the seventh R: reshaping your organization for a successful cloud migration

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abstract

When planning for a cloud migration, we often use the Six Rs as a rule of thumb to guide where applications will fit (or will need to evolve) during the shift. There is a missing seventh R: **Reshaping your Organization**. The organizational and cultural sides of transformations are too often afterthoughts yet are fundamental to success. Failing to make sure your whole organization understands the cloud vision and is equipped to embrace the changes in their day-to-day work could lead to a stalled rollout or, in the worst case, a completely failed migration. This paper discusses how to enable organizational change towards a more transparent, learning culture. Such a culture supports moving to the cloud in a complete way, carried by employees that value innovation.

problem statement

In the early phases of planning for your migration to the cloud, there are many things to take into account – where to host your systems, where your data will be stored, whether you are transitioning completely to the cloud, or whether you will continue to host some legacy databases on prem. Once the underlying infrastructure planning is complete, it's time to review what will be done with the existing system. For this we can use the standard method of categorizing application migrations using the Six Rs.

• Rehost
• Re-Platform
• Refactor
• Repurchase
• Retain
• Retire

It's extremely important to identify where existing applications will fit in these categories, as a migration is no small task. Planning alone may take as long as several months to kick off and complete.

This transition will undoubtedly consume your brightest Architects, Senior Engineers and Directors. Yet it is often the case, your Developers, Managers, Business Analysts, Testers, and Support Teams can be left in the dark. In a typical tech-focused migration, this second group may only receive an incomplete trickle of information from those directly involved. When these teams are left to speculate, and suddenly there's a change that will soon be made part of their day-to-day lives, they will inevitably lean towards the negative possible outcomes and resist that change.

the overlooked 7th R

There is a seventh R that is often overlooked in a cloud migration: **Reshaping your Organization**. Cloud migration affects not only applications and the engineers running them, but the organization and people in it. Communication channels, roles, and responsibilities will all be affected. During a transformation, it's of the utmost importance to make all feel like welcome participants undergoing a shared journey. Remember, your team members are the ones who enable the transformation in the first place. Their hard work and skills are what build the infrastructure needed for the transition. Even those indirectly involved deserve strong communication and a chance to ease into change.

What's ideally required is a larger cultural buy-in to make the transition smooth. That's because, without cultural change, the transformation may fail. As Gartner research describes it, *Cultural issues are the root of many failed business transformations, yet most organizations do not assign explicit responsibility for culture (Moore).*

Why is organizational culture so important? Without strong organizational support for cloud transformations, your business may face:

• Attrition
• Skill deficit
• Burnout

All of these translate to increased expense and potentially stalling your cloud migration. With attrition, for example, when valued team members leave your organization, you potentially face substantial costs through:

• Losing institutional knowledge and hard-won relationships
• Hiring and training new team members
• Increased workload for remaining staff, potentially leading to burnout

the challenge of change

Stalling in your migration due to a wave of attrition and burnout is the worst possible outcome for your business. When you're unable to successfully complete a cloud migration, you'll get increased complexity in your systems without realizing the benefits of a completed migration. Instead of building in resilience, you may be in a place where your systems are so hard to debug that, when an outage is taking place, it's nearly impossible to quickly understand how to restore them to a stable state. You'll see Mean Time To Recover (MTTR) from failure increase, and your deadlines will slip.

When people running your day to day are left to guess at what cloud changes mean to them, you have already failed your migration. Changes to your systems come with changes to the responsibilities of your teams, and these must not be an unknown to those affected. When your whole workforce understands what these changes mean for them, and what is needed to drive the migration forward, it's much easier for them to contribute to its success. Otherwise you risk both a decline in workforce with them leaving, and a decline in the system itself.

...people demand less evidence to diagnose lasting decline than lasting improvement, despite similar evidential quality (O'Brien and Klein 1).

The organization is sensitive to change, and sensitive to any decline during that change. Cloud migrations therefore must hold the organization and enablement of communication channels as fundamental components to a transformation of any scale to ensure proper adoption and completion of goals.

background

Organizational enablement is extremely important, but you will not find a simple explanation or a silver bullet that will instantly allow you to put sweeping changes into practice. Before we can unpack how to solve for this gap, we'll review some concepts and practices from around the industry that support reshaping your organization.

organizational culture

Organizational culture is the sum of values and rituals which serve as 'glue' to integrate the members of the organization. Richard Perrin

Before you can change your culture, it's important to understand what organizational culture is. Culture is formed gradually as the organization takes shape and evolves. It's the reflection of your reward system, the recognition of your team's success, and the challenges that have been faced as a group in order to get to where you are. Naturally people may have left the organization, and new members will have joined during this time. But your culture equates to all of the reasons that people have stayed for, worked late for, and celebrated success over the years.

With your culture comes a set of organizational values. These can be boiled down to what is most important to the organization. Likewise, employees have their own personal values that reflect what is most important to them in their work. Where there is a mismatch between employee and organizational values, you find people are more likely to become burned out with their work, leading to demotivation and lowered performance.

change management

Change management is the process, tools and techniques to manage the people side of change to achieve the required business outcome. Change management incorporates the organizational tools that can be utilized to help individuals make successful personal transitions resulting in the adoption and realization of change ("Definition of Change Management").

A change management framework is the "how" part of change. It's how your organization adapts to change, giving you an iterative loop that can be referenced repeatedly, with action items and a process to step through. This standardization can help push your teams towards the overall vision and goals established for the transformation.

While there are many change management frameworks, their ultimate goal is the same: creating a reference map for introducing new experiments or changes into your organization. A good path is to pick the one that makes the most sense for your organization and stick to it. We'll examine a successful example in a bit.

vision statement

A Vision Statement clearly and succinctly expresses why you're going to the cloud. It can be something like "Enable technical flexibility to produce quicker customer value" or "Lower the cost of experimentation." The vision statement is defined by leadership and shared throughout your organization, plastered to walls, and repeated often. Your teams will align their individual responsibilities with this overarching statement, driving their changes forward towards the shared goal.

value stream mapping

Value Stream Mapping (VSM) is a breakdown of how information flows throughout an organization. The main goal is to identify bottlenecks and areas that impede information flow. VSM is a lean management methodology that helps teams visualize all the steps in a value stream, from product creation to end-customer delivery. This allows the organization to understand the current process in order to make meaningful change through analysis and process improvement.

organizational enablement

Finally, before you can begin to change your organization, you need to understand what kind of organization it is. A good place to start is with Westrum's organization types in "A Typology of Organizational Cultures."

*I would identify three typical patterns. The first is a preoccupation with personal power, needs, and glory. The second is a preoccupation with rules, positions, and departmental turf. The third is a concentration on the mission itself, as opposed to a concentration on persons or positions. I call these, respectively, **pathological, bureaucratic**, and **generative** patterns (ii23).*

In examining these three cultures, Westrum sought to measure the flow of information from point A to B. In our case, this would be leadership (vision setting) to "boots on the ground," our developers, testers, and ops.

*...**pathological** circles tend to view information as a personal resource, to be used in political power struggles (Westrum ii23).*

Here, information is pooled up behind individuals and used as power. This information will be given out on a need-to-know basis, and will oftentimes be used solely to advance oneself.

*...**bureaucratic** organizations need to get information to the right recipient, they are likely to use the standard channels or procedures. These standard channels and procedures are often insufficient in a crisis (Westrum ii23).*

There is much less of a power struggle in bureaucratic organizations, as there is a plan and process cemented in place, though all communication must go by the book. This can often be seen as an informational bottleneck. The reporting is in place, though proper redundancy isn't supporting the flow of information or decision making.

*...**generative** organization alignment takes place through identification with the mission. The individual "buys into" what he or she is supposed to do and its effect on the outcome (Westrum ii23).*

As opposed to the bureaucratic organization, where a member identifies with their unit or group and aligns with them, a generative organization seeks to define "what is happening and why," allowing members to align with the vision of leadership. It makes the overall mission a personal one and alignment a routine exercise.

By having access to the larger picture, the needs of others around them come to light. This promotes more cooperation across groups and helps steer the organization towards the desired outcome.

How organizations process information

Pathological	Bureaucratic	Generative
Power oriented	**Rule oriented**	**Performance oriented**
Low cooperation	Modest cooperation	High cooperation
Messangers shot	Messangers neglected	Messangers trained
Responsibilities shirked	Narrow responsibilities	Risks are shared
Bridging discouraged	Bridging tolerated	Bridging encouraged
Failure → scapegoating	Failure → justice	Failure → inquiry
Novelty crushed	Novelty → problems	Novelty implemented

Westrum ii23

Westrum summarizes the three organizational types by stating:

...pathological climates encourage finding a scapegoat, bureaucratic organizations seek justice, and the generative organization tries to discover the basic problems with the system (ii23).

At its heart, organizational enablement means building out the framework for Westrum's generative organization. Organizations that fall under the pathological or bureaucratic models can (and should) incrementally move towards a more generative culture by shifting the overall focus within top leadership, and the frameworks they put in place. Your organization's goal should be to empower those who are a part of it, allowing them to own and drive their part of the vision statement. When every member is welcome to speak up and share new ideas and act as welcome participants, your team members will strive to push the changes forward, feeling safe to communicate areas that need further improvement. The key to Westrum's theory is in the mapping out of how information flows through the organization. He states:

The kind of conditions that create good information flow tend to be those that favour cooperation, creativity, and safety. On the other side, conditions that interfere with information flow also tend to decrease creativity, create conflict, and make the organization involved less safe (ii24).

the seventh R solution

Reshaping your organization is no small task. Your people are likely going to resist parts of the transformation, but it is crucial that you create a transparent, even playing field to help them understand why the change is taking place, and how you'll go about doing it together.

It's also important to remember that implementing change of this magnitude will never fall under a one-size-fits-all approach. Your organization may share some commonalities with another, though it is unique when it comes to your culture, product, and history.

Because of this we can break down how to plan and implement reshaping into two important segments: introducing a change management framework, and general guidance we've found works well. You are the subject matter expert when it comes to customizing the cultural shift in your organization, and with these general guidelines in your back pocket, you'll be closer to implementing a smoother cloud transition tailored to your particular organization.

selecting a change management framework

With a change management framework you gain structure and a clear path for adoption of new ideas, which will help to keep order when many items are changing at once.

Selecting a framework to introduce to your organization can be a daunting task. There are many to choose from, though all of them seek to introduce structure and order to change. We've had successful experience with implementing the "Kotter 8-step process" with our clients, so we'll use it as an example. The Kotter process seeks to put eight steps in place to ensure the least possible resistance along the transformation journey. The eight steps are based on a number of characteristics gleaned from successful organization change:

From experience we learn that successful change occurs when there is commitment, a sense of urgency or momentum, stakeholder engagement, openness, clear vision, good and clear communication, strong leadership, and a well executed plan. Kotter's 8-step change model recognises each of these characteristics (Webster).

The eight steps of Kotter's change model are:
1. Create a sense of urgency
2. Build a guiding coalition
3. Form strategic vision and initiatives
4. Enlist a volunteer army
5. Enable action by removing barriers
6. Generate short-term wins
7. Sustain acceleration
8. Institute change

Overall the Kotter framework seeks to break down the "why" for changes that are being made. It starts with clearly-defined objectives and driving them forward with a sense of urgency. From there it is important to build a guiding coalition that can push a strategic vision, and enlist a volunteer army – those who actually care about the change being implemented will be your best allies in the process.

removing barriers, enabling success

In order to succeed, your organization needs to be able to succeed. This is why step five of the Kotter process, enable action by removing barriers, is key to the entire framework. If there are blocks in process or communication, your changes will bog down and may altogether halt. Be sure that your team members feel welcome to speak honestly about roadblocks, not assigning blame but focusing on positive solutions.

Other best practices the framework introduces are celebrating short-term wins and collecting metrics from change. Most of your organization will not wait for a final "we did it" celebration during a long transformation. It is important to celebrate smaller stepping-stone achievements by giving props to team members along the way. To firmly recognize smaller wins, collect metrics of all new changes introduced into your organization, review them, and identify how efforts have succeeded or failed. Cement your successes in place. With failures, go back to step five and review how roadblocks might be removed.

In the space of change management frameworks, there is always an iterative loop. You should never feel that you're "done" improving. What is often left out of the "why adopt a change management framework" question is that, with each consecutive cycle, pushing a change through the organization becomes easier. Throughout the process you're gaining more buy-in from your teams and are actively seeking to remove bottlenecks. There will be times where progress slows, or a new idea is not well received. But every success will grow your culture into a generative one a little more.

further guidelines

In addition to a change management framework, there are particular guidelines that we find work well in cloud transitions. There is no one easy solution to fix every organization's culture in one fell swoop, though there are important characteristics to strive for. They begin at the leadership level.

Learn how to change

Thought leaders Nicole Forsgren, Jez Humbolt and Gene Kim give a simple yet profound perspective on the starting point to transform culture in the book Accelerate.

We are often asked by enterprise leaders: "how do we change our culture?"

We believe the better questions to ask are: How do we learn how to learn? How do I learn? How can I make it safe for others to learn? How can I learn from and with them? How do we together establish new behaviors and new ways of thinking that build new habits that cultivate our new culture?... Where do we start? (192)

More than anything, such questions imply a culture of curiosity in learning and a freedom to explore new ways of doing things. But how do we practically grow such a culture? Sowing these seeds starts with purposeful tools and transparency.

Identify your deliverables, roadmap, and communication channels; these are to be defined in completion and shared up front. These will drive your organization towards the changes you're seeking; use them to embed a learning focus with iterative elements in the process. As a leader it is your main objective to make sure that these focal points are fresh in everyone's mind and that the roadmap is on target.

If anything slips, don't hide it. Be transparent. People are absolutely aware that a slip has happened (the world of software deliverables and deadlines is a place we're all familiar with). Own your miss and speak to it, executing as close to complete transparency as possible. A culture that pools up information in silos leaves teams on the outside wondering what is happening, if the change is failing or if their jobs are at risk. Seek to be a generative culture that shares information – risks, successes, failures – and moves failure forward with positive change that bridges gaps.

Shape your vision and share it

Create a list of values and goals necessary to complete your cloud migration. Walk through your current information flows and visually map them out. Using this insight, make a formal vision, and share it with everyone in the organization. This is also likely the point where you'll see cracks in your plan. This is perfectly ok, and even necessary. Partner with those who will be impacted the most and identify the spaces where people and processes need to adapt in order to meet these newly set goals. Here, your communication and vision have to be echoed, shouted, and repeated. This is essentially a buyback in state for the members of your organization. Your message has to speak to why they are here in the first place, and why they should trust these changes to be beneficial.

After your vision is shared, start asking questions of those with "boots on the ground" to see if it's carrying through the business from end to end:

- Do you have a clear idea of where your group fits into the vision?
- Do you understand where the company will be going?

Remedy any gaps with more communications around the groups and people who do not have a shared understanding, and seek to clarify your messaging.

Simply calling out the mission is not enough to be sure that all walks of life in your organization understand the goals and vision completely. If you're in an organization that does not have clear communication channels, people may not understand that a change is needed. In this case, any change will likely instill fear based on unknowns. While asking questions to make sure the vision is understood by all, you should also seek to identify bottlenecks in the flow.

- Has the message stopped at your managers/directors?
- Is there a specific group that doesn't have the full picture laid before them?

Identify desired behaviors and communication channels for success in a cloud migration

Before embarking on a migration, you should establish exactly what the organization stands to gain from going to the cloud. Then find the gaps in your current structure. Using the results from this value stream mapping, write down all of the behaviours and communication channels that are needed in order to achieve the goals set in place. Lean management uses "Hoshin Kanri" (compass management) as a process to identify strategic goals and take action through communication channels. It is defined as, "a 7-step process used in strategic planning in which strategic goals are communicated throughout the company and then put into action" ("Hoshin Kanri").

The main goal of this process is to promote communication and goal setting over all else. Explicit communication channels are created with the means of sharing information and learning throughout the entire organization.

Equally important to communication channels are the shared behaviors and values that are communicated through those channels. In general, a few behaviors needed to pull off a successful cloud migration are:

- Equality among team members
- Communication
- Shared learning
- Rapid adapting on the individual level

The specific behaviours that are held important to your organization need to be defined internally. They should be shared and explained to all they will affect – and then treated as a golden mantra to work by.

Align hiring and training

People at all levels will resist the changes put in front of them without proper buy-in by explaining what the value gained from the transformation will be. The change to the cloud can be a drastic one. People may feel that they're not qualified to be involved, others may fear that their jobs are being replaced, some may disagree with the approach altogether. You can combat this by sharing information based around the "why" for the transition. Motivate your teams and point them towards the end goal. This is a time for learning and growth, not one of reprimand and punishment.

Your teams may have to act differently. Some of your roles could change altogether. It's necessary to identify the skills your team members currently have, and compare those to the new responsibilities to come.

Create job descriptions for the new roles in the company when needed, and make sure your training and hiring teams are in the loop on what skills qualify for the new roles. Share these resources with your teams. You'll find certain people that are excited to take on this new space; allow them to champion the changes. The excited ones are an indispensable asset when trying to get momentum for a complete adoption of a new culture.

Lead don't command

It can be easy to assume that change happens from a top-down perspective: once a direction is set, all will fall into place. This is very far from the truth. Maintaining momentum and establishing a tipping point of adoption is impossible without proper buy-in from all affected.

As a leader, the willingness to accept change and – together with the greater organization – work through the issues that arise requires a monumental effort. A top-down approach is not enough for a change to take place, be adopted by all, and to last. It may mean stepping aside as a leader and letting others push the vision and goals of change forward. This could sound scary or be a drastic departure from the status quo. But what we're seeking in a highly-cooperative culture goes beyond power and position towards enabling others. It should not mean "a highly cooperative culture to a point." Mary Parker Follett writes:

Leadership is not defined by the exercise of power but by the capacity to increase the sense of power among those led. The most essential work of the leader is to create more leaders.

As a leader you should:
- Make sure the vision is understood by all
- Empower your groups to lead towards this goal
- Coordinate leadership practices distributed throughout the organization
- Remove the carrot on the stick mentality
- Give the time needed to make this work

Whether actively working towards it or not, leadership is shaping culture with every daily interaction. Culture is formed by rewards, correction, and communication around what is felt as important.

With this, culture becomes a reflection of what is put into it. Your messaging and goals drive your organization which feeds culture. Your culture cements and grows your organization based on what has been deemed successful.

Adapt your culture and own it

Culture is not something that can be changed all at once, and the individuals in your organization are likely there because of the culture that has been created over time. They have a passive buy-in for what they hold as personal values, and how those personal values compare to the organization's values. Burnout rates will increase when there is a misalignment between personal and organizational values. Alternately, productivity and retention will increase when there is alignment. In Accelerate, Forsgren writes,

Strong feelings of burnout are found in organizations with a pathological, power oriented culture. Managers are ultimately responsible for fostering a supportive and respectful work environment, and they can do so by creating a blame-free environment, striving to learn from failures, and communicating a shared sense of purpose (97).

A key point is that when there is a change made to the culture – in the case of a cloud migration, how work is being done and how teams communicate – the individuals need to buy back in. This will take time and effort.

Begin by outlining what the changes mean for each team and communicating those changes transparently. Allow your teams to ask questions and give feedback on how their daily lives will be affected. If your vision statement is aimed around "lowering the cost of experimentation," and this means that your engineering groups can roll new solutions into your testing environments several times a day instead of several times a month, what will they spend this newfound ability to experiment on? If the new system allows higher resiliency, and builds leverage canary or other fail-safe deployment methods to catch issues before they become disasters, what will your managers do with this overhead in developer time?

What my... experience taught me that was so powerful was that the way to change culture is not to first change how people think, but instead to start changing how people behave – what they do (Shook 66).

Shook points out that an integral part of cultural change is simply giving people new things to do, new problems to solve. Capitalize around the benefits that moving to the cloud will bring, and challenge your teams to innovate around this new space.

conclusion

A cloud migration is not merely a shift towards innovating on technology, but a cultural shift towards valuing innovation. Valuing innovation and creating a safe, learning culture can be seen as a driver of cloud, but more than that, it is its own greater reward that simply runs parallel with the changing landscape of technology. It is much more valuable in this landscape to have people that value learning the latest technology rather than merely having the latest technology.

By being transparent and encouraging inquiry and iteration, you can push your organization towards becoming one that welcomes change and rewards innovation. This takes time and practice, though it is possible. Aim to become a generative culture that has a change management framework in place. Share your vision for change, and empower the people that care about the organization to drive the vision forward.

contact us

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