Peter Wollmann
Reto Püringer   *Editors*

Transforming Public and Private Sector Organizations

Implementing Sustainable Purpose, Travelling Organization and Connectivity for Resilience

Springer

Future of Business and Finance

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Peter Wollmann has been a responsible manager, initiator, mentor, and facilitator in large, predominantly global transformations and strategic developments for almost 40 years in large organizations and since 2017 as an independent consultant. Peter holds a degree in mathematics and physics from the University of Bonn. He is the author and publisher of several books and articles on strategy, leadership, and project and project portfolio management.

The Interviewees

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Jürg Hauswirth is a seasoned insurance professional. Starting as a Risk Engineer and Underwriter, he held several COO roles in Switzerland and abroad in a global insurance company. Over the last years, he has been in charge of Operations of a large Commercial Insurance entity globally. Jürg has a wealth of experience in strategic and operational change management and transformation

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Stefan holds diverse degrees like an MBA and an Executive Master in Coaching and Change. Before joining Adecco, Stefan worked as an independent consultant, as a manager in McKinsey's and at Deloitte Consulting.

Jörg Schneider was a member of Munich Re's Management Board and a CFO between 2000 and 2018. Since 2019, he has held mandates on supervisory and advisory boards, e.g. at state-related banking and asset management institutions as well as at a major retail group. He has degrees in economics and law.
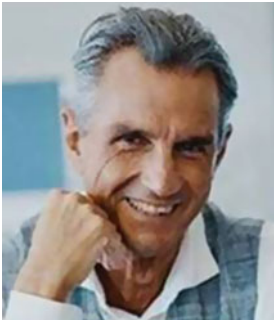
Uwe Schöpe, Chief Human Resources Officer and Labor Director Zurich Germany (Board Member since March 2020). Prior to his promotion, Uwe was a Head of Human Resources and part of the Executive Committee of Zurich Germany from September 2018. Uwe has particularly developed the areas of employee participation, flexible working, leadership principles and accelerated a cultural transformation that contributed to an increase of the Business Unit's Employee Net Promoter Score from -62 to $+59$ over the last 4 years. Uwe has worked for the company in various positions for more than 40 years, e.g. Head of Learning Operations, Global Head of Zurich Academy Europe, including heading the Zurich education association Bonner Academy for almost two decades.

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Part I

Introduction Chapters

General Introduction

1

Peter Wollmann and Reto Püringer

Abstract

The editors explain which explicit demand, expressed in a large number of interviews on C-Suite or comparable level, is covered by the new Three-Pillar-Book with its focus on transformations, and how the context to the previous books #1 and #2 ("Three Pillars for Organization and Leadership in Disruptive Times – Navigating Your Company Successfully Through the 21st Century Business World" by Wollmann et al., 2020 and "Organization and Leadership in Disruptive Times – Design and Implementation Using the 3-P-Model" by Wollmann et al., 2021) and Three-Pillar-Model (abbreviated in the following as "3-P-Model") incl. the Travelling Organization Concept looks like. Please note: details of the interviews on C-Suite or comparable level and their results are documented in an own chapter of this book, the next one in Part I/Introduction ("Framing the Book: The Message of Selected Leaders").

Furthermore, the editors explain what key drivers for transformations are most relevant in these days, which types of transformations in a broader sense have to be distinguished (incremental, medium, fundamental) and why and last but not least in which ways the concept of a Travelling Organization developed in the context of the 3-P-Model can be extremely helpful to successfully understand and run all types of transformations. After having prepared the stage with this overall book framing, the editors offer an overview of the book's structural logic and content in detail. incl. linkages between the different chapters.

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As the previous books, the current one is again written by an international community of practitioners, experts, and academics from different geographies, countries, public and private organizations, industries, and cultures which guarantees the comprehensiveness and richness of the developed insights and the value of the presented use cases.

1.1   Key Triggers for Transformations

There are some challenging developments in place which need to be fully recognized by organizations as they will lead short- or mid-term to a significant need for transformations (selection):

- *Environment*
  The need for a transformation to "Green Industries" etc. is obvious. In general, environment and sustainability targets will be probably increasingly supported/ fostered by regulation.
- *Society (1)*
  The trend to sustainability and purpose which started long before the COVID-19 pandemic was significantly accelerated by it. Customer demands and attitudes have to be increasingly regarded and covered by the organizations
- *Society (2)*
  The social differentiation of society and its different milieus leads to more individual and flexibly changing demands and claims for total convenience
- *Technology (1)*
  The fast development of technology offers disruptive options within nearly all industries. Start-ups are able to attack established large global players at defined parts of their value chains
- *Technology (2)*
  There is an overwhelming backlog in the public sector to apply modern technologies
- *Science*
  There is an exponential progress in some sciences (e.g., life sciences, chemistry) which influences competition and opens new future business fields
- *Data*
  There is an overwhelming overflow of data available (about customers, competitors, technical solutions, etc.) that has to be well sorted and applied into products and services of organizations
- *End of a cycle*
  This reflects on the famous S-Curve-Model for business models, products and services: coming to the end of a life cycle it is important to start a new one

(S-Curves) with perhaps new people, new business models as the old S-Curve will shortly come to an end[1]

- *And last but not least: politics*
  The impact of the Ukraine conflict, which are a war, political paradigm changes, new energy supply policies, change of supply chains and business models, cut of trade connections, threat of feedstock supply, etc.

All these—exemplarily mentioned—triggers will change industries and the character of public sector organizations forever. Some concrete examples for these disruptions are the significant changes in car automobile industry (from combustion to electric engine), in steel production (melting furnace from coke-based over natural gas-driven to hydrogen-based—with the whole necessary infrastructure to be modified), in life science the implementation of new gen-based vaccines and medication, in financial services the transformation from sophisticated processes to one-click-options for the customer on the one hand and on the other hand the takeover of payment processes by new specialized companies, in all customer-oriented processes across industries the step-in of platforms and for all public sector offices the digitalization of the interaction and communication with citizens. To ignore these trends and developments is not an option, neither for large global player nor for mid-sized or small enterprises in the private sector. And in the public sector the situation is similar.

In this context, it is worth mentioning that the COVID-19 pandemic acted normally not as root course for transformation but in different perspectives as a strong catalyst and an eye-opener making backlogs and failures very transparent.[2] All of the mentioned triggers were already in place, setting the respective trends but COVID-19 made them a lot more obvious and accelerated them.

An intensive research and a sequence of interviews on C-Suite or comparable level showed that most organizations are—at least on an abstract level—conscious of the challenges and the need to transform, but are still partly hesitant and unsure when and how to start the journey. This book tries to provide some supporting concepts, methods, use cases, and applicable experiences.

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[1]The S curve is a strategic concept that describes how the old ways mature and are superceded by new ways. As an example Facebook was first conceived as website, then a new S-Curve emerged— mobile—which the initial Facebook site did not handle very well. New competitors, designed for mobile, like Instagram and Whatsapp threatened to capture the new S-Curve. Facebook did jump to this new S-Curve including the acquisition of Instagram and Whatsapp and is now preparing for the "Metaverse"—as the expected new S-Curve.

[2]See also: https://www.ey.com/de_de/forms/download-forms/2022/03/ey-whitepaper-transformation-in-zeiten-von-covid-19.

1.2   The Character and Types of Transformations

First, it is important to stress that one has to make a difference between a transformation and a transformation project.

Transformation which is never a self-purpose but triggered by changing environments does never end as the environmental changes does never end. Dramatic change phases might be superseded by continuous development and optimization phases but the overall mindset should be that a steady-state condition will never happen again.

A transformation project—as a vehicle to respond to a specific transformation need of an organization—has of course always a beginning and an end, it accompanies a transformation for a defined time and is intended to reach a special target.

Having this clarified we want to categorize transformations by means of their character and scope:

- Incremental Transformations
  Regular adjustments in selected functions like the product portfolio, processes, branding etc., often necessary to achieve preconditions for a real transformation. The step by step transformation of the production process of Toyota might be a good example for this kind of incremental changes leading over decades to a fundamental transformation. On the other hand, incremental transformations are often necessary to achieve the necessary preconditions for a fundamental transformation.
- Medium Transformations
  Overarching changes in a large number of functions, e.g., in the context of mergers, not a total pattern breaker but quite comprehensive.
- Fundamental Transformations
  Development and implementation of new business models, dogma, and pattern breaker. Those transformations often go hand in hand with a paradigm change, a change of a fundamental belief for a long period.

The requirements vary from type to type. But it is common to all transformations: the capability to transform, to change has to be deeply rooted in the organization. This key capability, which contains cultural and mindset aspects, technical and social skills, leadership styles, etc., cannot be short-term developed. It is challenging enough to tailor the capability to the concrete transformation which has to be started. And it has to be clear that the need to transform might very suddenly appear, a bit unpredictable. So, the fundamental capability to change and transform has to be developed and rooted and maintained.

This special capability to start transformation journeys in which direction and on which contend ever reminds us immediately on the core of the concept of a Travelling organization, developed in the context of the 3-P-Model and described in detail in the two previous books. The concept of the Travelling Organization is also reflecting that changing an organization needs time, often it is also impossible to

define a solution to a problem at the outset and an organization needs mental space to find out what makes sense and adapt over time.

1.3 Recap of the 3-P-Model and Its Application on Transformations

The actual book explores transformations of different types and in different contexts. Independently if the transformation is radical, a real pattern and beliefs breaker, or only a significant incremental change that lays the fundament for further more extensive transformations, the success of the ambition is dependent on the general capability of the organization to transform in which context ever, the capability to go on journeys in more or less unknown territories and stay resilient in the VUCA[3] world where all transformations take per definition place.

As mentioned above, a transformation never ends. The illusion of business consistency, strategic stability, and structural continuity with some episodic change projects from time to time in disruptive and crisis-ridden times is finally over. Now, we must understand that organizations are continuously on transformation journeys, experiencing twists and turns, following their purpose or even striving for survival, always looking for the best way between poles, alternatives, and options. If the teams do not know what to expect around the next bend, they must take smaller steps and explore the territory. Even if they do not know in advance what the best result will be they will achieve it: they believe in their motivation and ability to manage the journey and to rely on their agile mindset, self-reflection, readiness to embrace change, and willingness to deliver.

People in a transformation or on a transformation journey in the unknown have to be curious, open, courageous, keen to experiment, and they are able to deal well with uncertainty, stress, unforeseen incidents—and they are empowered to take decisions swiftly by themselves and to operate on their own.

This corresponds very well with our metaphor of a Travelling Organization, developed in the context of the Three-Pillar-Model (abbreviated: 3-P-Model) in our last two books on this topic. To briefly recap: the 3-P-Model is based upon the interacting concepts of:

1. *Sustainable Purpose*—the raison d'être of an organization, bringing orientation and certainty to the people for their joint endeavor and success, important especially in transformations,
2. *Travelling Organization*—the mindset of an organization in a permanent state of flux and transformation, interacting with the markets' and customers' journey, with rapid adaptivity,
3. *Connected Resources*—Interconnecting all needed resources inside and outside the silos creating high efficacy and consistency

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[3] VUCA means volatile, uncertain, complex and ambiguous.

The 3-P-Model is an open approach that provides effective support for organization development, transformation, governance, and leadership. It was developed and described in detail in book #1 and its broad applicability demonstrated at a large number of different use cases in book #2—by a community of more than 40 *authors*—practitioners, academics and consultants—*from 5 continents, from over 15 countries and from about 40 different organization in the public and private sectors, thereof more than 15 large global players.* Overall, more than 35 use cases cover a large diversity of the model's applicability.[4]

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[4]The three main design principles for future organization and leadership can be described in detail as follows:

- *Sustainable purpose (the first pillar):*
  The employees and teams in the organization, but also its key stakeholders in the entire ecosystem and business environment, must know what the organization stands for and what entrepreneurial value and societal contribution it creates. This includes the reciprocity of enterprises, public and social institutions, science etc.
    The purpose must remain sustainable, reliable and consistent, supported by leaders, employees and stakeholders, lived by important representatives of the organization. The purpose aligns, convinces and inspires the people involved in the joint endeavor, makes them confident, proud to be part of it and to contribute to it. Employees and team leaders can then take this overall purpose and translate it into what it means concretely for their teams and for them individually. Even—or especially—in crises it proves its ability to provide orientation and energy, and to keep the organization together on its way.
- *Travelling organization (the second pillar):*
  Business consistency, strategic stability and structural continuity with some episodic change projects from time to time? This has long been an illusion in disruptive and crisis-ridden times. Now, we must understand that organizations are continuously on a journey, experiencing twists and turns, following their purpose or even striving for survival, always looking for the best way between poles, alternatives and options. If the teams do not know what to expect around the next bend, they must take smaller steps and explore the terrain. Even if they do not know in advance what the best result will be they will achieve it: they believe in their motivation and ability to manage the journey and to rely on their agile mindset, self-reflection, readiness to embrace change and willingness to deliver. People in a travelling organization are curious, open, courageous, keen to experiment, and they deal well with uncertainty, stress, unforeseen incidents—and they are empowered to take decisions swiftly by themselves and to operate on their own.
- *Connecting resource (the third pillar):*
  The organization has to be aware that impact, value and efficiency, but also survival, need multiple connectivity: between humans, organizations and ecosystems; between expertise and influence; between different political and social systems and cultures; between enterprises, scientific research and public sector; between customer satisfaction and economic needs; between strategy, processes and skills; between risk management and business continuity. This means managing connectivity, preventing unconnected structural silos, boxed competencies and echo chambers, but inspiring and supporting multilateral behaviors and initiatives in global and local professional communities, balancing the various, often contradictory interests between the stakeholders.

All three pillars are key assets of systemic dynamics and high organizational effectiveness: They provide orientation and inspiration, give fundamental impulses to start the journey and to connect

The ability to transform in which direction ever is exactly what—summarized—a Travelling Organizations represents:

- The organizational and personal mental and methodological capability to change (on which level ever)
- The management capability to run change or transformation projects over a longer period and in an agile way—and a transformation infinitely
- The leadership quality to keep the organization resilient (covering stability and change)
- The constant dialogue between leadership and teams that are travelling toward an outcome to ensure that the travelling organization can adapt and that there is bottom-up feedback to the leadership that can be reflected in the strategy of an organization.
- The present book develops ideas on resilient and agile journeys in the current environment. It reflects both a bit of theory, models, and methods as well as several practice use cases. It covers especially the requirements for mindset, capabilities, and leadership.

1.4　The Key Role of Sustainability to Reach Resilience

To be long-term capable for continuous transformation journeys requires a resilience-focused leadership which means also a focus on sustainability inside and in alignment with the surrounding world. Thus, it is not surprising that more and more the 17 UN SDGs (Sustainable Development Goals, see Fig. 1.1) are on the radar of organizations in transformation and of their leaders. It is not imaginable that a long-term transformation journey can be long-term successful without linking at least with selected SDGs as they represent the official ambition of world society for the next decades.

The trend to sustainability has started long by diverse movements[5] before COVID-19 but it was especially accelerated by it. Especially younger

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the resources for joint success. The more than 35 concrete use cases in book 1 and 2 show that at least three fundamental steps are needed for successful application:

- The perception, integration or adaption of the 3-P-Model as both a systemically effective and easy applicable approach into one's meta-level mindset and knowledge about organization
- Understanding of the Three Pillars as sustainable organizational capabilities and strategic success factors that need to be supported by key people and developed throughout the organization.
- Tailored interpretation and application of the concrete impacts, demands, impulses of the 3-P-Model and the Three Pillars in the concrete and unique situation of an organization ('what does 3-P mean concretely for us and which activities does it require?)

[5]Like MeToo, Black Life Matters, Fridays for Future, Diversity, Slow Food etc. etc.

Fig. 1.1 UN sustainable development goals (Rio 2014)

generations—and GenC[6] are on average very focused on a sustainable lifestyle. So, an adequate leadership style is required.

In the Global Citizen concept[7] from Russel Reynolds Associate sustainable leadership bases mainly on three components:

- Sustainability mindset—which means "a strong interior sense of purpose..." (closely connected to the setting of a "sustainable purpose" in the 3-P-Model)
- Systems thinking—which means among others "the intellectual flexibility to see the big picture..." (closely connected to the capability of having and/or producing the comprehensive image of the environment during a journey of a "travelling organization"
- Relationship Building which means among others "an understanding of people across cultures..." and being "an advocate of diversity..." (closely connected to having the capability of "connectivity" in the 3-P-Model)

These thoughts are taken up in diverse articles to develop detailed concepts on how to reach resilience. At the end it is obvious that there is no resilience without a clear idea about sustainability which in turn requires sustainable leadership—and a sense of mindfulness[8] together with coherently acting people with a supportive

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[6]Generation COVID-19, independent from the date of birth but connected by a shared experience.

[7]https://www.russellreynolds.com/en/Insights/thought-leadership/Documents/russell_reynolds_sustainable_leadership.pdf.

[8]See Chap. 7.

personality type.[9] It might be surprising that exactly those settings (people, internal systems, ecosystems) have the chance to resilient which are the one being best in transformations.

In this context it makes sense to refer to a very important outcome of the Glasgow Climate Change Conference (COP 26)[10] which was a little bit lost in the public perception: In the context of the Glasgow Climate Pact more than 100 finance ministers decided to establish standards for sustainability reporting, similar to the IFRS standards for accounting and reporting. The sustainability standards will be developed by the ISSB (International Sustainability Standards Board)[11] under the umbrella of the ISFRS Foundation. That means statements of organizations on the sustainability of their acting will become on the one hand comparable as basing on the same concept and metric—and on the other hand, there will be a neutral quality check and certification. This is a significant lever to start sustainability transformations and steer the development of organizations in this direction. A leading manager of the UNFCCC[12] valued this in a conversation with one of the editors as perhaps the most important outcome of the Glasgow Conference. Large enterprises will no longer be able to hide their "sustainability footprint"—this will highly impact their development and trigger transformations.

Technology as described for example in Chap. 19 will become a crucial part of the evidence of sustainable acting and of the sustainability reporting.

1.5   The Editor's Motivations, Direction, and Key Focus for the Book

Our key socialization took place in quite complex, large global organizations in a highly regulated industry. Our focus was on project and program management, large transformations, project portfolio management but also as line manager in areas like strategy, strategic and financial planning and controlling, business development, etc. But both of our working highlights were being in charge as program director in global contexts and closely cooperating with global and local responsibles, reflecting the very different and diverse interests in political challenging environments and nevertheless find solutions.

This means that we are not interested in pure doctrine or pure application of methodology, governance, tools, etc. but in sustainable success respecting a bundle of ethical rules, etc. The dilemma of many large organizations in special situations like transformations—to keep control through the existing steering systems on the

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[9] See Chap. 4.

[10] https://unfccc.int/conference/glasgow-climate-change-conference-october-november-2021.

[11] https://www.ifrs.org/groups/international-sustainability-standards-board/.

[12] UN Climate Change is the United Nations entity tasked with supporting the global response to the threat of climate change. UNFCCC stands for United Nations Framework Convention on Climate Change.

one hand but to offer more flexible solutions "start-up-like" on the other hand—needs solution which need action beyond "let's sit together and talk and check." It needs very the capability to empower task forces for a defined period and allow some—well described and documented—exceptions from "normal" proceedings.

Our ambition with this third book is to develop some creative solution ideas for conscious and transparent key demands of large global organizations, especially in demanding transformations. Those ideas have to be understood as an open approach enabling the applier to find in the concrete environments, situations, ecosystems their individual answers on urgent questions. In the best case, the third book would start considerations on the decision-maker level to adapt, tailor and use the ideas as animation for a perfectly fitting individual solution—especially there where the standard systems are at their limit.

To empower the approach described above—support appliers or readers respectively to find their best fitting individual solutions—the number and diversity is crucial. Therefore, it is important for us that already the author community (geography, profession, gender, etc.) represents diversity.

We both are looking at the book through the perspective of global program directors to check the usability of content in an international context. And to add: in the current philosophical discussion, we both would strongly tend to take the position of ethics of responsibility, not ethics of convictions and good intentions. We are strongly application—and result-oriented.

So, then take-aways we are striving for and which the book will make a real difference are answers on fundamental questions like:

– Which sort of Travelling Organization might be well used for which transformation?
– How is it possible to transform an organization to a Travelling Organization if needed? What are key success factors for this transformation and which are the success indicators? How is it possible to change the fear and rejection of the unknown to a curious perspective on the magic on the unknow?
– Which insights could be collected on success achieved in different journey modes like "step-by-step journeys" versus "top-down driven executions"?
– What are the lessons learned from navigating such a journey without knowing at the start where the journey might end?
– Which new perspectives arose on the people and teams travelling, how did people and teams connect to obtain the required knowledge, resources, and engagement during the journey in the unknown? And if incentive concepts are in place in the organization: how were people and teams incentivized in cases where the result of the journey was unclear or at stake on the journey?
– Etc.

1.6   The Logic and Structure of the Book

The book is divided into five parts:

Part I Introduction explains the reason and direction for the book and explains its general frame in detail with

- General Introduction
- The Framing of the Book Using Statements of Selected Leaders
  (Summary of 14 C-Suite interviews which define the demand and direction of the book. In this chapter the burning platforms to be covered by the book are described).

Part II Fundamental Perspectives details the frame of the book in different perspectives and introduces some meta-level concepts and basic consideration with:

- Different Umbrellas to Foster Innovation—An Overview of Potential Ecosystem Options for Innovation driving Change and Transformations on Different Levels
- Psychological Capabilities Required for Continuous Transformations—The Self on Permanent Journeys with a Travelling Organization
- A first striking metaphor: How Science and Management Under Uncertain Conditions Are Linked. Lessons Learned from Studying the Origin of Life Through Molecular Modeling and Life as a Doctoral Student
- A second striking metaphor: How to Create Neutral Views and Perspectives During Transformations. Learning from Rebecca Solnit's Book "A Field Guide How to Get Lost"

Part III Preparing and Running Transformations concentrates on practical frameworks and measures in detail which are developed to make transformations successfully happen with

- Introduction of a First Framework: "Large Scale Transformation, Adaptation, and Resilience Using Mindfulness, Purpose and the AAUL Framework"
- Introduction of a second framework in: "The Application of a New Framework: Connecting the 'Being Framework' with the 'Three- Pillars-Model' of Organization and Leadership to Foster Transformations—A Helpful Contextualizing of the 'Being Framework Onto-logical Model' in Working with People in Organizations in Transformations"
- A first practical idea to create and maintain momentum of transformation teams: "How to Bring Energy into a Travelling Organizations Running Transformations"
- A focus on a new interpretation of controlling: "Controller's New Role in Significant Transformations"
- A second practical development measure: "Development of the Personal Ability To Transform by Means of Actor Coaching and Training"

Part IV Fundamental Transformations—Exciting Use Cases in the Public and Private Sector represents an intensive glance into practice by providing use case from different sectors and industries with