

# ORGANISATIONAL FITNESS & RENEWAL

## A: Introduction to the concept of 'organisational fitness'

*What is 'organisational fitness'?*

- The concept of 'organisational fitness' relates to the capacity of the organisation to be mindful about its capabilities (in the widest sense, including the culture) and about its future, to learn and adapt its capabilities in order to be fit (ie. to have the required capabilities) to deliver on its purpose – both today and tomorrow.
- Application of the concept enables managers to understand the capabilities that their organisation has currently, relative to its current and future demands, so that they can purposefully, systematically and continuously monitor, manage and develop the capabilities it requires.
- The notion of 'organisational fitness' implies an embedded, continuous dynamic in the way the organisation works so that it is constantly, automatically (organically), adapting to changing demands and variables in its internal and external environment.
- The concept (of organisational fitness) is not about reaching an ideal (the required) state of fitness; rather it involves the notion of a continuous dynamic. It involves embedding a range of robust capabilities that will enable the organisation to be both pro-active and an initiator in sensing, adjusting effectively to fast-changing demands on the organisation
- Practically, a fit organisation has processes in place that ensure it can identify which capabilities it has and those which it lacks, that are or will be required to perform effectively, today and tomorrow.

## B: Why organisations need to work on their fitness: Drivers for embracing the concept of 'organisational fitness'

**Driver 1.** The Government wants ...

- 'sweeping reform' of the APS
- innovation, and
- envisages the APS being "the best public service anywhere in the world".

**Driver 2.** Survival (staying in business) and maintaining acceptable levels of efficiency and effectiveness (credibility, reputation).

- From a Darwinian perspective, unfit organisations – those that do not adapt to fit new circumstances – would not be expected to survive. If left to natural processes, organisations – like all living organisms - become unfit for purpose as they get older and their environment changes. It could be argued that, without an appropriate intervention, such organisations should be allowed to wither, die; to be replaced by a dynamic new institution that is fit for purpose. Why does this inexorably happen?
- Over time, an organisation develops a culture (a pattern of beliefs and values) that reinforces historically successful business and administrative practices. Not

surprisingly, the leaders of the organisation reflect the core beliefs embedded in the culture and use their power to sustain that culture. This fit, associated with past high performance, seems inevitably to lead to long-term rigidity.

- When the environment shifts and new business habits are required, the strengths that led to success can tend to become embedded and somewhat rigid - appearing perhaps to be set in concrete. This rigidity in the organisation's habits can get in the way of adaptation and become a weakness that can lead to failure. Informed commentators tell us that highly successful organisations often fail because they adhere too long to a pattern of behaviour that is no longer effective in a changed environment.
- To survive in a constantly changing environment, organisations need tools (processes) to help them identify and discard the capabilities they no longer need and the new capabilities they now need going forwards. Of course, they also need to know how to develop these new capabilities.
- In the special case of a government monopoly service provider, commentators suggest an unfit organisation may not cease to exist but it is more than likely it will need to be expensively propped up (subsidised) in order to survive. It is also unlikely to serve its stakeholders well or have a high reputation.

*“Monopolies and government agencies that are quarantined from competitive pressure and provide a large employment base, often live very long and very expensive artificially prolonged lives.” (Adizes Institute, ‘Understanding the Corporate lifecycle’ -Google)*

- Organisations that have had a long life and have an on-going role (possibly as a public sector monopoly) therefore face particular challenges and responsibilities in working continuously on their fitness (in terms of the capabilities they need to be effective) to ensure they maintain the agility, energy, outward focus and capacity – their ‘youthfulness’, health, fitness, effectiveness – that they need to anticipate and deal with emerging pressures for adaptation and to meet the government's and community's expectations.
- The health of older bureaucracies is very delicate. It follows that older organisations need to attend especially closely to signs of ill-health and lack of fitness. How can these organisations pro-actively discover signs of ill-health and address them?
- For these reasons it seems wise for an organisation and its leaders – especially where the organisation is aging – to work to understand what are the areas where the organisation is fit and where the organisation is lacking fitness (i.e. lacks required capability); how to leverage its strengths and address the areas where improved fitness is required in order to continue to stay in business, be adaptable and high performing.

### **Driver 3. Organisations tend not to attend automatically or pro-actively to their fitness for the next challenge they face**

\*Based on Michael Beer, 'Building Organisational Fitness in the 21<sup>st</sup> Century'; Michael Beer, Sven C. Voepel, Marius Leibold, 'Robust Organisational Fitness for Reinventing Strategy in Changing Industry Landscapes'; Brenda Barker Scott, 'Organisation Development Primer: Theory and Practice of Large Group Interventions'

- Commentators suggest that organisations tend to be predominantly focused on past successes and day-to-day internal difficulties and to not be concerned with ensuring that they possess the capabilities necessary to deal inventively with the rapidly changing environment.
- Organisations do not appear to be innately or organically adaptive. Experience suggests it cannot be assumed that organisations inherently possess the capacity to learn and change – to maintain organisational fitness for their ever-changing purpose. Nor can it be assumed that leaders of complex organisations possess the capacity to sense, without the appropriate tools, what levels and types of fitness exist in their organisation or what types of fitness need to be developed now for tomorrow. Nor is it easy to give timely and adequate attention and resources to building the required level of fitness in these areas.
- In fast-changing environments, the fitness that was the source of success in the past tends to be assumed to be fundamental to success going forwards. This sort of thinking – assumption – is indicative of the long-term rigidity that sets in. Organisations generally do not purposefully (consciously, deliberately, pro-actively, routinely) review and develop their capabilities to fit the new challenges and changing environment.
- To deal with those new challenges and changing environment, it is likely new business habits or capabilities will be required. Strengths that led to success can easily and rapidly become weaknesses and lead to failure. Experience suggests that highly successful organisations often fail because they adhere too long to a pattern of behaviour that is no longer effective.
- In other words, continuously creating robust organisational fitness capabilities may require dynamic, organic change in the organisation's structure and systems; in leadership and organisation behaviour; possibly may involve changes in various skill-sets; in coordination at lower levels and also can often require deep cultural change.

### **C: What sort of program response will address these drivers? Contemporary approaches to achieving organisation fitness;**

- What do organisations need to do to ensure they have the capabilities required to deal – reactively and pro-actively – with a fast-changing environment? A search of the state of the art literature suggests that organisations need to adopt the sort of approaches outlined below (key elements are bolded) in order to maintain (acquire, develop) the robust organisational fitness capabilities they require to function well:

#### **Approach 1. A total systems approach to organisational transformation.**

- In effect, an organisation must be able to **develop strategy from the inside out**; from listening, hearing and dealing constructively with what those inside the organisation are experiencing and interfacing that with what it is picking up from its environmental scan.

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### **Approach 2. Enable honest organisation-wide conversation**

- Management must be able to discover how the firm's existing organisational capabilities need to be augmented with new capabilities in order for them to meet the new challenges. What is clear is that organisational fitness, the capacity to adapt organisational design, behaviour, capabilities and culture to fit new circumstances, depends on **the capacity of leaders and organisations to listen, hear, confront and learn from internal tensions.**
- Looking at - **coming to grips in a meaningful way - with the undiscussables** and their consequences is essential for organisations to avoid decline. Defensive routines are deeply embedded in organisations and their leaders. Fearful of threatening or embarrassing higher ups, peers, subordinates and themselves, the whole truth is rarely communicated.

#### *Understanding the dimensions of the problem (difficulties, challenges) facing organisations in staying fit*

- It is widely recognised that there are internal organisational and human dynamics that block organisations from learning about their internal functioning and being effective.
- These dynamics arise from defensive routines that are deeply embedded in organisations and their leaders.
- The blockers or barriers are undiscussables topics, issues, concerns that have not been communicated to top management. (Beer refers to the undiscussables as the 'silent killers'; they include –
  - Unclear strategy and/or conflicting priorities
  - An ineffective top team
  - A top down or laissez faire style of leadership
  - Poor vertical communications
  - Poor coordination across functions, business or geographic regions
  - Insufficient leadership skills and development of down the line leaders.)
- **Unless key managers are engaged in an honest conversation which reveals the “unvarnished truth” about strategic and organisational issues, they cannot discover and come to understand the real problems and solve them.** More importantly, without **involving lower level managers**, commitment to solve problems cannot be developed. Gaining this buy-in or commitment is what organisational fitness is about. **Norms of silence** about how the organisation works or doesn't work, **prevent the honesty needed** to move leaders and key managers to a shared understanding of what must be changed.
- The key area of fitness required for organisational survival can therefore be seen as **knowledge and learning**. The more knowledge the organisation can put into effective use, and be able to learn from that knowledge, the better prepared, more adaptable and sustainable will the organisation be in the long run.

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- Organisations fail not through a shortage of ideas for innovation. They fail through the knowledge and ideas for innovation being locked inside peoples' minds and groups, routines and processes. Organisational fitness, being based on this insight, therefore focuses on the elements that create the climate for unlocking knowledge, freeing the take-up of innovative thinking and that nurtures growth of adaptive and re-inventive capabilities; coordination, competence, commitment, communication, conflict-management, creativity and capacity management.
- Two factors prevent employees from “speaking up,”: The first is psychological safety. Employees are afraid that telling the truth will affect their acceptance and their careers. They also, undoubtedly, protect themselves from the anxiety associated with upward feedback.
- The second is a concern about the utility of honest feedback. Their experience tells them that speaking up does not lead to change.
- To fix these blockers to **open, honest, effective communication, organisations need to establish forums for open, safe conversation, build the skills to make this the default style of communication and then do something about what the organisation learns from such communications.** The link between the conversation and their leadership's decisions must be explained to the employees.
- Open communications means that the whole organisation (all relevant participants in the conversation) know the conversation is going on, there are clear signals from the leadership team that it wants candid feedback, and there are well understood mechanisms for upward feedback and for everyone to learn about the actions management plans so they can be discussed and modified if needed.
- By safe, we mean people believe their status in the organisation will not be affected. Only if management is clear that they want feedback and demonstrate that bad news does not get punished can a climate of good vertical communication be established. Commentators suggest organisations are rather poor at doing this well.

### ***Approach 3. Organisational Fitness Profiling***

- One **large group intervention technique** (Beckhard) involves several levels of the organisation meeting together to identify problems and solve them in a supportive atmosphere that encourages risk taking. This strategic change process (called Organisation Fitness profiling – OFP) developed from recognition that it is very difficult for managers to orchestrate creating an honest conversation about the state of the organisation as a total system.
- OFP creates an honest organisational conversation about the fit of the organisation and its leadership with objectives and strategy envisioned by the top management team.
- Organisational Fitness Profiling has shown that sustaining high performance depends heavily on the willingness of top managers to confront the fit of their organisation with the demands of the competitive environment and the fit of their assumptions and leadership behaviour with the needs of the organisation.

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- There are two distinct strands to the OFP process:
  - (i) Fitness profiling enables the continuous, incremental improvement or upgrading of organisational capabilities in a systemic way. By systemic, we mean not just one organisational component is upgraded, but there is a total interactive solution of change effected throughout the organisation – e.g. in leadership behaviour, work system and structure, management processes, human resource system, principles and context. This is about continuously refining existing operations incrementally to achieve ever-improving competitive advantage.
  - (ii) Fitness profiling also is driven by the potential to co-shape the future through a re-invented business model. Continuous and dynamic fitness enables the organisation to develop sense-making abilities that can sink deeply into emerging trends and latent demands in order to identify various possible futures for proactive change. This fitness focuses on creating a range of robust capabilities to explore and activate likely effective future business models.
- The OFP levers include; leadership behaviour and style, management process, work system, principles and culture, fun, human resource system, corporate context.
- There is much to be said for involving – seeking the input of - every individual in the organisation in OFP.
- OFP is driven from support at the top, execution at the top, then support at the bottom and execution at the bottom. Staff are asked for data, this gives them buy-in to the process, they provide the data and feel an integral part of helping management to fix the problems.
- The benefits of OFP can include;
  - OFP gives greater authority to create change
  - makes employees, not external consultants, the architects of change
  - creates accountability
  - helps to prioritise issues
  - allows extremely rapid learning
  - is data based
  - helps to build collaboration & cooperation between different departments
  - strengthens bonds among the executive team
  - builds listening skills among the executive team
  - often promotes powerful, even transformational personal growth
  - is inexpensive
  - simple
  - can be easily integrated with other change management theories and processes.

#### **Approach 4. Other large group intervention technologies**

- Other large group intervention technologies such as Beckhard's Confrontation Meeting that view organisations as whole systems, have emerged. They engage the whole group in problem-solving. They involve participants in identifying the relationships among the many constituent parts (workgroups, BSL's, sub-plans) and the relationships between the organisation and its external environment. They permit large numbers of stakeholders to be actively engaged in the collection and analysis of data, as well as in decision-making and planning. Large group techniques facilitate a deep appreciation for these relationships and interdependencies.

#### *Understanding why large group processes work*

- Fundamental to large group change techniques is the assumption that organisational reality is a function of the collective perceptions of its members. Accordingly, organisations evolve as they articulate, test, and refine the mental models of their members. Large scale approaches enable new learning by expanding the database from which stakeholders diagnose "what is" and "what can be". This wide-angle view provides a platform from which a preferred future can be collectively envisioned and enacted.\*\*
- Underlying the use of these methods is the acknowledgement that organisations are generally poor at confronting difficult issues and that a disciplined method – a social technology - that creates the condition for a public, open and safe conversation is needed.
- Such approaches to confronting hidden issues safely have been largely effective in surfacing the unvarnished truth about what is going in the organisation. They are based on the underpinning insight that hierarchy prevents open communication and that open communication will help solve problems.
- In short, these methods have been focused on changing the human condition in organisations, making them less hierarchical and more democratic. However, in order for leadership teams to actually redesign their organisation to *fit* the firm's objectives and strategy, they need to learn to create and sustain psychologically safe processes for feedback. To do this they need also to embrace certain paradoxes essential for successful business transformations.
- Managers who are willing to confront the unvarnished truth can evolve their organisation and management systems to changing circumstance. But it requires humility and courage. Many managers prefer to avoid the truth about their business, organisation and leadership behaviour. Courage to learn seems to be what limits organisational fitness.
- Given that not all managers are ready to embrace the truth and learn, what might organisations do that want to develop the organisational fitness required in the 21st century? A strong case can be made for institutionalizing a strategic change process like OFP in corporations so that CEOs and business unit managers can be held accountable for continuous learning about the fit and fitness of their organisation

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and leadership. Candid review by the CEO with the board of directors and by business unit managers with the CEO about what they have learned about their organisation, their top team and themselves would develop a corporate learning culture that embraces paradox. It would create accountability for fit and fitness – the crucial ingredients for sustained corporate performance and survival.

- In established organisations, due largely to the specialisation of tasks and the development of horizontal fiefdoms, functional units often cease to communicate openly, apolitically or to connect with each other authentically, with straight behaviours. As domains (fiefdoms) become tightly defined – silos form, rigidity sets in and the system is no longer able to adapt its processes or relationships in response to changing environmental conditions. With procedural, emotional and structural blockages at each joint, the organisation becomes ‘arthritic’, with the flow of communication slowing and becoming more difficult. As mishaps occur between units who need to collaborate but don’t, feelings of depersonalisation and paranoia escalate, ultimately resulting in greater mistrust and polarisation of goals and values.
- Large group techniques, on the other hand, are an antidote to organisational arthritis. They bring the stakeholders of a system together in a common and public setting and with boundaries for respectful interaction and skilled facilitation. Structure and boundaries create both a physical and psychologically safe space for people to voice their opinions, be heard and hear others. Moving between small and large group forums, people have an opportunity to connect with each other, note differences and similarities, and develop a real appreciation and empathy for each others’ interests. As people join in and connect with each other, the stage is set for learning. People develop new, expanded mental models that provide a platform for the creation of common ideals.
- Large group technology creates porous, easy to penetrate boundaries among people and units of all levels to enable deep and pervasive action. It is based on a sound set of assumptions, including whole systems thinking, stakeholder involvement and the idea that organisations are socially constructed.

***Approach 5. Constructive, purposeful conversation (Dialogue; bottom-up, empowering, staff engagement process)***

- Purposeful, constructive conversation (dialogue) among staff who trust each other and feel safe to speak up provides the space for issues associated with the performance, effectiveness, aging and fitness of the organisation to be surfaced and addressed.
- The dialogue will create a deeper corporate understanding of - and engagement with - the concepts of organisational life-cycles; organisational fitness; developmental stages (maturity, aging, planning transitions between them – back and forth; continuous renewal and rejuvenation; flexibility/rigidity; the implications for the organisation of its history, its everyday reality and the possible obsolescence of that, of its experiences, culture, important events/crises/traumas, learnings and will position the organisation well to handle future shocks and demands.

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- The insights and knowledge that emerge are shared widely through such dialogue. Dialogue helps to shape approaches to implementing renewal and change. Dialogue ensures the approaches are designed, tailored and scheduled to align with how work and things are done in the organisation – i.e. consistent with its culture.
- From these bottom-up insights, understandings, consultation and collaboration come ideas and strategies on how to keep the organisation alive, high performing and fit.

***Approach 6. Consultancy – (also involves extensive use of bottom-up dialogue or conversation)***

- A consultancy project can be used to design and implement the solution to the challenge of embedding organisational fitness or continuous renewal. Organisational culture is self-perpetuating, so many informed commentators believe an external perspective is necessary to ensure the in-built blockers to renewal are surfaced, seen and addressed.
- Consultancies exist which specialise in the collaborative design and delivery of systematic, professional approaches to embedding organisational fitness and continuous renewal.

*- Illustration [A] - Adizes Institute approach*

Their approach entails getting an understanding the extent to which the organisation is at the PRIME stage or organisational life, which is characterised by vigour & health; understanding the extent to which the organisation is facing normal and abnormal problems and then designing tailored interventions to reach or sustain the organisation in the PRIME condition.

*- Illustration [B] – Organisational Fitness Profiling (from Building Organisational Fitness in the 21st Century by Michael Beer)*

Another strategic change process (called Organisational Fitness Profiling - OFP) creates an honest organisational conversation about the *fit* of the organisation and its leadership with objectives and strategy advocated by the top management team. It guides top management through a diagnosis of the organisation as a system, the development of a plan to redesign and change the organisational levers in the model, and then further inquiry into the success of the change over time.

Fitness Profiling ... (provides) a systemic change process – to change structure and systems as well as leadership and organisational behaviour, to make change in the top team and in the coordination at lower levels, and to create broad change across several organisational levers while also creating deep cultural change. It has been applied in over 150 organisational units within 18 corporations operating in several different national cultures with quite different work values.

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Research on the application of OFP in over a dozen organisations has shown that a disciplined process like OFP can produce an honest organisational conversation that reveals the unvarnished truth about the organisation fit with its business environment and its fitness to adapt. The discipline of the process helps general managers embrace the paradox inherent in building fit and fitness. The analytic frameworks embedded in OFP have produced dramatic changes in organisational design, leadership and performance in a variety of corporate settings and national cultures.

A program of action research, using Organisational Fitness Profiling, has shown that sustaining high performance depends heavily on the willingness of top managers to confront the fit of their organisation with the demands of the competitive environment and the fit of their assumptions and leadership behaviour with the needs of the organisation.

Managers ... willing to confront the unvarnished truth can evolve their organisation and management systems to changing circumstance. But it requires humility and courage. ... Courage to learn seems to be what limits organisational fitness.

Given that not all managers are ready to embrace the truth and learn, what might organisations do that want to develop the organisational fitness required in the 21st century? A strong case can be made for institutionalising a strategic change process like OFP in corporations so that CEOs and business unit managers can be held accountable for continuous learning about the fit and fitness of their organisation and leadership.

Candid review by the CEO with the board of directors and by business unit managers with the CEO about what they have learned about their organisation, their top team and themselves would develop a corporate learning culture that embraces paradox. It would create accountability for fit and fitness – the crucial ingredients for sustained corporate performance and survival.

***Approach 7. Embed continuous research into organisational fitness and renewal.***

Create and use opportunities to build understanding of the challenge of maintaining fitness and renewal and to embed in the organisation's DNA awareness and interest in organisational fitness and renewal.

Possible initiative 1. Sponsor an essay (article) competition on understanding organisational fitness, aging, revitalising & future-orienting mature organisations (theoretical research paper).

Possible initiative 2. Arrange for data gathering, research to be undertaken to generate material for a journal article on the organisation's place in the corporate life-cycle: the implications of the finding for the future.

Potential initiative 3. Seek to partner with an academic institution and other organisational stakeholders (APSC, other aging agencies) about establishing

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on-going research into organisational fitness, aging and renewal and producing a publication (say edited book with invited contributors providing chapter from differing perspectives) or publishing a special research compendium on organisational fitness and renewal.

Potential initiative 4. Negotiate for a special edition of a notable journal on topics relevant to rejuvenating organisations (such as organisational fitness, organisational wellness programs, resilience, etc.) In either case, a special international call for research papers and / or conceptual essays would be appropriate.

### **D: The fly in the ointment: The HR paradigm resists and blocks the above organic, bottom up processes required to achieve organisational health and fitness**

The dominant professional paradigm in the people & culture space is the HR profession. My view is that the HR profession's paradigm is essentially about control. This need for control undermines and blocks approaches to improving organisational effectiveness coming from paradigms that are not rooted in the concept of control; paradigms that are more optimistic about human behaviour, are more concerned with authenticity (in communications and relationships), straight behaviour, building trust than suspicion, distrust, power and politics. Most organisational challenges and problems of today are unsolvable, as long as we remain blind to the adverse consequences that flow from the HR profession's paradigm. It is time and important that our executives and leaders were helped to understand that HR (the professional paradigm - not the excellent, dedicated HR people who, like all humans, can't see their own culture, its adverse impacts and its limitations\*) is, many believe, the source of many blockers and problems. (\*There is a growing literature on this phenomenon - that HR is the problem and blocker to healthy organisational lives - but due to the HR function's hegemony and power to control, the awareness and debate of this problem and blocker is not getting through to our leaders, I fear.)

#### **Sources:**

*Michael Beer, 'Building Organisational Fitness in the 21<sup>st</sup> Century';*

*Michael Beer, Sven C. Voepel, Marius Leibold, 'Robust Organizational Fitness for Reinventing Strategy in Rapidly Changing Industry Landscapes';*

*Brenda Barker Scott, 'Organisation Development Primer: Theory and Practice of Large Group Interventions'*

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