

CHANGE PLAYBOOK

7 Essential Strategies for
Implementing Successful Change

THE INTRODUCTION



INTRO/ BUY-IN VS. PARTICIPATION

Seventy percent of change initiatives fail. That's a staggering number. Why so high? All too often management thrusts change on people instead of asking for involvement. In today's rapidly changing world, senior management or field experts can no longer decide how changes will be made. To lower the percent of failed change initiatives, senior managers need to turn to their workforce for solutions, to build partnerships that bring change.

We're talking about the difference between buy-in and participation, which was distinguished by one of our role models, Dick Axlerod. Buy-in assumes that people are being sold something. It assumes the approach that if you position the agenda just so and tell people what they want to hear, they will buy in. This attitude lacks authenticity and transparency, which results in failed change initiatives and apathetic employees. Nobody likes to be "sold."

Buy-in versus participation could also be described as the difference between dictatorship and community. The rise of social media has taught us a lot about what it means to be part of a community. Tools like Facebook and Twitter allow us to connect with like-minded folks, share ideas and learn from each other in ways we haven't been able to before. Translate that model to your organization: you don't employ a faceless workforce, and in the midst of change you want to build in ways for people to find each other, get to know each other and work together. It will help to renew people's enthusiasm for the work they do.

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THE INTRODUCTION



At Achieved Strategies, we believe that for change to be successful, it's got to be an organized community effort. That means leveraging engagement, not buy-in. It means involving those impacted by the change in coming up with solutions and giving them a voice in the process. This attitude says, "We can't do this unless we hear from you. How do we make this successful?"

Is it an idealist approach? Absolutely. Optimistic? Absolutely. But we say, why not? It's time.

The Change Playbook unabashedly reflects our optimism, which we think you'll find refreshingly different from most approaches to change management. In the following pages, you'll work through 7 Change Plays as strategies to coach you through implementing successful change.



"We can't do this unless we hear from you. How do we make this successful?"

The background of the slide is a solid orange color. It features faint, hand-drawn white chalk-like diagrams of football plays. In the top section, there are two arrows pointing in opposite directions and two 'X' marks. In the bottom section, there are several circles representing players, some with arrows indicating movement, and a central vertical line. The text 'PLAY 1: THE BIRD'S EYE' is centered in a dark blue horizontal band.

PLAY 1: THE BIRD'S EYE

THE BIRD'S EYE

OBJECTIVE / ESTABLISH A VISION FOR CHANGE

What's the big picture?

It's your goal as leaders to rally your team behind your big-picture vision. To do that, you need to bring others to a place where they get the bird's eye view.

The problem is that vision statements can be so commonplace that they are taken for granted, diminishing their effect. And we've all heard vision statements full of big words with little meaning. Or they're so long that we lose interest. However, when entering uncharted territory, the first thing your people need to hear is where your organization is headed. So don't overlook the importance of having a vision statement.

Your vision for change should inspire a sense of purpose and tap into possibility. It is not a plan. It does not map out how "we will get there." With The Bird's Eye and its 5 essential tactics, you'll develop a vision for change and learn how to bring it to life.

The Bird's Eye Essential Tactics

1. Align Your Vision
2. Check Your Blind Spots
3. Know Your Audiences
4. Watch Your Language
5. Embrace Your Role



THE BIRD'S EYE

1. Align Your Vision

In order to build a foundation for a **Change Initiative**, your vision needs to align with your business strategy or operational needs. To do that, target two goals:

1. Make a connection between the vision for change and long-term goals. How the change aligns with the bigger organizational picture needs to be clear.
2. Clarify what the change is and make sure you can explain its necessity to others.

2. Check Your Blind Spots

Our worldview often limits our perception of a situation because we choose to see whatever suits our likes and dislikes, which creates blind spots when things don't fit into the way we interpret the world. Checking your blind spots is not always easy because it relies on your willingness to challenge your own ideas. But when you're able to do it, you'll be open to other possibilities for achieving a successful organizational change.

Chances are that you're going through this playbook alone, and that's okay for now. Just be aware that soon you'll need to get your leadership team and trusted sources involved with the play by play. Why? Three reasons:

1. Going at it alone usually means that your blind spots bias your insights.
2. Exploring your blind spots puts you in a learning mode, which allows others an opportunity to provide input.
3. Different perspectives strengthen the foundation for change and its formation along the way.

3. Know Your Audiences

A common misstep in establishing a vision for change is to overlook your audiences. To avoid this, think about the specific groups that you'll be communicating the vision to. For example, you likely won't be communicating your vision for change to customers, suppliers or politicians. Rather, your likely audiences may include your management team, employees, shareholders, and board of directors.



DEFINITION

*A **Change Initiative** is a project that supports an operational, strategic or performance goal that is the target for implementing change.*

THE BIRD'S EYE

4. Watch Your Language

Another common pitfall in establishing a vision for change is uninspired language and ambiguous meaning, like using operational or technical jargon and over using trendy business phrases.

Look at these two sample vision statements:

Vision 1: To transform the resolution of family law issues to the respectful process of collaborative law.

Vision 2: To erase the distinction between community and professional theater and to be the region's destination for experiences of artistic excellence, whether traditional in nature or daring and innovative in choice.

Which one inspires you? Which one has terminology that a larger group of stakeholders would understand? Which one has less jargon? An inspired vision should use purpose-driven language that describes the future as you see it. Your language needs to help your audiences understand why you're implementing change, so choose your words carefully.

5. Embrace Your Role

As a key leader in implementing change, your role is an advocate: you advocate for the change with employees and the organization as a whole, but you also advocate on behalf of employees when you report back to your colleagues. To be an effective advocate, leaders must accomplish two things: alignment with each other and consistent visibility.

Leadership Alignment

In a perfect world, there is time to ensure leaders understand the change and are ready to support and advocate for the program. But when implementing a change, you don't usually have that kind of time. Nonetheless, leadership alignment must begin at the start of the **Change Program**. It then becomes a continuing conversation with senior leadership about the change, its value, purpose, and expected leadership behavior when interacting with employees and advocating for change.

DEFINITION

The Change Program is developed to achieve the business, strategic or performance goal outlined by the Change Initiative. It encompasses the sequence of Change Tactics.

THE BIRD'S EYE

This ongoing conversation should target how the change impacts each senior leader's area, what change means to them, and the best ways to balance bottom-line focused leadership and people-focused leadership. It requires some group-work around the leadership role in the Change Program. There are four fundamental aspects of a leadership role that all leaders need to agree on:

1. Establish boundaries. i.e., "This is what we will do; this is what we won't do."
2. Define goals for change.
3. Delegate decision authority to those who have influential power and capacity to make necessary decisions.
4. Maintain consistent visibility.

Getting leadership to agree on those 4 areas is core. Without agreement, they will send mixed messages and affect employee productivity, engagement and understanding of change. Leadership also needs to agree on the frequency for meeting to review how well they are honoring their roles. This often requires support from an objective person to work with the change leadership.

Getting leadership to agree on those 4 areas is core.


THE BIRD'S EYE

Consistent Visibility

Once you have a vision for change, you and your leadership must be visible and persistent. During times of change it can be easy to succumb to meeting marathons. Get out into the organizational community and talk with employees. Show how important the vision is to you, to the company, to customers and to your employees by being available to:

1. Vet the vision with key stakeholders and employees before rolling it out to the entire team.
2. Work with your leadership team to “walk the talk” and keep the vision alive and believable.
3. Assess the organization’s awareness and understanding of the vision.
If necessary, adjust your visibility tactics – don’t change the vision.
4. Allow employees to design ways to keep the vision visible.

In all of this, be prepared for pushback, and don’t make those who resist “wrong.” Also be careful to not focus solely on those who resist. There are plenty of supporters who can get easily turned off when leaders give too much attention to the naysayers.



There are plenty of supporters who can get easily turned off when leaders give too much attention to the naysayers.

THE BIRD'S EYE

A Glimpse

Change is not an easy thing for most people because it means discomfort, unknown and uncertainty, all of which breed fear. So just remember that the objective of The Bird's Eye is to paint the big picture – that's the purpose of establishing a vision statement for the change that's about to happen. Keep your focus on the big picture and work toward inspiring others so that they want to follow you to the vista for a glimpse of your bird's eye view.



Keep your focus on the big picture and work toward inspiring others...



PLAY 2: THE BLUE PRINT

THE BLUE PRINT

OBJECTIVE / BUILD AN UNSHAKEABLE FOUNDATION



How do you support the change vision?

Once you have executed The Bird's Eye and established a vision for change with your leadership, it's time to move on to The Blue Print. We call this play The Blue Print because you now need to focus on building the infrastructure that will support the vision for change. This infrastructure includes systems and tactics you can put into place to sustain the change and to help it go smoothly.

The Blue Print is the stage of the Change Program where you begin to make the vision public. To accomplish this, your leadership team will have to work closely with each other, and be straightforward in their leadership, interaction and communications.

Because things don't always go as you plan, you want to monitor what you're putting out into the organization. We believe the best way to do this is to build a strong infrastructure that will allow you to be agile and adapt as necessary, without losing momentum. With the 5 essential tools of The Blue Print, you will be on your way to building that unshakeable foundation.

The Blue Print's Essential Tools

1. Change plan
2. Multi-Channel Communication Plan
3. Visible Leadership Plan
4. Political Missteps Plan
5. Visible Change Plan

THE BLUE PRINT

2

1. Change Plan

The first tool for creating The Blue Print is the change plan, which means you're planning the sequence of tactics – what steps will happen and when – to keep your employees and the Change Program moving forward. This is where you lay the groundwork and begin to map out how the Change Program will manifest itself in your organization. Will there need to be employee training? If so, at which stage in the process does that occur? The change plan is where you identify milestones and document them.

2. Multi-Channel Communication Plan

Communication is huge. So huge that we devote an entire play in The Change Playbook to communication. In the meantime, we'll say here that your communication plan directly supports the change plan. Not only will you be communicating internally with your business partners and employees, but you may also need to communicate with your customers regarding the change.

Either way, you will have to plan exactly how to communicate the Change Initiative, and it's important that you reach out to share what's going on through a variety of different mediums such as blogs, videos and company intranet. This helps to ensure that everyone involved hears the same message from more than one place – it's not just trickling down from the top.

The change plan is where you identify milestones and document them.

THE BLUE PRINT

2

3. Visible Leadership Plan

As we established with The Bird's Eye, when implementing a Change Program, leadership must be as visible as possible. It's too easy for senior managers to get stuck in meeting after meeting. But if they are not out and about, advocating for the change, hearing what employees have to say, seeing how people "do their thing," employees are left to wonder how important the change really is to senior management.

If an organization is going to implement a successful Change Initiative, the leadership needs to be with the people. They should lead town hall meetings, host brown bag events, attend a Q&A session, present updates at staff meetings, share what they're excited about, concerned about. They should be transparent. Does this take time? Absolutely. And leaders have a lot on their plate. But the Change Program has to be a priority, or it will take double the time when the program doesn't meet the deadline, or doesn't get adopted because the workforce is disconnected.

4. Political Missteps Plan

Mistakes will happen. So this tool isn't about avoiding missteps, but being prepared by answering the question, "What do we do when we screw up?" To answer the question, look to the organization's values and make sure your actions align with those values. It also means that leadership needs to meet regularly to keep each other informed of what they hear and what they share out in the community. They should be on the look out for missteps or issues that stem from the messages they send. Your leadership may criticize privately, but do they understand and support the change publicly? If leadership is aligned, they should be communicating key messages clearly.

If an organization is going to implement a successful change, the leadership needs to be with the people.

THE BLUE PRINT

2

5. Visible Change Plan

Once you begin to communicate the Change Program, you want to keep the change visible and monitor how employees respond. We call this process a health-check. You'll want to check-in with the workforce to find out how they are doing -- are they stressed, overwhelmed? What do they need to make the change more manageable?

The leadership team then meets to assess feedback and adjust the change plan as necessary. One of the best ways to do this is with our **Change Score Card**. This tool helps to measure areas like adoption of changes, belief in vision, how engaged employees are etc. The Change Score Card is something that the entire organization should be aware of, because you want people know how things are progressing.

Rock Solid

As we've said several times, things don't always go as we plan. But you can at least be prepared for the unforeseen future, and The Blue Print is part of the preparation. You want to get out on the field and play ball, but you want to practice and warm up first. Just as practicing is the foundation for playing your best, the strategic plans we've outlined here are pieces of a rock-solid foundation that will sustain your Change Program come game time.



DEFINITION

*The **Change Score Card** measures specific dynamics within an organization as it relates to the Change Initiative. It's a way to monitor the health of a Change Program.*

The background of the slide is orange and features faint, hand-drawn chalkboard patterns. The top section shows arrows and 'X' marks, while the bottom section shows a formation of circles and arrows. A dark blue horizontal band is positioned in the middle, containing the title text.

PLAY 3: THE RECUITER

THE RECRUITER

DEFINITION

OBJECTIVE / ENGAGE WORKFORCE & CUSTOMERS

Who's on board?

After The Bird's Eye and The Blue Print, it's time for The Recruiter – this is the stage of the game where you recruit involvement in the Change Program beyond your leadership. It's called The Recruiter because you want to make participation in the Change Program enticing for your workforce and customers, so enticing that they eagerly engage the process.

So what exactly do we mean by “engage”? We mean create environments where employees have a voice and an opportunity to influence outcomes of the Change Program. To engage the workforce and customers, leaders need to recognize and be prepared for different responses to the Change Program depending on where people are on the **Change Curve**.

The Change Curve gives employees the opportunity to identify their reaction to the change. It simply gives language to behaviors that make it easy for leadership and employees to have a conversation about what's going on and how a person feels towards change. A person's movement through the change curve isn't necessarily linear. It's a person's choice about whether or not he will move forward, but understanding it will allow leaders to better interact and respond with employees.



THE RECRUITER

For those managers who tend to think, “I don’t care if employees like the change or not, I’m paying them, they need to get on board,” their understanding of the Change Curve is even more crucial. The days of “do it because I say so” are over. The shift in leading change today is toward collaboration between management and employees to find solutions that bring change into reality. This is done through employee engagement.

It’s important to reiterate that we are not looking for employee buy-in; we are looking for participation. Buy-in is rooted in a sales-process that says, “If we put all this fancy stuff around it, then you’ll buy-in.” Again, the shift in change leadership is toward transparency: honestly letting people know what’s going on, what’s working and what’s not working. Engaging employees this way will likely result in their voluntary participation.

What does it mean to engage customers in the Change Program? Because customers are users of your products and/or services, they are an extremely valuable source of information. Most businesses are reluctant to hear customers’ ideas and complaints, so those organizations that are willing to work with the customers and listen to what they think will have a competitive advantage.

Note: Not all changes involve customers. For example, if the change is to enhance internal processes or to restructure the organization, then customer input isn’t necessary. But if change impacts customers, then consider engaging them in the change process.



*The Recruiter encompasses
3 phases to consider
in engaging either the
workforce or customers:*

- *When to engage*
- *How to engage*
- *Pitfalls to anticipate*

THE RECRUITER

| | WORKFORCE | CUSTOMERS |
|----------------|--|---|
| WHEN TO ENGAGE | <ul style="list-style-type: none"> •as soon as you announce the change. Workforce engagement then continues throughout the change program. •once you have an idea/vision/purpose/branding for change. It's also a good idea to include employees in development of the change vision (they will see things that executives won't consider). •frequently. Interaction and communication with the workforce should be so frequent that it's built into The Blue Print infrastructure. Engage the workforce continually. | <ul style="list-style-type: none"> •at the beginning, middle and end of Change Program. •once the value and purpose are clear and both have been communicated to the organization as a whole. •to share from their perspective, "Here's what you do and here's the value." Or, "Here's what you do that doesn't work so well. " Use customer testimonies to remind employees why your organization exists. |
| HOW TO ENGAGE | <ul style="list-style-type: none"> •Design sessions: engage employees to come up with process designs, solutions for improving operations, or brainstorming to create something that doesn't exist. •Town Hall Sessions: larger group meetings with all levels of employees together, using two-way interaction, hearing ideas in progress, asking questions, voicing concerns, giving input, filling knowledge gaps. •Listening groups: similar to focus groups, you bring in a diverse group of employees and ask for opinions and reactions to Change Tactics that have been rolled out. Are the tactics helpful, or hindering productivity? Have the tactics helped improve things? | <ul style="list-style-type: none"> •Invite customers to attend a change program kick-off event, or participate in an improvement team. •Listening groups: during design phase of change to learn what is important to them about your product or service, what they don't like about current product/service, ideas that could be leveraged to improve customer experience, surveys. •POP (Purpose & Our Purpose) Events: build in customer testimonials. If you can't have customers live, then use videos. |

THE RECRUITER

| | WORKFORCE | CUSTOMERS |
|------------------------|---|---|
| WHEN TO ENGAGE | <ul style="list-style-type: none"> •Come Together Events: An Achieved Strategies product that includes the following event series: Purpose & Our Purpose (POP) Event, Realities Event, Creating Event, and Shared Ground Events. These events give the workforce an opportunity to collaborate with leadership as it relates to the Change Program. •Social Media principles: two-way communication through technology. Connect with your workforce, and allow them to connect with each other to share ideas. | <ul style="list-style-type: none"> •Shared Ground Events: an opportunity for two-way interaction between employees, managers, and customers. Including customers keeps them aware of how things are progressing and creates an opportunity for ongoing input feedback. •Bring them back once you have a strong Change Program designed with deliverables developed and ready for customer input and review. •Loop customer feedback to senior managers to determine how change program will need to change |
| PITFALLS TO ANTICIPATE | <ul style="list-style-type: none"> •Managers may resist high-engagement because it takes time away from "productivity." •Some managers may think it's a threat because employees have as much access to or interaction with senior management. •Employees who may not be equipped to process the amount or level of information could get overwhelmed, which can increase resistance or cause people to shut down. •If the change infrastructure isn't there, not engaging the workforce could fuel rumor mills if pockets of employees receive information, it won't get shared accurately with the entire company. •Senior management may not be comfortable with workforce engagement because community involvement rubs against the need for senior leadership. So there could be additional resistance you need to plan for or it could slow things down. | <ul style="list-style-type: none"> •Involving customers in creating changes or giving input to change is not common business practice, so there can be strong resistance from senior managers. •Employee confusion, because involving the customer is new and they don't understand why you're doing it. •The way some organizations are structured, they don't even think about the customer, so involving the customer challenges company culture. •The Legal department may have concerns about proprietary information and could potentially squash customer involvement out of fear. •Customers could potentially resist involvement if they think it's a fad or a trend that doesn't add value to their experience with your product or service. |



PLAY 4: THE STORY



THE STORY

4

OBJECTIVE / COMBAT WATER COOLER CONVERSATION



What are people saying?

We take a bit of a dramatic tone in this Change Play -- it's intentional.

Developing a communication strategy for the Change Program that will combat water cooler conversation should be a top priority. Once senior leadership announces the change, and if there is not enough information to direct conversation among employees, then off the bat you have a rumor problem and you'll have to overcome huge barriers to get the story straight.

If it's difficult news, it's better to get it out there; let people deal with it so they know what it means and engage the change process.

A common communication mistake that leaders make is withholding information. It's the attitude that says, "We don't want to share too much because we don't want to upset people." If you think this way, you're forgetting that employees can smell B.S. a mile a way. Employees want to hear the truth. With a watered-down communication that lack details, your people are left to make assumptions, which only feed the rumor mill and diminish their trust in your word.

With The Story, you can practice 4 essential principles to help keep people on the same page when talking about the Change Program.

The Story's Essential Principles

1. Transparency
2. Frequency
3. Preparation
4. Evaluation

THE STORY

When things change, the first question employees ask is, “What does this mean to me?” So how should you respond? Seek to understand your employees’ perspective. As we’ve already said, the paradigm of “Do it because I say so and I’m the boss,” is ineffective. You don’t have to tell people what they want to hear, but you do need to let them know what’s going on. If it’s difficult news, it’s better to get it out there, let people deal with it so they know what it means and engage the change process.

1. Transparency

Transparency is the willingness to put yourself out there even though you might get blasted. It’s not a new approach, but it is a shift from how change management has been done in past when leaders thought, “If we just tell them this much, they won’t have to worry about other stuff and we’ll be fine.” But the reality is that, even if people don’t like what they hear, if it’s the truth, at least they can deal with it and move forward.

Being transparent is THE foundation of a communication strategy. All communication, whether written, video or verbal, should have an openness to share what’s going on: What’s working, what’s not working, what people can expect in the future. Without openness, you spread a watered down message that doesn’t

help people engage with the reality of the change. The more transparent you and your leadership are, the more your people will trust and respect those leading the Change Program.

2. Frequency

If The Story is going to be successful in your organization, you must be communicating regularly: daily or weekly. Monthly is not enough, especially when there’s tension. There needs to be frequent reminders to help people keep track of where they are in the process, and why it’s important to stick with it. You do have to be careful of over-communication to the point where people stop paying attention. The main thing is to identify key messages from the onset and ensure that every communication reinforces those key messages.

If it’s difficult news, it’s better to get it out there; let people deal with it so they know what it means and engage the change process.

THE STORY

3. Preparation

Preparing to deliver a message is easy to skip because people focus on execution. But if you or your leadership are unprepared, it will come back to snag you because you'll send mixed messages. Then you have people saying, "Well, he said this, but she said that. So which is it?" To prevent this, take the time to coordinate and ensure that your leaders are aligned with each other.

Leadership must be visible throughout the change process. This includes engaging work groups and giving presentations. Anytime a presentation happens, do a dry run. Make sure the person presenting is comfortable with key messages and how to communicate them. This

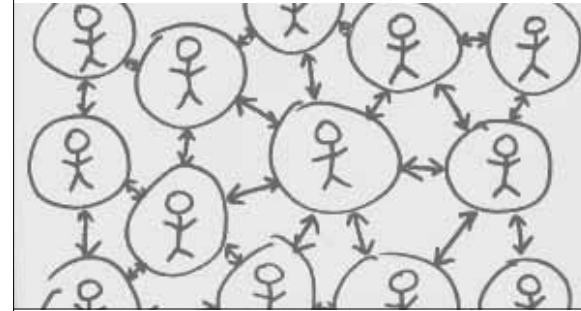
Happy Ending

The Story may be the most important play in this Change Playbook. The reason is that without it, the entire Change Program could be derailed. Mastering The Story means you intentionally think about what you say, how you say it, and most importantly, how the message will be received as a result. If you're hoping for a happy ending as the outcome of your Change Program, then use The Story to interact with your people and to embrace collaboration.

will reduce any anxiety and increase the person's confidence to keep the presentation from short-circuiting.

4. Evaluation

Constantly evaluate the effectiveness of all communication. We recommend using the Change Score Card to measure things like whether employees believe they are updated by management, whether they are satisfied with two-way communication, and whether they feel informed and understand what's going on. Calculating the metrics from each of these specific areas tallies the score for communication effectiveness, which gets shared with senior managers so that adjustments can be made as necessary.



Unless you and your leadership master The Story, the entire Change Program could be derailed.



PLAY 5: THE PRE-GAME

THE PRE-GAME

5

OBJECTIVE / SET GOALS AND MILESTONES



What's the plan?

You're about to hit the field, and you want to make sure everything's in place so that the pieces come together at kick off. This Change Play takes you from the global, wide-angle perspective of the first 4 Change Plays and zooms in to identify the Change Tactics, their sequence, and how quickly they'll be accomplished.

What needs to be done? If it's staff training, how long will the training be? When will it begin, and when will it end? There are a lot of questions to answer at this stage of the game, so The Pre-Game includes 4 essential questions to help with setting goals and determining your Change Program milestones.

The Pre-Game's Essential Questions

1. Are Change Tactics in sync?
2. Are other changes happening?
3. Are changes happening too fast?
4. Are there times to celebrate?

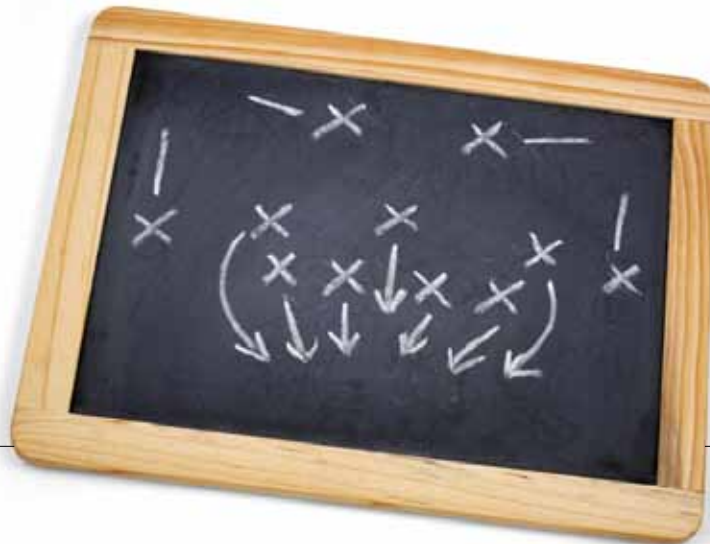
THE PRE-GAME

1. Are the Change Tactics in sync?

The **Change Tactics** need to line up with the main project timeline. If your Change Program is part of a strategic initiative, introducing a new product for example, the Change Tactics need to happen in lock step with product development. You might need to coordinate market research, customer listening groups, and implementation of new internal processes. In this example, customer listening groups should happen before product goes into R&D. Product design should happen before staff training, amending policy, or organizational restructuring. The tactics must be in sync to help employees through the changes and for the organization to realize the projected financial success.

2. Are other changes happening?

Take into consideration whether other changes are going on within your organization, and coordinate accordingly. If, for example, the marketing department plans to roll out a new campaign simultaneously with your product launch, you may want to consider the marketing timeline so that the new campaign includes your product. Bottom line: be sure to investigate how your Change Program may be impacted by other changes within the company.



DEFINITION

Change Tactics are specific actions or series of steps that engage the workforce or stakeholders to help achieve the ultimate goal of the Change Initiative and keep forward momentum.

THE PRE-GAME

3. Are changes happening too fast?

As you progress through the Change Program, you want to monitor the rate of change – how quickly change happens. This is another opportunity to make use of the Change Score Card. If you don't get feedback, you won't know how the change affects employees. If the rate of change is too much, employees may complain about seemingly trivial things, stop communicating, or avoid participating in important meetings. Consequently, meetings become ineffective and you can't accomplish what you set out to accomplish. Use the Change Score Card to monitor employees' responses to change. Be prepared to adjust your approach.

4. Are there times to celebrate?

Remember to include celebrations in the Change Tactic sequencing. Avoid the pitfall of focusing solely on execution. People have a certain capacity for change, and taking time out to celebrate accomplishments, or to just have fun, can reenergize an overwhelmed staff.

Kick Off

Once you've worked through this Change Play, it's game time. You're about to set things in motion so that all the Change Plays work in harmony with each other. You've done your prep-work and your team is ready for kick off.

*Use the Change Score Card
to monitor employees'
responses to change.*





PLAY 6: THE EBB & FLOW

THE EBB & FLOW

OBJECTIVE / DETERMINE NECESSARY ADJUSTMENTS



How are things going?

Any successful Change Program ebbs and flows as necessary. You never know how Change Tactics will be received once you implement them, so this Change Play may affect the sequence or the specific tactics you outlined in The Pre-Game. We've mentioned several times the importance of checking in to monitor how the Change Program affects people and the importance of using the Change Score Card, but we can't emphasize enough how essential it is to incorporate the feedback and adjust accordingly.

*The Ebb & Flow includes
3 essential phases:*

- *Monitor*
- *Evaluate*
- *Adjust*

THE EBB & FLOW

Monitor

Monitoring means taking the time to stop and evaluate Change Tactics as they get implemented. We want to reinforce importance of The Blue Print and building change infrastructure. The mechanisms must be in place in order to monitor the effectiveness of Change Tactics. Identify those mechanisms early in planning the Change Program.

Some ideas to help monitor the momentum of your Change Program:

- Leadership-by-Walking Around: Check in with staff to hear their thoughts and ideas about how things are going
- Change Score Card: Identify which aspects of change to measure, and learn how the workforce perceives the change process

Evaluate

It's not a safe assumption to think that because you've trained people or that you've communicated about the change that they will be fine with it. There is always the human element that you can't completely plan for, and evaluating is a way to assess whether issues exist and what's causing them. The Change Score Card will be a major influence in helping to monitor the health of the Change Program.

Consider these ideas:

- Follow-up with employees after attending training to see how they're applying the new skill or knowledge; hear their thoughts about how the training helped or didn't help.
- Evaluate the feedback and determine what next steps to take. You may decide to do nothing, but be sure to let that be known. Nothing is worse than being observed and not hearing the outcome.



Monitoring means taking the time to stop and evaluate.

THE EBB & FLOW

Adjust

You can't be afraid to stop on a moment's notice and try a different approach. The more you deliberate, you lose time, and it could cause more harm. Instead, build into the Change Program the value of saying, "No, this isn't working," and finding a workable solution. On the flip side, if one particular tactic worked so well, it's OK to eliminate a step. It's also important to let the leadership team know there will be continual evaluation so they can be prepared to adjust their approach and understand why things might take longer or move faster, depending on the necessary adjustment.

Consider this:

- As part of your change infrastructure, assemble a senior leadership team and meet regularly to decide on any potential adjustments to the Change Program

Go with the flow

When you maintain the openness and flexibility to modify the Change Program based on input from your workforce, people will appreciate that their voice is heard and be more responsive to engaging the process. The Ebb & Flow goes hand-in-hand with The Pre-Game because once the pace of the Change Program is established, it needs to be monitored.

*Build into the Change
Program the value of saying,
"No, this isn't working."*



PLAY 7: THE SCORE

THE SCORE

7

OBJECTIVE / FINISH WITH A GENERATIVE CLOSE

In order to survive in nature, organisms continually adapt to their environment. This analogy holds true for people and businesses: Thriving requires that people adapt to changing environments. Similarly, when a Change Program comes to an end, its continued success depends on a generative closing. Consider the question, "How do we continue to sustain changes so they become part of the business?" It takes time.



There Are 3 Essential Elements to a Generative Close

1. Continued Monitoring
2. Continued Communication
3. Continued Leadership

THE SCORE

1. Continued Moderation

If you've been using the Change Score Card to monitor how the Change Tactics affect people and the organization, don't stop now. Continue to monitor the change and seek feedback. Are people able to do what you envisioned with the Change Initiative? Is the business realizing identified outcomes? Do employees adapt more quickly to the next change? Successful transition from the Change Program to moving toward the identified goal requires continued monitoring.

3. Continued Leadership

Change Agents should continue interacting with staff impacted by change to learn what's working for them and what's not working. They should also continue their role as Change Agents, advocating for the Change Initiative and its vision by helping people understand the bigger picture.

2. Continued Communication

It's a common mistake to stop communication once the change is implemented. But communication needs to continue. You want to sustain employee engagement by keeping them updated. Let staff know what progress has been made, what they can expect in the near future, and about successes along the way. You also want to continue communication with customers, finding out if they are experiencing what the organization wanted them to experience with the Change Initiative.

DEFINITION

Change Agents are usually people in leadership and key roles who have been tapped on the shoulder to help others through the change process. They are important messengers for the entire organization because the goal is to have as many people accepting, engaging and participating in the change process



THE SCORE

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End Zone

Finishing with a generative close means you're examining the process to identify and reproduce winning tactics, keeping the cycle of success moving toward a common goal.

And there you have it – seven essential strategies to implement successful change in your business or organization. We hope you've jotted down ideas, action items, and people whom you'll want to involve in an upcoming Change Initiative.

We'd love to hear what you liked best about going through the Change Playbook. How you're using it. How it's made a difference in your planning and implementing change.

Please visit us at www.achievedstrategies.com/blog and leave us a comment.

As always, lead brilliantly.

Shawn and Becky



ABOUT THE AUTHORS



Shawn Murphy

A self-proclaimed “geek” for change leadership, Shawn directs his passion, skills, and ability to lead change projects for small businesses and organizations of all sizes – private and public. And it’s not uncommon to hear him “soap box” the urgency for organizational change to balance the achievement of business goals with involving employees closest to the changes to identify and shape solutions. He has a B.S. in Organizational Behavior from the University of San Francisco.



Becky Shook

A glimpse into Becky’s work over the past 15 years tells a story of success and tenacity. She has helped leaders implement large-scale transformational projects, reorganizations large and small, and facilitate transitions of corporations and people alike. Nothing is too big or too small to transform, as evidenced in her own growth-focused life. She earned a B.A in Psychology from Sonoma State University and a M.A. in Psychology from CSU, Sacramento.