LEAD CHANGE

PRACTICAL TOOLS FOR CHALLENGING TIMES

Change requires leadership.
Leadership requires change.

LEARNING POINT GROUP

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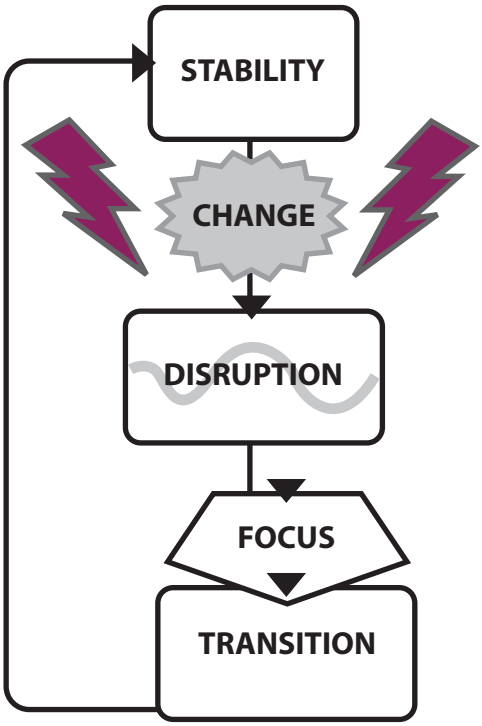
LEAD **CHANGE**

Change requires leadership and leadership requires change. Leadership can come from anyone in the organization. Leaders must not only deal with change themselves; but help others deal with the change as well.

This workshop is designed to help you do both. You will receive practical tools for not only surviving, but also succeeding in times of change.



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The Nature of Change

To manage it, we must first understand it.

Otherwise we must at least accept that it is managing us.

Three Words

1.

2.

3.

Realities of Change

What Is Your Experience

The World Waits for No One

It would be nice if we had a big pause button that would put our world on hold long enough for us to catch our breath and get our act together. But, the world just doesn't work that way. In today's business environment, factors change so rapidly that if we don't learn to adapt quickly, we get left behind.

How is this reality impacting your team?

What do you need to do to effectively handle this reality?

Change Is, by Definition, Disruptive

Change requires that we stop doing certain things and we start doing others. Habits and routines must be broken, and new practices must be established. Systems that we are comfortable with go away and we must learn new ones. None of this is necessarily fun. Change disrupts our lives both emotionally and logistically. A big challenge in dealing with change is dealing with the disruption.

Is this a reality where you work?

What do you need to do to effectively handle this reality?

Change Is Unrelenting

We don't have the luxury of dealing with just one change at a time. We are faced with a barrage of changes, and they just keep coming. They are often intertwined and they often create a domino effect. As a result we must learn how to anticipate, juggle, and prioritize the changes as they approach us.

How is this reality impacting your team?

What do you need to do to effectively handle this reality?

Change Happens at Four Levels

First, industries change as market conditions within the industry change. Second, organizations change to realign themselves with their industries and their markets. Third, teams and work groups change to realign themselves with new priorities within their organization. Fourth, individuals change to realign themselves with changing work priorities and to reconnect with their own values.

Is this a reality where you work?

What do you need to do to effectively handle this reality?

There Is Change and There Is Transition

Change is not the same as transition. Change is the shift from one situation to the next. Change is often tangible—we can describe it, explain it, and see why it makes sense. Transition is more complex. It involves the emotional process we go through as we deal with the disruption that the change creates. Moving from one house to another is change. Packing up and saying good-bye is transition.

How is this reality impacting your team?

What do you need to do to effectively handle this reality?

What additional realities are impacting your work team?

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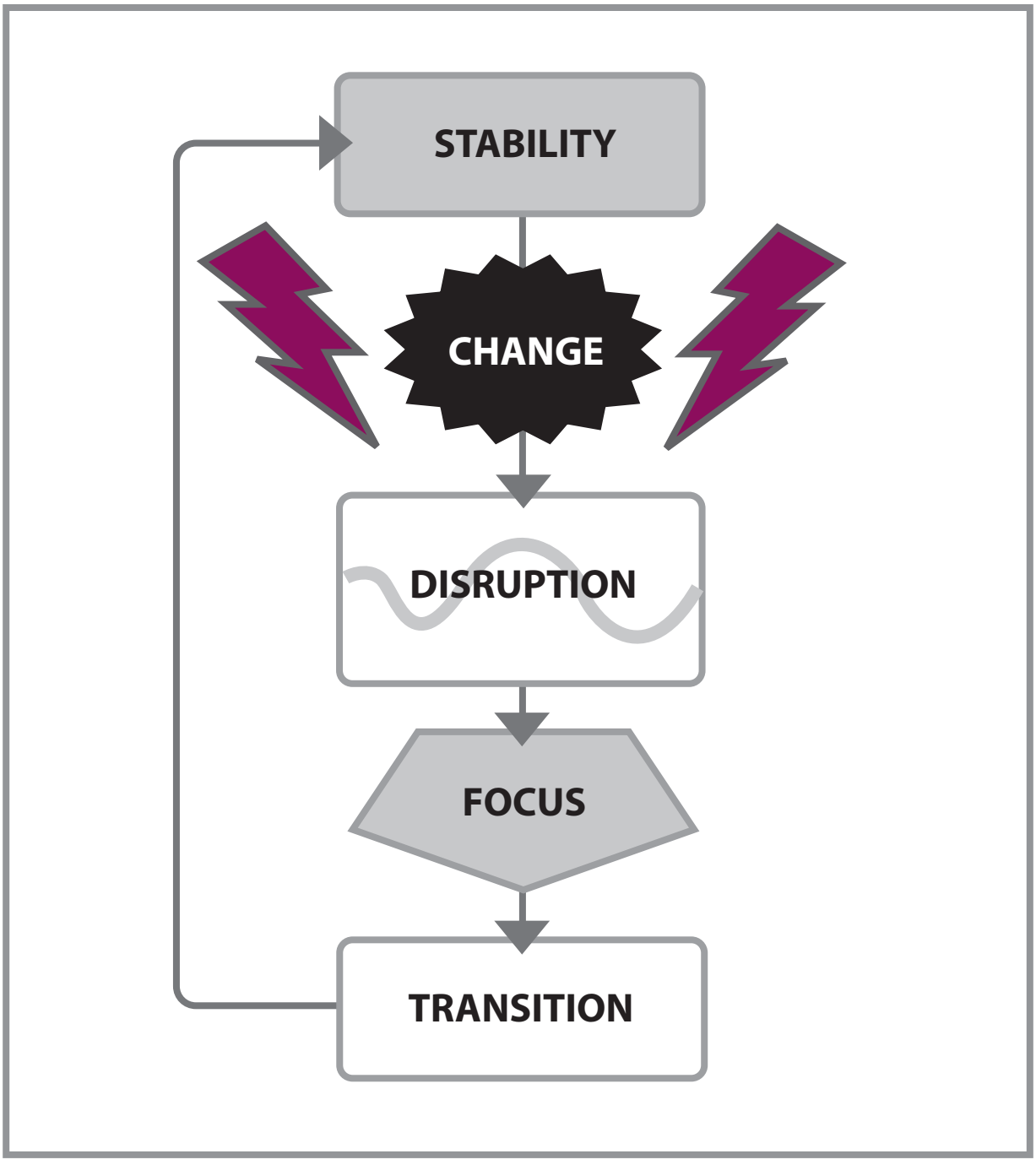
Lead Change
Model



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Five Keys

To Leading Your Team Through Change

1 **Build change readiness.**

2 **Clearly define the change.**

3 **Communicate during change.**

4 **Address resistance.**

5 **Make change happen.**

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Real Life
Change Situation

1. What is the specific change situation?

2. Why is the change necessary?

3. Is the change negotiable or is it pretty much a given?

4. What specifically will be required of you and your team?

5. What questions or issues do you have regarding the change?

6. What will be your first steps in moving forward?

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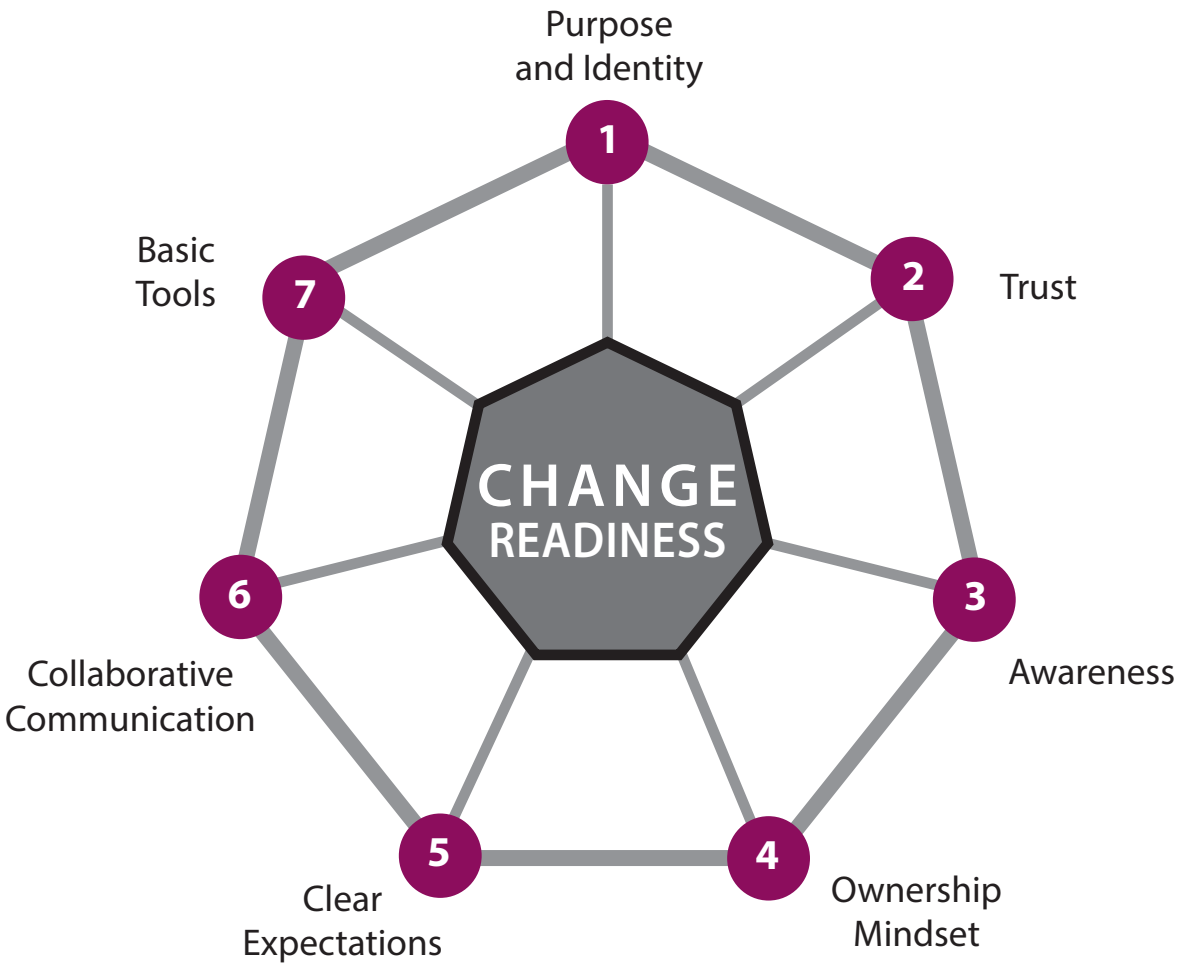
1

Build change readiness.

Both you and your team must work to be ready for change when it occurs. Develop readiness in the off-season.

Change Readiness

Overview



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Change Readiness
Assessment

When it comes to our change readiness, how well are we doing? What key factors are most important for us to work on right now?

		DOING WELL?	CAN DO BETTER?
1	Purpose & Identity		
2	Trust		
3	Awareness		
4	Ownership Mindset		
5	Clear Expectations		
6	Collaborative Communication		
7	Basic Tools		

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Change Readiness

Capacity to Change = Ability + Motivation

CAPACITY = Ability + Motivation

	Ability	Motivation
Individual	Skills Knowledge Experience Physical Requirements	Enthusiasm Perspective Confidence Value Alignment
Environment	Tools Resources Authority Information Cooperation	Clarity and Vision Alignment and Congruence Cooperation and Collaboration Accountability Fairness, Trust, Respect

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Change Readiness
Action Plan

Use this worksheet to plan specific actions you will take as a team to build readiness and resilience for change and transition. Then go and do what you plan. Use this action plan to also check your progress on the actions you intend to take.

Focus
Which of the readiness factors will you focus on (Purpose and Identity, Trust, Awareness, Ownership, Clear Expectations, Collaborative Communication, Basic Tools)?

Actions	Outcomes	Owner	Date
What specific actions will we take to develop change readiness?	What do we intend to be the outcome of each action?	Who will own each action?	When will each action be completed?

Check
What actual results are occurring from your actions? Are you achieving the desired outcomes? Are you effectively developing readiness for change within yourself and your team?

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2

Clearly define the change.

When change is imminent, your job as a leader will be to clearly define the change in a way that is compelling and accurate for your team. Doing so helps to create focus and prevent misguided energy and speculation.

2

Definition

Clarity Worksheet

As you begin to consider the specific change, take a moment to assess the readiness of yourself and you team to make the change.

Define what the change IS.	Define what the change IS NOT.

How negotiable is the change?

Benefits to making the change. Organization - Team - Individual	Benefits to staying the same. Organization - Team - Individual

Risks or costs to making the change. Organization - Team - Individual	Risks or costs to staying the same. Organization - Team - Individual

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2

Definition

Specific Requirements Worksheet

What specifically will be required of your team, as a whole and as individual team members?

What will be required of our team as a whole?	When?

What will be required of individual team members?	Who?	When?

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Communicate during change.

When change and transition is upon you, it becomes crucial that you plan plenty of time for communication.

You must carefully cultivate both the message (4Ps') and the messenger (4C's).

Change Communication

4 P's Worksheet

Preparing the Message (4 P's)

Purpose	Picture
Why is the change necessary? Who says so and on what evidence? What will be the benefits to making the change? What would happen if we didn't implement this change?	What will the change look like and how will it be different than now? What will people experience that is different than now? What will the transition process look like?
Plan	**Part to Play**
When will my people receive the information, training, and support they need to make the change? What key events are involved with this change that people need to know about? What specific steps, actions, and behaviors will be required of my people? What kind of help, support, and resources will be provided?	What will be the shared responsibilities of each team member during the change process? What will be each person's specific role during the change process? What will be each person's role once the change is complete? Where can people express concerns, problems, and ideas regarding the change process?

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Change Communication

4 C's Worksheet

Preparing the Messenger (4 C's)

Credibility	Concern
Do I know what I am talking about with regard to the change itself, why it is necessary, and how it will most likely happen?	Do I have a genuine care and concern for the needs of the organization? Do I have a genuine care and concern for the needs of the team? Do I have a genuine care and concern for the needs of the individual team member?
Connection	**Commitment**
How can I best connect with and relate to my team? How can I best connect with and relate to each team member? Do I have empathy for each person's situation?	Am I committed to the success of the change? Am I committed to the success of the team? Am I committed to the success of the individual?

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Communication
Action Plan

Use this worksheet to plan specific actions you will take to increase communication during times of intense change. Then go and do what you plan. Use this action plan to also check your progress on the actions you intend to take.

Focus
How will you incorporate the 4C's and 4P's into your communication pattern with your team? What else will you do to foster open and collaborative communication?

Actions What specific actions will we take?	Outcomes What do we intend to be the outcome of each action?	Owner Who will own each action?	Date When will each action be completed?

Check
What actual results are occurring from your actions? Are you achieving the desired outcomes? Are you effectively developing readiness for change within yourself and your team?

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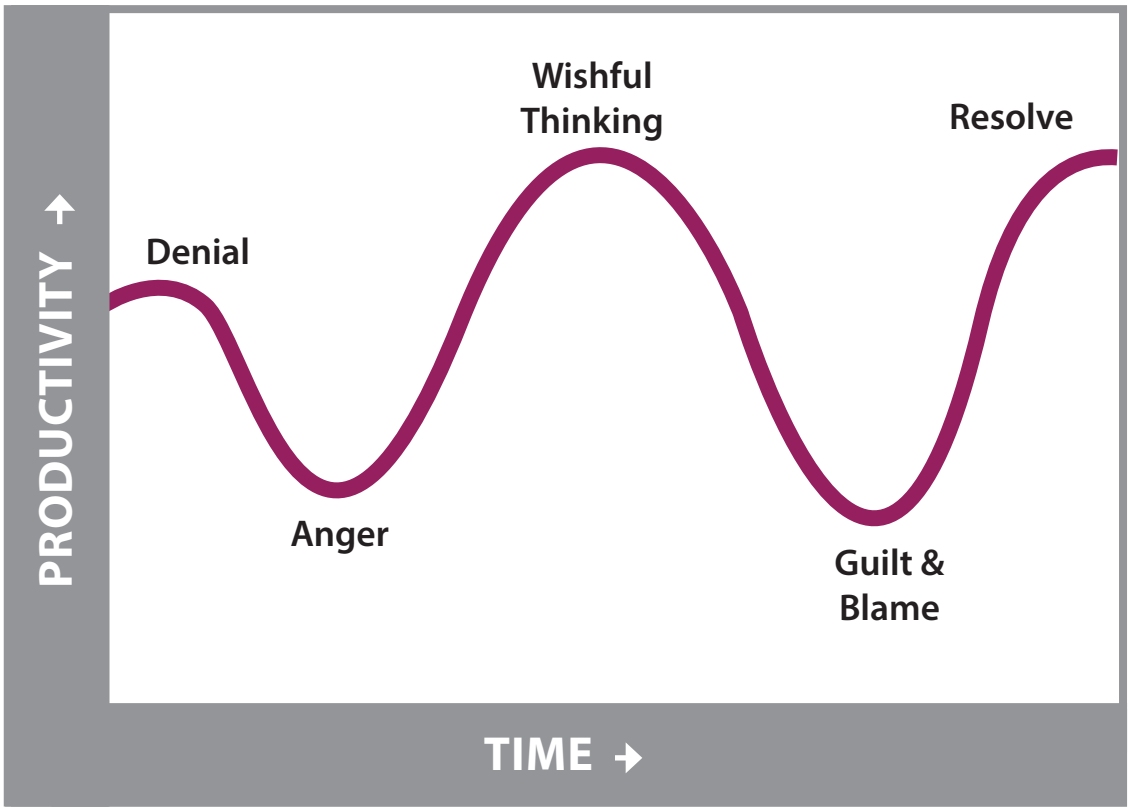
4

Address resistance to change.

Regardless of how inherently good a change may be, there will most likely be some resistance experienced by you and your team. Leading change means dealing productively with that resistance and helping others do the same.

Address Resistance

Emotional Impact



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Change Resistance

Managing Self-talk Template

Stop

Are you feeling negative energy? Do you know why?

What are you telling yourself regarding the change?

What assumptions are you making?

What do you feel is at risk or at stake for you?

Check

How can you verify the accuracy of what you are telling yourself?

How can you challenge your assumptions?

Affirm

What do you already know about yourself that will help you not only survive this change but also thrive during the change?

What experiences and successes from your past can you draw from?

What can/should you be telling yourself that will help you achieve the success you should achieve?

Act

What do you realistically want to have happen?

What practical steps can you take to make that happen?

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Perceived Loss

Change Resistance

Loss of Control

Loss of Position

Loss of Affiliation

Loss of Future

Loss of Purpose

Loss of Entitlement

Loss of Contribution

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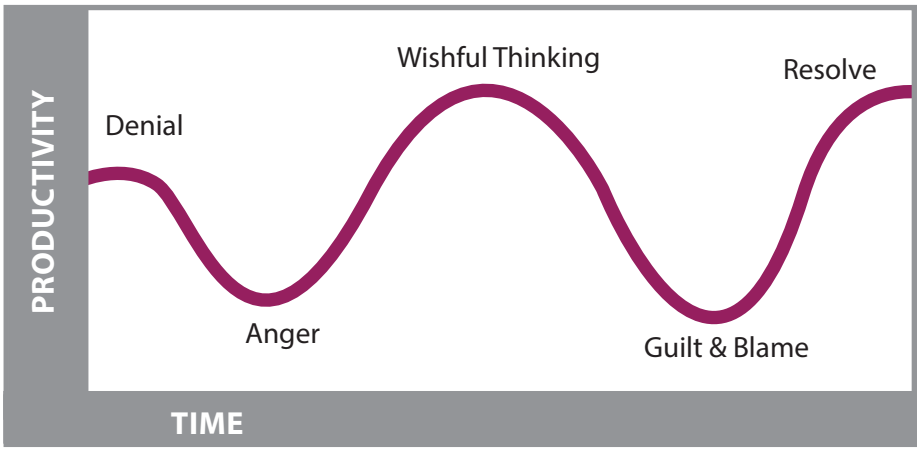
4 Resistance

Response Template

How will you recognize and address resistance – in yourself and in others?

"We all enter the emotional roller coaster at different times – and we all work through the curves at different paces.

Be mindful of the "marathon affect" and sensitive to those ahead and behind you."



	What do they need?	What will I do and say?
R Recognize • Check in daily • Look for early signs • Ask questions • Initiate conversations		
E Explore • Make it safe to talk • Empathy over sympathy • Ask questions • Listen and learn		
A Affirm • Affirm what is true • Affirm your commitment • Affirm your connection • Affirm their capacity to win		
C Create • Create confidence to win • Create sense of urgency • Create path forward • Create collaboration		
H Honor • Honor the person • Honor the past • Honor the process • Honor the change makers		

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Addressing Resistance

Action Plan

Use this worksheet to plan specific actions you will take to recognize and address resistance to change as well as check progress on the actions taken.

Focus

How will you anticipate, recognize, and respond to resistance to change?

Actions	Outcomes	Owner	Date
What specific actions will we take?	What do we intend to be the outcome of each action?	Who will own each action?	When will each action be completed?

Check

What actual results are occurring from your actions? Are you achieving the desired outcomes? Are you effectively addressing resistance to change?

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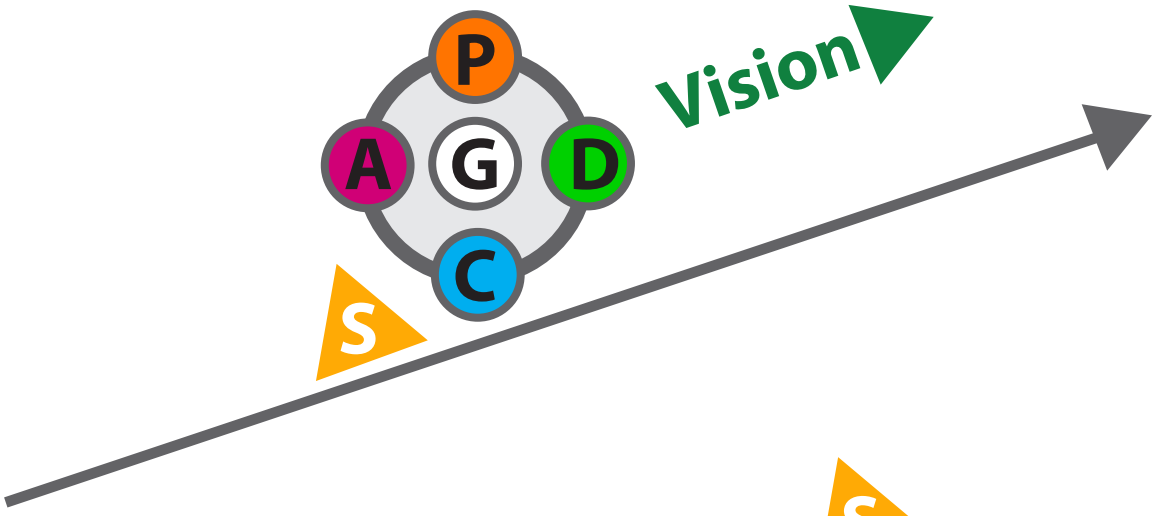
5

Make change happen.

There are usually two parts to successful change. The first part is conceptual and emotional. The second part is logistical. Even if you upgrade your home, you still have to pack the boxes.

Make It Happen

Vision, Goal, Plan, Do, Check, Act, Standardize



Vision

Picture in your head and heart of the desired state.

PLAN

Plan steps to reach the goal.

STANDARDIZE

Seek the best.
Standardize the best.
Sustain the best.

DO

Do your plan.

GOAL

-Specific
-Measurable
-Attainable
-Relevant
-Timebound

CHECK

Check your progress.

ACT

Act and adjust to obstacles and opportunities.

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5

Implement

Goal, Plan, Do, Check, Act Worksheet

What action will you take to successfully implement the change?

GOAL

Date:

Current Situation (Status)	Desired Situation (Vision-Goal)

PLAN

DO

Action Steps	Target Date / Completion Date

CHECK

On track? Lessons learned? Obstacles? Opportunities?

ACT & STANDARDIZE

Adjustments? Corrections? Standardize.

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