

Your Ultimate Playbook for Change Management Success



Introduction

Before COVID-19, studies revealed that over 70% of all change initiatives fail, resulting in loss of productivity, time, money, and most importantly, employee morale. Now—more than ever—the call-to-action for stability in the workplace is loud and clear. These unprecedented times have caused overlapping waves of rapid change, where familiar change management processes may be limited. We require a new perspective.

How do we, as leaders, help our teams survive and thrive in this chaotic world? The first step is adopting fast, constant change as the way business will be conducted in the new normal.

Who better to know what is working well and not so well than the leaders in the trenches?

Following the great success of our previous crowd-sourced webinar, [Co-create Your Playbook for Remote Work Success](#), Allen Interactions hosted a second successful open forum collecting the insights, lessons learned, and cautionary tales of change management.

Together, we created a reference playbook illustrating strategies and tactics to enable skills that foster organizational resilience, trust, compassion, and empathy.

Thank you to all of the participants in the May 20th, 2020 roundtable webinar for contributing to the content in this playbook.

Here are the areas we focused on during our time together:

- Best practices in communication, engagement, and productivity for successful change management
- Insights from leaders in the trenches who have valuable knowledge to share and build our collective expertise
- Working together to succeed. Social distancing isn't social isolation; it's physical distancing. So, let's explore the crowdsourced Ultimate Playbook for Change Management Success!

“

Your company may have a reputation for brilliant leadership, outstanding innovation, clever branding, and effective change management, but the business would fail if the world changes and you are unprepared.

Patrick Dixon

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Christina Coidakis-Barss | HR, Learning, and Organizational Change Expert

Dr. Coidakis-Barss is an experienced executive, coach, professor, and researcher. Her sweet spot is building systems that support, engage, and inspire cultures with measurable and sustained results. As a change management expert, she's lead initiatives empowering employees to understand and adopt shifts in their current environment. Barss's research studies have focused on how to standardize safety, quality, and service in diverse teams. Her findings yielded insights on how goals, location, communication, and relationships impact team efficacy.



Lisa Stortz | Solutions Architect

Lisa is an experienced and passionate solutions architect. She has the gift of building strong and lasting client relationships with measurable learning and business performance outcomes. Her areas of expertise include: Customer Relationship Management (CRM), Management, Leadership, Marketing, and Strategic Planning.

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How to Use This Playbook

This playbook is separated into five sections. Each crowdsourced section has an introduction, a knowledge checklist, recommended plays from our experts, and crowdsourced ‘wins’.

Thank you to the participants of our roundtable webinar for their input in this playbook!

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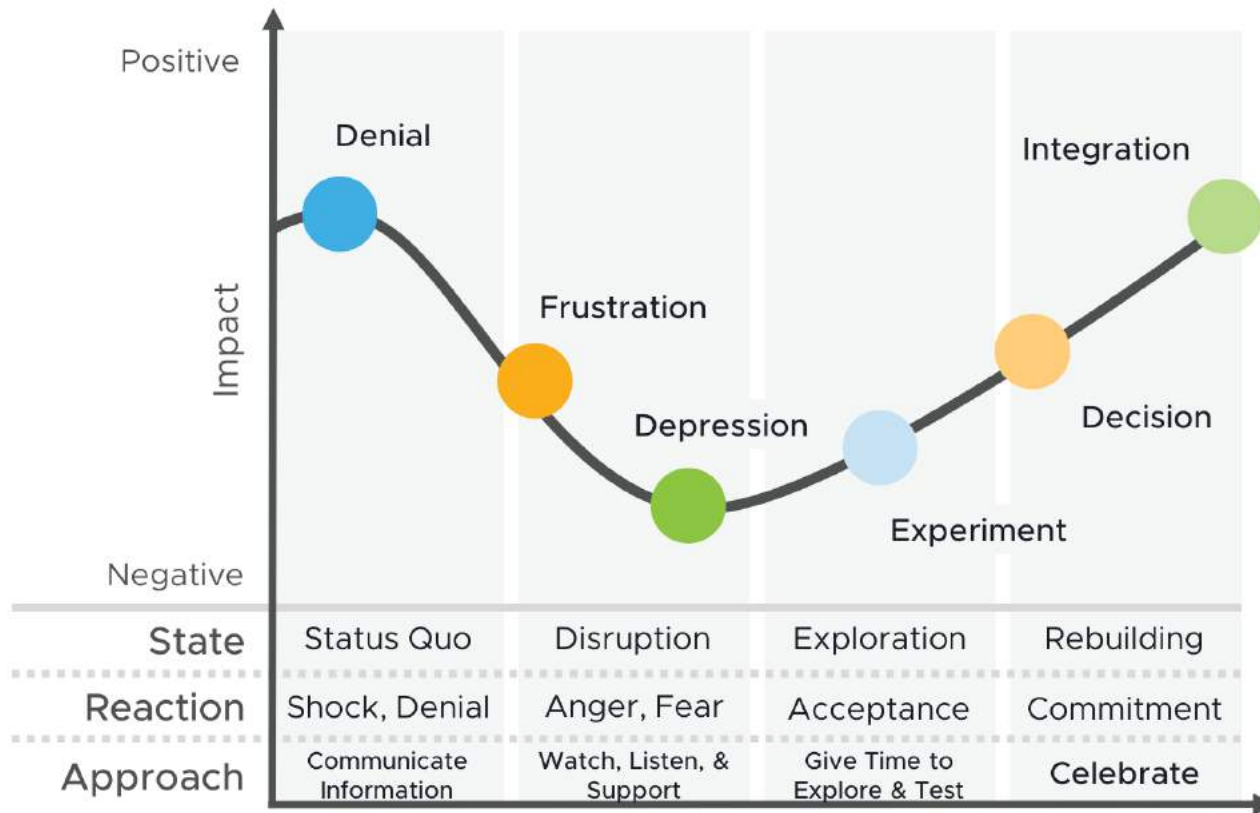
Change Management

Change is changing. The rate and speed of change is far different than what we have experienced in the past. How we lead change, and who we lead, is changing. When change happens at any level, there is a distinct sense of loss; a loss of 'what was.' This feeling of loss is not limited to singular events or organizations.

The current pandemic has expanded beyond our workforce emotional landscape to include families, communities, and even countries. Accepting the new normal or even the newest normal requires letting go, which is accepting loss. The speed and frequency of that loss has increased. This hyper-connected world challenges a person's ability to emotionally and intellectually process and adjust to change. We are poised for a new and better evolved understanding of the human capacity for change is required.

Change management models provide people a common language for shared understanding and empathy. These mental models provide leaders the ability to create a safe space of belonging for those around them. Frameworks and models are an excellent way to teach the transitory nature of how people process change on both emotional and on intellectual levels. For example, they improve a person's capacity to assess and address an anticipated or already occurring change. This heightened awareness may reveal an employee resistance to change, better prepares a leader to build a trust bridge of empathy and compassion.

The Kübler-Ross Change Curve



The most recognizable of change management frameworks is the Kübler-Ross Change Curve. In 1969, Elisabeth Kübler-Ross studied the emotional experience of terminally ill patients. Specifically when the subjects learned they were terminally ill, how they processed the information and accepting loss.

Lessons learned about managing the emotional toll of change are readily applicable to the workplace. Understanding the loss pattern, leaders may employ empathy, compassion, and kindness.

Successfully managing and leading change in this dynamic time requires employees to perceive a stable work environment. Achieving solid footing allows leaders to fully access strengths and overcome weaknesses. Psychological safety allows teams to face real time challenges in an open and honest matter. During disruption, stability fosters faith in employees. There are many sources of stability: reiterating organizational mission and vision, clearly communicating strategies to accomplish purpose, and holding a common language for change management.

- 1 Before the change, or when you are first informed of the change
- 2 During the change, creating a safe space for productive progress
- 3 After the change, applying systems thinking

A diverse world requires a diverse range of change models, meeting people and organizations where they are and getting them where they need to be. There are linear and recursive models. Linear models are effective when change has a distinct beginning and end. Examples of these types of changes are implementation of a new enterprise resource platform (ERP), building a new hospital, rolling out a new manufacturing line, or launching a new academic degree program.

To better understand the similarities and differences between change management models, let's compare the 'steps' of four well-known models against the Kübler-Ross model. Our matrix will bucket Lewin's simple 3-stage Change Management Model: Unfreeze—Change—Refreeze (1947), Kotter's Sophisticated 8-Step Process for Transforming Organizations (1995), EASIER (Hussey, 2000), and Prosci's ADKAR (Haitt, 2003). For equanimity, we will place the steps into three milestone buckets: before, during, and after the change.

Framework	Before	During				After
Change Curve (Kübler-Ross, 1969)	Change Occurs	Denial	Resistance	Exploration	Acceptance	Post Change
3 Stages (Lewin, 1947)	<u>Stage One:</u> Freeze	<u>Stage Two:</u> Unfreeze		(Transition)	<u>Stage Three:</u> Refreeze	
8 Steps (Kotter, 1995)	<u>Step One:</u> Create a sense of urgency	<u>Step Two:</u> Build guiding coalition	<u>Steps Three and Four:</u> - Form Strategic vision and initiatives - Enlist volunteer Army	<u>Step Five and Six:</u> - Enable action by removing barriers - Generate short term wins	<u>Step Seven and Eight:</u> - Sustain acceleration - Institute Change	
EASIER (Hussey, 2000)	Envision	Support	Activate	Implement Ensure	Recognize	
ADKAR (Hiatt, 2003)	Awareness	Desire	Desire	Knowledge	Ability	Reinforcement

Our “new normal” requires us to accept that we are in a constant state of change, driven by significant and powerful forces out of our control. In a world filled by rapid fire technology advances, disruptions are occurring at a speed that is giving us organizational whiplash.

The framework or model our organizations choose becomes the culture’s emotional and logical support structure. Through shared understanding, the model provides a predictability to processing change. It helps to build a trust bridge between leaders and front line teams—even extending to customers. Sometimes the model itself requires an enhancement to meet new dynamic organizational requirements.

Let’s unpack three change management models that are recursive or cyclical in design. Spiral Model (Boehm, 1986), Transtheoretical Model – Stages of Change (Prochaska, et. al 1983, 1992), and Leading People Through Change (Blanchard, 2006). This may assist in better understanding how to navigate the ‘newest normals’ of our workplace environments.

Framework	Before	During				After
Change Curve (Kübler-Ross, 1969)	Change Occurs	Denial	Resistance	Exploration	Acceptance	Post Change
Spiral Model (Boehm, 1986)		Liaison and planning	Risk analysis	Engineering	Construction and release	System evaluation
Transtheoretical Model – Stages of Change (Prochaska & DiClemente, 1983; Prochaska, DiClemente, & Norcross, 1992)		Precontemplation (not ready)	Contemplation (getting ready)	Preparation (ready)	Action	Maintenance
Leading People Through Change (Blanchard, 2006)	Select and align the leadership team	Explain the business case Envision the future	Experiment to ensure alignment	Enable and encourage team Execute and endorse	Embed and extend	Explore possibilities

We are in a constant state of flux where shifts occur fast enough in the curve that, before acceptance has happened, another change has occurred. A spiraling change model is **not** a new concept. Focusing on the benefits of the Boehm Spiral Change Model (1986), this will enable leaders to identify where enhancements can be done to their current organizational change model to help with cultural stability and recursive change.

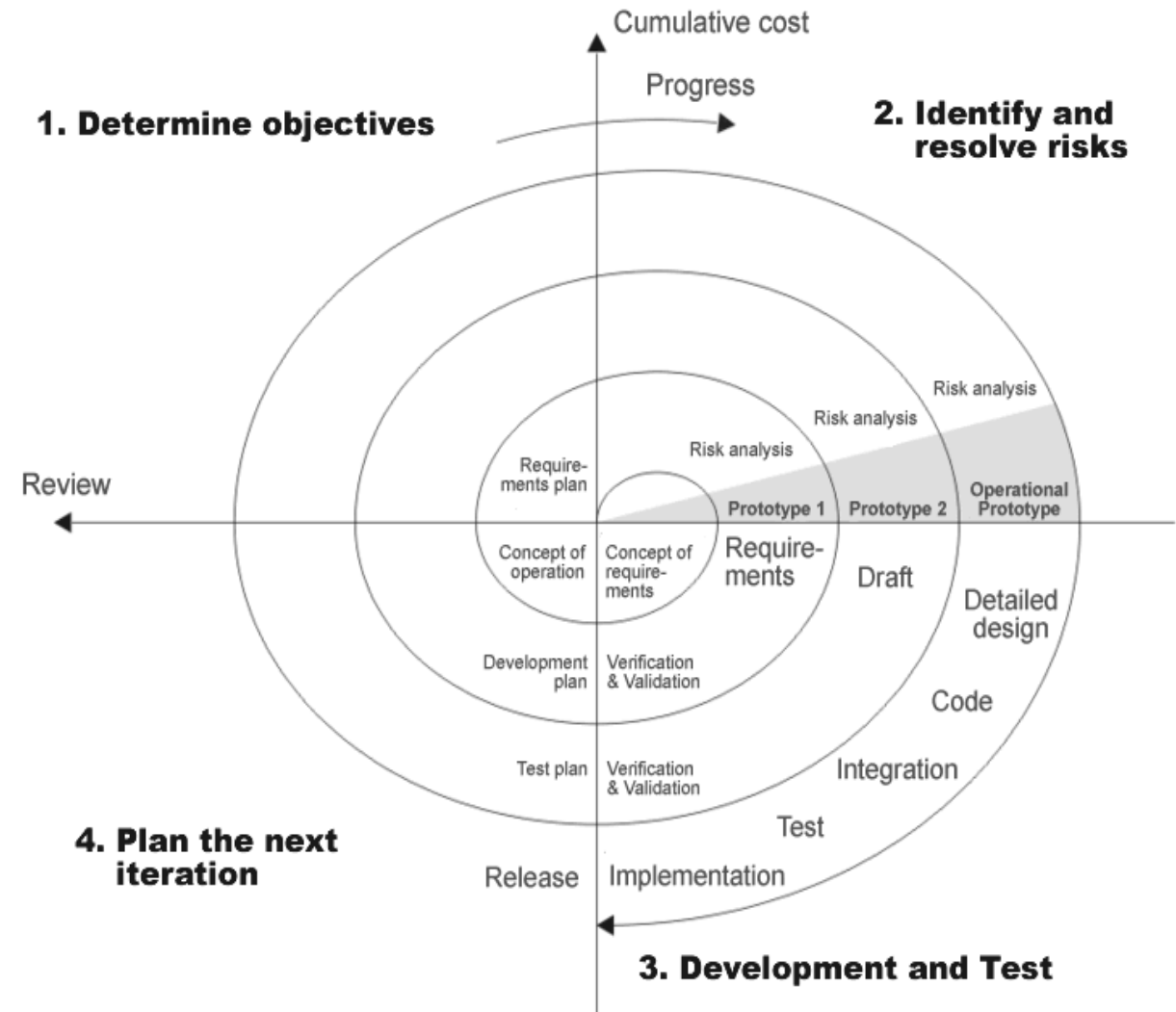
First, accept that our new normal is a constant state of change driven by external forces.

Second, understand that this linear geometry of change has quickly evolved into an overlapping cycle.

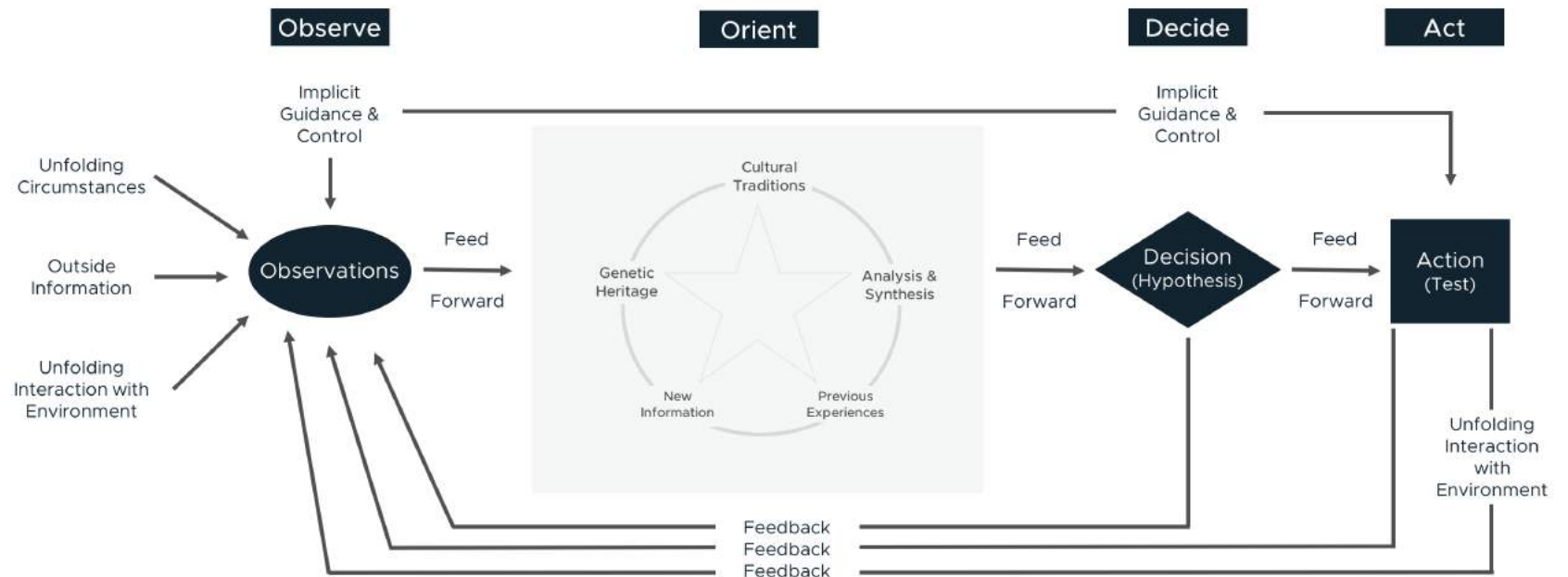
Spiral Change Management

How do you modify a linear change model to ensure success in a recursive world? Through this modification, you maintain the organization's shared language and understanding.

A picture is worth 1,000 words. Here is an illustration of a spiral, or recursive change management model. In 1986 and 1988, Barry Boehm published this model based on observed repeating patterns of change within software development projects. The purpose of the model was to reduce new product risk in the information technology industry. Boehm posited that change was experienced in a four step cycle. With each iteration, those experiencing change would learn and adapt quicker. He later expanded his findings for wider application beyond the software industry. The importance of this model is the recognition of organizational learning and intellectual property.



We may modify an organization's linear change model by improving the leader's cycle of observation and action with a concept called 'the OODA Loop'. Developed by USAF Colonel John Boyd, it helps create a structure for understanding and dealing with the unfolding of uncertain events. The OODA Loop emphasizes our ability to look at and collect information to synthesize into our mental model for orienting towards a stance for decision, and then onto the action. The better we can OODA and keep doing it iteratively, the more chance we have of staying out in front of events or starting to control the 'battlefield.'



John Boyd's OODA Loop

This introduction to change management models and frameworks is not a comprehensive primer. We have briefly explored the linear and non-linear nature of change and human behavior modification. Earlier, we stated how over 70% of change management initiatives fail. Digging deep, there are two leadership super-powers during change: adaptability and a learning mindset. Both of these help leaders systematically sustain the gains of change management initiatives. The Spiral Change Model (Boehm, 1986) and Transtheoretical Model – Stages of Change (Prochaska, et al, 1983, 1992) support the continuous learning of organizational culture. Another systematic approach to building trust and cultivating a learning culture is the Allen Behavioral Change Model (ABCM), which will be described in deeper detail later in this playbook.

How can you successfully navigate change during COVID-19?



Lead the way

Learning and development professionals ensure the change management framework is understandable and easy to adopt.



Prepare

Ensure our organizations have change management tools readily available: develop job aids, quick win webinars, collective coaching sessions, mini-educational bursts, etc.



Over communicate

Partner with our marketing department to carefully craft prewritten texts and scripts for your managers and supervisors *focusing on the emotional connection.*

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*It is not the strongest or the most intelligent
who will survive, but those who can best
manage change.*

Charles Darwin

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Leading Change

Are we managing change or managing success?

During our highly interactive *Co-Create Your Playbook for Change Management Success* webinar, a provocative shift was discussed around changing the term of 'change management' to 'success management'. The goal is to embed the newly desired behaviors, processes, systems, and structures into our organization's DNA. Shifting an organizational culture requires support from the C-Suite to the front line. Engaging executives, managers, and employees in a meaningful implementation may reduce the risk of failure. A two-prong approach is recommended for achieving success: strategic planning and tactical execution.



Strategic Planning

- Align change management to organizational philosophy, strategic goals, and KPIs (key process indicators)
- Create a strategic planning document addressing all stakeholders
- Secure executive champion for sponsorship
- Utilize systems thinking to connect mission, vision, and values
- Acknowledge talent pipeline requirements for successful implementation and sustainment

Tactical Execution

- *What is our organization's change management methodology?*
- *What are the specific values, behaviors, and other organization culture attributes required to support the implemented change?*
- *What are the strengths and weaknesses of the existing workplace culture?*
- *How are we clearly articulating the link between the required new behaviors and the ongoing success of your organizations?*
- *How will we facilitate employee engagement on a social level to strengthen our culture?*



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Leading Change **Before**

Before the Change

It is important for employees to understand how the business processes will be different from the status quo—before and during COVID-19. Methodically, conduct a change management assessment and have the information available for the change management task force to assist in communicating with employees. Both individually and in teams, remember that change communication best covers both the rational housekeeping business to-do's, as well as the emotional mindset of the employees. The latter will drive your success and adoption of new processes and procedures when employees feel safe and trusted.

When our organizational leaders have heard of an impending change, or in the case of COVID-19, change that has happened already. Let us level set and review how prepared you are for the change.

How are we doing? Have we...



Completed a culture audit (formal/informal) to determine what will support and what will impede the changes (risk analysis)?



Established a governance structure: steering committee, change champions, work group, etc.?



Engaged stakeholders through interviews, focus groups, etc.?



Documented implementation plan with timeframe and milestones?



Created a communication plan inclusive of all channels?



Planned for training and educating leaders at all levels to lead change?

Crowdsourced Insights

What successful practices do you utilize before change?



Before the change, or at the beginning, we need to know why we are here. We need to understand what drove the change, so we can modify what we do accordingly.



Involve everyone who will execute the change as a part of the strategy conversation so that the network and resources needed are on board at the beginning.



Before is filled with so much uncertainty. Communicate as much as possible to put employees at ease where you can. Answer questions.



Determine the level of acceptable risk— what are we willing to give up?



Keep in mind that employees are often excited to be a part of a new initiative and helping with execution, especially if you help them see it as career growth experience.



Don't forget that even good change is about loss. Employees will feel pushback or resistance even when you see the change as positive.



Make sure leadership is aligned in strategy.



Communicate how success will be measured.

Guide on the Side

In an ever-changing work environment, leaders may cultivate a sense of stability by fostering a psychologically safe environment. This is accomplished through meaningful connections with direct and indirect reports. The leadership skills of empathy, compassion, adaptability, and learning mindset strengthen organizational resilience and emotional wellbeing. To help leaders coach those they lead, a simple and effective tool is David Rock's SCARF model (2008). This hard science mnemonic model leverages the neurological science of survival. Acknowledging people's behavior is driven by the perception of threat and safety. This easy and natural model both unpacks and resolves emotional distress. Employee engagement is heightened when they experience being heard, valued, and trusted in an ever-changing work environment.

SCARF stands for the five key “domains” that influence a person's behavior in social situations.

Status

Our perceived relative importance to others

Certainty

Our perceived ability to predict the future

Autonomy

Our perceived sense of control over events

Relatedness

How safe we perceive our environment

Fairness

How we perceive the level of equality during exchanges between ourselves and others

When planning communication with your team, whether as a group or individually, plan your discussion using SCARF to anticipate pushback or resistance. The following example includes a framing question and a real-world application in the scenario of returning to work.

S

What is your relative importance to others?

Validate the value of your team to the organization so they can make meaningful and purposeful connections to your organization's mission, vision, and purpose.

C

What is your ability to predict the future?

Creating safety during a time of uncertainty in a success in itself!
Our human brains prefer predictability, therefore when we know what to expect, we feel safe. Ensure you are clear in your communication of goals, timelines, and deliverables.

A

What is your sense of control over events?

Leadership gut check: How much are you allowing the team to drive the discussion? Are you holding a safe space for them to learn and grow?
By allowing your team to participate in the decisions regarding people, process, systems, and structure—together you build ownership of outcomes and ultimately, success.

R

How safe are we in this environment?

This is an excellent application of Maslow's Hierarchy of Need: fostering a sense of belonging. Relatedness is a great driver for employee engagement. How are you creating a sense of belonging for team members?

F

How fair do we perceive the exchange between others or ourselves?

Be aware that a sense of unfairness may happen when there is a lack of rules, expectations, or objectives. When returning to work, this is a good time to revisit your team's charter and make modifications.

Collective Wisdom Communication, Engagement, & Productivity Recommendations

Communication

Document your communication strategy as a data-driven plan

Create a compelling description (both rational and emotional) of the desired future state that speaks to the value proposition of each stakeholder group

Gather appropriate information resources in different formats and for different audiences

Determine the communication channels you will use

Identify who the appropriate senders of different communications should be

Create mechanisms that will allow two-way communication

Engagement

Conduct a culture audit to determine the risks and rewards of change, anticipating impact: process, capabilities, organization, beliefs, policies, systems, behaviors, values

Lead the way: a comprehensive plan for preparing leaders as advisors and guides to the change

Be cognizant of your middle managers as they will be the most impacted by any resistance to change among the employees they supervise. Provide them coaching skill guidelines.

Collective Wisdom Recommendations Continued

Governance			Stakeholder Engagement			
Productivity	Establish a change oversight, which could be steering committees, work groups, or a network of change advocates	Secure executive champions, i.e. a sponsorship to remove productivity barriers and encourage the front line	Approve and allocate resources to support the change; financial, staffing, vendors, etc.	Identify stakeholders who could be affected by your change initiative	Conduct periodic check-ins to gauge how stakeholders perceive the change and to prepare them for the change	Facilitate the sharing of information among stakeholders—events, briefings, and other activities
	Enhance your Risk Analysis with a heat map to the amount of impact experienced by internal and external stakeholders		Make sure the implementation plan includes a change management structure, program, and project activities and milestones		Ensure new processes, procedures, policies, systems, and structures are designed, reviewed, documented, and version controlled with easy access	

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Change is inevitable.
*Progress is a **choice**.*

Dean Lindsay

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Leading Change **During**

During

The most compelling reason organizations require formal change management planning and execution is because of the complexity of operational change. Purposeful change management reduces the risk of failure when upending a deep-rooted set of behaviors and systems. Keep in mind who is responsible for what: front line employees are responsible for their personal decision to accept the change and how they accept the modification of their jobs, while it is the responsibility of managers to direct and support them. If employees are unsuccessful in their personal transition, or if they do not embrace the new way of working, it is most likely that the change—no matter the level—will fail. During change, when leaders maintain a psychologically safe and meaningful connection with employees, they create a trust bridge for them to adopt the change required and your organization's ability to successfully change.

How are we doing? Have we...



Clarified leadership expectations and support?



Implemented the training plan for helping implementers learn new behaviors, skills, and work progress—aligned to performance and mindset changes that must occur?



Communicated the business case “why” to reinforce changes in behavior? Instituted a recognition platform for success?



Included both a strategic and tactical approach for change, especially focusing on the individuals experiencing the change?

Crowdsourced Insights

What successful practices do you utilize during change?



Help leaders be active sponsors, not just outside viewers.



Empower those who are excited about the change to champion it.



Don't assume that everyone has what they need. Communicate via feedback loops to keep employees aware and engaged.



Start to communicate small changes with mini-lessons, webinars, and videos before a full training program.



Pay more attention to employee emotional needs. Social interaction is down, so try virtual check-ins, events, and casual chats.



Normalize the need for people to take a few hours to 'check out' when they need to.



Be mindful of the whole person. Lines between work life and home life have blurred.

Guide on the Side

Once the change is underway, continual support of the cultural values of learning, trust, and innovation is required. In the “During” timeframe of change, a focus on individual readiness and capability is an opportunity to further strengthen trust in leadership. When you invest in the training and development of your employees, whether at the team or individual level, you demonstrate how much you value them and believe in their ability to achieve success.

The Allen Behavioral Change Model (ABCm) enhances and is enhanced by the concepts of spiraling change, adaptive stance, and OODA. In addition to the rational and logical frameworks of other change management models, ABCm focuses on the emotional and subconscious drivers for human decision making.

ABCm focuses on the emotional and subconscious drivers for human decision making. This is where the magic happens and the necessary knowledge and behavioral changes stick. ABCm is “genuinely about enriching the lives on individuals by increasing their capabilities, self confidence, and performance.”

Found within the seven-step ABCm is the 3M’s model, which stands for **M**eaningful, **M**emorable, and **M**otivational learning experiences. These 3M’s connect the change message to employees’ hearts and minds, which in turn strengthens change through an emotional connection. In turn, employee engagement is heightened as they find themselves succeeding in an ever-changing environment.

[DOWNLOAD THE ABCm White Paper](#)

Collective Wisdom Communication, Engagement, & Productivity Recommendations

Communication

Implement the training plan for helping implementers learn new behaviors, skills, and work progress aligned to performance and mindset changes

Does your behavior approach include a model for individuals to experience the change?

- Allen Behavioral Change Model (ABCM)
- Ensure participation and help to minimize stress
- Personalize the case for change

Engagement

Leaders conduct rounding with employees, direct reports, and teams. These rounds are more emotional and include empathy and compassion check-ins and less process/ progress reports. Use open-ended questions and apply active listening

- How are you feeling about this change?
- How may I best support you?
- Do you understand the change?
- What are the impacts of this change on your department?

Productivity

Openly share productivity measures via dashboard, physically or online. Be transparent!

Leaders consistently connect with direct reports to reinforce changes in behavior

Be prepared for conflict and manage it effectively because these are emotions of denial and resistance. When not addressed, they are often the reason for change management failure

Prepare your middle and front-line managers to be able to answer questions and explain the process

Apply a 'train-the-trainer' approach and create internal champions of new systems or practices. Internal staff will help disseminate information more quickly and easily

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*There is nothing wrong with change, if
it is in the right direction.*

Winston Churchill

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Leading Change **After**

After the Change

The dust has settled. We are now on the other side of a significant milestone of capstone. The true measure of success is how integrated this newest change positively impacts the day-to-day world of our organization. How will we systematically sustain our gains?

How are we doing? Have we...



Planned the ongoing reinforcement of the new ways of working?



Ensured this change is still on the radar of our executive sponsor and senior leadership?



Implemented an evaluation methodology to measure ongoing change adoption? Included a loop for needed adjustments?



Culturally embedded the change into performance management mechanisms such as annual reviews, engagement surveys, succession planning, etc. ?



Instituted a multiple phase training plan, documented via completion rate, new knowledge acquired, and impact to KPIs?



Formalize a feedback mechanism for employee and consumer engagement and satisfaction to ensure the open and candid exchange of ideas and information?

Guide on the Side

An effective method to measure and understand a change implementation at a milestone or final deliverable is an **After-Action Review (AAR)**.

This simple process can be conducted live, facilitated in-person, or online in less than an hour. There are five questions which provide insight into the lived experience of the target audience.

This process may also be known as a 'Project Postmortem' or 'Hot Wash', dependent on the industry.

This engagement activity advances self-directing teams by fostering the autonomy to make data-driven decisions and own the quality of their outcomes.



After-Action Review (AAR)

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What is working well?

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What is working not so well?

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What might we stop doing?

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What might we start doing?

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What might we continue doing?

Collective Wisdom Communication, Engagement, & Productivity Recommendations

Communication	Maintain momentum through reinforcement communication mechanisms	Actively solicit feedback from affected parties: executive leadership, employees, consumers, and sometimes even vendors	Conduct a pulse or benchmarking survey to determine engagement, wellness, and morale	Report to executive sponsor and senior leadership on a quarterly basis via a dashboard to maintain gains
Engagement	Continue to invest in your employees through training and development		Monitor and evaluate the systems that are in place to gather feedback and measure change adoption and impact	
Productivity	The implementation measurement goals are transitioned as the way business is conducted daily	Continue to reinforce the coaching expectation with manager and supervisors as a role to play		Record your training and make it available for current and future employees

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*Change is the law of life. And those who
look only to the past or present are
certain to miss the future.*

John F. Kennedy

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Competing **Priorities**

Competing Priorities

Change fatigue... it happens. It is the opposite of change resilience. Change fatigue is a mindset of destructive passive acceptance towards organizational change. No one is immune, leaders, individual contributors or teams can experience it. Constant change risks constant chaos. People may feel bombarded with the multiple requests to change direction, processes or practices. When they reach the change exhaustion tipping point, it is natural for them to quickly survey the workplace landscape. They are seeking camaraderie in the chaos. If organizational leadership, at any level, is witnessed avoiding or ignoring the requested change, the trust bridge is broken.

In today's highly volatile environment, change is not a singular event. The challenges of constant and concurrent change raises the risk of competing priorities.

Leaders create a sense of stability during uncertain times when they recalibrate expectations. Clear and honest communication support organizational adaptation and resilience.

How are we doing? Have we...



It is clear how many different change initiatives and programs are currently happening within the organization



A mechanism for reviewing multiple cultural impacting events is easily accessible by senior leadership



Data collection mechanisms like pulse surveys, annual employee engagement surveys, culture of safety surveys, exit and stay interviews are assessed for trends regarding resilience, burnout, and change fatigue.

Crowdsourced Insights How may we lead through competing priorities?

Strategic Planning



I use a visual of a pie. We make pieces for every initiative. If something needs to be added, we look at what has to be removed or replaced and have that discussion.



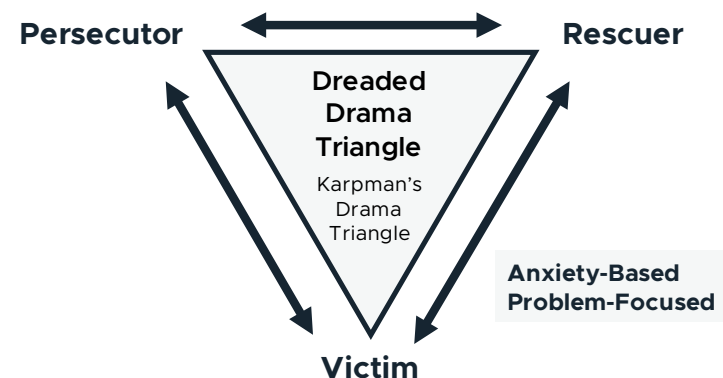
Get early buy-in on what is important to stakeholders. Get clear reasons for their support.



Make sure that the right and left side of the organization know what the other is doing. There is danger in running change initiatives with a lack of communication.

Tactical Execution

Webinar facilitator, Lisa Stortz, recommended teaching our critical middle leaders the “Drama Triangle” or “Karpman’s triangle” as a coaching tool. This quick and easy model helps to shift individuals and teams out of a victim mindset. First published in 1968, popular application today is the structural analysis of conflict. The triangle illustrated the tension between three conflict roles: persecutor, victim, and rescuer and the instability of such perceptions. Karpman received the Eric Berne Memorial Scientific Award in 1972 for this work.



Guide on the Side

To provide certainty in uncertain times, here are three things a leader can do.

Establish routines, rituals, or team habits that provide stability

Neuroscience reveals the brain finds comfort in predictability—providing the brain something to expect. Example team routines: daily huddles or afternoon check-ins; rituals: celebration of birthdays or anniversaries; team habits: agendas for meetings, lunch and learns, or social happy hours.

Encourage your team to invest in themselves

Have them calendar block time weekly for professional development. It can be as little as 1 hour per week. Provide them with a playlist of open source material for development: TEDTalks, Podcasts, Articles, and Free Online Assessments. These short-term goals will build confidence and know one thing is truly certain – that you care about them.

Utilize visual management to track progress of projects or KPIs

There are sophisticated programs your company may already have access to or use a simple whiteboard/excel spreadsheet dashboard. During this period of uncertainty, long term goals can feel overwhelming. Chunking them into short sprints and acknowledging progress will foster reward and happiness.

Collective Wisdom Communication, Engagement, & Productivity Recommendations

Communication	Create focus and tie multiple changes to the organizational mission, vision, and purpose. This will help our employees prioritize multiple requests	Overlay the multiple change initiatives into one schedule. This is a powerful way to illustrate to senior leadership the amount of change being cascaded throughout the organization. It can help develop realistic timelines and prevent 'change fatigue'	When managing expectations, remember that change is a highly emotional experience, so be sure to express empathy, compassion, and kindness when speaking to those affected.
Engagement	Stay organized to maintain a feeling of stability	Delegate – distribute work in a transparent manner and express how you understand the capacity of your team	Check in via leader rounding and pulse surveys
Productivity	Review the workload regularly. If productivity is lagging, seek to understand if it is people, process, system, or structure	Prioritize – hold weekly 15-minute strategic initiative meetings and distribute findings to ensure everyone understands what is important in the short term	Advocate for time blocking. It is a technique utilized to increase productivity and it works beautifully with multiple concurrent projects

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Willingness to change is a strength, even if it means plunging part of the company into total confusion for a while.

Jack Welch

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When Change Fails

Change can be difficult. There is not one easy solution. It is a process that requires a lot of hard work, planning, dedication, and commitment. Even when the processes suggested in this playbook are followed diligently, the change does not always just 'stick'. Though we did not fully explore this aspect of change management during our interactive webinar, we felt it important enough to include some 'guide on the side' insights. Maybe this may warrant another interactive webinar – you tell us!

When successful and unsuccessful change initiatives are compared, often the failure lies in the skipping of steps or mindful assessment between phases. Accelerating through change phases, whatever the chosen model or framework, only provides the illusion of speed. Slowing down and conducting an AAR at each milestone will help identify missed opportunities and course correct. To not purposefully assess progress during change, runs the risk of compounding errors.

Bravely diagnose the symptoms of change misfires. Give our employees a voice and honor it. When we do, nurture the required buy-in and trust for sustained and future change.



Symptoms of Change Misfires



The change lacks buy-in from key influencers and executive champions

Antidote: Gain executive sponsorship, establish a business case, data-driven, ROI, cost-benefit analysis, or payback period.



The change has not been communicated thoroughly

Antidote: "The single biggest problem in communication is the illusion that it has taken place." – George Bernard Shaw.

Communicate multiple times.



The change was not followed by an effective training program

Antidote: Ensure your training team is looped into the change directive so they may be equipped prior to launch.



The change lacked specific dates. What is worse than knowing there is a change coming? Not knowing when it will happen!

Antidote: Provide your internal team enough time to process changes so they are emotionally prepared. A FAQ sheet is highly effective in communicating salient facts about the change and ensuring clear expectations.

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The real winners in life are the people who look at every situation with an expectation that they can make it work or make it better.

Barbra Pletcher

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Resources for the **Future**

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*The lesson is, we all need to expose
ourselves to the wind of change*

Andy Grove

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How we help people



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