

iProCon Insight

White Paper: Identifying Critical Success Factors and
using the Force Field Analysis

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Change Management: Simple tools to define and deliver the vision.

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Many senior management teams have a clear idea of what they want their organisation or project to achieve, but have difficulty in distilling the often complex plans into a clear message for all staff. In tandem with this challenge is the need to overcome organisational inertia to bring about change and deliver your desired vision.

This paper focuses on two simple tools that can be used to address the above challenges. The first, the identification of Critical Success Factors, is a relatively simple way of articulating what must be performed well in order to achieve your vision or strategic objectives. The second, the Force Field Analysis, is used to identify the forces that drive and restrain the achievement of an objective, making it easier to identify the next steps that will deliver maximum benefit.

Critical Success Factors

Identifying Critical Success Factors (CSFs) is a vital way of communicating what must be performed well if you are to achieve the goals or objectives of your company or project. With well defined CSFs, all members of the team can understand what the objectives are and can then work together towards the same overall goals.

CSFs were popularised in the 1970s by John F. Rockart of the Sloan School of Management. Rockart defined CSFs as "The limited number of areas in which results, if they are satisfactory, will ensure successful competitive performance for the organization. They are the few key areas where things must go right for the business to flourish. If results in these areas are not adequate, the organisation's efforts for the period will be less than desired."

Whilst the use and definition of CSFs has evolved over time, Rockart's core message remains valid – that it is better to have relatively few CSFs, as they should be used to focus minds on the most critical goals of the business or project. Too many, and you risk diluting the message away from what is truly important.

So how should you go about identifying CSFs, and once identified how can you elevate them to maximise your chances of success?

Identification of CSFs is typically an iterative process:

- Step 1: Identify your mission or strategic objectives
- Step 2: For each goal, ask yourself "What is absolutely essential to achieve this goal"? The temptation at this stage will be to add all of the tasks and dependencies needed to deliver the objective. The truth is there are usually only relatively few *truly critical* CSFs.

Tip: Use the PESTLE

acronym (Political, Economic, Social, Technological, Legal and Environmental) to help identify all types of possible CSFs.

- Step 3: Evaluate the list of candidate CSFs to identify your true CSFs. It may be useful to use problem-solving frameworks (such as an affinity diagram) to group the candidates and determine if there are any underlying themes.

This all sounds relatively straightforward, and it can be, however don't be surprised if you uncover new objectives, projects or dependencies as you work through this process, particularly if you are working through the process with a group.

So at this point you have identified the CSFs, now what? Of course communicating them to the team is important, as is determining how you will measure them, and remembering to revisit them from time to time in order to ensure they remain relevant. In all honesty, many people struggle at this point with the "so what" question, and this is where the Force Field analysis is so beneficial.

Force Field Analysis

Although in this paper we are applying Force Field Analysis (FFA) to CSFs, the technique can be applied to any decision or change that you are seeking to introduce.

FFA was developed by Kurt Lewin, who believed "an issue is held in balance by the interaction of two opposing sets of forces - those seeking to promote change (driving forces) and those attempting to maintain the status quo (restraining forces)". Lewin proposed that organisations were in a state of dynamic balance, where forces working in opposite directions balanced each other out. In order for a change to occur the driving forces must overcome the restraining forces – either by weakening the restraining forces, or strengthening the driving forces.



Simple yet effective tools that will help to define and deliver the vision.

Defining and delivering a vision is a focus of the iProCon HCM Change Practice

An FFA is conducted in the following way:

- Step 1: Ensure the CSF or current and desired states are well defined and understood by those involved in the process (it is better to do this as a group and brainstorm the forces).
- Step 2: List all of the forces driving change on one side of the goal.
- Step 3: List all of the forces restraining change on the other side.
- Step 4: Assign a score to each force ranging from 1 (weak) to 5 (strong), and sub-total the forces on either side.

Organisations are in a state of dynamic balance, where forces working in opposite directions balance each other out.

Kurt Lewin

Critical Success Factor: Flexibility – The organisation is able to quickly assess opportunities, seizing those that make commercial sense and quickly killing those that do not.			
Score	<u>Supporting forces</u>	<u>Opposing forces</u>	Score
5	Willingness to train individuals in order to prepare them for potential future roles.	Limited understanding of capabilities and capacity outside of departmental silos: Talent not managed across the organisation.	4
3	Continuous improvement culture exists within some departments (not everywhere)	Training needs analysis ad-hoc.	5
3	Multi-skilling is a strong feature of the production team; less so in other departments.	Strategy viewed as ambiguous and constantly changing. This makes it difficult to know in which areas flexibility is desired.	
11	Total Supporting Force Score	Total Opposing Force Score	9

Figure 1 - Example Force Field Analysis

Again the technique, whilst beautifully simple, is an incredibly powerful way of bringing about change:

- If you are trying to decide how to maximise your chances of realising a CSF, the FFA helps to clearly identify the factors that most affect it.
- If you are using the technique to determine if you should pursue a particular objective or not, the FFA can help you decide how realistic it is before committing funds.

When using the technique on live projects and initiatives, the temptation might be to try to increase the strength of the forces driving change, however it is worth remembering that the best way to increase acceptance of an initiative is often to reduce the strength of the forces opposing it.

Summary

Whilst there are more complex tools available that will potentially give a greater breadth and depth of understanding, the real beauty behind both the identification of Critical Success Factors and the Force Field Analysis is their simplicity.

By identifying and communicating CSFs and conducting a Force Field Analysis you can ensure that your project or organisation is focused on the areas that are truly critical for success, and clearly direct your efforts towards those actions that will most support the achievement of your goals.

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