



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



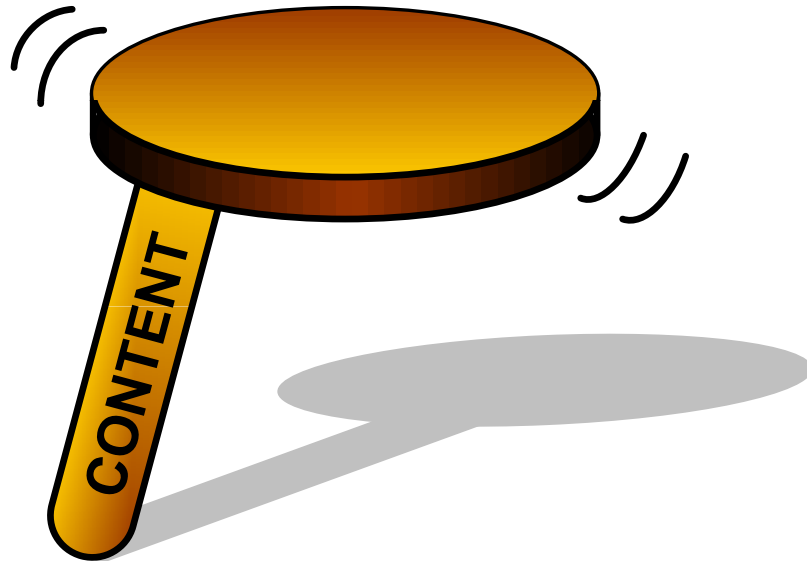
- **Purpose and Outcomes**
- **Roles**
- **Deliverables**
- **Guiding Principles**
- **Focus and topics to assess**
- **Audiences**
- **Methods**
- **Plan**

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



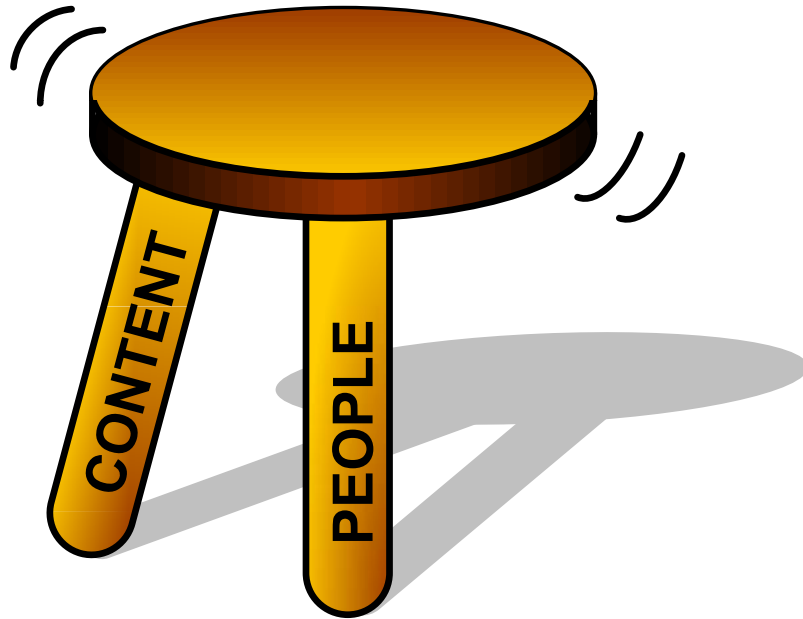
Content of Change

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

Critical Focus Areas of Change Leadership



People in Change

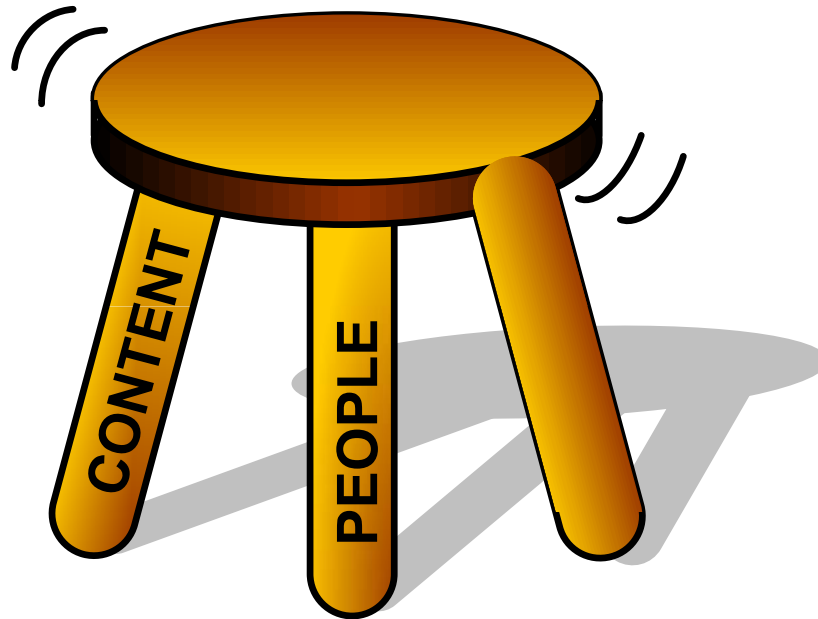


Handling the human dynamics of change: people's mindsets, commitment to change, emotional reactions, behavior, engagement, relationships, politics; cultural dynamics impacting the change

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:

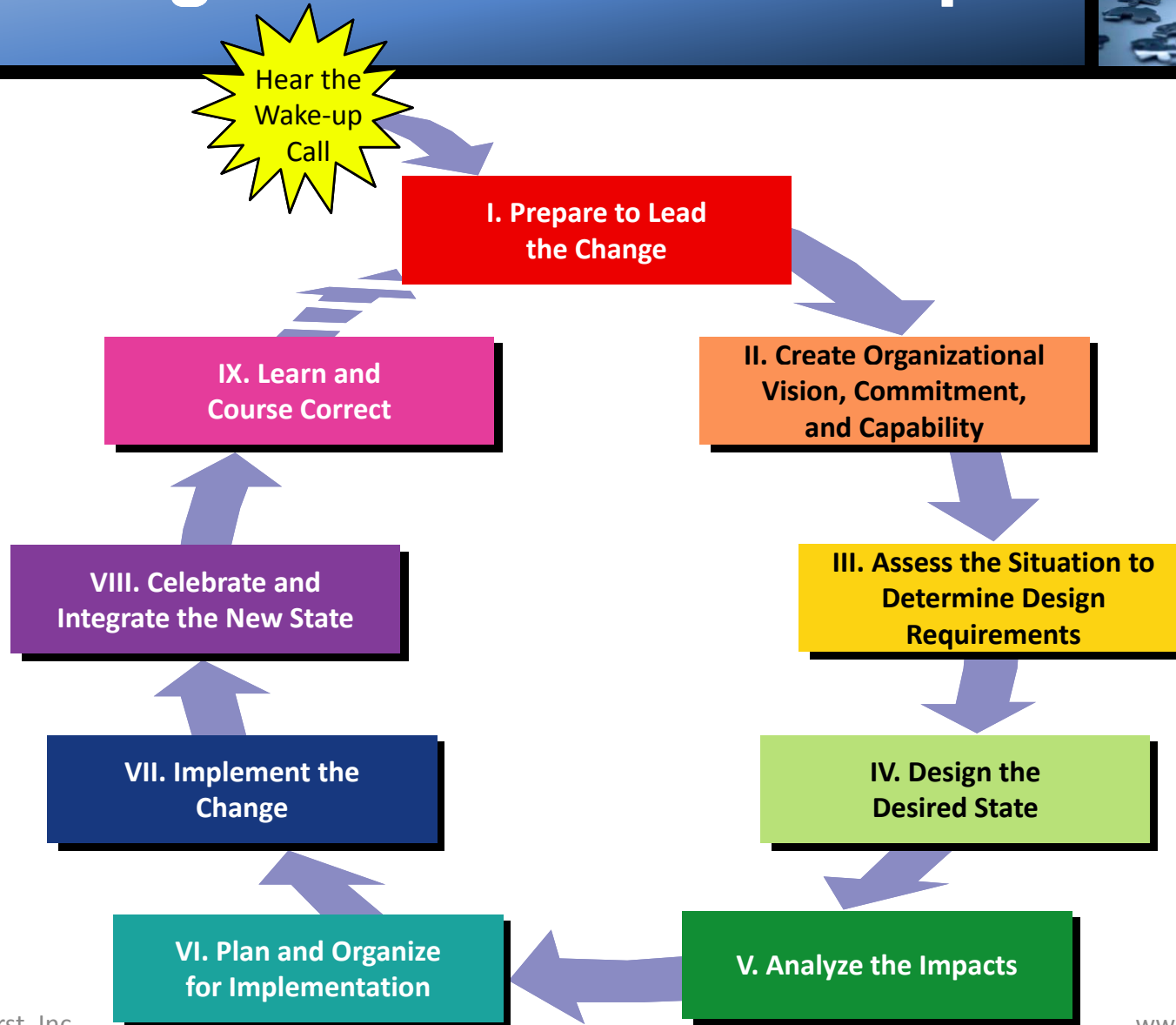
- **Not adequately engaging and communicating to stakeholders, especially early on; relying too heavily on one-way, top-down communication; engaging stakeholders only after design is complete**
 - “If I ask them what they think, I will have to do what they say...I’d rather not ask.”
 - “I already *told*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

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