The Digital Change Agent's Manifesto

How the People Behind
Digital Transformation Lead
Change From Within

DECEMBER 2017

BY BRIAN SOLIS

**INCLUDES INPUT FROM 30 INDUSTRY STAKEHOLDERS AFFECTING
CHANGE WITHIN THEIR ORGANIZATIONS**

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Introduction

In the era of digital Darwinism — the phenomenon of technology and society evolving faster than organizations can adapt — companies are increasingly steering toward the future by investing in their digital transformation.

In most organizations, however, these digital transformation efforts often take place in isolated pockets, sometimes with little coordination and collaboration across the enterprise. Even still, these movements are important and often driven by individuals who share a deep expertise and passion for digital and are ardent advocates of its potential to help their companies compete more effectively. These individuals are the "digital change agents" and they represent the future of the organization.

While change agents are well-versed in all things digital, they aren't necessarily seasoned or trained at navigating the cultural dynamics that drive change in an organization. They typically pick up leadership and change-management skills on the fly as they learn to face and manage the behavioral challenges that often prevent colleagues from accepting their perspectives, ideas, and digital innovations. There is no one type of change agent, however, as they each bring to the table different skillsets, goals, and aspirations. But they all wear similar hats at different points in their journey, serving as data gatherers and storytellers, influencers and case makers, relationship builders, and champions of digital transformation. With support and guidance from the C-Suite, change agents spread digital literacy, drive collaboration between silos, build internal bridges with executives, and help accelerate their organization's progress across Altimeter's **Six Stages of Digital Transformation**.

The Digital Change Agent's Manifesto is the result of more than five years of research and 30 interviews with those who have led digital transformation initiatives within the world's most renowned brands, including Coca-Cola, Equifax, FCC, NFL, Samsung, Starbucks, and Visa, among many others. In our conversations, we uncovered that behind every evolving enterprise, there is a human narrative, rich with stories of people learning, struggling, and eventually mastering how to drive a unified digital transformation strategy. We learned that change agents are often early adopters of digital trends who want to help their companies modernize how they operate and compete. Many started as digital advocates and, over time, developed into experienced transformers. The interviewees' advice for likeminded individuals form the basis of a 10-strategy manifesto designed to guide the efforts of digital change agents at every level. The report will provide executives with insight into who these change agents are and how they think, the hurdles they experience, and how they can benefit the organization when they are properly supported.

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THE SIX STAGES OF DIGITAL TRANSFORMATION

BUSINESS AS USUAL
Organizations operate with a familiar legacy perspective of customers, processes, metrics, business models, and technology, believing that it remains the solution to digital relevance.
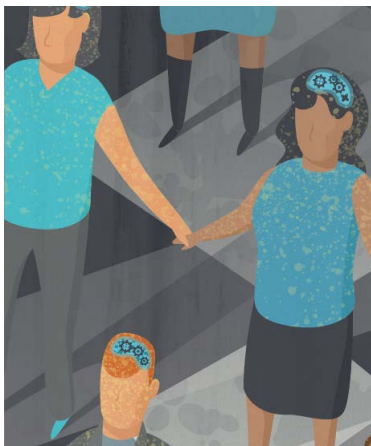
PRESENT AND ACTIVE
Pockets of experimentation are driving digital literacy and creativity, throughout the organization while aiming to improve and amplify specific touchpoints and processes
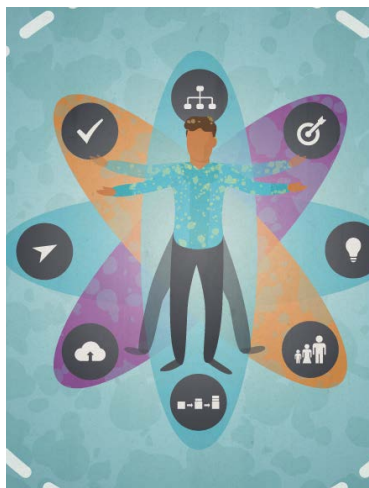
FORMALIZED
Experimentation becomes intentional while executing at more promising and capable levels. Initiatives become bolder and, as a result, change agents seek executive support for new resources and technology.

STRATEGIC
Individual groups recognize the strength in collaboration as their research, work, and shared insights contribute to new strategic roadmaps that plan for digital transformation ownership, efforts, and investments.

CONVERGED
A dedicated digital transformation team forms to guide strategy and operations based on business and customer-centric goals. the new infrastructure of the organization takes shape as roles, expertise, models, processes, and systems to support transformation are solidified

INNOVATIVE AND ADAPTIVE
Digital transformation becomes a way of business as executives and strategists recognize that change is constant. A new ecosystem is established to identify and act upon technology and market trends in pilot and, eventually, at scale.

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Change Agent's Agenda

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Report Highlights

- Although digital transformation is one of the biggest trends in business today and companies are investing heavily in new technologies and innovations, many still do so as a grassroots effort driven by resourceful individuals — digital change agents — across the organization.

- Digital change agents are passionate about digital innovations and ardent believers in their potential to help the organization succeed — but they are sometimes reluctant to step into a leadership or change-management role.

- Change agents can rise from anywhere in the organization and often begin as digital advocates — employees who introduce or promote new digital ideas or products — and eventually progress to experienced transformers.

- To garner support across the organization, change agents quickly realize that they must acquire basic change-management skills if they are to secure cross-functional collaboration and leadership support.

- Change agents often take on informal functions — data gatherers and storytellers, influencers and case makers, relationship builders, and champion — to navigate the human aspects of change and digital transformation.

- When trying to rally support for digital transformation initiatives, change agents eventually learn to face detractors and manage behavioral challenges (i.e., managing ego, bias, fear, and self-doubt) in others and themselves.

- Change agents should operate from a strategic manifesto to guide them in their digital transformation efforts, expedite change, and minimize complications and detractions:

  1 Embrace being a catalyst.

  2 Organize with other change agents.

  3 Learn to speak the language of the C-Suite.

  4 Make allies.

  5 Spread digital literacy.

  6 Create a digital transformation roadmap.

  7 Link digital transformation efforts to business and individuals' goals.

  8 Set metrics and milestones.

  9 Democratize ideation.

  10 Capitalize on their own inherent "super powers."

- Leaders should identify and publicly support change agents to make enterprise-wide digital transformation a mandate.

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Digital Change Agents Driving Digital Transformation and Managing Change

After years of researching digital transformation, we've learned that any effort to bring about change in an organization is often met with great resistance. When it comes to digital transformation, in particular, our research shows that even though companies need to compete in a digital economy and are investing heavily in new technologies and innovations, many still do so through disjoined efforts driven by digital innovators across the organization — initially without an official mandate.

As a result, the efforts of these digital innovators are often hindered by an organizational culture that is risk averse and slow to change. Not everyone believes in change, however, nor that they need to learn or even unlearn skills and perspectives to compete for the future. Any effort to change comes down to people, and in the absence of supportive leadership, people typically form roadblocks.

To truly succeed, digital transformation efforts must also be supported with change-management skills, processes, and leadership. These self-driven, and often self-empowered, digital innovators quickly realize that simply being passionate about new technology and having expertise in implementing it is not enough. Eventually, they recognize that to bring about meaningful digital transformation, they must become more involved in change management — in changing cultural aspects of their organizations — as change agents.

These change agents bring new thinking, mindsets, expertise, and experience in digital to their organizations and are the catalyst to the very bold initiatives that fuel their success. They build bridges to the C-Suite and to other key stakeholders to make digital innovations happen. But their path is not straightforward. They are not born change-management experts — but to succeed, they must do the hard work of managing change: help others in the organization learn, unlearn, and adopt new ways of thinking and working in order to spark transformation.

That transformation, however, must be done in such a way that even as it results in constant change, it still preserves the integrity of their organizations. Dr. David Bray — a former Senior Executive and CIO of the Federal Communications Commission (FCC), now Chief Ventures Officer at the National Geospatial-Intelligence Agency, and one of the most vocal supporters of change agents publicly — champions balancing transformation with change management to move forward strategically. A key question that Dr. Bray suggests asking of change agents and executives alike is: "How do we move with speed but still have the checks and balances needed?"

Where Do Digital Change Agents Rise From?

Digital transformation requires digital innovators who can perform — and help others perform — at tomorrow's standards. They must teach and inspire colleagues or create a sense of urgency to gain support and pave the way for a more formal digital transformation strategy.

Our research, however, shows that while some change agents are born leaders who want to help their organizations transform digitally, many become change agents reluctantly. Their passions lie in technology and innovation but not necessarily in the political aspect of organizational life. They are not always skilled at getting buy-in or are interested in operating as part of a sanctioned change-management initiative. "My passion is not as a change agent, because that role is more political and requires the person have a strong skillset of getting buy-in," explains a senior director of innovation at a global luxury brand. "Unfortunately, when you have a role of innovation in a corporate setting, you can't have the explorer role without the change-agent role."

Digital change agents can rise from anywhere in an organization. Marketing and IT tend to lead investment in innovative technology early on — typically driven by the need to modernize marketing and the Customer Experience (CX) overall — so many change agents come from these areas of the business. But anyone who builds digital programs, infrastructure, and capabilities as a part of their work or because they are passionate about digital can become a digital change agent. "Digital isn't owned by one department," explains the managing director of an international shipping company. "We all own it together, and that has to be part of our structure and how we manage change."

Our conversations with change agents in companies across many industries reveal that when it comes to digital transformation efforts, there are two common ways digital innovators become change agents:
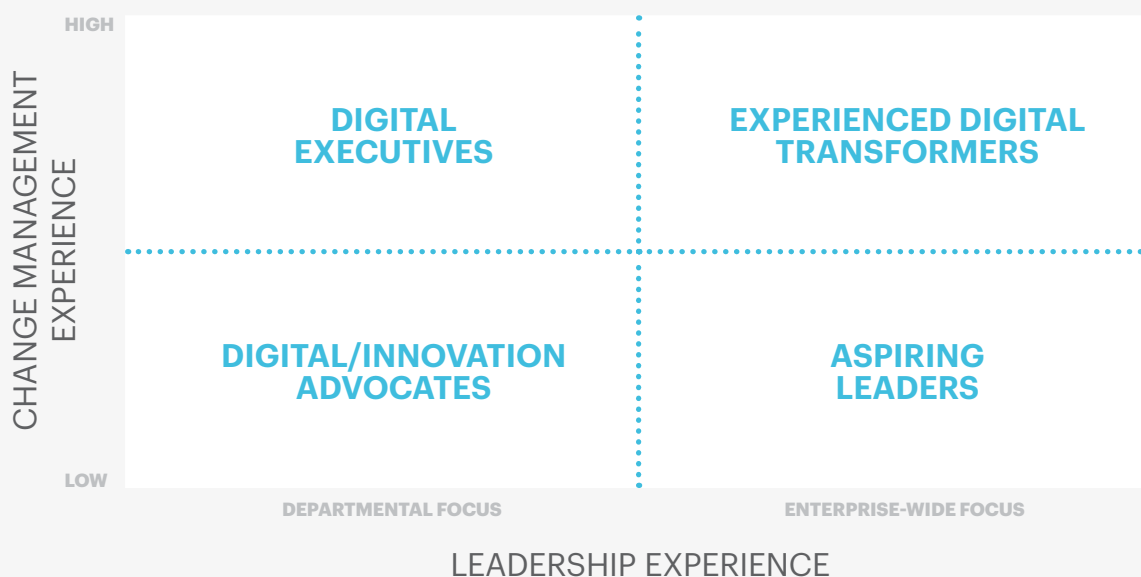
GRASSROOTS: Digital change agents rise above their day-to-day responsibilities, pursuing innovative projects without official sanction as a means of "doing the right thing" in digital. These digital champions want to help their organizations compete for the future, but the C-Suite and business units that can benefit from their work in innovation don't always know about or officially support their critical efforts.

EXECUTIVE-APPOINTED: Leaders tasked with discrete digital efforts (e.g., managers, directors, VPs of innovation, digital customer experience, e-commerce, digital marketing, etc.) drive change within their domain of influence. Even though they are operating in an official capacity, their work is "local," focused on specific business areas and not immediately exposed to other areas or teams that can benefit from their work and experience.

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FIGURE 1

PORTFOLIO OF CHANGE AGENTS

CHANGE MANAGEMENT EXPERIENCE

HIGH

DIGITAL EXECUTIVES

EXPERIENCED DIGITAL TRANSFORMERS

DIGITAL/INNOVATION ADVOCATES

ASPIRING LEADERS

LOW

DEPARTMENTAL FOCUS

ENTERPRISE-WIDE FOCUS

LEADERSHIP EXPERIENCE

There is no one type of change agent, however. They each boast different skillsets, goals, aspirations, and management experience. While their path isn't typically linear, our research has also found four recurrent organizational roles that change agents adopt or progress through (see Figure 1, above):

DIGITAL/INNOVATION ADVOCATES: Individuals who are passionate about digital innovations actively spread the word about its potential to colleagues and executives. Even though they realize they don't have experience in navigating corporate change or guiding change management, they feel like not doing something is not an option.

DIGITAL EXECUTIVES: Individuals who are tasked with heading digital efforts in specific roles, groups, or business units and are motivated to expand their insights and efforts within their sphere of influence. But they are not naturally or initially inclined to deploy change-management tactics to inspire enterprise-wide digital transformation.

ASPIRING LEADERS: As Digital/Innovation Advocates and/or Digital Executives realize that their expertise can be productive and beneficial to the rest of the organization, they learn to navigate corporate relationships better and become skilled in the art of managing-up and managing-across to rally support and collaborate with others. In short, they learn how to align their digital innovation expertise and passion with change-management initiatives to advocate for organization-wide digital transformation.

EXPERIENCED DIGITAL TRANSFORMERS: Those Aspiring Leaders who master the art of change management, over time, are sometimes promoted to leadership positions to help bring the right people together and align everyone's work toward a mutually beneficial and productive charter of digital transformation efforts. In short, they build bridges across stakeholders groups and the C-Suite to lead and manage digital transformation formally.

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As the saying goes, "Practice makes perfect." Change agents might start out as digital advocates who, with the right digital expertise, ambition, and support from their colleagues and leadership, eventually learn how to become experienced leaders in both digital transformation and change management.

Those change agents who start their journey as digital executives can become experienced transformers by making allies and leading crossfunctional teams that help them extend their expertise and vision beyond their initially discrete domain. This was the case with Chief Digital Officer and EVP, Digital Ventures, Adam Brotman. He first led a cross-functional team at Starbucks that brought together people from multiple departments to craft the company's mobile vision. "That [initiative] worked well, and [it] catalyzed, moving into web, where we were charged with figuring out what our mobile web strategy looked like and how it connected to our loyalty and payment groups," Brotman explains. "From there, it snowballed pretty quickly." Using his team's mandate to implement a mobile strategy as a catalyst to spark cross-functional working groups enabled Brotman to create the momentum needed to help Starbucks focus on a more holistic digital approach.

Sara Camden, Data-Driven Digital Marketing Strategist at Equifax, followed a similar path to become an experienced transformer. "I made up my current role for myself," she acknowledges. "I started with gently introducing new digital ideas to my colleagues, without scaring them. ... Once people got wind of my campaigns and tactics, they wanted me to come educate their departments. I became an internal consultant of sorts and luckily had a very supportive manager who wanted to champion me and get me to a point of greater influence in the company."

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>
> **SARA CAMDEN, DATA-DRIVEN DIGITAL MARKETING STRATEGIST, EQUIFAX**

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The Critical Roles of Digital Change Agents

Regardless of what organization role or stage in their journey they are, successful digital change agents share a common superpower: the ability to take on the following informal functions to navigate the human aspects of change. Our research shows that change agents typically assume any or all of these four functions that actively foster agility, instill confidence, and promote communication and collaboration in their organizations:

DATA GATHERER AND STORYTELLER

Successful change agents become storytellers, collecting data and translating it into relatable insights for stakeholders to take action.

INFLUENCER AND CASE MAKER

Organizations are largely risk-averse and, often, adopt an unofficial stance of resistance to change and innovation. Change agents often influence stakeholders and make a case for new digital initiatives by providing evidence and creating a sense of urgency.

RELATIONSHIP BUILDER

Change agents don't expect everyone to "get it" and jump on board. Instead they network and build bridges with those in the organization who remain skeptical of the need for digital transformation or are not digitally savvy. They listen empathetically to their concerns and translate information in ways others can understand.

CHAMPION

Change is complex, difficult, and often defeating — it requires champions to inspire and urge progress throughout the organization. Change agents adopt this role as champions for digital transformation. But they must also be their own champion to keep their spirits up and focus on their goals.

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Common Challenges Digital Change Agents Face

Regardless of the stage they find themselves in or their level of change management experience, most change agents at some point meet the reality that their digital transformation efforts, by default, challenge the status quo and generate diverse and swift reactions from colleagues and executives alike — especially in the form of opposition, roadblocks, and even sabotage.

"Everyone thinks of changing the world, but no one thinks of changing himself."

LEO TOLSTOY

"Digital transformation is more of a people problem than a business problem. Trust is the least measurable but most important factor to build. You have to manage resistance to chance alongside business outcomes. Otherwise, you deal with sabotage that undermines your work and the digital transformation seed doesn't germinate."

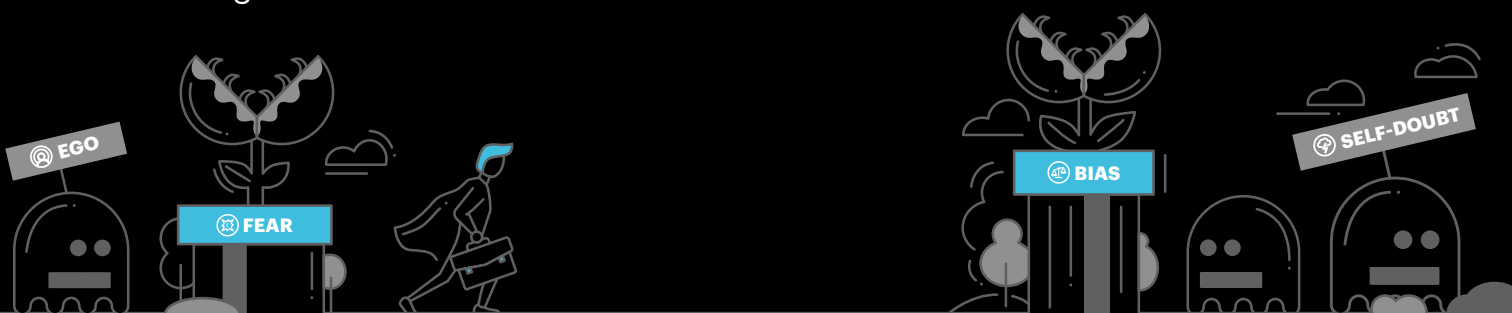ADRIAN PARKER, VP OF MARKETING ,
THE PATRON SPIRITS COMPANY

"Every day I walk into the office, the majority of people I face are resistant to what I do," a senior director of innovation at a global luxury brand told us. Adrian Parker, VP of Marketing for The Patrón Spirits Company, explains that managing the resistance that change agents, such as this senior director, routinely face is a crucial aspect of championing digital transformation: "Digital transformation is more of a people problem than a business problem. Trust is the least measurable but most important factor to build. You have to manage resistance to change alongside business outcomes. Otherwise, you deal with sabotage that undermines your work, and the digital transformation seed doesn't germinate."

Digital advocates turned change agents, especially, often find themselves unqualified to confront the challenges that come when trying to rally support for digital transformation initiatives. They're not usually psychologists, masters of persuasion, or skilled facilitators. In their efforts to future-proof their organizations, they are often thrown off-balance when others don't see the need for change the way they do.

Those whom we interviewed for this report observed a consistent set of behavioral challenges — both in themselves and others — that they had to learn to manage in order to effectively inspire others to change.

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⦾ MANAGING EGO

A person's self-esteem or sense of self-importance can stand in the way between vision and progress. When a person's ego is out of control, it manifests either as arrogance, ignorance, or pride or as insecurity, jealousy, and constant need for validation. Egotists, especially, believe that they know it all, that they work harder, or that they're smarter or better than everyone else. They make excuses and cast blame when things do not go as they had planned or expected.

Managing Change Agent's Own Ego: When change agents display too much ego, they have a difficult time earning credibility and trust with colleagues over time — both essential qualities to build relationships and rally support for digital-transformation efforts. But if change agents display too little ego, then they come across as lacking self-confidence, which hinders their long-term leadership potential. To succeed in their transformation efforts, digital change agents must learn to set aside their ego and personal ambitions for the greater good of the organization. By managing their ego and exhibiting humility and benevolence, change agents disarm other people's egos and earn their trust and respect. "You have to create partnerships not competitions," Alissa Lieppman, Director of Club Digital Strategy at the NFL, explains. "Sometimes, people can be embarrassed when they don't know an answer to a question. Be cognizant of that and respect what they do know."

Managing Ego in Colleagues: Change agents are likely to encounter many colleagues whose large egos prevent them from accepting new ideas that are not their own. Egotists don't want to be wrong, tend to self-promote, and have a strong inner-circle. To successfully garner these colleagues' support, change agents need to acknowledge their expertise — offer praise, seek them as mentors — and must behave in an inclusive way by asking them to play a role in leading the way.

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✻ MANAGING FEAR

Fear serves as a self-protection mechanism, as it leads individuals to believe change or failure can threaten or be dangerous to their status or position (or that of their companies).

Managing Change Agent's Own Fear: Some reluctant change agents are either too scared to rock the boat or don't feel it's their place to bring forth bold ideas. In fact, the fear that they will fail to rally support for their ideas often keeps them from even trying. But change agents must take confidence in their digital expertise and learn to speak with authority. They key to their success lies in realizing that failure leads to new learnings and experience; it isn't the same as entirely failing the company or their careers. They must learn to redefine what "failure" means. As a senior director of innovation for a global luxury brand shared with us, "To me, not trying and being crippled by fear is failure, as is accepting the status quo. I will allow my tests to fail, but I will not allow myself to fail. There is a very clear distinction."

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>
> **SENIOR DIRECTOR OF A GLOBAL LUXURY BRAND**

Managing Fear in Colleagues: To many colleagues, digital transformation can seem at best risky for the entire organization or at worst potentially menacing to their work or even their jobs. These colleagues might react to the change agent's attempt to rally support for digital transformation with self-preservation measures and roadblocks. Change agents must manage these colleagues' fears by communicating clearly that the risks of not doing anything are greater than future-proofing the business through digital transformation. They must assure these colleagues that they and executives have their backs.

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⚖️ MANAGING BIAS

Behavioral scientists and psychologists have identified common biases that prevent people from accepting new ideas and adopting change. These include[1]:

- Confirmation bias: interpreting new information as confirmation of one's existing preconceptions, beliefs, or theories.[2]
- Anchoring: basing decisions on initial feelings and locking into this reaction, preventing one from considering alternatives.[3]
- Groupthink: making decisions or adopting ideas as a group; especially, when several people share an aversion to a new idea, it becomes the standard for the group.[4]
- Loss aversion: preferring to avoid losses rather than to acquire potential gains.[5]
- Present bias: placing greater value on short-term gains over longer-term value.[6]

Managing Change Agent's Own Bias: Like everyone, change agents are affected by confirmation bias. They have ideas for how to effect digital transformation — and when others don't see eye-to-eye with them, they tend to react in disbelief or frustration. They have difficulty seeing why colleagues wouldn't want to change when it's clear the world around them is changing. To overcome one's bias, change agents must first recognize they have them in the first place — whether they are aware or not. In the absence of an outside party pointing these biases out to them, change agents must remain open minded and not jump to conclusions. They must embrace dialogue, ask questions, and be open to and comfortable with disagreements. They must also surround themselves with people with different opinions.

Managing Bias in Colleagues: Change agents are likely to encounter colleagues who might recognize the changes sweeping business but respond with disproportionately less consideration to the digital solutions or possibilities presented by change agents. They often cannot relate to movements to digitally transform the business, because they don't believe these affect their work directly or because becoming someone versed in digital literacy is not "who they are." They might also resist change because other influential people in the organization are skeptical as well. "In order for someone to start listening to you in a large organization, they have to stop listening to something else," Emery Skolfield, former VP of Omni-Channel Marketing at Samsung and current VP of Global Digital Marketing at Foot Locker, Inc., reminds us. To counter this type of bias, he advises change agents to: "Marry your work with what they're going after." To help others see beyond a particular bias, it's not enough to say, "Let's be as objective and as unbiased as possible." Change agents must understand other people's motivation and bring to light what may be holding them back from supporting a new initiative or idea.

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⚡ MANAGING SELF-DOUBT

Self-doubt can be paralyzing. It's incredibly difficult to overcome the fact that one initially lacks the knowledge necessary to tackle new things. It is difficult to jump into unchartered water, where there are no guidelines, standards, or even basic knowledge to rely on. This feeling in turn builds up into doubt that one will succeed. Self-doubt can also arise from one's lack of self-confidence rather than lack of actual experience — otherwise known as the "imposter syndrome."

Managing Change Agent's Own Self-Doubt: While some digital change agents are alpha types, others are reluctant to bring people together and lead change. These change agents might become overly sensitive to how others view their leadership skills or feel they are being judged. To make progress, change agents must learn how to work with those who don't feel they can learn and those who refuse — but must learn not to take those people's resistance or judgement personally or let them affect their confidence.

Managing Self-Doubt in Colleagues: Digital literacy is not always widespread throughout an organization. Many colleagues know the world is "going digital" but also are aware that they don't fully understand the implications of that for the organization or even their work. This makes them doubt themselves. To manage self-doubt in colleagues, change agents must mentor colleagues, help them gain digital literacy, and encourage them to believe they can become an active part of digital transformation. NFL's Lieppman explains: "People will relate to you as an expert if you speak simply and are empathetic if they don't know the answer to a question. Be cognizant of that and respect what they do know in order to frame the digital story in a way they'll understand."

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While change agents are likely to confront some of these behavioral challenges in their journey, their biggest hurdle, according to our interviewees, are detractors. Detractors are individuals who passive-aggressively or publicly sabotage change, undermine progress, and poison the culture by instilling doubt and skepticism of digital transformation efforts. Ego and fear fuel detractors' desires to oppose change agents' efforts. They are pervasive critics, projecting their insecurities and self-doubt onto others in order to hinder or derail change.

Although it may seem counterintuitive, to manage detractors, change agents ought to listen closely to their feedback. It is better to let them voice their concerns than to let them detract in secret. By listening to their concerns and the rationale for why they resist specific efforts to transform the organization digitally — and by trying to understand their motivations — change agents can turn detractors into allies. As Patrón Spirits' Parker shares, "Most vocal critics can become your biggest advocates if you spend time with them."

Change agents can also disarm detractors by being informed, secure, and sincere when they communicate with them — never confrontational. If this still doesn't disarm them, they should proceed without the detractor's support, documenting their efforts of building a case that demonstrates ROI to earn other influential support. Above all, change agents should constantly remind detractors and others that digital transformation efforts can help the company and all those involved achieve immediate and long-term goals. Visa's SVP of Innovation and Strategic Partnerships, Shiv Singh, believes building credibility and support within the organization is critical: "The first step is flying below the radar, putting points on the board, aligning what you're doing with the core mission of the company, and emphasizing that alignment while creating perception that those who sabotage the program are sabotaging something directly aligned with the CEO's agenda."

VISA

THE MANIFESTO IN ACTION

At Visa, Shiv Singh, SVP of Innovation and Strategic Partnerships, reminds himself and other change agents that the more they do, the more they expose themselves. However, by doing so, they will also gain more expertise and experience. Sing believes change agents should derive satisfaction in the pain and progress, knowing that they're doing something right if they have arrows in their back!

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Change Agents Need Leadership Support

Although digital change agents eventually become proficient at managing challenges and facing detractors, they need help from the top to truly help the organization progress along the Six Stages of Digital Transformation — they can't positively affect transformation on their own. That's why our research suggests leaders should identify them, seek them out, and empower them.

Leaders can also guide them by pairing them with mentors and collaborators who are experienced change managers. Without doing so, change agents can spin their wheels unproductively, feel unchallenged, and lose their drive over time. This was the case for Kriti Kapoor, a social customer care leader, before she moved to Silicon Valley and before working at Hewlett-Packard and now Microsoft. In previous roles, she felt her abilities and ideas went unnoticed despite her high performance and willingness to embrace the new. "Not being fully tapped had a profound impact on my self-confidence," she shares. "I am rebuilding by stepping out of my comfort zone, both geographically and professionally. It is important to be in an environment, and with people, where I can unleash what I know I have in me. Sometimes, you need someone to help pull you there."

More important, if they don't empower and partner with change agents, leaders risk losing the very talent who are working to future-proof the organization. That's what happened with a top innovation executive and change agent we interviewed at a global beauty brand. Feeling that her talents were not put to good use, she had decided to leave. "I'm ready to take a new direction," she told us. "I'm not being fully utilized and am getting bored."

For digital transformation to progress, the C-Suite must vocally and publicly support change agents. When these two groups converge, real change becomes not only possible, but a mandate.

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>
> **KRITI KAPOOR, SOCIAL CUSTOMER CARE LEADER, MICROSOFT**

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The Digital Change Agent's Manifesto

In our interviews, we asked change agents to share their best advice for likeminded individuals. The key, they voiced, is to operate with purpose, create alignment, deliver value, and prompt new learning and expertise. Their guidance serves as the foundation of a 10-strategy manifesto all change agents can operate from when driving digital transformation across an organization, attempting to build a culture of digital innovation — or simply trying to impact any initiatives that push digital progress and market relevance.

THE CHANGE AGENT'S JOURNEY

1. Embrace being a catalyst
2. Organize with other change agents
3. Learn to speak the language of the C-Suite
4. Make allies
5. Spread digital literacy
6. Create a digital transformation roadmap
7. Link digital transformation efforts to business and individuals' goals
8. Set metrics and milestones
9. Democratize ideation
10. Capitalize on their own inherent "super powers"

1. EMBRACE BEING A CATALYST

Organizations are largely risk-averse by design, which makes enterprise-wide digital transformation a challenge for most companies and daunting for many would-be digital change agents. Even though they have a vision for the future and a desire to lead the way, they are often also operating largely in their comfort zone, which makes it difficult to have an impact outside of their roles. Only when change agents embrace being catalysts who create alignment with others in the organization and help them overcome their reluctance to change, do they begin to positively affect digital transformation.

Effective change agents must become bridge builders, guiding and empowering others to change. To do that, they must learn to navigate the human dynamics involved in helping people see and do things differently. They must understand their colleagues' perspectives, beliefs, and realities to find common ground with them.

2. ORGANIZE WITH OTHER CHANGE AGENTS

Digital transformation, just like any change management initiative, requires support across the organization. Getting it is not always easy. Colleagues can be territorial. They might guard information or processes, claiming ownership over them. That's why it's important for digital change agents to seek out others like them: to form groups of self-support and mount a coordinated case for a unified digital transformation strategy. This was the case at Equifax. Camden shares: "I've had a real struggle with territory and boundary issues between departments. I found there were change agents in those areas that I could identify with, and we formed an informal committee that regularly connects to share ideas and brainstorm solutions."

THE MANIFESTO IN ACTION

At the NFL, Alissa Lieppman, Director of Club Digital Strategy, relies on data to help colleagues overcome their resistance to change. Data helps skeptics "see" concretely the impact that digital has on results, rather than letting them rely on their "gut feelings" about what digital can accomplish for the business. "It's a balancing act of art versus science to ensure data isn't overwhelming," Lieppman tells us. "Be proficient in communications and selective in what data you're sharing."

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3. LEARN TO SPEAK THE LANGUAGE OF THE C-SUITE

No initiative can gain significant, enterprise-wide traction without direct leadership and support from the top. That support can be hard to earn if change agents don't speak the same language as the C-Suite. It's not enough for digital change agents to talk about the technological side of digital transformation. Digital innovations must be translated into the context of everyday work, accountabilities, and value to the organization. It's also difficult to get people to jump on board digital transformation efforts if they can't see or feel tangibly how it benefits them and their work.

To gain traction with digital transformation, change agents must:

- **Translate technology and digital trends into everyday language.** Bring executives together by emphasizing the potential benefit that digital transformation can have on their work.

- **Engage in storytelling.** Telling stories of successful digital transformation efforts help humanize change and bring executives around to formally support change agents.

- **Listen.** Some executives may not jump on board immediately because of their existing biases. By listening and engaging them, change agents might find what these biases are and evolve their narrative from how change agents speak about digital transformation to how others need to hear it.

- **Be empathetic.** Understand that some executives believe they can't "get digital" and that they can't see the world the way that change agents do. Be open to their perspectives and positions to gain mutual understanding.

- **Bring outside voices.** Whether aimed directly at senior executives or as part of a conference series for all key stakeholders, external thought leaders can help change agents introduce new ideas and trends on digital innovation without a political agenda. An outside expert's message might resonate more and motivate executives to see new possibilities on their own terms.

- **Create a compelling narrative about the organization's state of digital adoption.** Change agents should audit the organization by (1) hosting one-on-one interviews with key stakeholders, (2) assessing the division between digital "laggards" and "innovators," and (3) determining why the organization has trouble getting traction on digital transformation. By assembling significant findings about all the opportunities and hurdles facing the organization, they can create a narrative that compels C-Suite executives to see and feel the potential and urgency of digital transformation initiatives.

Being able to communicate clearly with the C-Suite paves the way for gaining formal executive support for change agents' digital transformation efforts. This support can clear hurdles, offer unprecedented organizational access, and secure funding and resources for pilot and training programs. Doors opened for Equifax's Camden once her manager was willing to "go to bat" for her among other managers. "I had the floor with other managers rather than relying on my manager to be the go-between," she remembers. "That ensured I could answer questions and avoid miscommunication. My manager referred to me as the expert, and that made a huge difference."

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4. MAKE ALLIES

Many digital transformation efforts are bigger than any one department. They often require cross-functional resources for support and to be properly executed and funded. Change agents must make allies across departments and form cross-functional working groups and steering committees to champion change across the enterprise.

When approaching stakeholders across functions, change agents must be genuine and take any personal agendas off the table to remove any perceived threats to the stakeholder's "territory." Change agents must also make a case for digital transformation that is grounded in reality, facts, and provable evidence — and change agents must explain why digital transformation will benefit these stakeholders, as well as the organization as a whole.

> "I have a mission to build a greater movement than just one group, and that can only happen at scale. I developed a list of expert speakers to help drive a new culture and attitude here. But that only works if outside experts are able to address a larger audience. Doing so gets executives and everyone across the organization out of our typical way of thinking, and challenges them to hear, validate, and consider new perspectives from real-world leaders."

SENIOR DIRECTOR OF INNOVATION AT A GLOBAL LUXURY BRAND

> "Some people want to be territorial of trade secrets vs. sharing across the organization. I'm very open, and a big believer in paying it forward, so I'm always happy to help anyone and share anything I know, which always tends to come back around."

SARA CAMDEN

It also helps to share with stakeholders stories of people whom they trust and respect and who have jumped on board of digital transformation initiatives. Once change agents make one ally across functions, it's often easier to make more. When people are unsure of something new, they often go with what the majority is doing — this is call "social proof." If stakeholders see others changing, they will follow suit.

Change agents must also often recruit others into their cause who might have been initially skeptical of digital transformation. They must reduce friction with these key individuals by listening to the reasons why they are resistant to change. Listening and encouraging openness is key to making allies. Effective change agents are ambassadors of empowerment and inclusion. Camden tells us, "Some people want to be territorial of trade secrets versus sharing across the organization. I'm very open and a big believer in paying it forward, so I'm always happy to help anyone and share anything I know, which always tends to come back around."

National Geospatial-Intelligence Agency's Dr. Bray also believed in encouraging openness. While he was CIO at the FCC, he had an open-door policy and office hours for employees to stop by and provide feedback. He also set up a poster for employees to post anonymous comments on what the group could do better. "Listen to [why] people are frustrated or dissatisfied in the organization, because people aren't prone to change when they're happy," Dr. Bray advises. Once concerns and issues are out in the open, change agents can garner support by identifying steps

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to diffuse tensions among colleagues and departments, inform those who need more convincing, and work together more productively.

Making allies is critical to getting official sanctioning for cross-functional engagements. In turn, these official cross-functional initiatives are critical for digital transformation efforts to spread under a shared vision across the enterprise. Once change agents are able to make allies and form cross-functional groups, they can organize, execute, self-govern, and report progress to the C-Suite — and in the process get traction on advancing the organization across the six stages of digital transformation.

5. SPREAD DIGITAL LITERACY

Digital literacy is becoming a huge competitive advantage, and one of the key roles that digital change agents play is as "digital educators." Change agents must help their colleagues identify the new skillsets needed to succeed in a digital economy, audit the expertise that is available internally and externally, and introduce new training programs to ensure everyone in the organization can help advance digital transformation.

"You need to help people understand the value of digital by educating them so they're comfortable talking about digitally focused solutions," advises Foot Locker's Skolfield. "Education precedes day-to-day advocacy."

Acquiring digital literacy is challenging — but crucial — for our changing workforce. Learning new skillsets and adopting new perspectives, while also unlearning legacy processes and skills, is instrumental in modernizing the workforce. It also sets the stage for a culture that's the opposite of risk-averse. A change agent from a commercial door lock solutions company explains that younger employees have an advantage when it comes digital literacy, but change agents are in a unique position to bring everyone — regardless of age or experience — along as the company evolves: "The younger workforce is coming in with new ideas, and we need to embrace an innovation mindset. Millennials are already coming up with new ways to do business, so we have to do the same to compete."

SAMSUNG

THE MANIFESTO IN ACTION

While he was VP of Omni-Channel Marketing at Samsung, Emery Skolfield was an advocate of educating legacy decision-makers — those who had come up in the era of physical in-store tactics — so they were comfortable talking the e-commerce and digital language. He believes educating these decisions-makers is key to garner the right support for any digital-transformation initiative. "They have to be educated before they can become your day-to-day advocates," according to Skolfield. He recommends bringing them in for half- or full-day workshop sessions to teach them the importance of digital and what best-in-class looks like.

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6. CREATE A DIGITAL TRANSFORMATION ROADMAP

There is no prescription for how to achieve digital transformations, and, as we're learning, there's no end to business evolution either. New innovations are constantly disrupting businesses. To compete in this ever-changing market, organizations need to invest in bold technology and agile business models.

Digital change agents play an instrumental role in helping organizations continually adapt and innovate. But it's often not easy for change agents to trade short-term success for long-term focus. Julie Bowerman, VP of Global Ecommerce, Shopper Marketing, and Digital at Coca-Cola recommends change agents push past their instincts to work only on smaller digital transformation efforts within their domain and instead work toward long-term strategy. "I've always told my team to focus less on the day-to-day and think more in bigger chunks of time," she says.

The key to helping their organizations constantly innovate is for change agents to work on local pilots and on a longer-term, enterprise-wide digital transformation roadmap that everyone can work against. By focusing on local digital transformation initiatives, change agents can use their incremental, quick wins to prove concepts and garner support for larger efforts. Foot Locker's Skolfield tells us, "To stand out, you have to do big, ambitious things that are incredibly visionary and inspire people. You also need to be pragmatic so people believe it can actually happen." While change agents must deliver value quickly, they must also keep an eye on the bigger picture. "You eventually want to get to the point where you're not solving for one-off things, but rather you have a system of solutions and ideas," advises Parker of Patrón Spirits.

When designing a long-term, enterprise-wide digital transformation roadmap, change agents, along with their executive sponsors, should consider not just the business opportunities tied to transforming the organization digitally, but also internal and external challenges facing digital transformation in the organization, the stakeholders who should be involved in managing these efforts, and the critical skillsets and experience necessary to achieve them.

7. LINK DIGITAL TRANSFORMATION EFFORTS TO BUSINESS AND INDIVIDUALS GOALS

When designing a digital transformation roadmap, change agents must also have a clear business objective in mind. This is a standard practice at Visa, where the company's digital transformation agenda is driven by an "end-state vision." Visa's Singh explains, "You need to know what you're trying to accomplish in the end and why. Digital for the sake of digital isn't enough." A strong digital transformation roadmap must state a specific and clear business end goal and the key milestones necessary to achieve it.

> "You have to embed digital transformation in employee performance routines. Multiple people at the very senior level must be held accountable as part of their performance management and compensation structure to make it a priority."
>
> **JULIE BOWERMAN**

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Successful change agents also link employee's goals to digital transformation objectives. National Geospatial-Intelligence Agency's Dr. Bray recognizes that employees like to see measurable progress at work and be incentivized to change. By tying digital transformation goals and employees' goals, employees feel like they have skin in the game. Bowerman of Coca-Cola agrees: "You have to embed digital transformation in employee performance routines. Multiple people at the very senior level must be held accountable as part of their performance management and compensation structure to make it a priority."

8. SET METRICS AND MILESTONES

All digital transformation efforts must be tied to ROI. Digital change agents might initially struggle to predict and measure ROI for their individual efforts. But as they form cross-functional workgroups and collaborate on digital transformation initiatives, they are able to establish more clear milestones, KPIs, and metrics to measure progress.

Metrics for digital transformation efforts don't always have to be tied to market share or quarterly profitability though. They can be linked to market opportunities or to developing new customer segments. Change agents need to define metrics for their initiatives that substantiate their personal and team efforts. When they don't, there's a tendency for them to focus on the long list of tasks that lay ahead without acknowledging the steps they've taken and accomplishments they made thus far.

At Patrón Spirits, Parker uses a daily metric report to educate executives on how current digital transformation programs are performing, as well as progress on longer-term efforts. "It's a single source of truth. That's a powerful solution that's hard to argue with," he recounts.

Skolfield advises change agents to set milestones for their transformation initiatives at three, six, and nine months of when they plan to complete them. "Make [them] tangible so people see you as someone who gets things done," he says.

9. DEMOCRATIZE IDEATION

In our research, organizational culture was often cited as either the greatest catalyst or inhibitor for digital transformation. Many cultures, for example, are largely resistant to taking risks — and just as many exclude or limit where innovations can come from. In some cultures, ideas and new initiatives are only considered when they come from the C-Suite or from tenured executives who are sanctioned to ideate — this is often referred to as HiPPO (Highest Paid Person's Opinion). But when it comes to digital transformation, these executives are not always the most qualified to brainstorm solutions.

Digital change agents must play a role in democratizing idea generation so that as many ideas for digital transformation can be heard and considered, regardless of where these might come from. More important, change agents must bring executives to the table so that the best ideas can be implemented into official pilot programs.

National Geospatial-Intelligence Agency's Dr. Bray told us that in his work as CIO of the FCC, he's tried to avoid making ideation hierarchical. "I [don't] want to come across as a top-down, guarded executive imposing my view onto the organization," he reveals. "Instead, I treat the edges of the organization like a partnership." He is willing to listen to anyone in the organization who brings an idea to him, so long as they make a case for it. "I ask for

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three reasons why we should and three reasons why we shouldn't consider a new idea," he says. "Finally, I ask them to tell me how we're going to mitigate those reasons for not doing something. If they have that plan, I'm willing to invest in them."

For digital transformation to take hold, change must become part of an organization's culture, managed as part of everyday work. Tata Group in India launched the Tata Group Innovation Forum, a company-wide initiative to create a climate that fosters innovation. Whether it's by learning new skills or by contributing new ideas, all employees are expected to participate.

10. CAPITALIZE ON YOUR INHERENT "SUPER POWERS"

Change agents possess qualities that help them learn and experiment in areas where there isn't much clarity. We asked interviewees whether they were committed to staying at their current employers versus moving to a new company where the proverbial grass may be greener. Interestingly, their answer was guided by the question, "Can I affect change here?" The challenge and the goal were the same. They agreed they would take their passion and expertise for digital transformation elsewhere if their work didn't progress or their efforts weren't supported. The DNA of change agents — their core personality, beliefs, and ambition — are uniquely suited to digital transformation, which involves high doses of uncertainty:

> "Being a change agent is in your DNA. You have to be thick-skinned, and you can't worry too much about getting knocked down. It's something that you can't teach; it's who you are. You're an optimist who relishes in opportunity and doesn't focus on getting stuck."
>
> JULIE BOWERMAN

- Those who described themselves as problem-solvers, extroverts, and career-minded find comfort in chaos.

- Those who described themselves as critical thinkers, introverts, or cautious expressed the need for internal support and validation to further their efforts.

- They all described themselves as self-starters.

- They proactively find reasons to stay committed to whatever initiative they are tackling before giving up.

- They don't give up unless they feel that true innovation isn't possible without significant compromise.

Change agents must capitalize on these "super powers," which allow them to remain strong in the face of criticism and resistance to change — and even when they themselves are reluctant leaders or scared. "Being a change agent is in your DNA. You have to be thick-skinned, and you can't worry too much about getting knocked down," says Coca-Cola's Bowerman. "It's something that you can't teach; it's who you are. You're an optimist who relishes in opportunity and doesn't focus on getting stuck."
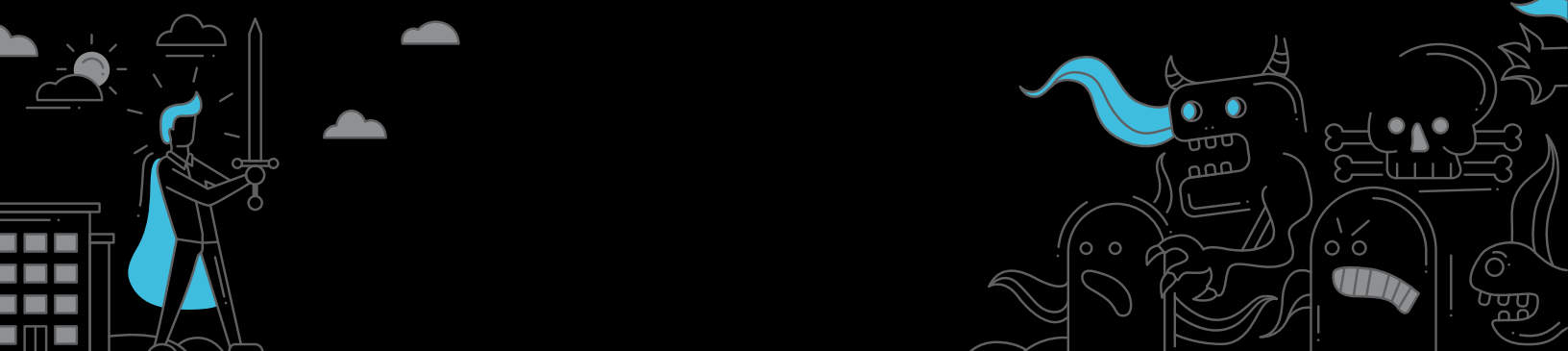
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Conclusion: The Value of Digital Change Agents

The pace of innovation and disruption is accelerating. Digital Darwinism is increasingly becoming either a threat or an opportunity based on how organizations react to change. Digital change agents and leaders are instrumental in helping their companies more effectively compete in this digital economy and to successfully move them along the Six Stages of Digital Transformation.

But the value of change agents to the organization goes well beyond their digital transformation efforts. By challenging the status quo and championing new ideas, they expand the organization's thinking, agility, and capabilities. They help instill curiosity and promote an innovative mindset to tackle problems and create opportunities in new ways. They help modernize workforce skillsets and processes. They improve customer and employee experiences. They contribute to the development of potentially profitable products and services. And with each step they take, they help the organization learn and grow. Given their incredible value, leaders should compile a portfolio of digital change agents in their organization and consider how to best deploy and develop each of them.

Digital change agents may or may not intend to start out as such, and their journey, at times, might feel lonely. But they walk a promising path. Change is never easy, but when change agents and leadership align, organizations can achieve much more than digital transformation; they build an agile foundation for an evolved enterprise.

If you are a change agent and would like to share your story with us, please contact **brian@altimetergroup.com**.

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ENDNOTES

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ECOSYSTEM INPUT

This report includes input from 30 digital strategists and executives at the organizations undergoing digital transformation efforts listed below. Although we could only include a few of their voices in this report, we thank all of the change agents we spoke with for their time, as well as for their insights which informed and are reflected in this report. Input into this document does not represent a complete endorsement of the report by the companies listed below.

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