5
COMPETENCIES TO PREPARE FOR CHANGE**

Key Role: Ensure a personal readiness for change

Unit of Competence: Prepare for change

Elements of competence	Competencies
<ul style="list-style-type: none"> ● Ensure a comprehensive understanding of the envisaged change ● Determine how change will impact on self ● Determine what will be required to be successful in the transition period ● Determine how change will impact on personal life ● Formulate sacrifices that need to be made ● Determine potential 'losses' ● Determine competencies that will be required to be effective in the changed environment ● Obtain organisational support to facilitate competence ● Draft a plan of action to ensure personal readiness for change ● Commit to change 	<p>Skills</p> <ul style="list-style-type: none"> ● Analytical ● Introspection ● Personal competence analysis ● Personal goal setting ● Networking ● Identifying sponsors in organisation ● Scheduling ● Questioning ● Information processing <p>Knowledge</p> <ul style="list-style-type: none"> ● Target state of change ● Own capabilities and limitations ● Personal goals ● Career goals ● Competencies required to be effective in the change process ● Where to lobby support <p>Behaviour</p> <ul style="list-style-type: none"> ● Attention to detail ● Objective ● Rational ● Resilient ● Self motivated ● Emotionally mature ● Honest with self ● Proactive <p>Equipment</p> <ul style="list-style-type: none"> ● Personal plan of action <p>Conditions and circumstances</p> <ul style="list-style-type: none"> ● Might have to make personal sacrifices to be successful in future ● Need to take important career decisions ● Might need to develop a whole new range of competencies to be successful ● Need to be able to show emotional maturity

The third key role is to minimise resistance to change. The units of competence required are listed as follows:

- Conduct an audit of individual strengths and weaknesses of team members by involving them in the process.
- Compile individual communication strategies.
- Compile team communication strategies.
- Conduct individual information sessions.
- Compile individual development plans.
- Facilitate development of team members.
- Agree on a code of conduct governing behaviour during change.

These are reflected in Tables 6 – 12.

TABLE 6
COMPETENCIES TO CONDUCT AN AUDIT OF INDIVIDUAL STRENGTHS AND WEAKNESSES OF TEAM MEMBERS BY INVOLVING THEM IN THE PROCESS

Key Role: Minimise resistance to change

Unit of Competence: Conduct an audit of individual strengths and weaknesses of team members by involving them in the process

Elements of competence	Competencies
<ul style="list-style-type: none"> ● Analyse each team member individually. ● Determine individual strengths and development areas. ● Determine potential individual responses to change. ● Determine talents that can be utilised in the facilitation of change. ● Determine the ability of each individual to understand the envisaged change. ● Determine potential emotions that individuals might experience when change is communicated to them. ● Determine possible strategies for each individual when communicating change. 	<p><u>Skills</u></p> <ul style="list-style-type: none"> ● Managing diversity ● Assessment of individual strengths and development areas ● Forecasting ● Talent identification ● Interview preparation ● Determining trends and tendencies ● Reflection to ensure trained subjectivity <p><u>Knowledge</u></p> <ul style="list-style-type: none"> ● Strengths and development areas of each team member ● Performance results of individual team members ● Emotional intelligence ● Feedback techniques ● How to deal with different types of responses from people <p><u>Behaviour</u></p> <ul style="list-style-type: none"> ● Trained subjectivity ● Honest ● Fair <p><u>Equipment</u></p> <ul style="list-style-type: none"> ● Team member analysis sheets <p><u>Control guidelines</u></p> <ul style="list-style-type: none"> ● Relevant legislation protecting the individual <p><u>Conditions and circumstances</u></p> <ul style="list-style-type: none"> ● Need to be objective with regards to all team members ● Prepare to deal with emotional responses from team members

TABLE 7
COMPETENCIES TO COMPILE INDIVIDUAL COMMUNICATION STRATEGIES

Key Role: Minimise resistance to change

Unit of Competence: Compile individual communication strategies

Elements of competence	Competencies
<ul style="list-style-type: none"> ● Consider the profiles of each individual. ● Determine the impact that the change could have on each individual. ● Consider strengths and development areas. ● Consider the potential emotions that individuals might experience. ● Determine a 	<p><u>Skills</u></p> <ul style="list-style-type: none"> ● Analytical ● Impact analysis ● Developing interview approach strategies ● Questioning ● Determining trends and tendencies <p><u>Knowledge</u></p> <ul style="list-style-type: none"> ● Strengths and development areas of each team member ● Personal circumstances of individual team members ● Personality traits of team members ● Approach strategies for effective feedback

<p>individualised strategy for each person to ensure an understanding of the envisaged change.</p> <ul style="list-style-type: none"> ● Formulate a structure of questions per individual to ensure that each individual discovers the outcomes of the envisaged change. ● Compile a logbook to document suggestions and recommendations to ensure successful change 	<ul style="list-style-type: none"> ● The outcomes of the change process ● Emotional intelligence <p><u>Behaviour</u></p> <ul style="list-style-type: none"> ● Objective ● Fair ● Attention to detail ● Open and honest <p><u>Equipment</u></p> <ul style="list-style-type: none"> ● Logbook <p><u>Control guidelines</u></p> <ul style="list-style-type: none"> ● Relevant legislation protecting the rights of individuals <p><u>Conditions and circumstances</u></p> <ul style="list-style-type: none"> ● Need to be willing to listen and deal with people's personal circumstances. ● Need to take firm decisions that can influence a person's career
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TABLE 8
COMPETENCIES TO COMPLETE TEAM COMMUNICATION STRATEGIES

Key Role: Minimise resistance to change

Unit of Competence: Compile team communication strategies

Elements of competence	Competencies
<ul style="list-style-type: none"> ● Determine the message that should be conveyed to the team ● Predict potential responses to the information ● Prepare answers for potential concerns or questions ● Determine a best strategy to communicate the message to ensure optimum impact 	<p><u>Skills</u></p> <ul style="list-style-type: none"> ● Analytical ● Questioning ● Forecasting ● Determining trends and tendencies ● Communicating with teams ● Facilitation of team dynamics <p><u>Knowledge</u></p> <ul style="list-style-type: none"> ● Strengths and development areas of each team member ● Strong personalities in the team ● Potential responses from dominating members ● Personality traits of team members ● Approach strategies for effective feedback ● Emotional intelligence ● Group problem solving and decision-making strategies <p><u>Behaviour</u></p> <ul style="list-style-type: none"> ● Objective ● Fair ● Attention to detail ● Open and honest <p><u>Equipment</u></p> <ul style="list-style-type: none"> ● Presentation media <p><u>Control guidelines</u></p> <ul style="list-style-type: none"> ● Relevant legislation protecting the rights of individuals <p><u>Conditions and circumstances</u></p> <ul style="list-style-type: none"> ● Need to be able to deal with group conflict ● Need to facilitate group sessions with diverse people

Note: The need might arise in teams to obtain information relating to the change in the organisation. This will require of the first-line manager to be able to also be competent in communicating to groups or teams.

TABLE 9
COMPETENCIES TO CONDUCT INDIVIDUAL INFORMATION SESSIONS

Key Role: Minimise resistance to change	
Unit of Competence: Conduct individual information sessions	
Elements of competence	Competencies
<ul style="list-style-type: none"> ● Prepare the identified strategy per person ● Schedule the information session ● Determine existing levels of understanding of the envisaged change ● Ask questions to test their understanding of the change ● Provide information as required per individual ● Encourage individuals to explore the impact of the change on themselves ● Determine if they have solutions or suggestions to address their concerns ● Facilitate problem solving sessions per individual to agree on solutions to concerns ● Allow individuals to express their concerns and emotions ● Demonstrate empathy and understanding ● Agree to plans of action 	<p>Skills</p> <ul style="list-style-type: none"> ● Scheduling ● Interviewing ● Questioning ● Empathetic listening ● Communication in English ● Communicating with an interpreter (if required) ● Analytical ● Determining trends and tendencies ● Conflict handling ● Problem solving ● Dealing with emotions ● Obtaining commitment from people ● Coaching ● Individual leadership <p>Knowledge</p> <ul style="list-style-type: none"> ● Individual strengths and development areas ● Personal circumstances of individuals ● The envisaged change process ● Questioning techniques ● Emotional intelligence ● Typical behaviour of people when confronted with change <p>Behaviour</p> <ul style="list-style-type: none"> ● Assertive ● Objective ● Firm ● Fair ● Honest ● Patient ● Empathy <p>Equipment</p> <ul style="list-style-type: none"> ● Prepared personal files per individual <p>Control guidelines</p> <ul style="list-style-type: none"> ● Legislation protecting the rights of individuals <p>Conditions and circumstances</p> <ul style="list-style-type: none"> ● Deal with people who are experiencing their emotions ● Give negative feedback to people ● Give positive feedback to people ● Deal with conflict on a one-on-one basis ● Deal with stubborn people ● Deal with diverse people

TABLE 10
COMPETENCIES TO COMPILE INDIVIDUAL PERSONAL DEVELOPMENT PLANS

Key Role: Minimise resistance to change	
Unit of Competence: Compile individual personal development plans	
Elements of competence	Competencies
<ul style="list-style-type: none"> ● Compare requirements of existing roles with that of new roles after the change process ● Determine potential competencies that should be addressed to ensure individual is ready to deal with 	<p>Skills</p> <ul style="list-style-type: none"> ● Interviewing ● Assess individual competence ● Identification of competencies to be able to perform required tasks ● Formulation of learning and development contracts ● Questioning

<ul style="list-style-type: none"> ● Facilitate individual discussions with team members ● Agree on best practice solutions to address competencies ● Formulate learning and development contracts ● Agree to a plan of action ● Obtain commitment 	<ul style="list-style-type: none"> ● Analytical ● Determining trends and tendencies in development needs of team members ● Obtaining commitment from people <p>Knowledge</p> <ul style="list-style-type: none"> ● The structure of tasks in the changed environment ● Competencies required to be effective ● Individual levels of competence ● Options for development <p>Behaviour</p> <ul style="list-style-type: none"> ● Development oriented ● Assertive ● Fair ● Objective <p>Equipment</p> <ul style="list-style-type: none"> ● Learning and development contracts <p>Control guidelines</p> <ul style="list-style-type: none"> ● Relevant company policies and procedures ● Relevant legislation <p>Conditions and circumstances</p> <ul style="list-style-type: none"> ● Deal with stubborn people ● Deal with diverse people
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TABLE 11
COMPETENCIES TO FACILITATE DEVELOPMENT OF TEAM MEMBERS

Key Role: Minimise resistance to change	
Unit of Competence: Facilitate development of team members	
Elements of competence	Competencies
<ul style="list-style-type: none"> ● Communicate the training and development needs of team members to relevant stakeholders in the organisation ● Obtain commitment for the development process ● Agree on an implementation strategy ● Provide opportunities and support to team members 	<p>Skills</p> <ul style="list-style-type: none"> ● Networking ● Identifying sponsors in organisation ● Scheduling ● Questioning ● Analytical ● Determining trends and tendencies in the development needs of team members ● Obtaining commitment from people in functional departments ● Persuasion ● Resource allocation ● Team leadership <p>Knowledge</p> <ul style="list-style-type: none"> ● Organisational structure ● People responsible for training and development <p>Behaviour</p> <ul style="list-style-type: none"> ● Development oriented ● Assertive ● Committed to team members ● Proactive <p>Equipment</p> <ul style="list-style-type: none"> ● Internal communication channels <p>Control guidelines</p> <ul style="list-style-type: none"> ● Relevant company policies and procedures ● Relevant legislation <p>Conditions and circumstances</p> <ul style="list-style-type: none"> ● Liaise across functional departments ● Deal with areas outside own area of expertise ● Need to obtain commitment from people across departments

TABLE 12
COMPETENCIES TO AGREE ON A CODE OF CONDUCT THAT WOULD GOVERN BEHAVIOUR DURING CHANGE

Key Role: Minimise resistance to change	
Unit of Competence: Agree on a code of conduct governing behaviour during change	
Elements of competence	Competencies
<ul style="list-style-type: none"> Facilitate a discussion session with team Identify the potential concerns from the team Agree on acceptable behaviour to address concerns Agree on a process to address concerns Agree on a strategy to address acceptable and unacceptable behaviour Obtain commitment to the code 	<p>Skills</p> <ul style="list-style-type: none"> Facilitation Forecasting Conflict resolution Questioning Listening Analytical Obtaining commitment from people Motivation Team leadership <p>Knowledge</p> <ul style="list-style-type: none"> Acceptable behavioural standards Format of a code of conduct Ethics <p>Behaviour</p> <ul style="list-style-type: none"> Assertive Firm Objective <p>Equipment</p> <ul style="list-style-type: none"> Presentation media <p>Control guidelines</p> <ul style="list-style-type: none"> Company performance standards Company code of conduct <p>Conditions and circumstances</p> <ul style="list-style-type: none"> Deal with diverse team members

Note: A code of conduct that would govern behaviour during change will require input from the team members to ensure high ownership. This will require a competency that requires team-related activities.

The final key role is to continuously act as a catalyst for change. In order to achieve this, first-line managers should be able to:

- Understand the rationale for change.
- Develop a business case for change.

These are outlined in Tables 13 – 14.

TABLE 13
COMPETENCIES TO UNDERSTAND THE RATIONALE FOR CHANGE

Key Role: Act as a continual catalyst for change	
Unit of Competence: Understand the rationale for change	
Elements of competence	Competencies
<ul style="list-style-type: none"> Obtain information regarding the envisaged change Compare existing state with target state Determine the change in behaviour, process, systems and/or technology in the organisation Determine the change in behaviour, process, systems and/or technology in own area of influence 	<p>Skills</p> <ul style="list-style-type: none"> Networking Identifying sponsors in organization Questioning Analytical Determining trends and tendencies Business communication <p>Knowledge</p> <ul style="list-style-type: none"> Business processes Core business Client requirements Company systems and technology

<ul style="list-style-type: none"> Ensure a comprehensive understanding of the reasons for change Communicate concerns and/or suggestions to immediate supervisor and/or expert Ensure that rationale for change is understood 	<ul style="list-style-type: none"> Own area of responsibility Own area of influence <p>Behaviour</p> <ul style="list-style-type: none"> Assertive Attention to detail Objective Proactive <p>Control guidelines</p> <ul style="list-style-type: none"> Organisational change strategy document <p>Conditions and circumstances</p> <ul style="list-style-type: none"> Analyse large quantities of information Need to communicate with senior stakeholders
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TABLE 14
COMPETENCIES TO DEVELOP A BUSINESS CASE FOR BOTTOM-UP CHANGE

Key Role: Act as a continual catalyst for change	
Unit of Competence: Develop a business case for bottom-up change	
Elements of Competence	Competencies
<ul style="list-style-type: none"> Facilitate regular meetings with team members and customers Identify areas for potential improvement Facilitate problem solving sessions with team members Obtain commitment from team members Document suggestions Determine advantages to the organisation Build a business case for change Present to relevant decision-makers in the organisation 	<p>Skills</p> <ul style="list-style-type: none"> Facilitation Networking Problem identification Problem solving with groups Decision-making with groups Conflict resolution in groups Business communication Prepare a business case Business presentation Identifying sponsors in organisation Analyse information to motivate new changes Obtaining commitment from seniors <p>Knowledge</p> <ul style="list-style-type: none"> Organisational processes, systems and technology and behaviour Client requirements Market demands Market trends Group problem solving and decision-making techniques Group dynamics <p>Behaviour</p> <ul style="list-style-type: none"> Attention to detail Accurate Creative Assertive Proactive <p>Equipment</p> <ul style="list-style-type: none"> Presentation media <p>Control guidelines</p> <ul style="list-style-type: none"> Core business of organisation Existing company strategies <p>Conditions and circumstances</p> <ul style="list-style-type: none"> Suggest solutions to key stakeholders Need to be able to think on levels more complex than existing level in the organisation

Note: Bottom-up change implies that input comes from the team. This requires team-related competencies.

In summary, the skills, knowledge and behaviour listed below would be used most frequently in managing resistance to change and should thus be priorities in developing first-line managers.

TABLE 15
SKILLS, KNOWLEDGE AND BEHAVIOUR THAT APPEAR
MOST FREQUENTLY IN THE FUNCTIONAL ANALYSIS

Skills	Knowledge	Behaviour
✓ Analytical	✓ Approach strategies for providing feedback	✓ Assertiveness
✓ Decision-making	✓ Client needs and requirements	✓ Attention to detail
✓ Determining trends and tendencies	✓ Emotional intelligence	✓ Fair
✓ Effective communication	✓ Group decision-making techniques	✓ Firm
✓ Effective listening	✓ Group problem solving techniques	✓ Open and honest
✓ Facilitation	✓ Personal circumstances of team members	✓ Patient
✓ Interviewing	✓ Questioning techniques	✓ Proactive
✓ Networking	✓ Strengths and limitations of individual team members	✓ Resilient
✓ Motivation	✓ Where to lobby for support in the organisation	✓ Trained subjectivity
✓ Questioning		
✓ Obtaining commitment from people		
✓ Persuasion		
✓ Problem solving		
✓ Scheduling		
✓ Team leadership		

CONCLUSION

In the challenge to ensure the effective management of resistance to change, first-line managers will have to make use of a combination of team as well as individually focused interventions in their areas of responsibility. In the process they will have to focus on both the cognitive as well as emotional levels of employees to obtain commitment on an individual and team level. Technical competence is therefore not sufficient to facilitate effective change and first-line managers need to develop their understanding of emotional intelligence and reactions of people when confronted with change.

Furthermore, first-line managers and their teams can play an important role in identifying opportunities for change in order to improve product and service delivery. Teams will own change initiatives with potentially greater commitment and minimal resistance. First-line managers can therefore contribute to organisational effectiveness and customer satisfaction by persuading decision-makers to implement suggestions from operative employee level.

The competencies identified in this study can be used to develop outcomes-based interventions to enable first-line managers across various industries to deal with resistance to change within their unique conditions and circumstances. In addition to the developmental value however, an important contribution of the study is to highlight the invaluable role of the first-line manager in implementing effective change interventions.

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