



**An analysis of organization transformation to enhance
performance and minimize resistance to change**

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1 Introduction

This report aims to examine the impact of organizational transformation on performance. It aims to systematically discuss the motivations and factors that influence performance. In addition to drawing on the theoretical framework and historical practice of Western countries, this report will also incorporate a unique perspective shaped by traditional Chinese cultural values. It will explore in depth how organizational change affects performance. In addition, the report will also deeply analyze the necessity of change management in Chinese logistics industry and put forward corresponding recommendations.

2 Background

Performance management, a critical instrument for executing organizational strategies and achieving objectives, has traditionally been pivotal in driving profitability. However, the advent of the COVID-19 pandemic has precipitated a global economic downturn, profoundly impacting enterprises worldwide (Bagchi, 2020). Duringt this disruption, the goals of performance management practices have changed, often adopting a punitive approach characterized by fault-finding, cost-cutting, and layoffs. Recent data indicates that the annual layoff rate in large Chinese companies has escalated to as high as 20% over the past three years (Amosh, 2023). This trend has engendered a high-pressure work

environment, with employees resorting to unsustainable practices like excessive overtime to evade layoffs, particularly in non-revenue generating departments such as customer service and finance department (Zicari, 2023). The current economic challenges necessitate a reevaluation and restructuring of performance management systems, which proves the necessity for organizational change in this context. As Guerra (2023) suggested, organizational change is not just beneficial but necessary for effective performance management. It ensures that performance management systems are adaptable, aligned with strategic goals, supportive of modern work practices, and conducive to employee engagement and a culture of continuous improvement.

3 Theory Foundations

3.1 Performance Management

Performance management is a widely used management method in businesses and organizations. However, when examined in depth, one may question the need for performance management. Given that company, departmental and individual goals have been established and performance-related employee incentives are in place? The answer lies in the inherent complexity of human nature. The famous management consultant Peter Drucker (1993) pointed out that the management of

intellectual employees is the 21st century, one of the most challenging task. The modern business performance management system is often thought of as a logical part of the organizational structure, but in fact it is based on a wide range of management theories. These theories explore the understanding of human nature, motivation and the practical application of people and organizational management

It is vital for organizational leaders, particularly HR leaders, to not only understand how to apply methods, tools and systems to the performance management process, but also to have a grasp of the underlying management theories and the context in which they have been developed. This in-depth understanding ensures that one not only knows ‘what is right’ but also understands ‘why it is right’. This insight is critical to the effective and appropriate application of these management tools and methods in daily management practice.

Edwin Locke’s goal setting theory is an important milestone in the fields of management and psychology. The theory clarifies how setting clear and challenging goals is effective in increasing motivation levels and job performance. According to Locke (1968), the specificity and difficulty of goals directly affects an individual's effort, persistence, and performance. The theory emphasized the importance of setting specific and measurable goals, as well as the critical role of feedback in achieving them.

In addition, various theories of motivation have expanded understanding

of human motivation and needs. Abraham Maslow's (1974) Hierarchy of Needs Theory outlines five levels from physiological needs to self-achievement needs, arguing that once lower level needs are satisfied, higher level needs arise. Frederick Herzberg's (1959) Two-Factor Theory distinguishes between factors that lead to job satisfaction and dissatisfaction, suggesting that motivational and hygiene factors have different effects on employee motivation and satisfaction. David McClelland's (1960) Achievement Motivation Theory, which is particularly applicable to high-level talent, focuses on how the three primary needs of achievement, power and subordination drive human behaviour.

These theories collectively reply the question of why is performance management still essential, and reveal an important point: motivation is a multi-dimensional, multi-level process, and different individuals have widely varying needs and motivations in different circumstances. In practical management, therefore, it is important to recognize and understand the unique needs of employees and to stimulate their potential by meeting those needs. This requires leaders to have not only a basic knowledge of psychology and management, but also a high sensitivity and adaptability to be able to use different motivational strategies in different contexts.

In order to improve the effectiveness of performance management, it is

vital to incorporate theories such as American psychologist John Stacey Adams' (1965) Equity Theory and Victor Vroom's (1964) Expectancy Theory into the performance management process. Adams (1965) addresses issues such as goal setting, appraisal and motivation, emphasizing that employees are not only concerned with their outcomes, but also with the internal fairness of these processes. They are very aware of whether they are being treated fairly, especially from a psychological perspective. Effective performance management is therefore not just about the actual implementation of policies, but also about ensuring that there is clear communication between employees and a sense of fairness. Vroom (1964) suggests that an individual's motivation is affected by the probability of achieving a goal and the value of the reward provided. This suggests that for performance management to be effective, goal setting and performance rewards must be tailored to meet the varying needs of different employees. This tailoring should be consistent with the theory of motivation mentioned earlier. The application of performance results in management should go beyond the mere distribution of performance rewards. It should include meeting the different needs of employees, including career development and skills enhancement, so that it is truly individualized and optimized. In this way, performance management not only improves organizational efficiency, but also promotes the career development of employees.

However, there are still some neglected areas of performance management. These aspects may include the specific nuances of an individual employee's situation, the dynamic development of team interactions or the broader impact of organizational culture on performance indicators. These need to be addressed in order to create a comprehensive and highly effective performance management system.

Fred Fiedler (1967), an American social psychologist, developed the theory of contingency, which emphasizes that different management strategies should be used in different contexts and conditions. This theory argues that strategies must be appropriate to the setting to be effective; even the best strategies may fail to produce performance if they are misplaced. This requires leaders to have the ability to develop appropriate performance management methods and corresponding incentives based on the specific circumstances of the business, the organization and its employees. While the concept may seem obvious and simple, the pursuit of 'management fashions' is a common global phenomenon (Jackson, 2001). For example, a performance management model that works well in innovative companies with knowledge-based employees has been introduced to some Internet companies in China and then be regarded as a universally applicable management model. This is clearly not valid.

The applicability of these Western management theories and methods by Chinese leaders in specific management practices raises a question. In the

West, American management practices have long been mainstream, often overshadowing approaches from other countries. Canadian academic Henry Mintzberg (1989) noted, management is a science, requiring the application of knowledge from various disciplines. Yet, it is also rely on insight, vision, and intuition. More crucially, management is a expertise, highlighting the importance of practical experience - learning by doing. This perspective underscores the adaptability and contextual application of management theories across different cultural and organizational landscapes.

Attribution theory provides a theoretical explanation of the psychological foundation behind potential problems with employee performance self-evaluation. This understanding enables leaders to adopt a more effective approach to performance appraisal.

3.2 Change Management

Businesses typically follow a life cycle, a concept illustrated by Boston Consulting Group Matrix, raised by Bruce D. Henderson (1970). Change management is the means by which a business can effectively navigate this cycle. Charles Handy (1996), a renowned British management expert, made a similar point in his book through the concept of the 'S-curve'.

The fundamental reason for business failure often lies in the organization's collective abandonment of its commitment to innovation

(Bresser, 1986). Instead, business change revolves around a shift in corporate culture. When an organization establishes mechanisms and cultures that sustainably inspire dynamism, it can successfully traverse the entire business cycle. Even in the face of an inevitable business life cycle, companies can forge a new path through collective effort, fueled by dynamism and innovation, while addressing real challenges (Davenport, 2007). If a company loses its dynamism and lacks a clear vision for the future, it will experience internal conflict, less efficient management and higher internal transaction costs. Such a business will struggle through the business cycle (Teece, 2009). The essence of change, therefore, lies in reshaping the organizational culture and infusing it with the energy needed to persist and innovate. Change requires removing what exists and rebuilding what is new (Jassawalla, 2002).

Kurt Lewin, a founding figure in the field of change management and organizational development, highlights the significant impact of group behaviour on the success of change initiatives. His goal was to devise a straightforward model that would illuminate the cultural and behavioral nuances of a company. To achieve this, he developed the concept of 'refreezing'. This concept is significant in his model, highlighting the key stages of consolidating the results of a change innovation and integrating it into the daily operations of the organization in a seamless manner (Cummings, 2016). While Lewin's model continues to be utilized, it's

broadly acknowledged in contemporary discourse as a somewhat reductive representation of the change management process. The model provides a basic framework for understanding the dynamics of change. However, it does not address the complexities inherent in modern organizations, nor does it provide leaders with a comprehensive or adaptable strategy for implementing change effectively. This limitation highlights the need for a more nuanced approach to current complex and changing organizational environment (Michel, 2013).

The ADKAR model, which stands for Awareness, Aspiration, Knowledge, Ability and Reinforcement, is a framework specifically designed to assess, quantify and support an individual's motivation to change during organizational transformation. In the context of organizational change, the ADKAR model assumes that each individual involved in the change process fits into one of the stages. This assumption enables a leader to strategically identify and implement the most effective measures to facilitate an individual's progression to subsequent stages. For example, if an individual is in the 'Desire' stage, they may demonstrate enthusiasm and readiness for change, but may not yet be in the 'Knowledge' stage, where they understand the specifics of implementing change (Hiatt, 2006). The ADKAR model is known for its simplicity of understanding and is a practical tool for dissemination and application. It provides a unique mechanism for practitioners to measure

readiness for change at an individual level, providing valuable insights for tailored interventions (Rauhavirta, 2023). However, the limitations of the model become apparent in larger businesses where there is an urgent need to assess change on a larger organizational scale. More importantly, the ADKAR model does not take into account environmental factors and corporate culture, both of which play an important role in influencing an organization's ability to change. These unresolved issues point to the need for a more holistic approach in change management, one that includes the individual and organizational levels as well as the cultural and environmental contexts (Al-Alawi, 2019).

The Bridges Model of Transformation summarises the three stages that people go through in the process of transformation . Its framework design of the transformation process is crucial to understanding change, allowing people to recognize that change is a process rather than a single time point (Bridges, 1991). The Bridges Transformation Model is highly relevant in helping individuals undergoing change to understand the change itself by way of internal psychological change. Similar to Lewin's change management model, it is simple to understand but tends to reduce a great deal of complexity to a small three-stage model. Also, although it is primarily concerned with the human experience of the process, it can sometimes appear to be more concerned with the impact on the organization and processes (Leybourne, 2016).

Virginia Satir, a renowned family therapist, developed the Satir Model as a tool to help individuals navigate personal and internal change. It recognizes that an initial phase of resistance and distress often precedes emotional recovery. This process involves resistance to change, panic, followed by gradual acceptance, adaptation and finally integration of the change into the new status quo (Cheung, 1997). The Satir model, like other personal change frameworks, helps to unmask the internal processes experienced by individuals undergoing change. Its unique perspective is that it emphasises that change is a sudden, one-off event, providing insights into how people adapt to sudden shifts in their personal or family environment (Cameron, 2019). However, as Weick (2011) discussed, in organizations, change management has to do precisely what it needs to do to get more people involved and prepared in advance, and it should not be an unexpected event.

In his seminal book *Leading Change*, John Kotter (1996) famously introduced the eight-step change model, which has now become a cornerstone of the change management field. The model provides leaders with a straightforward, structured road map that guides them through the critical stages of planning and implementing organizational change. Appreciated for its clarity and structured approach, the Kotter model provides leaders with comprehensive guidance that includes preparation and implementation phases. This ensures that change takes place in an

organized and manageable way (Salman, 2017). However, the model does face certain limitations in modern change initiatives. While it promotes tolerance, its approach is somewhat traditional and top-down, which may be perceived as inflexible. Once the eight steps have been identified, the model may appear rigid and may lack the adaptability that is often required in dynamic change environments (Appelbaum, 2012). In addition, Kotter's emphasis on creating a 'sense of urgency' can sometimes unintentionally affect employee feedback and engagement, as it can lead to increased stress and anxiety. In current rapidly evolving business environments, striking a balance between a sense of urgency and employee well-being is critical to creating a supportive environment that is conducive to successful change (McLaren, 2023).

Rick Maurer has developed a change management model for understanding why people resist change: 'I don't understand change', 'I don't like change' , 'I don't like you'. This model provides a strategic framework for leaders to 'diagnose and treat' the root causes of resistance (Maurer, 2003). For example, comprehensive training and education can enhance understanding and acceptance of the new change; well-structured incentives and a clear explanation of the benefits can positively shift perceptions and motivate employees to participate; and initiatives designed to build trust can bridge the gap between leaders and employees. This approach encourages organizations to examine their corporate

culture in depth to identify and address the underlying reasons for unsuccessful change initiatives (Maurer, 2011). However, while this model sheds light on the issue of resistance in change management, its limitations must also be recognized. Focusing merely on resistance may oversimplify the multifaceted nature of organizational change. To be truly effective in managing change, a more holistic approach is required that takes into account not only resistance, but also factors such as leadership coordination, communication effectiveness, employee engagement, and the integration of change into the organizational culture. This comprehensive perspective is critical to navigating the complexities of change and achieving long-term, sustainable success in organizational transformation efforts (Fernandez, 2017).

In the 1950s, Edwards Deming, a leading figure in the field of quality management, introduced the PDCA cycle, known as the Deming Cycle, which established a pioneering framework for the continuous improvement of business processes. The cycle consists of four steps - Plan, Do, Check and Act - and provides a clear, accessible strategy for solving problems. In the Plan stage, the approach involves gaining a thorough understanding of the problem or goal, setting clear criteria, and developing a plan for an experimental approach. In the Do phase, the main focus is on small-scale testing or implementation and meticulous documentation for later analysis. Afterwards, the Check phase consists of

evaluating the results of these tests to determine whether the objectives have been met and to gain insight into the effectiveness of the actions. The final Action phase involves implementing these changes on a wider scale, ensuring that improvements are assimilated and standardized (Moen, 2006). Deming's PDCA cycle is notably groundbreaking because of its early emphasis on customer experience and its iterative problem-solving approach. This model laid the foundation for contemporary approaches to quality and process improvement. Its cyclical and iterative nature promotes continuous improvement and adaptability, making it an invaluable tool for guiding change processes and experimentation across industries (Johnson, 2002). The model is particularly important in fast-paced and ever-changing business environment, where its focus on iterative learning and market dynamics (Kholif, 2018).

In considering various models of organizational change management, it is critical to recognize certain important insights. Firstly, change is inherently dynamic and non-linear. Contrary to the ideal 'post change' state envisaged by some organizations, change is a continuous, fluid process. Moving from one state to another is not a straight line. Instead, the pace, timing and manifestation of change varies across organizations. Reaching a fixed 'ideal end destination' is a misconception. Change is continuous and multifaceted (McGlade, 2013).

Secondly, organizational change occurs in open systems. This is sometimes fueled by the view of some change management models that change can be neatly contained within set boundaries and free from external influences (Odor, 2018). In reality, organizations are part of a complex network of internal and external factors, making it difficult to identify a single root cause of change. This interaction means that change is influenced by a myriad of factors both inside and outside the organization (Kanter, 1992).

In addition, approaches to change tend to be one-way, usually top-down, like a waterfall, with instructions coming down from the top. However, this approach ignores the possible volatility and resistance that can occur at different levels (West, 2011). Effective change leadership should be multi-dimensional and multi-directional. This is not to argue that top-down approaches are ineffective, but achieving sustained and meaningful change requires a redefinition of the drivers of change, combining multiple approaches such as bottom-up or centre-out strategies. Leaders must be highly adaptable and able to react to new situations in order to keep change sustainable, which often requires the full cooperation of the entire organization (Haeckel, 1996).

Finally, there is no common model for change. Organizations need discernment to determine when to implement change and which model to adopt. Large-scale activities such as organizational restructuring or a new

strategic vision may require a specific model, but fitting new ways of working within these structures often requires an adaptive and tailored approach. Understanding the context and nuances of each situation is key to choosing the most effective change strategy (Prochaska, 1986).

3.3 Obstacles in Organizational Transformation

In the area of organizational management, it is important to recognize that any internal upgrades must evolve in pace with changes in the internal and external environment. Such synchronisation is essential to better adapt to future development needs and thus improve long-term efficiency.

However, organizational change itself brings risk, uncertainty and unpredictability. The underlying assumptions, values and behavioral patterns that are deeply rooted within an organization can often create significant resistance to adapting to new environmental challenges. When an organization undertakes a series of changes to its management model, these resistances are transformed into accelerators that drive the organization to move forward. In the face of new challenges, leaders must strike a delicate balance between ideals, realities and rational approaches (March, 2009).

Drawing on the insights of the renowned British historian Toynbee, human civilization owes its development to the synergy between moderate challenges and successful responses. Changes in the

environment require civilizations to make moderate adjustments to meet emerging challenges. Failure to adapt means deterioration. While these challenges bring pressure, they are also an engine for progress (Navari, 2000). This view is shared by Schein (1996), an American management expert, who argues that there are two main types of challenges faced by organizations: those posed by the external environment in which the organization operates; and those posed by the continuous reconfiguration of the organization's internal resources. Similar to civilization, while these challenges may initially appear to hinder organizational development, successfully navigating and overcoming these obstacles can be a driving force for change (Schein, 1996).

Thus, resistance to organizational change comes from two main sources. One is the result of changes in the organization's external environment, where adherence to outdated responses can lead to an inability to effectively navigate external challenges, thus creating external pressures and resistance. The other type of resistance arises from changes in the internal structure of the organization, where the inability to adapt to these internal changes leads to internal stress and drag. Understanding and addressing both aspects of obstacles is critical for organizations aiming to successfully and sustainably navigate change.

The determination and commitment of leaders is a key factor in the success of any change implementation (Nordin, 2012). History is replete

with examples of successful and unsuccessful reforms, and the critical factor often lies in the willpower of the leader. Take the historically commendable Duke Xiao of Qin as an example. His unwavering support for the legal reforms led by Shang Yang played an important role in overcoming the resistance of aristocratic interest groups. This determination not only drove the reforms but also led to change, making it a classic example of effective leadership in history. In sharp contrast, the reforms of Wang Anshi during the reign of Emperor Shenzong of the Song Dynasty and the Hundred Days' Reform in the late Qing Dynasty both encountered difficulties. These initiatives were undermined in large part by the lack of strong leadership will, ideological rigidity, public ignorance and great vested interest. In a business environment, change will always encounter resistance from all parties. Businesses must overcome opposition from staff, internal and external conflicts, and sometimes even opposing factions within the organization, when making changes (Fernandez, 2017). In addition, such change often brings short-term challenges, such as a decline in performance, which requires sacrificing immediate benefits. Reallocating resources, balancing employee interests, and even restructuring core team members become tasks that leaders must accomplish (Lowndes, 1998). Not only do leaders have to deal with market and financial pressures, but they also have to endure the mental and emotional impact of these changes. Constant

short-term pressure amplifies resistance to change (Groves, 20006). If leaders do not have a strong will and a long-term strategic vision, the chances of change being successful are greatly reduced. The effectiveness of a change initiative therefore depends to a large extent on the leader's ability to tolerate these pressures and guide the organization towards its long-term goals.

The behaviour of the team is another important factor. Changing human behaviour, especially within teams, is often considered one of the most challenging aspects of organizational management, mainly because changing internal logic and thought patterns is a complex task (Stacey, 2007). In a business environment, the behaviour of employees governed by norms and operating procedures can be significantly influenced by the existing management system. As Pettigrew (2001) considered, Chronic lax management can foster a work culture that is lacklustre and breeds shortcuts, laziness and casual attitudes. This occurs because individuals naturally seek to minimize effort and maximize rewards, which often leads to the entrenchment of harmful behavioral habits. These negative habits can subconsciously weaken the organizational structure in the same way that a small hole can cause a dam to collapse. Therefore, to effectively change behaviour, the underlying thought processes must first be addressed and transformed. Without strong leadership and systems support, changing behaviors and mindsets becomes an even more

challenging task. Many leaders, motivated by management training programmes, try to implement new systems and procedures with great enthusiasm. However, without sustained implementation and support, these initiatives tend to falter, leading to a relapse into old habits. It is a common cycle in many organizations to introduce change and then gradually fall back to previous practices (Van, 2011). This again highlights the need for strong leadership that is persistent and consistent, as well as well-structured and consistent management systems, if real and lasting behavioral change is to be achieved in a team or organization.

Addressing the challenge of vested interests within an organization is critical to successful change management. As Price (2006) suggested, vested interests are prevalent at all levels and pose a clear barrier to change. At the top, individuals often control significant resources. Without proper institutional checks and balances, this power can lead to business corruption. These top individuals may control product pricing and supply chain resources, and in the absence of rigorous financial accounting and evaluation, they can benefit from these positions. Efforts to implement controls may conflict with their interests, leading to resistance. In addition, top management may create information asymmetries to maintain the status quo, making it difficult for leaders to initiate change. Many business leaders recognize these problems but hesitate to act for fear of potentially disrupting the entire business

operation. Middle management, especially those who lack competence, represent another layer of vested interests. These individuals can thrive in loose management environments that are not rigorously evaluated or monitored, masking inefficiencies and deficiencies. Stricter management systems expose their shortcomings, leading them to focus on pleasing superiors and subordinates, often by manipulating or faking data to portray good performance. These leaders may be seen as loyal and emotionally intelligent, but often fail to take critical action when it is needed. Leaders sometimes avoid going up against them out of loyalty or adaptability. Grassroots employees are often the most immediate resistance to change. With less to lose and without wider organizational considerations, they are easily motivated to oppose changes that threaten their interests or undermine long-standing, although inefficient practices. While they may be in the minority, their influence can be large, sometimes overshadowing the efforts of more dedicated and conscientious employees, which is aligned with Scully (2002). In short, addressing these layers of vested interests requires a careful approach. Leaders must manage the intricate network of power dynamics, resource controls, and resistance at all levels to foster a transparent, responsible, and adaptable culture. This often involves difficult decisions and actions, but is critical to the long-term health and success of the organization.

4 A Case Study of Successful Transformation of Huawei Company

R&D Change Management

4.1 Background

Huawei Technologies Co., Ltd. (hereinafter referred to as H company), established in 1987 and headquartered in the Longgang District of Shenzhen, Guangdong Province, has emerged as a global frontrunner in the information and communications technology (ICT) sector. With a steadfast focus on the ICT industry, H has been committed to robust management, incessant innovation, and fostering open cooperation. This approach has enabled H to build a comprehensive solution portfolio encompassing telecommunication carriers, enterprise networks, consumer terminals, and cloud computing. These solutions offer competitive ICT products and services to a diverse clientele, ranging from carrier and enterprise customers to individual consumers.

Over its more than three decades of evolution, H has undergone extensive organizational changes that have touched virtually every aspect of its operations, including research and development (R&D), manufacturing, marketing, supply chain management, finance, and human resources. Given the high-tech nature of H's business, the R&D management system stands out as a cornerstone of its core competencies. For a more focused

and illustrative analysis, this study narrows its scope to R&D management changes within H's multifaceted organizational transformation. It selects three comprehensive R&D change processes as case studies, aiming to uncover the intricacies of organizational change. This exploration is done through the lens of the interaction between dynamic capabilities and organizational inertia, seeking to explore the underlying mechanisms and secrets behind H's successful adaptations and transformations in the highly competitive and ever-evolving high-tech industry.

4.2 Implementation Process

In 1990, against a background of changing market dynamics and increased competition in the telecommunication equipment industry, H embarked on a journey to transform itself from a trader to a product manufacturer. This transition involved sourcing components for telecoms equipment from state-owned enterprises. Recognizing the need for long-term survival in the telecoms equipment industry, H adopted a single, focused product development strategy in 1991 and began developing its own telecoms equipment. Initially, H did not have a separate R&D department. The manufacturing department doubled as a development laboratory, responsible for the development, manufacture

and testing of hardware and software. This overlap meant that the boundaries between R&D and manufacturing were vague (Zhang, 2020).

In 1993, H ventured into in-house development of LAN switches in order to expand its product range, and the success of the C&C08 project demonstrated the Digital Group's ability to manage complex R&D projects (Hanzhe, 2022). In May 1993, Zheng, as the leader of the group, restructured the Digital Group and implemented an organizational framework similar to that of the C&C08 project. 1994 marked an important milestone in the commercialization of H's flagship product, the C&C08 digital programmable control switch. As the C&C08 switch gained market acceptance, H experienced rapid expansion and a surge in staff numbers. However, growth in the domestic telecoms equipment market began to plateau, and market demand diversified, focusing increasingly on network services and mobile communications. To remain competitive, H shifted its product development strategy from a single centralized focus to horizontal integration, which increased the number and complexity of R&D projects. Recognizing the inefficiencies of a linear R&D management structure, H established the Central Research Department (CRD) in 1995 to consolidate project teams into one large formalized R&D team. This signaled a new era in H's R&D management. Following the establishment of the CRD, H adopted a matrix management approach, and in 1995 established the Experimentation

Department, followed by the Product Strategic Research Planning Office and the Pre-Research Department in 1996. These developments laid the foundation for a structured R&D system that guided the company towards its long-term R&D goals (HRD, 2024).

Although H's sales grew rapidly after this second R&D management transformation, it still faced challenges such as improving efficiency, declining gross margins, and lengthening product development cycles compared to competitors such as Cisco. In February 1999, H implemented an Integrated Product Development (IPD) transformation programme, drawing on the expertise of IBM (Zhongtian, 2023). After three pilot projects, IPD was a clear success, dramatically improving product stability and reducing the need for rapid version upgrades to solve problems. By 2003, H had fully integrated the IPD process throughout its R&D system. With the support of the IPD system, H has greatly enhanced its R&D and management capabilities, paving the way for continued innovation and growth in the highly competitive global telecommunications industry (Shirley, 2021).

4.3 Analysis of the Case

In the early days, H relied on the sales agency model to gain primitive capital accumulation, and the cognitive inertia formed by the existing successful experience could prevent leaders from recognizing external

crises. As H's strategic focus at this stage was to maintain the company's survival, the ability to recognize crises played a key role in this change. H's able to recognize crises at this time mainly came from the knowledge and experience of executives such as Ren Zhengfei (Giant, 2021). In terms of environmental monitoring, H paid close attention to policy changes and competitor dynamics, and found that credit and equipment import policies were tightened and competition in the switch agent market was intense. H analyzed its own strengths and weaknesses based on changes in the external environment, and identified a crisis that made the sales agency model unsustainable, prompting leaders to quickly overcome cognitive inertia. To transform a crisis into an opportunity, H adopted a unified and centralized product development strategy, shifting from a sales agency model to an internal R&D and production business framework (Huang, 2022). The company selected the C&C08 project as a pilot for this transformative initiative, marking its first significant step into R&D aimed at ensuring corporate survival. Throughout this transition, H began to cultivate its change leadership capabilities by formulating new strategies, designing innovative business models, and identifying necessary changes for these changes. This approach enabled the organization to respond swiftly and effectively to environmental shifts. During this phase, H's ability in integration and restructuring was prominently demonstrated. It effectively reorganized internal resources

and addressed employee inertia through strategic restructuring, thoughtful staffing, and process optimization. A significant aspect of this restructuring was the establishment of a new organizational structure dedicated to managing R&D projects. Despite facing resistance from certain leaders who were reluctant to separate R&D functions from the manufacturing department, H's top leadership remained undeterred. They decisively continued with the reorganization plans, demonstrating firm resolve in the face of opposition. Simultaneously, in terms of personnel management, H appointed Zheng Baoyong, a key leader at that time, to helm the newly formed digitalization department. This move not only empowered the department but also helped mitigate some of the resistance to the changes. Additionally, H implemented a dynamic personnel mobility mechanism that allowed technically proficient leaders to transition between various departments, thereby enhancing the overall technological ability within the organization. Though H's capacity to solidify these changes was somewhat fragmented at this stage, the company still managed to yield positive outcomes (Shirley, 2021).

In the second R&D change, H's crisis recognition capability was reflected in both environmental monitoring and environmental analysis. In environmental monitoring, H paid close attention to the growth of the telecommunications equipment market, developments in the network services and mobile communications industries, changes in market

demand, and the behaviour of competitors, and was keenly aware of the diversification of market demand. In environmental analysis, H accurately judged the trend of the industry, and combined with the current problems of increasing management complexity, insufficient technology sharing, and weak competitiveness. making forward-looking judgements on network services and mobile services (Standard workshop. 2023). To address the problem of fragmented projects and difficulty in unified management, H adopted an integrated approach to restructuring by reorganizing project teams and setting up new departments. After established the Central Research Institute, it changed the linear R&D structure to matrix management, which to a large extent solved the problem of project leaders working in isolation and failing to achieve specific goals. In terms of staffing, H recruited thousands of highly trained MBAs to work alongside technical experts. The MBAs focused on specialized management methods, while the technical experts shared their practical experience, effectively bringing about cognitive and behavioral change. Integration and reconfiguration capabilities effectively overcome behavioral inertia. H focused on cultivating the integration capability of change, mainly in terms of establishing rules and regulations. First, establishing a leadership team system, which helped overcome behavioral inertia. The second was to build an incentive mechanism (Yang, 2023). On the basis of a unified plan to assess the progress of

project completion, H improved the assessment system, made teamwork an important aspect of project leader assessment, and distributed bonuses based on overall project performance and individual performance. Changes in the way value is distributed are conducive to guiding employees to change their mindsets, accept change, and develop change-oriented behaviors. It can be seen that in the second R&D change, H further strengthened its crisis identification, change leadership, and integration and restructuring capabilities (Nine zero, 2021).

In the third R&D change plan, H paid special attention to overcoming cognitive inertia, proposing systematic, forward-looking change planning and top-down change vision. H further strengthened its change leadership capability, stimulated a sense of crisis throughout the company, and helped employees recognize the urgency of change, effectively overcoming the resistance to change that arose from cognitive inertia during the change phase. Initially, H set a plan for change. The company engaged IBM consultants to conduct a thorough diagnosis of internal challenges, the necessity for transformations to IPD (Integrated Product Development). H then made a strategic decision to collaborate with IBM for the execution of the IPD changes. To address the cognitive inertia, H adopted a strategy of granting full authority to the consultants, thereby minimizing internal conflict and enhancing the credibility of the change process. In terms of project promotion, the team adopted a ‘cell division’

approach, initiating changes in a pilot area first, then adjusting based on feedback before extending the changes across the entire R&D system (Nine zero, 2021). This phased approach significantly reduced resistance to change, gradually shifting employee attitudes from initial resistance to recognition and acceptance. In the early and middle stages of change, Ren Zhengfei, H's CEO, consistently leveraged the idealized vision of change to counteract pessimism. He published the influential article *What We Learn from the American People*, highlighting the management crisis facing H and advocating for change (Giant, 2021). The widespread circulation and discussion of this article ignited a transformation within H company. Subsequently, a mobilization meeting was convened, uniquely critiquing executives instead of grass root staff, prompting senior leaders to acknowledge their own shortcomings. Importantly, communicating the vision for change wasn't a singular event. Throughout the change process, Ren Zhengfei regularly advocated strategic visions in internal speeches, while the change steering committee persistently underscored the urgency of change, emphasizing the significance and necessity of the IPD transformation to all employees (Giant, 2021). The shift to the IPD process marked a departure from H's traditional R&D methods. Therefore, in its third R&D transformation, H concentrated on enhancing its capacity to solidify change. This was achieved through value-enhancing activities and the establishment of robust rules and

regulations. These efforts were aimed at guiding employees to adopt change-oriented mindsets and behaviors, effectively reshaping both cognitive and behavioral inertia. This strategic approach ensured that transformation was not only implemented but also deeply ingrained within the organizational culture and practices, setting a new direction for future growth and innovation.

5 Recommendations

From the aforementioned case study, it's evident that in the process of organizational change, there are two interacting forces at play: the 'driving force' and the 'resisting force'. These forces either bring the organization to a state of equilibrium or drive it into dynamic development. Dynamic capabilities act as the 'driving force' in change, while organizational inertia forms the primary 'resisting force'. Analyzing the case study and drawing upon dynamic principles, it is suggested that dynamic capabilities and organizational inertia are a pair of counteracting forces in scenarios of change (Zhu, 2018).

The 'unfreezing' phase is critical in ensuring that the driving force, represented by dynamic capabilities, outweighs the resisting force, signified by organizational inertia. This imbalance is necessary to disrupt the status quo and initiate change (Shebli, 2016). During the 'Transformation' phase, the focus shifts to continually enhancing the

driving force to a level robust enough to address the resistance at all tiers of the organizational change (Kanter, 1992). This involves overcoming the path-dependency and rigidity of core competencies ingrained in the organization's traditional practices, thus facilitating the effective implementation of change.

The 'refreezing' phase is pivotal in maintaining and stabilizing the new state over time. This stage concentrates on reshaping the organizational inertia. This phase focuses on reshaping the inertia of the organization. In this way, changes in dynamic capabilities and higher-level operational capabilities can effectively improve the efficiency of the organization. The ultimate goal of this phase is to reshape the organizational inertia and to stabilize the organization in a new equilibrium state by using dynamic capabilities and enhanced operational functions to improve business efficiency (Anderson, 2010).

Recognizing a crisis is a crucial first step in organizational change. Leaders who have found success with a particular business model or strategy often develop a cognitive dependence on that mindset, which initially provided a competitive edge. This reliance can subsequently blind them to changes in their business environment that are not yet widely recognized (Fragouli, 2015). A prime example of this is seen in H's initial transition, where the success of their sales agency model led to a cognitive path dependency, hindering the company from venturing into

its own R&D. Essentially, cognitive inertia can obstruct a company's ability to detect and respond to emerging crises.

From H's case study, it becomes apparent that the ability to identify a crisis during its first R&D change largely stemmed from the knowledge and experience of executives like Ren Zhengfei. This was manifested in their attention to national policy changes and other external environmental factors, coupled with an analysis of the internal environment, particularly the weaknesses of the sales agency model. They identified the threat posed by external policy changes, prompting a need for change driven by the emergency of corporate survival and external threats. In H's second R&D shift, the company effectively navigated the external environment by monitoring national policies, discerning industry trends, and detecting shifts in market demand. They noted the diversification of market demands and future opportunities in network services and mobile communications. Internally, they identified their technological shortcomings and recognized the necessity to enhance their technological prowess, with change being propelled by external opportunities. During its third R&D transition, H established regular monitoring and analysis of both external and internal environments. This included keep pace with national macro-policies, technological advancements, and stakeholder needs, as well as assessing the company's operational performance. Significantly, H developed an organizational

self-reflection capability, identifying internal management crises such as low R&D efficiency. This led to the initiation of IPD changes to establish a long-term and efficient R&D system, driven proactively by internal crises. Compared to the previous changes driven by external factors, the third transition marked a significant enhancement in H's crisis identification ability, stimulated by its developed capacity for organizational reflection, enabling proactive change.

Leaders must cultivate the ability to recognize crises at an organizational level through environmental monitoring, analysis, and self-reflection. This helps in identifying both internal and external opportunities and threats, challenging entrenched cognition and behaviors, and motivating top management to overcome their cognitive inertia. Reflection, a process of evaluating perceptions, thoughts, and actions, and planning future actions, can catalyze organizational change (Kolzow, 2014). In H's third transition, it was this critical self-reflection on the gap between the company and industry leaders that enabled H to overcome its cognitive inertia, reevaluate its existing R&D management system, and identify its internal management crisis during the unfreezing phase.

Secondly, the vital role of leadership in driving change cannot be overstated. Business leaders and employees, shaped by their educational, professional, and industry backgrounds, often exhibit cognitive limited rationality, a key contributor to cognitive inertia. Typically, general

employees are more focused on immediate stability and may struggle to rapidly recognize the need and potential benefits inherent in organizational change. This can result in anxiety about the change, leading to resistance (Kanter, 1002). Even if core leaders possess the courage and determination to implement change, thorough execution of organizational change can be challenging without the understanding and support of the broader staff.

The case study illustrates that change leadership is crucial in overcoming cognitive inertia and integration process. This is manifested in two primary aspects: developing change planning and conveying the vision for change. In terms of change planning, H has consistently employed an incremental approach in its R&D transformations, initiating with pilot projects before expanding to other areas. This method helps mitigate failure risks and diminishes resistance to change. During its third R&D transformation, Ren Zhengfei and other leaders repeatedly emphasized the management crisis and the anticipated benefits of change through training and communication. This strategy served a dual purpose. Firstly, it raised awareness among the majority of the participants about the crisis facing the organization, instilling a sense of urgency for change and accelerating the transformation of core concepts and perceptions among employees. Secondly, by articulating and disseminating a clear change vision, leaders can proactively engage employees' psychological and

behavioral defenses, helping them to recognize the potential benefits of change and garnering acceptance and understanding from organizational members. It's important to highlight that communicating the vision for change is not a one-off event. Instead, it should be repeated throughout the organization's change phase, ensuring that every member aligns with and works towards a common goal. Without strong change leadership, overcoming the significant cognitive inertia encountered during H's third R&D transformation would have been a formidable challenge.

Finally, the ability to integrate and reconfigure has been crucial in H's three transformation phases. Traditional hierarchical organizational structures, designed with defined processes and clear vertical authorization alongside horizontal division of labor, tend to be rigid. This rigidity often impedes an organization's capacity to adapt swiftly within a limited time, resulting in structural inertia and process inertia, which strongly resist organizational change (Saiti, 2020). The case study reveals that the capability to integrate and reconfigure is vital in enhancing the driving force behind each level of change and effectively overcoming organizational inertia. This capability is evident in two main aspects: the integration of external resources and the restructuring of internal resources. On one hand, in H's third R&D transformation, it actively incorporated advanced external resources, technologies, and knowledge through external collaboration and learning. This integration

transformed these external elements into the company's own resources, injecting fresh perspectives and management concepts into the employees. Moreover, involving external consulting organizations not only bolstered the driving force for change but also significantly reduced resistance from inertia, encouraging employees to adopt new cognition and behaviors aligned with the change direction (Sveningsson, 2023). On the other hand, restructuring internal resources, such as adjusting structures, optimizing processes, and staffing, inevitably triggers resistance and inertia among employees. It's important to recognize that due to the diverse knowledge, experiences, backgrounds, and cognitive abilities of organizational members, preaching and training alone may not suffice in aligning employee perceptions with the change. Real cognitive shifts often occur when the foundational resources change, necessitating resource reconstruction to address cognitive and behavioral inertia. H adopted a mix approach in staffing, integrating new talents into the system, which not only brought in complementary skills but also weakened organizational inertia (Woo, 2015). Simultaneously, H chose to overlook opposition, adopting a proper approach, compelling employees to alter their work processes and behaviors, which in turn facilitated a change in mindset and actions. Over time, this shift in cognitive inertia further helped to overcome behavioral inertia in a more profound manner.

Therefore, in the phase of organizational change, while cognitive and

behavioral inertia can hinder the effectiveness of integration and restructuring capabilities, these capabilities are instrumental in overcoming cognitive inertia. This leads to a change in cognitive inertia, which further helps in addressing resistance more deeply. The ability to integrate and reconfigure is key in overcoming behavioral inertia, leading to changes in cognitive inertia, and subsequently deeper overcoming of obstacles.

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