



# Assessing Your Organization's Track Record in Change

May 27, 2009



World Leaders in Transformation

# Our Agenda



- 1. Setting Context: Why Assess How Well Changes Are Being Led?**
- 2. Your Assessment Strategy**
- 3. What to Assess?**
- 4. Who Inputs?**
- 5. Using the Data to Add Value**
- 6. Sustaining Action to Develop Real Change Leadership Capability/Infrastructure**
- 7. What Does Success Look Like?**

# Context for Assessment



- To capture Executive attention with relevant data
- To understand your organization's track record in change:
  - To ensure ROI from strategic change efforts
  - Cost of failure: How big is your risk?
  - Repeating mistakes
  - Landing the "Greased Pig" of change
  - To identify strengths and resources to build on
- To increase efficiencies and results from change
- To assess a specific (critical) change effort
- To mobilize in-house development, capability, infrastructure

# Your Assessment Strategy



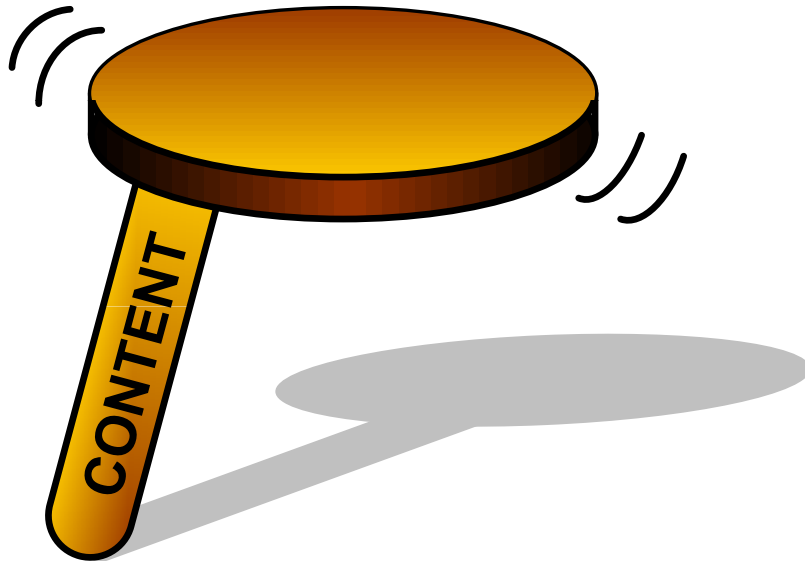
- **Purpose and Outcomes**
- **Roles**
- **Deliverables**
- **Guiding Principles**
- **Focus and topics to assess**
- **Audiences**
- **Methods**
- **Plan**

# What to Assess



- **Three Areas of Focus of Change Leadership**
- **All required to produce desired outcomes and ROI from change**

# Critical Focus Areas of Change Leadership



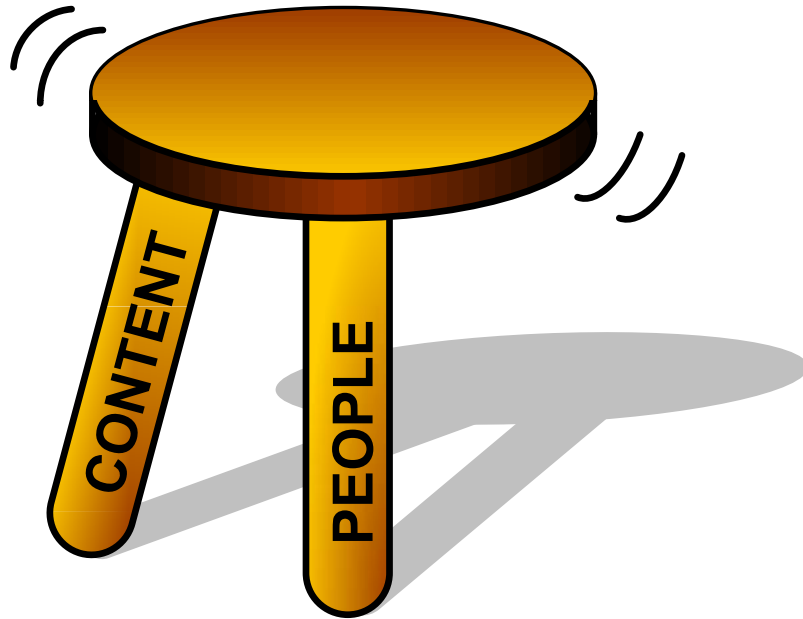
## Content of Change

The organizational focus of the change (structure, strategy, business process, technology, culture, product, or service)

# Critical Focus Areas of Change Leadership



## People in Change

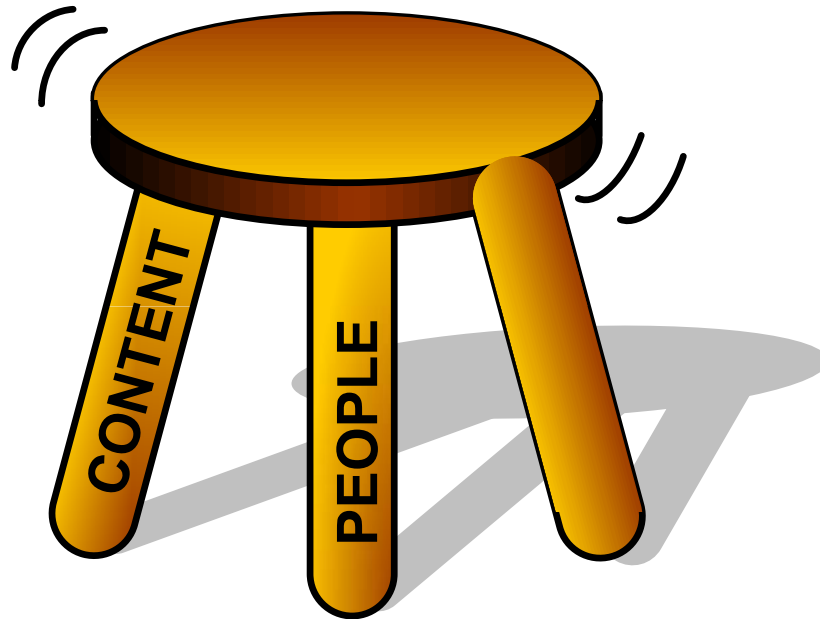


Handling the human dynamics of change: people's mindsets, commitment to change, emotional reactions, behavior, engagement, relationships, politics; cultural dynamics impacting the change

# Critical Focus Areas of Change Leadership



## Process of Change



The way in which change is planned, designed, and implemented; adjusting to how it unfolds; its A-Z roadmap, governance, integration strategy, and course corrections

# What to Assess



- **Three Areas of Focus of Change Leadership**
- **10 Most Common Mistakes in Leading Change – Risk Assessment**

# 10 Most Common Mistakes in Leading Transformation



## 1. Meaning and Relevance:

- **Not linking change to the market and business strategy to create relevance and meaning in the minds of stakeholders**
  - “And WHY are we changing? Why is this more important than what I am now doing?”
  - “Is this change going to stick around???”

# 10 Most Common Mistakes in Leading Transformation



## 2. Change Governance:

- **Unclear Change Governance: Roles, Structure, Decision-Making, Interface with Operations**
  - “We are in too big of a rush to spend time on start-up...”
  - “The team will handle everything...just give it to the team.”

# 10 Most Common Mistakes in Leading Transformation



## 3. Strategic Discipline for Change:

- **Leaders not providing a strategic discipline for change: no enterprise-wide change agenda, no common change methodology, and inadequate infrastructure to execute change successfully**
  - “There are too many changes happening everywhere to attempt to prioritize them....or even organize them!”
  - “We have too many competing change models...”

# 10 Most Common Mistakes in Leading Transformation



## 4. Misdiagnosing Scope:

- **Misdiagnosing the scope of the change either in magnitude, or by initiating only technological or organizational initiatives, and neglecting the cultural, mindset, and behavioral requirements**
  - “This is just moving around a few boxes...”
  - “People issues are the job of HR to fix...”

# 10 Most Common Mistakes in Leading Transformation



## 5. Initiative Alignment and Integration:

- **Running the change through multiple separate or competing initiatives rather than aligning all initiatives as one unified effort and ensuring the integration of their plans, resources, and pace**
  - “Air Traffic Control”
  - “If I’d only known you were going to do that....”

# 10 Most Common Mistakes in Leading Transformation



## 6. Culture:

- **Not adequately addressing the organization's culture as a major force directly influencing the success of change**
  - “Culture eats Strategy for breakfast!” --Jim Collins
  - “We don't have the time or skill to deal with this 'soft stuff'!”

# 10 Most Common Mistakes in Leading Transformation



## 7. Leadership Modeling:

- **Leaders not addressing or being willing to change their mindsets, behavior, or style to overtly model the changes they are asking of the organization**
  - “Go change *them* (and leave me alone...)”
  - “This conversation is off-limits” “...or too risky”

# 10 Most Common Mistakes in Leading Transformation



## 8. Capacity:

- **Not creating adequate capacity for the change—setting unrealistic, crisis-producing timelines and then laying the change on top of people’s already excessive workloads**
  - “I want it done NOW!”
  - “Just do it along with everything else you have....”

# 10 Most Common Mistakes in Leading Transformation



## 9. Human Dynamics:

- **Not adequately or proactively attending to the emotional side of change; not designing actions to minimize negative emotional reactions; not adequately attending to them in constructive ways once they occur**
  - Leaving this to the water cooler to figure out...
  - “They’ll get over it...”

# 10 Most Common Mistakes in Leading Transformation



## 10. Engagement and Communications:

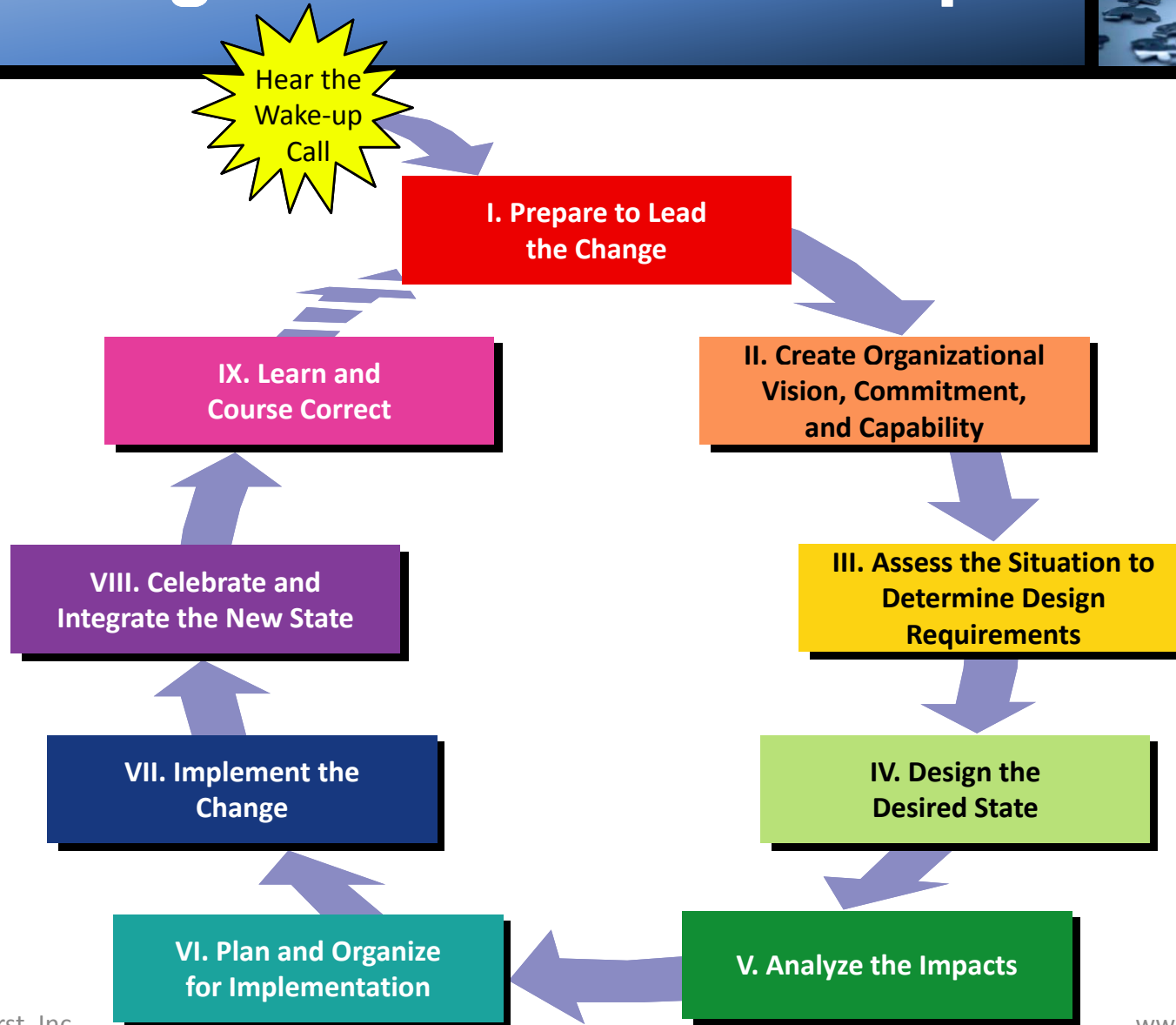
- **Not adequately engaging and communicating to stakeholders, especially early on; relying too heavily on one-way, top-down communication; engaging stakeholders only after design is complete**
  - “If I ask them what they think, I will have to do what they say...I’d rather not ask.”
  - “I already *told* them we were going to change! Why aren’t they???”

# What to Assess



- Three Areas of Focus of Change Leadership
- 10 Most Common Mistakes in Leading Change
- ***ChangeCheck*** (free trial at [www.beingfirst.com](http://www.beingfirst.com))
- **Change Leader Assessment**
- **Change Sponsor Assessment**
- **Change Model Audit: Need for a Common Change Process Methodology**

# The Change Leader's Roadmap



# What to Assess



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- Change Leader Assessment
- Change Sponsor Assessment
- Change Model Audit: Need for a Common Change Process Methodology
- **Change Services Audit**

# Who Inputs?



- **Change Leaders**
- **Executives/Change Sponsors**
- **Project Managers**
- **Change Managers**
- **Organization Development Specialists**
- **Targets/Stakeholders of specific change efforts**

# Sustaining Action to Develop Real Change Leadership Capability



- **Frame your data to speak to executives and business imperatives**
- **Use your data to drive awareness and action**
- **Recommend “best practice” solutions**
- **Be prepared to amend to realistic action plan**
- **Manage upwards: partner with your sponsor to ensure follow up**
- **Negotiate for Round Two Assessment to measure progress**

# Use Your Data to Add Value



- **Build in-house change leadership capability and infrastructure:**
  - **Link change capability to business results**
  - **Expand your Leadership Development curriculum**
  - **Build common practices and skills in targeted Project Managers, Change Managers, OD and HRD**
  - **Select and implement a common change methodology and best practices**
  - **Raise management awareness on key “Lessons Learned”**

# What Does Success Look Like?



- **C-Suite commitment, support, engagement**
- **Change services deployed on Day One on strategic initiatives**
- **In-house change leadership capability:**
  - **Skills, Strategies, Tools, Resources, Capacity**
- **Change infrastructure:**
  - **Standard practices and templates**
  - **Governance: roles, charters, decision-making**
  - **Common change methodology**
  - **Standard conditions for success and metrics**
  - **Standards for change communications and engagement**
  - **Requirements for rapid course correction**
  - **Requirements for multiple project integration**

# Being First

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- **Methodology & Resources**

*All to help you succeed with change*



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