

# ***Changing IT***

## **Culture, Leadership & Employee Engagement – a basis to leverage IT Organizational Excellence**

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### **Abstract**

Essential aspects such as Organizational Culture, Leadership practices, Group Effectiveness and Employee's Engagement are, among others, determinants for the achievements emerging from Organizational Strategies on Quality and Innovation. So, the intended initiatives on Organizational Excellence - including programs targeting Customer and Employee's Satisfaction and integrating Process, Product & Service's Improvement – must be based on favorable conjunctures emerging from a positive confluence of those factors. The Changing IT program – here presented on its essential aspects – had its main objective on preparing the *ground* for this kind of initiatives and has produced its *fruits*, in its immediate results, as well as on setting-up organizational units and infrastructural projects to allow it. The current article – having elapsed sufficient time to allow for proper results' surfacing – intends to evaluate the major outcomes from an Action Research program, giving evidence of the essential aspects of the Organizational Intervention, its results, subsequent actions and next steps toward a process concerning Commitment to Excellence within the IT Organizational Unit.

**Keywords:** organizational learning, innovation, human behavior and performance, IT quality management, organizational excellence models.

### **1. Problem positioning**

Within the context of Information Systems & Technologies the aspects related to Quality and Organizational Excellence are frequently approached through the adoption of proper methodologies, best practices, models and frameworks, which, as a general rule, have strong

connotation with specific IS/IT realities – being, mainly, focused on process, risk, control and service's issues.

In fact, most normative bodies adopted on these domains – including, among others, COBIT, ITIL, CMMI and PMBOK – although underscoring within their principles some aspects related to quality and continuous improvement, put the keynote on those former aspects.

But – as a foundation for any effective living organization – Culture, Leadership practices, Group's performance & Employee Engagement (among other relevant aspects) are essential determinants of the outcomes which can result from the application of any Quality & Organizational Innovation Strategy.

Merlyn and Parkinson (1994), within their approach to Development Effectiveness concerning strategies for IS Organizational Transition, deeply explore key characteristics directly associated to high-performance IS organizations – thus, bringing into this specific field the importance of the role performed by TQM, Process Orientation, Group Effectiveness and Organizational Change Management disciplines.

On his approach to effective change management, Kotter [1996] enhances and details the importance of these main aspects – integrating them on an “Eight-Stage Process of Creating Major Change”.

Focusing on Organizational Culture, Quinn & Cameron [1998] on their wide view to approach this domain – the competing values framework – detail the main aspects of Organizational Culture and develop a specific framework for its assessment.

On the Leadership research field, authors enhance essential aspects, including the Leader's influence over team effectiveness and its determinant sponsorship role on major change programs. Leadership Vision [Bennis 1994] and Transformational Leadership [Bass in Bryman 1992] are considered as strong predictors for teams' effectiveness on achieving change objectives.

Also, relevant and well tested change management methodologies [e.g., ODR 1989] consider, as one of the main aspects to be clearly evaluated at change diagnosis stage, the Leader's role as Sponsor – either as initiator, or as sustainer – at all hierarchical levels.

Concerning the Employee's role – pointing to fundamental concepts and dynamics (Communication, Coaching, Engagement & Empowerment) in order to remove barriers and mobilizing to change – it is essential to take into account their contribute to the success of major change initiatives. Potential resistances must be handled and synergies must be explored, as opportunities, in order to lead change towards its defined objectives.

Their active involvement on self-assessment processes – which form the basis for many

approaches to organizational excellence [e.g., EFQM 2010] – will lead, not only to a more realistic vision on identifying improvement opportunities, but also to a greater level of self-identification with proposed solutions (and, as a consequence, on an increased adherence to its implementation and future sustainability).

These are only some of the main dimensions which must be considered within this domain. All initiatives intended to be successful on the Organizational Excellence field must count on a positive confluence of these factors. This positive confluence – this is, on the strict direction to have a favorable influence on its planning, development and final achievements – must (1) occur at an initial stage, to provide “structural” conditions, (2) be properly and continuously managed, according to the “conjuncture” and (3) enhanced within the change projects context, involving the Organization, the Groups and the Individuals, as well as its interactions.

The Program *Changing IT* – here presented on its major aspects – was founded on a deep understanding of the importance of these factors and targeted the *ground preparation* in order to create specific conditions in favor of future initiatives. It has produced its *fruits* on an effective and visible way – either in terms of immediate outcomes, or through the creation of structural units and structuring projects, which will allow for future achievements – addressing values, attitudes and individual behaviors.

## **2. Introduction**

### ***2.1. Objectives and Constraints***

The main objective of this article is to present a brief evaluation of this important change program, which has been conducted within the organizational unit responsible for the Information Technology (IT) function for a Financial Institution. This evaluation is based on the main objectives stated for the program and uses, as a main reference, the pre-defined indicators selected for its measurement.

Within this context, main relevance will be given for: (1) the essential aspects within the scope of this intervention, (2) its inherit results, (3) subsequent (most relevant) actions already initiated and (4) relevant next steps on the way to a wider approach to quality – towards an IT Commitment to Excellence.

The results, presented here, emerge from the evaluation of the pre-defined indicators selected at the program’s planning stage – being [this evaluation](#) limited by three main kinds of reason:

1. the difficulty (due to the wide scope and complexity of the intervention) on obtaining specific measurements associated to indicators which could give evidence – in a strict and unambiguous way – of the results of the several actions that have been taken;

2. the impossibility of isolating the effects of those actions from other impacts emerging from transversal action taken during the same period (e.g., implementation of a new individual performance appraisal system);
3. the short time window between the action's development instant and the moment of the program's closure balance – either due to the fact that some of those actions were still at an implementation stage, and also because the effects of some other ones were not still visible (e.g., results from new leadership practices implemented, specific individual attitude / behaviors changes).

Within an intervention with these characteristics, it has also not been possible to establish an independent group of control – aligning with a quasi-experimental methodological perspective [Campbell & Stanley, 1963] – in order to obtain an explicit and unambiguous relationship between action taken and emerging results. In fact, the intervention has covered the whole IT Unit and, within these boundaries, there were no similar group suitable for this purpose.

## ***2.2. Organizational Context***

The in-scope organization was the internal unit responsible for providing Information Technology Services to a major Portuguese Bank – to whom it belongs.

Concerning *Employee Management* the corporate policy strongly points to a decentralized line of action – focused on direct leadership responsibilities and being granted along all the hierarchical chain.

It has been detected that, in some situations, the perceived practices were not properly aligned with those policies and orientation guidelines – having, as a consequence, been identified a clear need for leadership training.

This has been the main foundational basis for this program.

Also, in the customer orientation, communication and internal cooperation and engagement domains, some improvement needs have been identified.

The IT Unit provides mainly application development and infrastructure management services to all the company, having, internally, about 500 employees. For this last service's component the company holds a structured outsourcing contract with a major international IT service provider.

On the application solution's domain (system's design, development and maintenance) and on the internal customer's support functions (relationship management, help desk and service support) the services are provided on a basis of internal staff – although, in some limited cases, there is also some use of external providers.

### ***2.3. Program Initiation - the Diagnosis Phase***

This program has started with a diagnosis phase, on which – through the application of a specific questionnaire [OCAI, Cameron & Quinn 1998] – it has been produced an image of the current culture, as well as of the desired one. In order to characterize the current culture, it has been also conducted a set of specific focus group sessions involving IT Unit employees, as well as, performed structured interviews with internal customers.

From the comparison of both images – from current and desired culture – it has been possible to identify the gaps between the current reality and the organizational vision concerning the future. As a main conclusion of the Diagnostic Phase, the study revealed the existence of a strong IT culture, with typical values associated to a hierarchical culture (including some heterogeneity of leadership practices) and the willingness to evolve to a market culture. These elements have been the main basis to tailor the intervention.

## **3. Essential aspects of the Organizational Intervention**

### ***3.1. Objectives***

The program – developed along 2009 and congregating efforts from all the IT structure – has integrated a set of consulting, training and communication actions, with the following main objectives:

1. To develop a ***Service Culture*** – customer oriented and based on a more open and flexible internal communication structure;
2. To develop and harmonize more effective ***Leadership practices*** – valuating employee's coaching, skills development and team's attitude alignment towards values and principles;
3. To promote the ***Engagement and Participation*** of all employees on service and internal functioning improvement.

It has been set-up and implemented by an internal team, supported by external consultants, coordinated with the IT management team, facilitated by a Change Agent's Team and sponsored by IT top-level management.

### ***3.2. Basic Characteristics of the Intervention***

Concerning the kind of change promoted [Porrás & Robertson 1992] it must be classified as a 2<sup>nd</sup> order planned change (multidimensional, multi-level, radical and discontinuous, involving an organizational paradigm's rupture), this is, transformational - targeting “changes in

organizational climate and culture, with significant changes on working processes, organization structure, conception and management, according to a previous plan” [Caetano 2001].

In effect, it has been a multidimensional intervention – targeting distinct objectives such as “the acquisition of leadership competences and team management, the adoption of new attitudes and behaviors, the reorganization of some internal work coordination processes and the adoption of new values and principles”.

Thus, it has implied:

- the individual level – targeting the acquisition of new leadership skill and competencies, as well as the stimulation and change of individual attitudes and behaviors – articulated at group level within the groups which they lead and/or belong to;
- the group level, and the relationships among the several groups which integrate the organization – targeting the introduction of improvements in the teams’ dynamics (teambuilding, group problem solving) and into the cooperation among teams in transversal processes;
- the macro-organizational level – focusing on organizational culture values, management processes and practices.

It configures a scenario of *planned change* [Van de Ven & Poole 1995] built at the level of a single entity – with development induction through a *cycle of goal formulation, implementation, evaluation, and modification of goals based on what was learned*.

According to Weick & Quinn [1999] it can be characterized as an *episodic change (infrequent, discontinuous and intentional) occurring during divergence periods, where organizations are moving away from their equilibrium conditions* [Punctuated equilibrium model, Tushman & Romanelli 1985].

These characteristics are clearly recognized within the current organizational context – being visible either during the intervention’s period (metamorphic change *fueled* by top-level organizational managers), as well as by the long (equilibrium) period which has preceded it.

### **3.3. Main Action Lines**

This program has followed a typical phased segmentation structure – including diagnostic, intervention and evaluation – being important to enhance some targets and action force lines towards the accomplishment of its pre-defined objectives, as depicted in Figure 1.

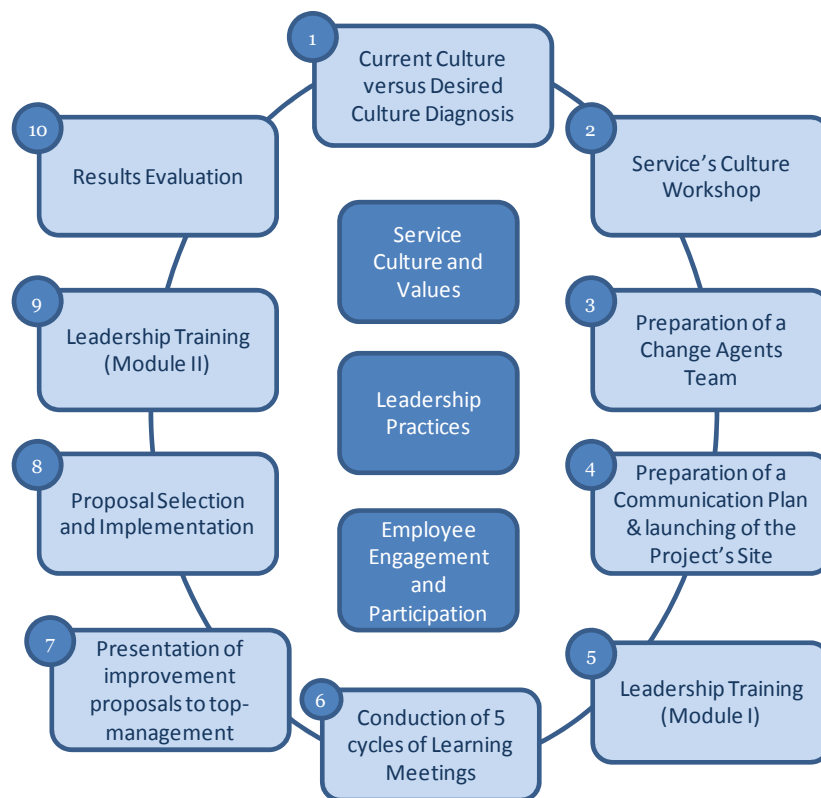


Figure 1 – Intervention's main Targets and Action Force Lines

Additional information – concerning the details of each of these stages, in strict alignment with each main target of the intervention – is provided, further in this article, along with the presentation of their specific results.

#### 4. Evaluation Methodology

The program's evaluation has involved the previous identification and selection of a set of specific indicators – being measured along the intervention period and compiled and evaluated at the end of it – as summarized in Table 1.

Indicator	Methodology	Evaluation Moments
Workshop and Training Actions Effectiveness	1. Culture Workshop Satisfaction Survey	At the end of each training action
	2. Leadership Training Satisfaction Survey	
	3. Methodologies Implementation narrative reports	
Internal Perception of IT Culture	4. Culture Survey	Before and after the Program
	4.1. Dimension Values	
	4.2. Dimension Leadership	
	4.3. Dimension Information	
	5. Self-evaluation Questionnaire on Leadership Practices	At the end of the Program
	6. <i>Focus groups</i> with employees	

Indicator	Methodology	Evaluation Moments
Customer Satisfaction with IT Services	7. Annual IT Internal Customers Satisfaction Survey 8. Structured Interviews with Major IT Customers (top-level managers)	During the Program Before and after the Program
IT Improvement Actions Implemented	9. Characterization of the validated proposals and analysis of its implementation level	At the end of the Program

Table 1 – Program Evaluation – Indicators, methodology and evaluation moments

It is important to emphasize for a part of these indicators as being “soft indicators” – as they refer to perceptive information resulting from qualitative techniques’ application – including structured interviews, surveys based on questionnaires, narrative reports and focus group sessions.

Although the choice of these indicators does not completely solve the previously pointed out evaluation’s limitations (see 2.1, on evaluation’s constraints), they compose the best possible choice from those which were consistently available and applicable within the intervention’s context.

## 5. Main Results

The results from this major program are now presented according to a segmentation structure that is in line with the three target dimensions – (1) Service Culture and Values, (2) Leadership Practices and (3) Employee Engagement and Participation.

For each one of these focus areas, the sequence of main actions is also evidenced, as well as the underlying rationale.

### 5.1. Service Culture and Values

As already mentioned, the Initial Diagnosis phase has addressed the Current Culture identification and the Desired Culture definition – as the main elements to identify the gap and drive this intervention.

The following diagram (Figure 2) depicts the main stages, objectives and evaluation methods for this intervention’s focus area.



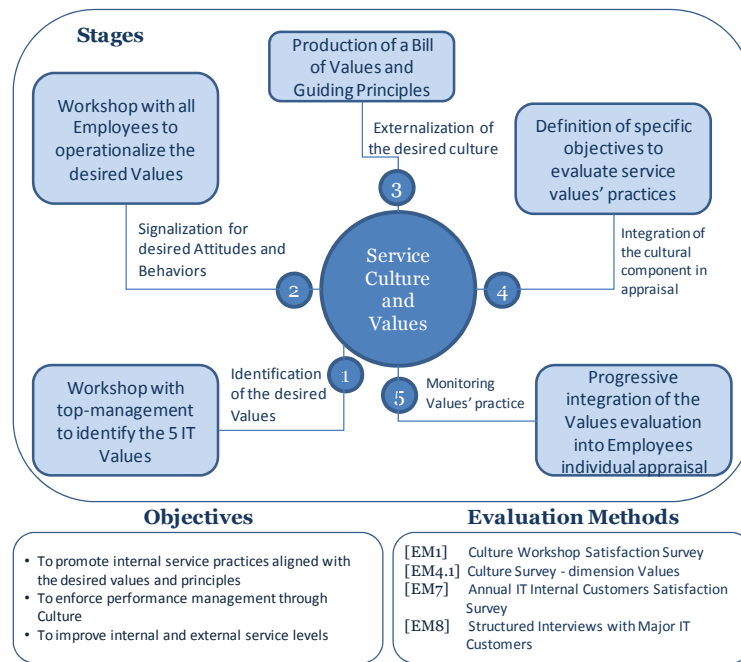


Figure 2 – Service Culture and Values – Stages, objectives and evaluation methods

### 5.1.1 – Main Stages

1. Identification of the desired Values – in a specific Workshop with IT top-management, five core values (Global Service Vision, Competency, Innovation, Results Orientation and Cooperation), aligned with the desired culture, have been identified;
2. Signalization of desired Attitudes and Behaviors – conduction of twelve workshops, involving all Employees – integrating values' presentation, discussion and concretization through specific behaviors, with the objective of creating common meanings and developing awareness for critical behaviors concerning customer service;
3. Externalization of the desired culture – systematizing information generated during the previous stage and production of a bill of values and guiding principles for IT services;
4. Integration of the cultural component into appraisal – based on the bill of values and guiding principles for IT services and sharing it with the Employees – this stage corresponded to the definition of specific objectives to evaluate service values' practices;
5. Monitoring Values' practice – progressive integration of the Values' alignment evaluation into Employees performance appraisal.

### 5.1.2 – Summary of Results

The results – evaluated through the regular Internal Customer's Satisfaction Survey – revealed an effective services' quality improvement, very evident for items related to behavioral elements on service and pointing to service oriented attitudes within the IT area (such as a

increased availability for customer attendance and more effective support on problem resolution). Considering that the Culture Workshops have been focused on these variables it is valid to assert that there is an effective congruence between the investment made and the perceived service improvement. Based on the interviews which have been conducted, it is also possible to assert that the improvement effort, at internal processes' level and at service quality, has been visible for the customer top-management structures. Most of them have done explicit references to the teams' customer proximity and have perceived this program, and its communication strategy, as an explicit evidence of a strong improvement commitment – thus recognizing *Changing IT* as a structuring element for the new IT unit's positioning (next to its internal customers). According to the internal Culture Survey, it is also important to emphasize the great congruency between Employees and Internal Customers – in the sense they perceive the IT Unit's culture positioning: a typical Market Culture structure, focused on results, with major attention on service delivery's quality monitoring. Although, within the Culture's Value dimension it has been denoted some enforcement on items related to a hierarchical culture – control, rules' accomplishment, maintenance and stability. Besides the evident greater concern with the customer's satisfaction focus, employees still perceive the IT Unit as somewhat focused on internal processes.

## 5.2. Leadership Practices

The following diagram (Figure 3) depicts the main stages, objectives and evaluation methods for this intervention's focus area.

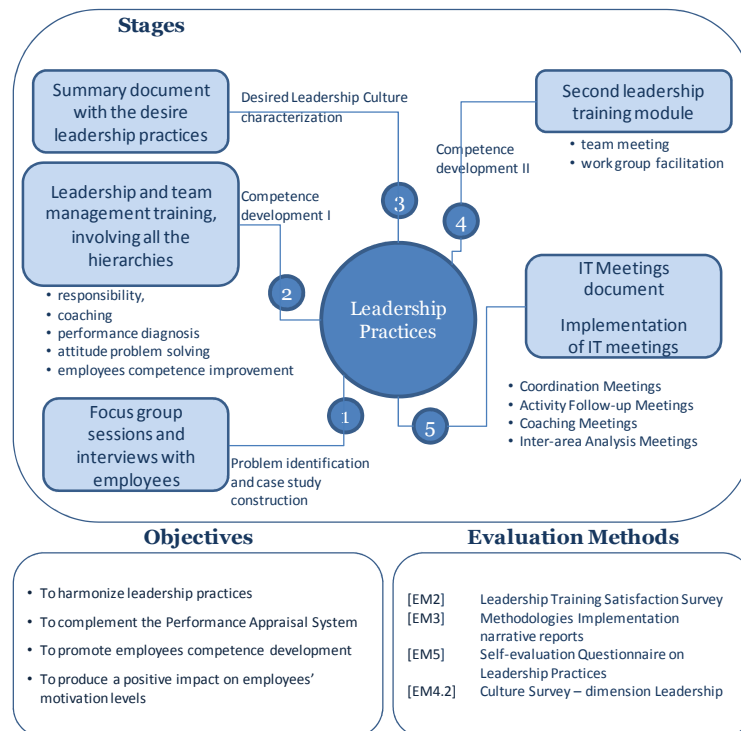


Figure 3 – Leadership Practices – Stages, objectives and evaluation methods

### ***5.2.1 – Main Stages***

1. Problem identification and case study construction – through focus group sessions and interviews with employees – having as objectives the characterization of current leadership practices, identification of needs for leadership competence development and collecting information to construct case studies for training;
2. Competence development I – leadership and team management training, involving all the hierarchies and covering the themes responsibility, coaching, performance diagnosis, attitude's problem solving and leader's role on employees' competence improvement. It have been applied specific methodologies to be used by work teams on the real working context, thus providing training concerning the new practices to be implemented;
3. Desired Leadership Culture characterization – production of a summary document concerning the desired leadership practices for the IT Unit – where the leadership model has been translated into practices and behaviors and communicated at all hierarchical levels;
4. Competence development II – conduction of a second leadership training module mainly dedicated to team meeting and work group facilitation;
5. Leadership practices' monitoring – based on the production and presentation of a summary document which includes the guiding principles for IT Unit meetings, according to different typologies. At this stage it has been conducted, mainly, follow-up sessions, where it has been asked to each leader to report the implementations done within their teams.

### ***5.2.2 – Summary of Results***

The satisfaction levels' with the leadership training process has been very high. The volume and quality of the methodologies' implementation has been quite remarkable – evidencing a change on the current perception that employees have about leadership practices. Effectively, it has been observed a shift on employees' perception towards the desired leadership culture. They evaluate now their direct hierarchies' leadership style as more near of them, objective and focused on results. The leaders, themselves, became more exigent concerning their leadership practices. On most situations, employees are more satisfied with the individual objectives definition process, the way they receive feedback and the form how leaders deal with attitude problems. Practices which have been assumed as mandatory have evidenced more expressive implementation levels (e.g., individual performance appraisal meetings and team coordination meetings). Besides its lower implementation's frequency, it is visible a growing attention given to the need for developing employees' technical, business and behavioral competencies. Coaching is done mainly at direct hierarchies' level, but still in a poorly structured way and more focused on support to short term tasks. There is still a lower frequency on medium-large

term employees' support. This heterogeneity on the coaching process implementation is perceived by the team leaders – which consider, themselves, that there is here an opportunity for improvement. Another visible element consists in some explicit difficulty to delegate – with its impact on the growing volume of operational work done by intermediary leaders and its implications on their (un)availability to carry on some leadership tasks directly related to employees follow-up and support. The results of the focus group sessions evidence the existence of a significant volume of work that is being carried out at a hierarchical level upper than recommended. Globally, the results evidence a very positive impact of the leadership training component of this program – which, jointly with the work done at the performance appraisal process redefinition, has implied a shift, towards the desired direction, of the leadership style perceived by employees.

### 5.3. Employee Engagement and Participation

The following diagram (Figure 4) depicts the main stages, objectives and evaluation methods for this intervention's focus area.

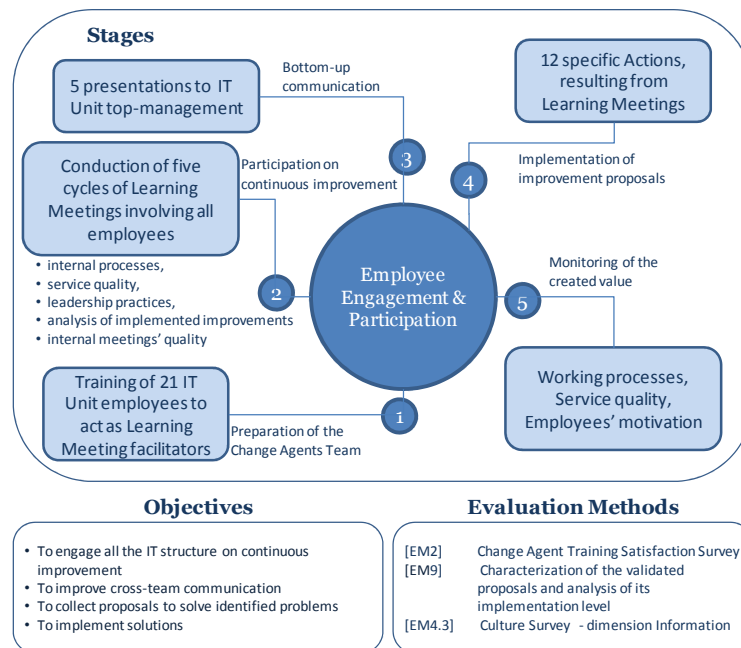


Figure 4 – Employee Engagement and Participation – Stages, objectives and evaluation methods

#### 5.3.1 – Main Stages

1. Preparation of the Change Agents Team – initial training of 21 IT Unit employees to act as Learning Meeting facilitators, as well as conduction of several follow-up sessions and continuous support to the team along the process;
2. Participation on continuous improvement – conduction of five cycles of Learning Meetings involving all employees – asking them to participate, once a month, on a one hour meeting

(in groups of 15 participants) where, analyzing a case study, they reflected about ways for solving the depicted situation. Each cycle has covered a specific thematic – internal processes, service quality, leadership practices, analysis of implemented improvements and internal meetings' quality;

3. Bottom-up communication – at the end of each cycle the change agents had systematized the proposed ideas and, along five specific sessions, had presented them to IT Unit top-management;
4. Implementation of improvement proposals – 12 specific resultant actions have been structured – in parallel with the remaining actions of the program and since the first learning meeting results' presentation to top-management;
5. Monitoring of the created value – analysis of the benefits emerging from the several actions implemented at different level of intervention – including working processes, customer's service quality and employees' motivation.

#### ***5.3.2 – Summary of Results***

All the critical tasks of this dimension have been completed with success, being evident all intervenient satisfaction – from oral informal feedback and, also, from recorded employees' testimonial (available at the program's site). The bottom-up communication mechanism – created by all employees and reciprocated by top-management – has generated a very significant dynamics towards improvement action's implementation. There were been 12 the most significant actions – with distinct impacts at internal organization, processes and service quality levels. From those, IT Academy and IT Portal are the most significant. As a consequence of this work, it has emerged a significant change on the perceptions about internal forms of IT communication. Undoubtedly, the results measured on the internal culture survey evidenced a global shift towards more flexibility in information / communication within the IT Unit.

### **6. Main Conclusions, Actions and Subsequent Results**

As it emerges from the results which have been included in the Program Closure evaluation, service quality has improved and several actions have been implemented in order to potentiate future improvements. The internal and external recognition of the program – namely through the attribution of 2010 APCE's Great Award (Portuguese Association for Organizational Communication) – sets a main milestone on the recognition of the organizational ability, and on the increment of the collective self-confidence, as concrete incentives to decide and face new projects on the domain of organizational development towards organizational excellence.

After the closure of the program, several new initiatives have been set – mainly in domains contributing to Employees Satisfaction and Motivation and Teams Effectiveness – within areas such as (1) Training, Development and Communication, (2) Leadership practices, (3) Best Practices Adoption and (4) Work Process Optimization and Supporting Tools Implementation.

The following diagram (Figure 5) presents a summary of these initiatives, highlighting their contribute to each of these areas.

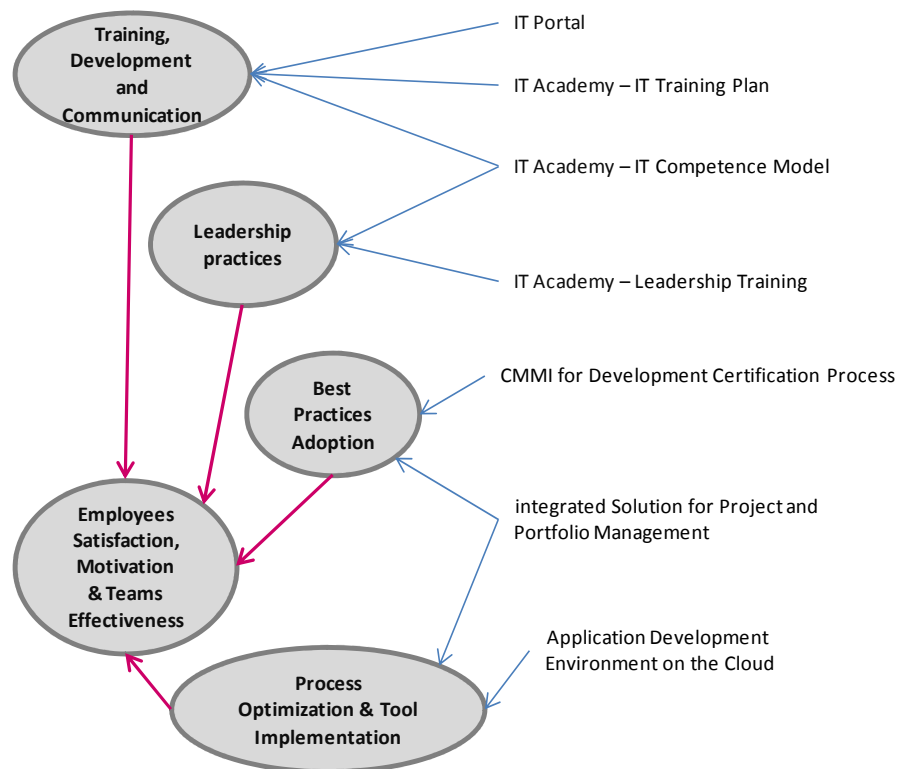


Figure 5 – Main initiatives - subsequent to the *Changing IT* Program

Among those actions, it is important to stress:

1. IT Portal – as a main vehicle for IT Communication – storing normative, process and organizational data, making available training and informative contents and providing access to services and tools supporting the activity;
2. IT Academy – defining a global IT Competence Model (aligned with international frameworks and serving as reference for professional development and training needs identification), supporting the IT global Training Plan (including specific leadership development training actions and promotion of its transfer to daily practices);
3. CMMI for Development Certification Process – aligning to maturity level 2;

4. Implementation of an integrated Solution to support the Project and Portfolio Management Process – replacing a set of disconnected tools, thus facilitating process institutionalization and continuous improvement initiatives;
5. The creation of Application Development Environments on the Cloud – as contribute to increment productivity and improve IT development projects' time-to-market.

Concerning the objective results attained after the Changing IT program – measured through the regular Satisfaction Management Systems – it is important to give evidence (Figure 6) of the significant improvements attained at Employees and Internal Customers' levels.

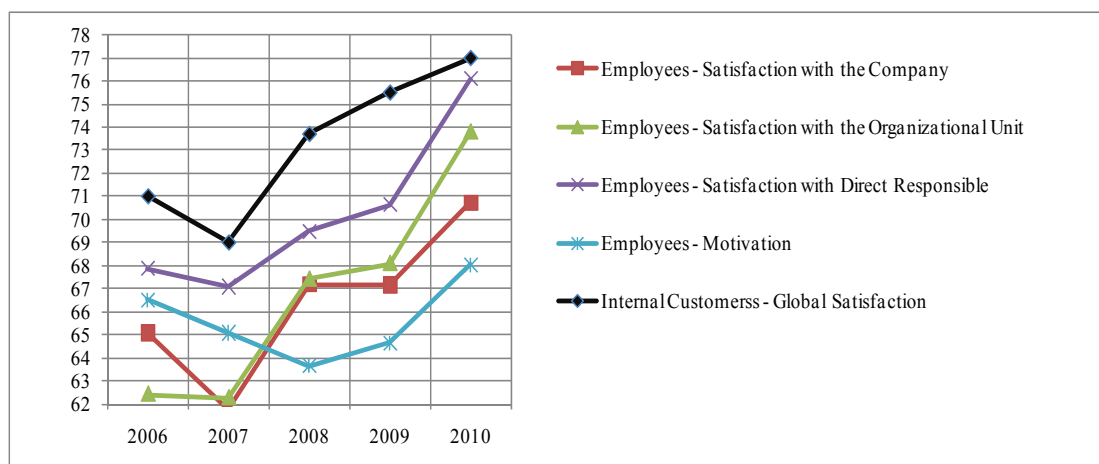


Figure 6 – Sustained evolution of Employees and Internal Customer's Satisfaction levels

As a matter of fact, about an year and half after the Program's closure, these results give strong evidence of its positive outcomes – denoting a sustained growth of index levels, with main progressions during 2009 and 2010 – and concerning the major items of Satisfaction with the Organizational Unit, Satisfaction with Direct Responsible, Motivation, Satisfaction with the Company and, not less important, IT Internal Customers' Global Satisfaction.

It is also important to enhance that – although this program has been conducted mainly along 2009 – it has been founded on relevant previous course of action taken during 2008.

In fact, during this year, the newly appointed IT top leader has triggered and actively sponsored a set of important structuring actions, including:

- new organizational structure for the IT Unit;
- new IT service delivery and support processes – including more agile structures and procedures concerning service's monitoring and user's problem solving;
- deep IT infrastructures' renewal – involving local equipments and telecommunications;
- strong investment on application improvement and housekeeping;

- customer and employee proximity and feedback practices and
- set-up of an IT Communication area – which entailed a set of structured, specific and regular actions targeting, both, Internal Customers and IT Employees.

This strong leadership involvement and commitment – expressing new objectives, policies and visible actions – has created the previous “infrastructural” conditions to a more deep change, towards a new employee’s engagement and service-oriented culture. It has produced immediate positive effects over Employee and Customer’s Satisfaction (which are clearly visible on its inflection point evidenced by the end of 2008).

## **7. Future work – Models and orientation**

The Changing IT program has created its own specific dynamics for working problems’ identification and, also, a strong conscience towards leadership, processes, values, attitudes and behavioral issues.

Specific actions have been taken – with special emphasis to leadership training involving all the hierarchies and learning meetings engaging together all the employees. The results which have been achieved and the emerging actions are effective capital assets (in terms of future organizational development applied to quality improvement initiatives) and have been strongly acknowledged, at management level, as producing significant benefits.

The Company, since its first beginning, has understood service quality as one of its most differentiating aspects and the IT areas apply, on a regular basis, a continuous improvement process based on (1) satisfaction levels’ measurement, (2) situation diagnosis and (3) the development of quality improvement oriented actions. The inherit results exhibit a significant progress and, currently, they are above the Company’s average.

Focusing on productivity and organizational effectiveness perspective, we have also introduced within our framework of management indicators (KPIs) a significant set of satisfaction indicators.

On the processes’ point of view, we are also progressively introducing improvements – mainly those which promote alignment with IT best practices (ITIL, PMBOK, CMMI and COBIT).

All these efforts denote a good ability to obtain success on the introduction of continuous improvement practices, as well as a strong willingness for innovation on this chapter.

The recent change processes’ accomplishments – mainly due to the evidence of effective outcomes emerging from its proper employee’s engagement dynamics towards improvement



actions – has created a positive perception of the great potential that these kind of actions can induce into the organizational environment.

So, the company is in a proper condition to act – sustaining its achievements and developing new ones – towards an upper level of Quality approach, conciliating the “IT best practices” approach with the creation of a new commitment to Organizational Excellence Models.

This new Vision corresponds to a significant qualitative jump in terms of approach – in scope (involving all employees and relevant areas), alignment (congruent to the desired culture and its essential values) and consistency (sustaining and self-enforcing along time).

Considering the current state of positioning facing Quality standard paradigms – in terms of already applied processes, encompassed areas and achieved results – it is evident our preparedness to promote a structured approach to Organizational Excellence, within the context of European Reference Model’s framework [ EFQM, 2010].

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