

Advances in Project Management Series ¹

Leading the transformation: Navigating disorder in times of crises ²

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The term transformation is often used to identify and describe a more intense, extreme and radical change in form, shape, nature or appearance. Such a radical shift requires a significant transition to new mindsets, thought processes and operating paradigms.

Transformation is particularly applicable in the context of large organisations looking for alternative future scenarios. Indeed, the notion of addressing the challenges associated with enabling, managing, leading, sponsoring and directing major strategic change initiatives has preoccupied corporate leaders for decades. Kotter (1996: 3) maintains that the amount of traumatic, significant change has been growing tremendously and will likely continue to do so as powerful macroeconomic forces continue to play out. Kotter (1995: 59) observes that when large companies try to remake and reposition themselves, they often encounter a number of major obstacles which he characterises as the eight significant errors and traps that lead to the failure of transformation efforts:

1. Not establishing a great enough sense of urgency
2. Not creating a powerful enough guiding coalition
3. Lacking a vision (that clarifies the projected future direction)
4. Under-communicating the vision
5. Not removing obstacles to the new vision
6. Not systematically planning for and creating short-term wins
7. Declaring victory too soon
8. Not anchoring changes in the corporation's culture

While the downside of transformation is inevitable, the pain accompanying it is palpable in many organisations. The errors seem to dynamically combine in more volatile environments leading to significant consequences such as, slowing down the

¹The PMWJ *Advances in Project Management series* includes articles by authors of program and project management books published by Routledge publishers worldwide. Each month an introduction to the current article is provided by series editor **Prof Darren Dalcher**, who is also the editor of the Routledge *Advances in Project Management series* of books on new and emerging concepts in PM. Prof Dalcher's article is an introduction to the invited paper this month in the PMWJ. See Darren's background and qualifications at the end of this article.

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new initiatives, creating unnecessary resistance, frustrating employees and stifling change (Kotter, 1996: 15). The specific consequences include the following (p. 16):

- New strategies aren't implemented well
- Acquisitions don't achieve expected synergies
- Reengineering takes too long and costs too much
- Downsizing doesn't get costs under control
- Quality programs don't deliver hoped for results.

Moreover, the conditions for making decisions without corporations are also shifting. The business environment demands more larger scale change (p.56). Decisions meanwhile, are:

- based on bigger, more complex and more emotionally charged issues;
- made more quickly;
- made in a less certain environments;
- require more sacrifice from those implementing the decisions;
- furthermore, no one individual has the information needed to make the major decisions, nor the time and credibility needed to convince people to make them (ibid.)

More recently, Kotter (2014: 10) observes an even greater imperative and more urgent need to accelerate transformation through: innovation, productivity improvement, integration of acquisitions or global operations, key strategic change, cultural change, and profitable growth. Yet, organisations often introduce their own limits. Accordingly, Kotter also identifies a set of obstacles to making progress, including: limited number of recognised change leaders, silo parochialism, rules and procedures, pressure to make quarterly numbers, complacency and insufficient buy-in (ibid.).

Revisiting the topic of transformation after 20 years, Ashkenas (2015) points out that the success of transformation efforts still hovers at a persistently meagre rate of around 30%. Ashkenas explains that whilst traditional change management implies implementing finite, well defined initiatives, transformation requires a different order of magnitude of actions characterised by an interdependent and intersecting portfolio of initiatives, which aim to reinvent the organisation and redefine the business model based on a new vision of the future. The nature of such initiatives therefore implies a more courageous, unpredictable, iterative and experimental journey through uncharted territory, as leaders endeavour to make sense of the emerging new terrain, experimenting with and seeking new ways to survive, thrive and prosper.

Reinvigorating digital transformation

The interest in transformations has accelerated through an increased focus on digital transformations that is sweeping across many industries, creating new products, services, experiences and platforms. Whilst digital technologies have proved to be a great enabler, an interesting insight that permeates a lot of the recent work seems to affirm that digital transformation is not about the platforms and new digital

technologies, but rather about rethinking the business model, refreshing the strategy and developing new ways of thinking. In other words, digital transformation is about making sense of emergent opportunities, embracing new possibilities, and developing a strategy that would harvest and benefit from the interactions with a richer world.

Digital transformation is positioned as a process, strategy and blueprint that foster digital disruption and the identification of opportunities for discovering and enhancing new value creation paths. Deloitte (2016) define it as an opportunity to express a bold ambition, unlock new opportunities, drive new growth and rethink the business and operating models to deliver breakthrough value. Vial (2019: 11) maintains that structural changes within organisations enable transformational change in value creation paths that in turn facilitate novel value propositions, value networks, digital channels and agility and ambidexterity. The impacts often extend beyond the corporation, reshaping industry, business and society at large.

Digital transformation is often positioned as a tempting proposition to business, yet one which can terrify senior leaders. Highsmith et al (2020) duly define digital enterprise as an enterprise that is transforming itself to meet the challenges of the post-industrial Digital Age by embracing an adaptive culture, employing transformational technology and creating new business models. However, that journey is never simple. Andriole (2017) observes significant hype associated with digital transformation and offers insights around five key myths and misconceptions associated with the term:

Myth 1: Every company should digitally transform: Digital shocks are only useful for some organisations, and while the efficiencies of processes will decline and diminish over time, streamlining should only be applied where it makes sense.

Myth 2: Digital transformation leverages emerging or disruptive technologies: In reality, most short-term transformational impact comes from conventional rather than disruptive technologies; indeed, it is often easier to achieve impact with technologies that are already in widespread use.

Myth 3: Profitable companies are most likely to launch successful digital transformation projects: If things are going well, transformation will be low on the agenda; moreover, successful companies will resist the temptation to inject changes to their business models.

Myth 4: We need to disrupt our industry before someone else does: Disruptive transformation rarely begins with the market leaders; it tends to come from start-ups making bold bets in established marketplaces.

Myth 5: Executives are hungry for digital transformation: Digital transformation requires strong support, endurance, unwavering dedication; indeed, many executives feel challenged by the sheer complexity and scale of projected digital transformation (p. 22), and may also be reluctant to tweak what already works.

Indeed, innovation does not often happen in successful, established and well positioned organisations. Repositioning today's business to capture the future may seem risky, especially when things may still be going well. Agile approaches have often been offered as a way of encouraging innovation, but have also been seen to lead to challenges, when efforts are not coordinated. Rigby et al. (2016: 2018) acknowledge that agile cannot reshape an organisation all at once, making a case for balance that will enable organisations to optimise some aspects of work, whilst innovating and refreshing other aspects offers a more responsive and adaptive way forward.

Crisis accelerates transformation

Leading transformation is difficult at the best of times; however, everything seems to change in times of crisis. The Covid-19 Pandemic had unleashed unprecedented torrents of transformations to every conceivable aspect of life ranging from schooling, office work, meetings, retail, shopping, and supply chains to entertainment, travelling, holidays, city centres, airlines, charities and markets. No aspect of life seems immune to an immediate demand to transform.

Disasters, pandemics and turbulent times make significant change and transformation possible as participants embrace the outcomes of the crisis as a challenge (Bayram et al., 2020; Dalcher, 2020a). Society it would seem, can pivot into significant transformation at the behest of leaders. A radical new reality was demanded almost instantaneously, just as work, the firm, business, the economy and society at large were being radically overhauled and reconfigured. Many transformations simply had to work first time around as life was being reconfigured.

Turbulent times call for new skills and capabilities. Rakesh & Wind (2020) define a set of eight key principles needed to adapt and navigate disruption:

Principle 1: Challenge your mental models and always stay ahead

Principle 2: Reimagine and reinvent your approach to customers and stakeholders

Principle 3: Speed up digital transformation and design for personalisation at scale

Principle 4: Reinvent your talent strategy and embrace open innovation and open talent

Principle 5: Seize the need for speed and design for agility, adjacencies and adaptability

Principle 6: Innovate then experiment, experiment, experiment

Principle 7: Redraw your timelines and build a portfolio of initiatives across all innovation horizons

Principle 8: Deploy idealised design, recreate your organisational architecture and network orchestration

Yet, during the pandemic, there was a need for acceleration, to jump into action and deliver a new reality, immediately. Societal shock was sufficient to enable new coalitions to form and join forces to deliver the new reality. The transformation needed was nearly instantaneous as the crisis had magnified deep disruptions, and coalesced

societal demand introducing turbulence on a hitherto unexperienced scale. Bhattacharya, et al. (2020) maintain that thriving in an era characterised by the three major forces of social tension, economic nationalism and technological revolution requires a new set of strategies; chief amongst them is the need 'to embrace *always-on transformation*' as part of a continuous journey.

Navigating in times of crisis

The pandemic catalysed and accelerated the digital and strategic transformation journeys that many organisations, charities, public bodies and society itself embark upon. But how does one engage with a transformation journey exploring different options, possibilities and opportunities?

How do we learn to navigate in times of crisis? The article by Jonathan Whelan offers important guidance for leaders and change and transformation managers. It is derived from a recent book *Visualising Business Transformation: Pictures, Diagrams and the Pursuit of Shared Meaning* written by Jonathan Whelan and Stephen Whittle published by Routledge. Whelan's work seeks to empower change leaders' ability to visualise significant change and design informed and meaningful change interventions.

Transformation journeys are complex, uncertain and turbulent. Whelan embraces a dichotomous world where many fundamentally different approaches are available. He makes a case for embracing diversity and plurality of approaches and recognising the range of different perspectives that can be utilised. Transformation often redefines what is possible, and hence a useful playbook that enlists the range of philosophies and perspectives is much needed. Whelan's work provides exactly that, a solid starting point for visualising and engaging with transformation journeys.

Whelan contrasts a contained machine-based perspective, introduced in terms of programme management, with an organic position that can build on design thinking as leaders engage with and learn from their environment. The pandemic has reminded us that the context for change and transformation is becoming more complex, with a need to connect with a wider range of participants who are ready and able to respond and transform rapidly.

To encourage greater diversity, Whelan introduces systemic ways of thinking and complexity as additional perspectives on change. He also offers some solid thinking around the role of models, pictures and diagrams in facilitating change. Models play a key part in guiding and navigating turbulent and uncertain contexts. Ultimately, Whelan's approach offers a plurality of navigational approaches through the notion of employing a larger portfolio encompassing a collection of thinking paradigms related to navigating the journey. Transformation journeys remain extremely challenging and difficult to navigate, but Whelan's approach can encourage leaders to view and explore alternative perspectives that can fit a given business context and offer a way of coming to terms with some of the options.

Transformations remain both significant and fundamental. The recent pandemic has forced an urgent rethink of what can be achieved through transformation, disruption and acceleration. When leaders first began to engage with the notion of transformation, it was typically applied to something that was being acted upon (i.e. in the process of *undergoing a transformation*; something being done to someone or something.). Nowadays, transformation is more embracing and significant, as we transform people or things more directly. As we begin to make sense of a richer range of transformation options, we can embrace a plurality and diversity of more active possibilities, where transformation takes place more actively and more speedily. Indeed, the diversity of options enables further shaping and defining of the context, the modes of interaction and what can become possible as a result of our new transformation journeys. The lesson from the pandemic is perhaps that life will never be the same again but we can develop models and pictures that will help us navigate towards a better and more meaningful future.

Projecting a better future

Necessity is the mother of invention... Thinking creatively can make a difference, especially in constrained time and space situations, but to do so under pressure is always challenging. A global pandemic is therefore not merely an epic calamity; indeed, according to Bayram et al. (2020) a pandemic-sized opportunity opens a whole new portal; a new space, a creative chance to rethink and to question everything. The dizzyingly intensifying pace of the pandemic also forces the rapid integration of different tools, capabilities and communities through new waves of integrating digital transformation. Yet, liberating through new digital spaces and technologies and enabling digital transformations, must not disintegrate into *digitalism*, when unchecked and misguided digital connectivity is carried out without considering the attendant adverse repercussions on science, human rights and every day practices of democracy (ibid.: 460), and the potential clashes with governance of health and society (Dalcher, 2020b). Chief among the concerns is the shrinking of critically informed debate, where technical, biological, temporal, spatial and political uncertainties interact in the covid-19 pandemic horizon, especially when facts are uncertain, stakes are high and decisions are urgent (Bayram et al, 2020) with lingering concerns regarding fairness, society, governance and potential future scenarios and long-standing implications.

However, securing a better future may require a little bit of help. Innovation is essential in unlocking new patterns of behaviour in many different sectors, scenarios and situations, especially in a constrained climate with shrinking resources. The purpose of innovation in difficult times is to spark new links, patterns and triggers that break with the past and introduce new paths and potentials. Bayram et al (2020: 463) conceive innovation spaces as knowledge ecosystems that are always in the making, contested and ought to be deliberated by diverse publics, and therefore filtered through distinct public lenses, including human values, power, hopes, fears, assumptions, concerns etc. They make a case for utilising *epistemic competence* as a way of helping to overcome, at least partially, the uncritical approach to public engagement and innovation policy making, and in particular to help address

democratic deficits in civic life, not least to counterbalance the growth of populism and authoritarian governance. The crises have been used as opportunity to speed up decision making regarding health, well-being, choices and societal implications, and it would therefore be essential to rebalance and liberate the opportunity space and the innovation potential by developing more systemic basis for questioning the epistemic nature of decisions and assumptions about what is known and understood.

Langlois et al. (2020: 587) identify a Covid-19 silver lining, a significant disruption to health profession education and practice, and consequently to interprofessional education, ultimately leading to a new model of learning and practicing, where professionals are forced to acknowledge that much remains unknown. The current crisis offers a golden opportunity to break with what has not worked, reflect on what has been useful and reposition and plan for a new form of reflection in practice. This view requires a rethinking and repositioning of professional practice, akin to the view offered by Dalcher (2016: 815):

'Fish and Coles (1998) contend that there are two fundamentally different views of professional practice. The first view accords with an instrumental technical rationality, implying an achievable competency-based perspective concentrated on the elements of practice. The classical approach thus prescribes and proscribes all the practitioner's activities. The second view acknowledges the situated and fast changing reality, replete with uncertainty and therefore advocates a reflective and deliberative practice. This modern view acknowledges that practice is messy, unpredictable and unexpected requiring continuous refinement and update as practitioners endeavour to understand complexities and investigate actions and theories.'

Traditional competence-based approaches have proved to be of limited use during the pandemic. Making sense of uncertain contexts and networks requires new ways of engaging with what is known and what may be possible and exploring new opportunities for collaboration and innovation for the future.

Open innovation communities

Chesbrough (2020: 410) identifies significant advantages that have been accentuated during the pandemic. The first, features the rapid mobilisation of scientists, pharmaceutical companies, and government agencies to launch a variety of parallel scientific initiatives to find effective responses to the virus. The second, has focused on the unprecedented release and sharing of copious volumes of data about the virus, its spread, and the range of human responses in order to accelerate research and identify new avenue for exploration. Parallel experimentation and the release of complete datasets encourages greater openness and the liberation of discovery and innovation, especially when speed is crucial.

'Opening up mobilizes knowledge from many different places, causing our learning to advance and our progress against the disease to accelerate. Openness unleashes a volunteer army of researchers, working in their own facilities, across different time zones, and different countries. Openness leverages the human capital available in the

world to tackle the disease, and also accesses the physical capital (such as plant and equipment) already in place to launch rapid testing of possible solutions. This openness corresponds well to an academic body of work called open innovation.' (ibid.: 410)

While a case for open and distributed innovation can be made at any time, it's value during an extremely uncertain pandemic becomes even more compelling. Crowdsourcing has proven effective at responding to immediate pushes for action and therefore holds potential for underpinning and enabling much needed future transformations (Dalcher, 2019). Chesbrough sees an even greater potential for harvesting open innovation in the post-pandemic spirit, and a way of overcoming financial constraints and societal limitations, whilst encouraging greater openness and sharing. Specifically, he identifies a set of suggestions that will liberate and enable further collaboration through open innovation communities (Chesbrough, 2020: 412, which is slightly summarised and paraphrased below):

1. **Encourage your scientists and engineers to engage deeply with the wider scientific community;** allow them to invest time and contribute to the work of the community; encourage them to launch and share their own experiments and learn from the experiments of others
2. **Share some of the most challenging problems that might benefit from collaboration;** make scientific and technical data available on open platforms; include other specialists, including users
3. **Work with your legal team to manage your IP more creatively and openly;** pragmatically separate your IP into three separate buckets: including your crown jewels, to be protected, the middle ground, to be shared selectively with key customers, suppliers and partners, and the long tail that can be opened up to everyone, enabling everyone to innovate, improve and grow what is known
4. **When you achieve a major technology breakthrough license out previous generation technologies to spread them to new markets;** that can create chains of entire new markets, waiting for improved products, and building up from earlier generations of licensing

The innovation DNA is triggered by misadventure

Innovation can be viewed as an organisational response triggered by crisis. Rather than viewing the pandemic as an inhibitor. Jha and Saini (2020) maintain that crisis can serve as a precursor of innovation emphasising innovation and creative problem solving. Drucker (1985) similarly reasoned that innovation is sparked by unexpected occurrences, incongruities, process needs and inevitable changes in process, organisation and context. Anthony (2012) encourages a number of internal practices that foster innovation through the four lenses of questioning, networking, observing and experimenting. The pandemic can therefore be utilised as an opportunity to identify innovation pathways and opportunities to explore, question, probe, experiment and reflect, encouraging a deliberative professional practice that engages with difficulties, challenges and opportunities and enables the development of more reflective and considerate professionals, who are more comfortable with the unknown

and the uncertain, and are ready to explore, challenge and probe a way forward. Alternative futures can therefore emerge from interaction with the present and the challenging, offering benefit, value and learning that enables further growth and development through engaging with present and future endeavours.

George et al (2020) note that the viral contagion has also resulted in a social contagion in terms of accelerating technologies and their adoption during the pandemic. Digital transformation has proliferated during social angst and readjustments resulting in a significantly altered new reality, which is more technology savvy and innovation infused. What is not clear, is the long-lasting implications of such contagion. Will we continue to collaborate beyond the pandemic? Will we continue to digitally transform all social and corporate practices? What will be the lasting and residual impacts of all the parallel change be? Indeed, will the flurry of innovations simply die out when the pandemic ceases to occupy our attention or have we been too significantly transformed to revert back to old ways of thinking and being?

A lot depends on our remaining appetite for change and innovation. The pandemic has heightened our self-awareness of inequalities, offering a potential for rethinking values and questioning long held views about fair distribution and equality. The pandemic has also sensitised us to new technologies and opportunities and offered a glimpse of an alternative world which may be more open and liberating and more conducive to redistribution of various assets and capabilities. But would we be open to a rethink beyond the immediate shadow of the pandemic? Will our sense of social purpose outlast immediate necessity? And most critically, will our journeys of imagination and transformation be too coloured to search for an alternative albeit more egalitarian and responsible future?

The experience of the pandemic has also enabled significant achievements. Johnson & Murray (2021) concede that it is much easier to develop new ideas and drive change during an emergency and they therefore seek to synthesise the learning from a turbulent period into a set of lessons that can be applied to future innovation efforts and utilised in the future. Their formulation encompasses the following five interdependent conditions (slightly rephrased as below):

1. **A crisis provides a sudden and real sense of urgency:** Proximity to a grave problem focuses attention and galvanises action, whilst the absence of a problem reaffirms the status quo: To foster innovation organisations may need to approximate some of the launch conditions.
2. **The urgency enables organisations to drop all other priorities and focus on a single challenge, reallocating resources as needed:** Crisis situations defy normal decision making rules, requiring immediate attention and urgent, if difficult trade-offs: Crisis situations may dictate new priorities, form immediate consensus, accentuate particular decisions and force specific choices.
3. **With the new singular focus and reallocated resources, it is now everybody's responsibility to come together to resolve the challenge, bringing a new diversity of viewpoints and perspectives:** Diverse teams and coalitions can be formed to tackle the specific challenges and develop new

skills and coalitions to address emerging challenges through open coalitions and open innovation communities.

4. **The urgent focus and perceived importance of finding an urgent solution legitimises the effort, allowing for more experimentation and learning:** The gravity of the crisis attenuates concerns related to the potential failure of some of the solutions or the experiments. Newly heterogeneous groups with different combinations, capabilities and resources receive a license to play, try, test, experiment and explore more diverse options and solutions – allowing for potentially radically different approaches and innovative experiments to emerge. This perceived urgency and need undermines the normal organisational fixation with efficiency allowing organisations to experiment with spare resources, thereby unleashing new forces and reserves for innovation, change and discovery.
5. **Because the crisis is only temporary, the organisation can afford to commit to a highly intense effort over a short period of time:** Deadlines and sprints have long been used as timeframes and timeboxes for experimentation and discovery. Organisation can continue to design appropriate cadence for continuous and unrelenting discovery work, where there is a sufficient coalition and political interest, but designing such operating mode outside the normal system can still prove challenging, and sustaining such efforts beyond the immediate and urgent need, can still be difficult.

Ultimately, we have seen that innovation and significant transformations are possible. Crisis situations are challenging particularly because they are pervasive and immediate. The license to innovate and to transform, it seems, comes with a heavy price tag one that is given a special warrant to operate under the most exceptional circumstances. Nonetheless, the pandemic proves that alternative futures are possible. Special innovative teams can be formed and new ideas can be stormed and experimented to address extreme journeys of discovery and innovation and enable exceptional transformations to emerge and persist.

Change and transformation remain difficult, reflecting a need to begin with an urgent and demanding challenge. To empower a richer and more diverse palette of potential modes for charting progress and engaging with challenges, we need to embrace a diversity of options and situations, continue to learn from the most extreme opportunities and above all, allow for alternative futures in the making. Together communities can achieve more and transform more widely, and hopefully the lessons of global cooperation and collaboration can help us to make sense of future challenges, liberate achievement and engage with a richer and more diverse future in a deeper, more engaging, better informed and more purposeful way.

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