Managing Yourself

How to Challenge Your Organization's Status Quo — Productively

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Summary. Challenging the status quo is the mechanism that leads to innovation and improvement. But doing so can feel risky, leading you to self-censor and shy away from speaking up. Challenging the status quo calls into play context, personalities, and self-interest,... **more**

Innovation requires deviation. In fact, every aspect of innovation, radical or slight, begins with at least a small dose of constructive dissent, some kernel of an idea to shake up the system.

But shaking up the system is the easy part. It's not the system that fossilizes, gets territorial, and pushes back — it's humans who stand in the way of subsequent progress. In fact, the deeper the attachment to the status quo, the greater the willful blindness to its growing irrelevance. Therein lies the danger.

So how should you go about sharing an idea or feedback that goes against the status quo? It's more about dislodging a deeply entrenched paradigm than it is presenting clear logic and unimpeachable data. Even if what you have to say doesn't feel earth-shattering, what you're calling for is the destruction of dogma, the abolition of a mindset, the transfer of an allegiance — much of which becomes more emotional and political than rational.

It's no wonder then that challenging the status quo can feel risky, leading you to self-censor and shy away from speaking up. Threatening the edifice threatens those who built and sustain it. You could bruise egos, reveal poor performance, redistribute power, or upend hierarchy. You probably will. At a minimum, the business of challenging the status quo calls into play context, personalities, and self-interest.

Ironically, challenging the status quo is how we keep each other safe, and yet we often feel terrified to do it. For example, how do you convince marketing that they're wasting ad spend on poor messaging? How do you challenge finance to relax the hurdle rate for smaller capital budget requests? How do you inform your division that the current onboarding process for new hires is tedious and ineffective? How do you let HR know that you see systemic gender bias in the promotion of production managers? How do you raise a concern about the potential unintended consequences of a new product launch?

Just shine the light of logic and data, right?

And as if an entrenched status quo isn't enough, what if you have no positional power? What if you're new to the organization? What if you want to challenge something not in your area of expertise? What if you're a member of an underrepresented and marginalized group, which makes challenging the status quo especially risky and potentially costly to your reputation and chances for advancement?

In working with organizations around the world, I've learned that challenging the status quo requires not only courage, but skill. Here are 10 concrete steps to build that skill, mitigate the risk, and increase the chances of success:

1. Anticipate the opportunity.

Very few organizations have open-mic, challenge-the-status quo forums, so expect to do so in the context of your natural workflow. It won't be like standing in front of venture capitalists with a pitch deck — but you should prepare as if it were. The lower your seat in the hierarchy, the tighter the case you must bring.

Odds are that it will be an informal opportunity or chance encounter that allows you to introduce your idea. You never know when you might have the ear of the right stakeholder.

2. Ask for permission.

When it comes to challenging the status quo, employees are often unsure of their participation rights. So ask explicitly for permission to challenge. For example: May I have your permission to push back on this? Do you mind if I offer a different perspective? May I suggest an alternative way to look at this?

The moment someone with positional power gives you the OK, you trade your personal risk for institutional permission, and those in charge feel the assurance of retaining control. This allows you to position your interaction as a contribution rather than a confrontation.

3. Begin with inquiry, not advocacy.

Challenging the status quo often evokes defensiveness. To neutralize this response, begin your challenge with inquiry, not advocacy. Make it a conversation. Rather than advocating a position that might divide, exclude, or marginalize, disarm with questions that recruit others into dialogue.

Good inquiry engages the intellect and reduces the chance of emotional escalation. For example, to start the inquiry process, you might ask the "do-nothing" question: If we don't change

anything, what will happen? This question transfers critical thinking to others and invites them to think through potential consequences out loud.

4. Model emotional intelligence.

Paradoxically, the challenger must often create psychological safety for the challenged, giving them space to acknowledge and come to terms with needed change. To foster that safety, let your emotional intelligence be your guide. This includes demonstrating self-awareness to inform your own behavior while paying close attention to the non-verbal cues of others.

Interact with poise, humility, and sincerity. Remember that respect diffuses defensiveness and humor de-escalates tension. If a topic is sensitive, raise it privately. Show your stakeholders that you're acting in good faith and that you appreciate their concerns and objections. Use empathy to ensure that they feel seen, heard, and understood.

5. Demonstrate a grasp of the past.

In his book, *The Thing*, G.K. Chesterton introduces a situation in which a fence has been erected across a road. An eager reformer comes along to challenge the status quo — "I don't see the use of this; let us clear it away" — to which someone representing the status quo responds, "If you don't see the use of it, I certainly won't let you clear it away. Go away and think. Then, when you can come back and tell me that you do see the use of it, I may allow you to destroy it."

The lesson is simple, but often overlooked: If you want to challenge the status quo, grasp the past. Demonstrate contextual understanding by acquiring a thorough knowledge of previous decisions and how the status quo came to be. Sure, you can spitball ideas anytime, but when you're ready to push back on the status quo, demonstrate mastery of the current state first.

6. Be transparent about potential unintended consequences.

If you're proposing a different course of action, you bear the burden of proof to explain how your proposal will make things better. This means being candid about the risks. Think through first, second, and third-order consequences — both intended and unintended.

When you take aim at the status quo, there's often a susceptibility to confirmation bias. It's easy to dismiss disconfirming evidence and focus solely on first-order intended consequences as if they were already facts in evidence. Don't do that. If you're transparent and impartial in your analysis, that candid disclosure of risk will create trust with stakeholders.

7. Bring credibility.

As a matter of principle, every employee should have participation rights and be encouraged to challenge the status quo. That's nice in theory, but what percentage of organizations have truly embedded the obligation of dissent into their DNA?

Every day you don't challenge the status quo should be a day spent preparing. And how do you prepare? By growing your credibility through a track record of performance. In *The Structure of Scientific Revolutions*, Thomas Kuhn explains that advances in science are inherently subversive — not only to current theory, but perhaps more importantly to existing commitments. So even if you're right in your analysis and recommendations, your challenge is a threat that naturally stirs up opposition, especially among those who benefit from the current incentive structure. Your personal credibility will be table stakes. If you're not credible, people may listen, but choose to not hear you.

8. Know your boss.

Understand your boss's personality, biases, preferences, and goals. I know one executive who simply can't tolerate being challenged in a public setting. One of his direct reports was convinced that several metrics in the KPI dashboard were no

longer useful and could be eliminated. He surprised his boss with this blunt advice in an executive meeting. He was right in his challenge and wrong in his approach.

If you know your boss, don't collide with them. To determine the best approach, ask: When does your boss get defensive and territorial? Do they invite challenge and dissent? How willing are they to be wrong? How do they handle bad news? How emotional or unflappable are they? How entrenched in the status quo are they?

9. Frame dissent as exploration.

Even if you think you have the perfect solution to fix or enhance the status quo, be careful in the way you frame your dissent. Think, for instance, about the natural response to curiosity compared to contradiction. When you're contradicted, it can trigger a fear response, spike emotion, and thrust you into fight-or-flight mode.

Try using statements such as, "I'd really like to learn more about this," "I wonder what else the data is telling us," and "Please poke holes in this." Then show your own cognitive flexibility. Think and challenge yourself out loud. When others see you as curious rather than dogmatic, they'll be more willing to join the expedition.

10. Use data.

Data has the power to de-personalize and de-risk challenging the status quo. If you have compelling quantitative data to make your case, use it. If you don't, move down the data hierarchy. Do you have meaningful qualitative data? If not, move down again to less-reliable anecdotal data. If you don't have that, you're down to impressionistic data, or what we call a hunch.

All categories of data are admissible, but may not be compelling enough to get the attention of your stakeholders. Use the best data you can get your hands on. If you're low on evidence and high on gut, ask for an opportunity to test your hypothesis, such as an

experiment, trial, or pilot. This lowers the perceived threat of the challenge as well as the anticipated risks and costs of trying something new.

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Challenging the status quo is the mechanism that leads to innovation and improvement. It's also a behavior that causes fear and trembling. Yet summoning the courage to challenge the status quo is almost never enough. Yes, you need courage, but you also need skills.

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