

# **Meditation: A Powerful Change Management Tool**

**Resiliency during a Major Change through Meditation & Mindfulness**

By

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## Executive Summary

Pacific Blue Cross has recently undergone the largest technology and business transformation in the history of the organization. This was a seven year project, affecting every department, most business processes, and how we do our jobs.

We started offering weekly lunch time meditation and mindfulness classes in early 2011, and the participation level has grown from 12 to 190 employees (representing 26% of the organization). It has become part of our culture and has the highest participation rate of all health and wellness activities offered in our organization.

Leading up to our large transformation project which went live in April 2014, I wanted to capitalize on the employee's engagement of meditation and mindfulness. Specifically, I based each session's introductory talk on the Prosci ADKAR model for individual change. For the months leading up to and after the implementation, I geared the classes towards guiding people to experience the journey they wanted to have, rather than feel like a victim or that they had no control.

I hypothesized that the success we had to date would benefit participants by helping them through the large transformation with more resilience and less stress. In turn, this would reduce the organization's risk from a people perspective.

At the six month post-implementation mark, a participant survey was conducted which demonstrated the undeniable benefits that meditation and mindfulness has had on our employee population.

Even amidst the typical technology and business process issues that most large implementations have, our staff went through the height of the transition phase with strong commitment and calm. This paper explains our journey.

## The Challenge: Getting employees through the largest transformation in the company's history

This paper is not about common change management strategies, it is about a unique and innovative way that we used to build employee resiliency to change and reduce stress.

Pacific Blue Cross has been British Columbia's leading benefits provider for over 70 years. Together with BC Life, our subsidiary, we provide health, dental, life, disability and travel coverage for approximately 1.5 million British Columbians through employee group plans and individual plans for those who do not have coverage with their employer.

In April 2014, Pacific Blue Cross implemented its largest technology and business transformation in the history of the organization. This new system replaced 25 disparate systems that managed our enrollment, administration, claims and billing functions – the administration heart of the organization. The new system, called 'ACES', replaced multiple mainframe systems with a Windows-based client server system. This seven year project substantially impacted business processes, how people do their jobs, and changed the way we interact with our clients. Pacific Blue Cross had 730 people to help through this massive change. Our unionized employees had little experience going through change and most were long term employees (20+ years) in production type clerical roles.

At eight months post-implementation, we are now able to share how our meditation and mindfulness program positively helped people through this transformation.

As the Change Manager at Pacific Blue Cross, I was part of a Business Readiness Team that did a superb job of preparing the organization for the change from a business readiness, training and communication perspective.

From the start of this project in 2007 until now, the change management competency of our management team has risen to a solid level. Much emphasis was directed to business readiness, which was well-planned, right down to cutover checklists. This ensured each business area knew what to do during the go-live period. Even with our skilled management team and detailed business readiness plans, we still had a significant challenge ahead of us.

Along our journey, we experienced four delays in the project's go-live date. A new CEO arrived in the company. Stress and burnout were mounting. People's vacations were cancelled, anxiety increased and cynicism grew about whether we would ever go live.

Even with our diligent business readiness and change management plans, people were fearful about the magnitude of this project and how it would impact the organization, jobs and our client community.

Pacific Blue Cross has an exceptional internal offering of ongoing health & wellness programs including: yoga, onsite gym, onsite health clinics, flu shots, educational Lunch & Learns, health challenges, health fairs, an employee assistance program, and so on. Even with this rich set of health & wellness offerings, the anxiety and fear level about the upcoming change was evident. Participation levels in these programs started to decline as the implementation drew near.

We knew we had to keep people committed and calm to get through the massive transition. The risks were significant if we didn't and included:

- Unmanaged stress that could lead to toxic behaviors affecting the work environment, performance, absenteeism and disability leaves.
- Inability to focus and learn the new systems could affect user adoption and proficiency.
- Poor client relations which would affect our reputation.

## **A powerful change management tool – the use of Meditation and Mindfulness**

In early 2011, about half way through the project, I introduced a practice within the organization that was seen as unusual at the time.

I had just returned to work after dealing with a cancer diagnosis, and told many co-workers of my experience with meditation and mindfulness. This practice had given me a whole new perspective on life, and gave me the calm and resilience that carried me through the cancer journey.

Through many years of practice, attending workshops and courses, and participating in various groups, I had gained a tremendous amount of knowledge and experience about meditation and mindfulness. My co-workers asked me to teach them what I knew.

I began a modest weekly meditation group at work for twelve people, which included two senior vice presidents. I taught basic meditation and mindfulness techniques in a non-religious fashion, and quickly learned what worked well to get beginners interested and develop confidence in their own practice.

I developed a 'Learn to Meditate' curriculum geared towards beginners and made it applicable to the workplace. It was important to make it non-religious, easy to attend and offer people options so they could sit in office chairs or use meditation props if they desired.

The light bulb went on for me: meditation and mindfulness is much more than a personal life practice. *It is also a unique change management technique that can shift people's perceptions, attitudes and behaviors about what they are going through at work.* The benefits that my students were sharing with me indicated that their state of being, and often their outward behavior, had changed since starting a meditation and mindfulness practice.

With so many reported benefits, it was challenging to succinctly describe this. But simply put, it was **increasing resiliency & reducing stress**.

In a few short months, the twelve participants reported many wonderful benefits and began to share their experiences with co-workers. A natural grassroots groundswell began with very little effort.

I then opened up the program to everyone in the organization (approx. 730 employees, including external consultants). I felt it was important to include consultants as I saw them as our partners and they, too, needed benefits from the classes.

The participation list grew steadily over time:

- By May 2011, four months later, the class grew to 42 people.
- By January 2012, one year later, the class grew to 75 people.
- Today, November 2014, almost four years later, 190 people are registered. This represents 26% of the organization.

I attribute the popularity of the program to the fact that when people experience such profound benefits (see figures below), they are likely to tell other people. Also, I often shared the remarkable survey results around the company, and that captured people's attention. Most people are seeking ways to reduce stress and make their lives easier.

## How classes are run

The meditation and mindfulness classes are designed for easy attendance and broad appeal to everyone, regardless of experience level. This is a non-religious program, so there is no conflict with anyone's personal belief system.

Here are the key components of the program:

- Newcomers attend a 30-minute introduction that teaches basic

foundation for meditation posture, attitude, and technique.

- Weekly 30 minute class, at lunch time.
- Class starts with a 5-10 minute talk/lesson to settle people in, and instructs on the meditation that is about to begin.
- The meditation is guided for 15-20 minutes, leaving a few minutes at the end of the session for questions and comments.
- Each class teaches a new concept or reinforces a previously taught meditation or mindfulness technique. This allows participants to find what works best for them. The variety also keeps the interest level high.
- Participants must register, but attendance is a drop-in format with no obligation.
- I run this on a volunteer basis.
- A minimum \$2 donation per class is collected, which is donated to holistic health and cancer causes.

Although the skills taught and practiced in class apply to both our work and personal lives, I often talk about common work examples that cause stress in the workplace. For example, I refer to the changes that the organization is going through and how it may impact jobs, processes and technologies. Then, I ask the participants to become aware of how they are reacting to such stresses; the simple act of becoming self-aware is an important step to making a decision on how they will choose to react.

## The Vision

With the obvious success of the meditation program prior to the project's implementation, I made a very intentional decision to see how this practice would specifically help people through our big transformation.

The vision was to:

- Reduce stress and increase their personal resiliency.
- Focus clearly on people's self-awareness and reactions through the transition, hoping it would help participants, and have a ripple effect across the organization.
- Benefit the organization by having people calm and committed through the implementation.

## The Action

In the months leading up to the project's implementation date, the focus of the introductory talk/lesson at the beginning of each class was to specifically address the large transformation from the individual, personal perspective.

This included:

- Becoming very self-aware of one's own perceptions about the change.
- Learning to mindfully choose their reactions.
- Using mindfulness techniques to become present through their day, and practice non-judgment.
- Recognizing emotions and being mindful of behaviors at work and at home.
- Creating a feeling of community that we are all in this together. We had a change management theme of 'All Hands on Deck' for go-live.
- Cultivating calmness and improving clarity of thought and focus through meditation.

I openly and directly addressed many of the rumors and situations that were occurring around the office regarding the project. I discussed these issues and how the use of meditation and mindfulness could help them deal with these. This significantly helped the participants improve their ability to journey through the change.

I designed my introductory talks at the beginning of the sessions based on Prosci's ADKAR model for individual change. For example, 'Awareness' was discussed as taking the time to become self-aware of how much they understood the change, how they were reacting to the change, and how their reactions affected their emotions and outward behaviors. 'Desire' was discussed as reflecting on whether they made a conscious decision to support the change, etc.

Many reported that their perception and mindset regarding the project shifted, and they were better able to manage their own experience, regardless of what was going on around them.

On the day of 'go-live', silicone 'reminder bracelets' were distributed to all employees, regardless of whether they were meditation class participants. These silicone bracelets had the words 'Perspective, Breathe, Calm' imprinted on them. The meditation participants had been involved in selecting the words for the bracelets. Note that 'Pacific Blue Cross' is abbreviated as 'PBC', so the meditation participants chose '**P**erspective, **B**reathe, **C**alm'. The bracelets were introduced as a way to remind people to be mindful as we went through the implementation. An accompanying card was distributed with the bracelet stating:

- Choose your **P**erspective
- Remember to **B**reathe
- Be **C**alm

## The Outcome

The action plan had remarkable results.

The project's implementation experienced typical challenges, common with any project of this magnitude. We had many technological issues high call volumes, and lots of overtime to keep up with the activity. Employees were very tired.

Staff and management, however, remained calm and committed, and the 'All Hands On Deck' approach was apparent.

We created a well-crafted guide for people leaders called 'Guiding Employees Through ACES'. The purpose was to provide guidance and support to people leaders in recognizing distress and employees who are struggling with the change. The guide provided them with suggested ways to handle such situations and how to escalate people issues to Human Resources. We were pleasantly surprised that not one instance occurred where an employee issue needed to be escalated.

There was a surprising calmness throughout the organization during implementation and the calmness continues now, at eight months post-implementation. There is still a high number of technology and business process issues to be resolved, so we're not out of the woods yet. The degree of commitment and calmness, however, is very evident across the organization.

On balance, it is important to note that the implementation was not 'rosy' across the entire organization. There have been pockets of the company that were hit hard, dealing with huge backlogs, high call volumes, technical and business process issues and angry customers. The point is that even with such pressures, the blanket of overall calmness has been steady. . People have essentially been able to self-manage through this difficult time.

In the weeks leading up to and after implementation, attendance was high at the weekly meditation classes. This was very positive, given that people were extremely busy, and missed other health and wellness activities. This confirms the priority people gave to this practice.

## The Metrics:

There are countless, wonderful anecdotal stories from participants as to how this practice has benefited their lives. Quantifying the measurable benefits, however, is challenging. Despite this, the charts and feedback below are compelling.

The following results are from a survey conducted in September 2014, six months post-implementation:

- 190 registered participants were invited to respond.
- 85 people responded.
- Results below represent 65 people who have attended class at least five times.

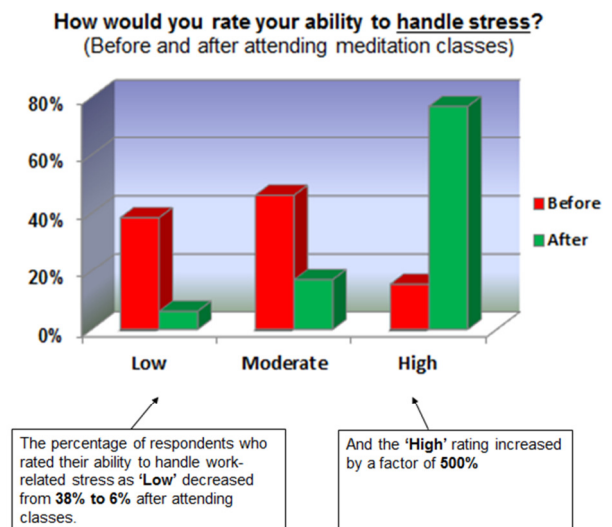


Figure 1 - Stress

**How would you rate your personal resiliency?**  
(Before and after attending meditation classes)

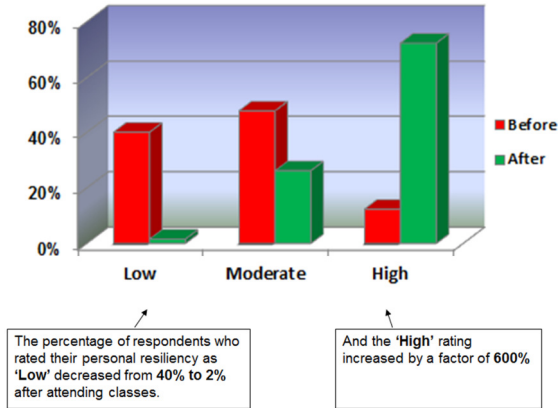


Figure 2 - Resiliency

**How much has meditation and/or mindfulness helped you through our big system implementation?**

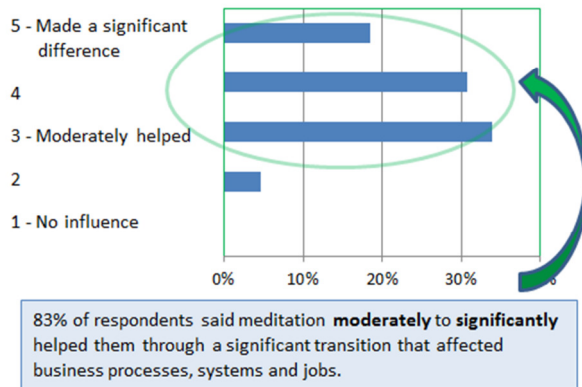


Figure 3 – Degree it helped through major transformation

The results show the remarkable and measurable impact that meditation and mindfulness has had on the participants.

In particular, in Figure 3, 83% of the respondents (54 people) said that meditation and mindfulness moderately to significantly helped them through the transition.

The most compelling comment provided by a staff member was:

***“This is the single, most important thing the company has done to help people through the project. All other things are good (yoga, gym, etc) but teaching meditation and mindfulness is having the biggest impact.”***

**Participant Feedback:**

Shown below is representative feedback from meditation class participants. These comments come from all levels (front line staff to executives) and across all departments in the organization.

- Just 1/2 hour of meditation a week has helped put things in perspective.*
- After meditation, I was feeling more confident in the project.*
- Meditation helped me manage and calm anxiety over related issues.*
- It helped me to be more focused.*
- I've changed my mindset to worry only about things that are important to me or something that I can do something about.*
- I've only been to two classes and I'm already making different choices on how I choose to react or behave. I know I'm just starting but the impact is so profound I feel I can already see my life in terms of before discovering meditation and after.*
- I think it has helped the most in dealing with other people. I think more about the situation(s) for a few moments internally rather than just reacting.*
- I have been able to take situations that would have stopped me cold in the past, and calmly, through meditation and mindfulness, approach the situation with less stress, anxiety and clearly move forward in a positive way. Having learned mindful presence has made me more here, in the now. As a result, I have solved situations with more clarity, focus and positivity.*
- The techniques have allowed me to reduce the amount of counseling and medication needed to combat depression.*
- Allow any negative interactions to be let go easier.*
- Being mindful has allowed me to put the system change into a whole new perspective. Feeling*

*relaxed about the learning the new processes were vital to my ability to go with the flow.*

12. *Meditation has helped me in every way, work and at home. I deal with everyday things so differently now. I don't feel as anxious.*

13. *I was staying relatively calm through all the transition.*

14. *I feel more calm and much more willing to experience whatever comes my way.*

15. *The "Perspective, Breathe, Calm" bracelet we were given at Go Live really helped me.*

## **Why this is important to change management**

In change management, we know that people's ability and willingness to adopt and accept change is a critical success factor for a successful transformation.

Sometimes the best change management practices are not enough to help people through a change. In such cases, developing personal internal strength and resiliency contributes to a more resilient corporate environment.

Personal resiliency can appear in many forms:

- Coping well with stress and adversity.
- Exhibiting positive behaviors when faced with challenging situations, such as communicating one's concerns respectfully, asking for help, seeking to understand, helping others, etc.
- Actively participating rather than withdrawing or being toxic.
- Ability to 'bounce back' quickly after a setback.
- Self-awareness of one's own reactions and choices.
- Remaining calm and professional.
- Avoiding or reducing depression.

As change management practitioners, we know that successful organizational change happens one person at a time. Addressing an individual's needs can be very difficult for change leaders for many reasons – lack of time, lack of skills, etc. Teaching people to become self-aware of their own thoughts, reactions and emotions allows them to cultivate their own personal resiliency.

## **Spreading into the local change management community**

I founded a change management group here in my home town of Vancouver, British Columbia in 2010. This group has now transformed into the Vancouver Chapter of the ACMP. I have had the opportunity to share my journey about how meditation and mindfulness has had such an impact on our change management at Pacific Blue Cross. It has intrigued a number of change management professionals who are considering it for their organizations.

## **Spreading beyond Pacific Blue Cross**

Media attention regarding the proven benefits of meditation and mindfulness is pervasive. This has made the subject of meditation come 'out of the closet' and into day-to-day conversation. When I started teaching meditation almost four years ago within Pacific Blue Cross, it was seen as rather odd. Today many companies are showing interest. Mental wellness is becoming more of a focus for organizations.

I have developed a workplace meditation program with a self-sustaining facilitator training module so organizations can run ongoing sessions themselves.



## Conclusion

Since beginning meditation and mindfulness weekly classes in early 2011, the benefits have been loud and clear. This has been confirmed, through surveys, anecdotal conversations and the sharing of benefits that staff discuss amongst their co-workers.

This paper is written to not only share the benefits and how we achieved this, but to show measurable results in how this practice has helped people through our large transformation project. The results are measurable and remarkable (see Figures 1, 2 and 3).

It is clear to our organization, from management to front-line staff, that this practice has helped many people through the change with lowered stress and increased resiliency. People generally have remained consistently calm and committed throughout the implementation, and we are proud to be able to say the implementation went very well from a people perspective.