



Corporate
Inclusion Institute



Chicago United

Managing & Leading Change

August 14, 2023

About me

James Egan & Company

Helping companies change for good

Human-centered organizational change that unites people, strengthens inclusive cultures, and improves business performance by:

- inspiring unified belief
- shared ownership and
- personal accountability

for working together in a better way for a greater good.





Session Roadmap

Individual Change & Transition

Organizational Change Management

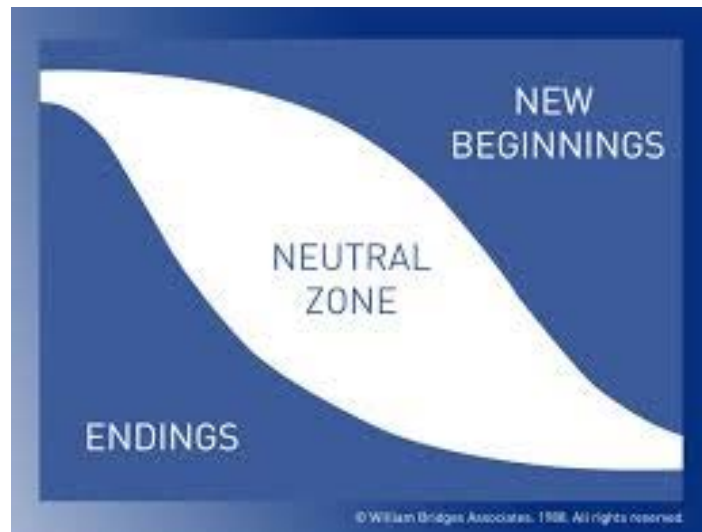
A Process for Leading Change

Ten Minute Break

Break-out sessions



Individual Change & Transition



Transition
Management



ADKAR

Common Responses To Change

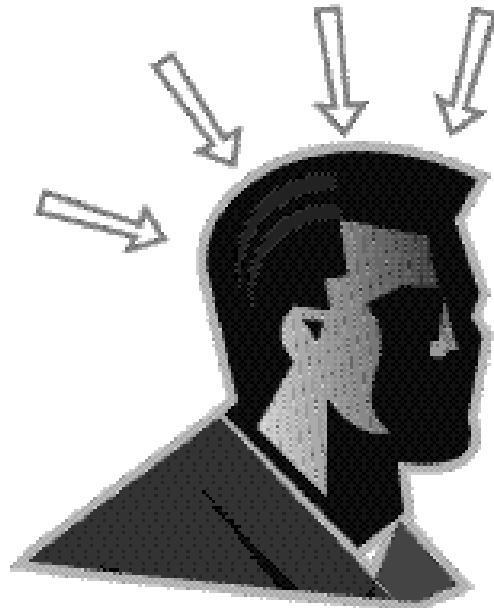
- Act as victims
- Choose own pace of change
- Pick wrong battles
- Slow down
- Check out
- Ask a lot of questions
- Try to get involved
- Get excited/talk it up



Change vs. Transition

Change

COMES FROM 'OUTSIDE'
situational
external forces / decision

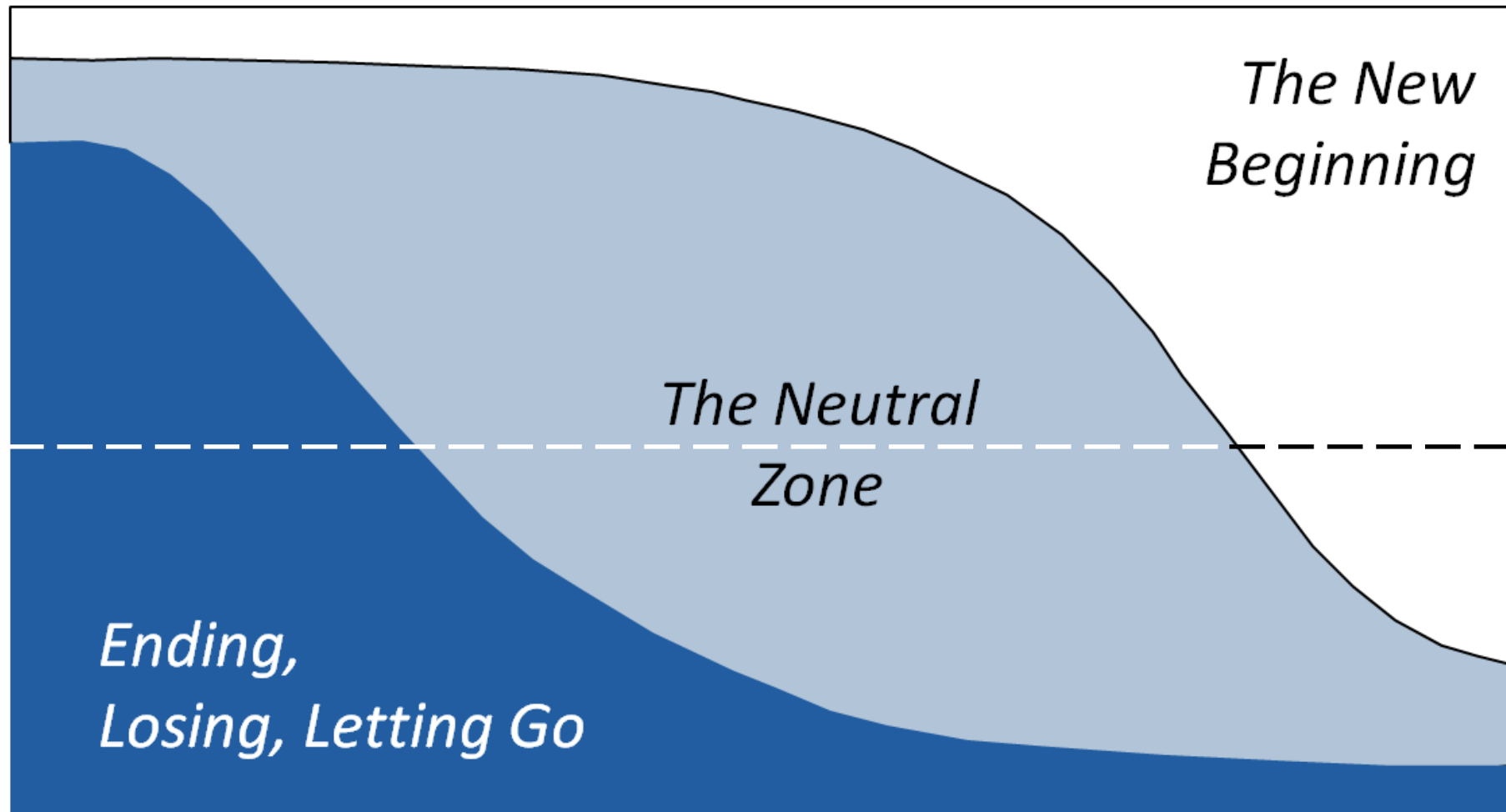


Transition

HAPPENS INSIDE
psychological
an individual's reaction to change

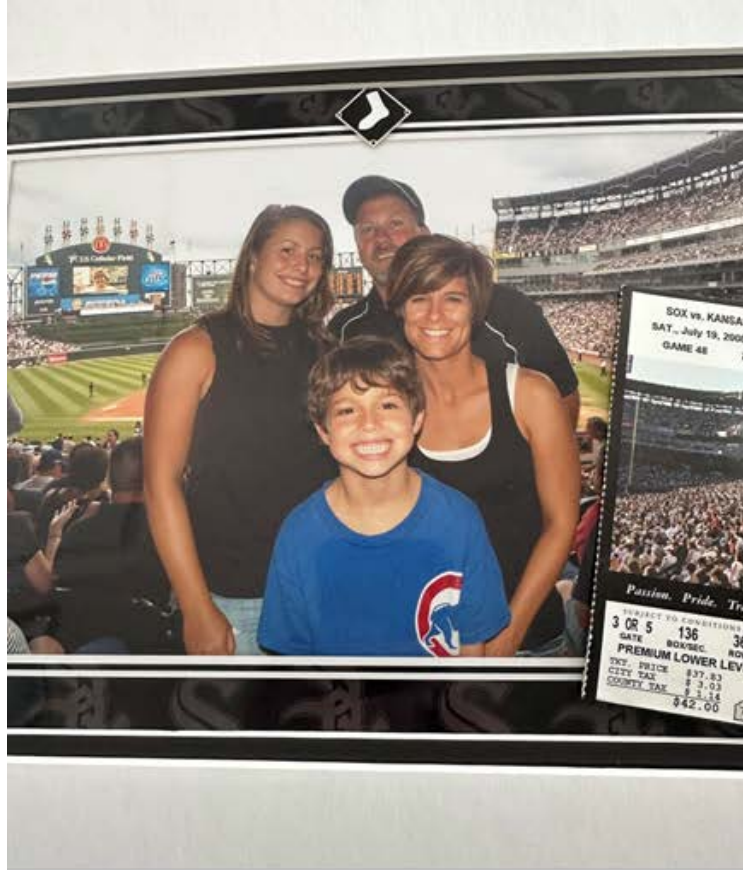


Managing Change: Transition Process Phases



A personal story

Managing individual transitions

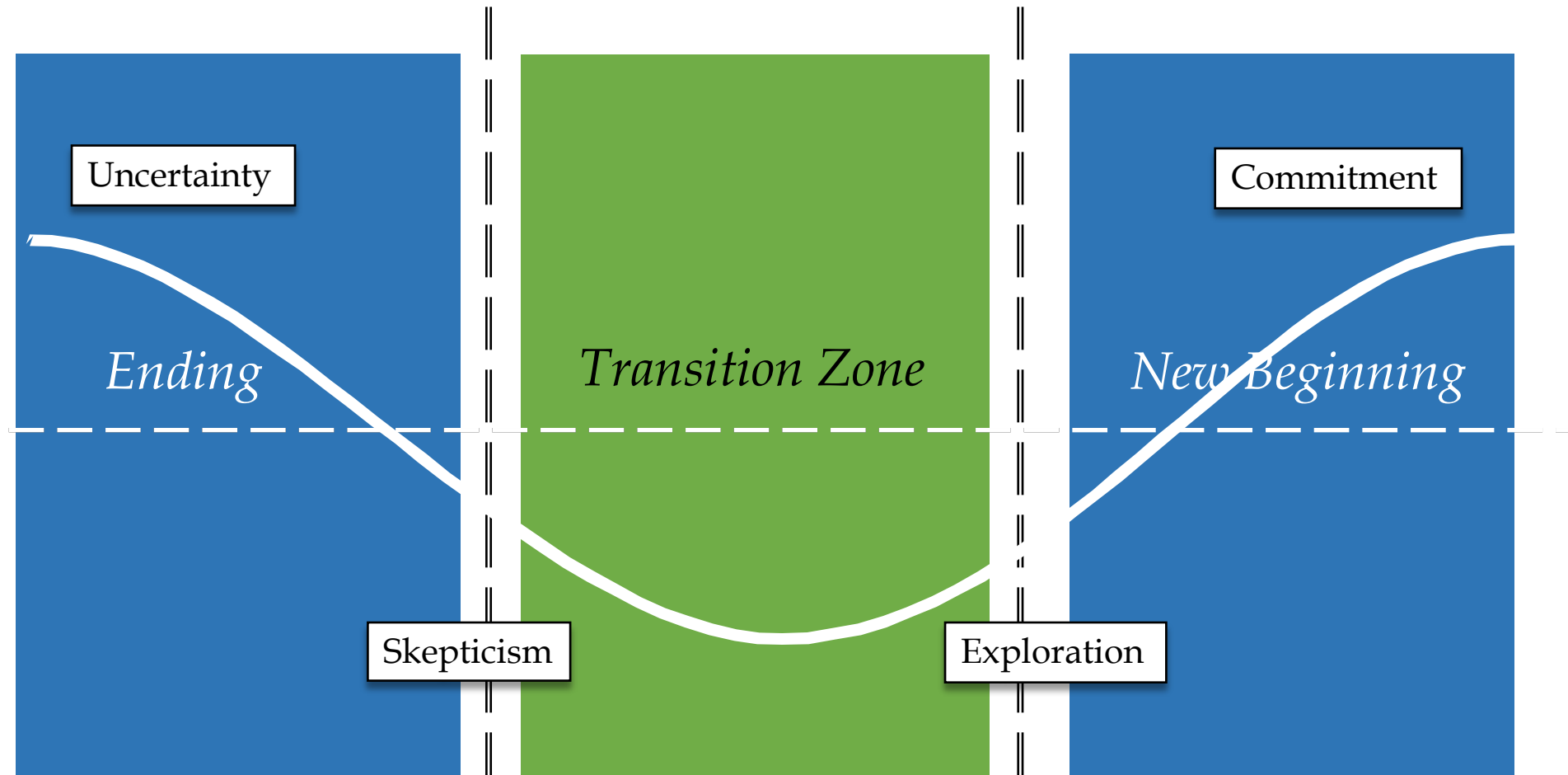




Individuals in Change: Guiding Principles

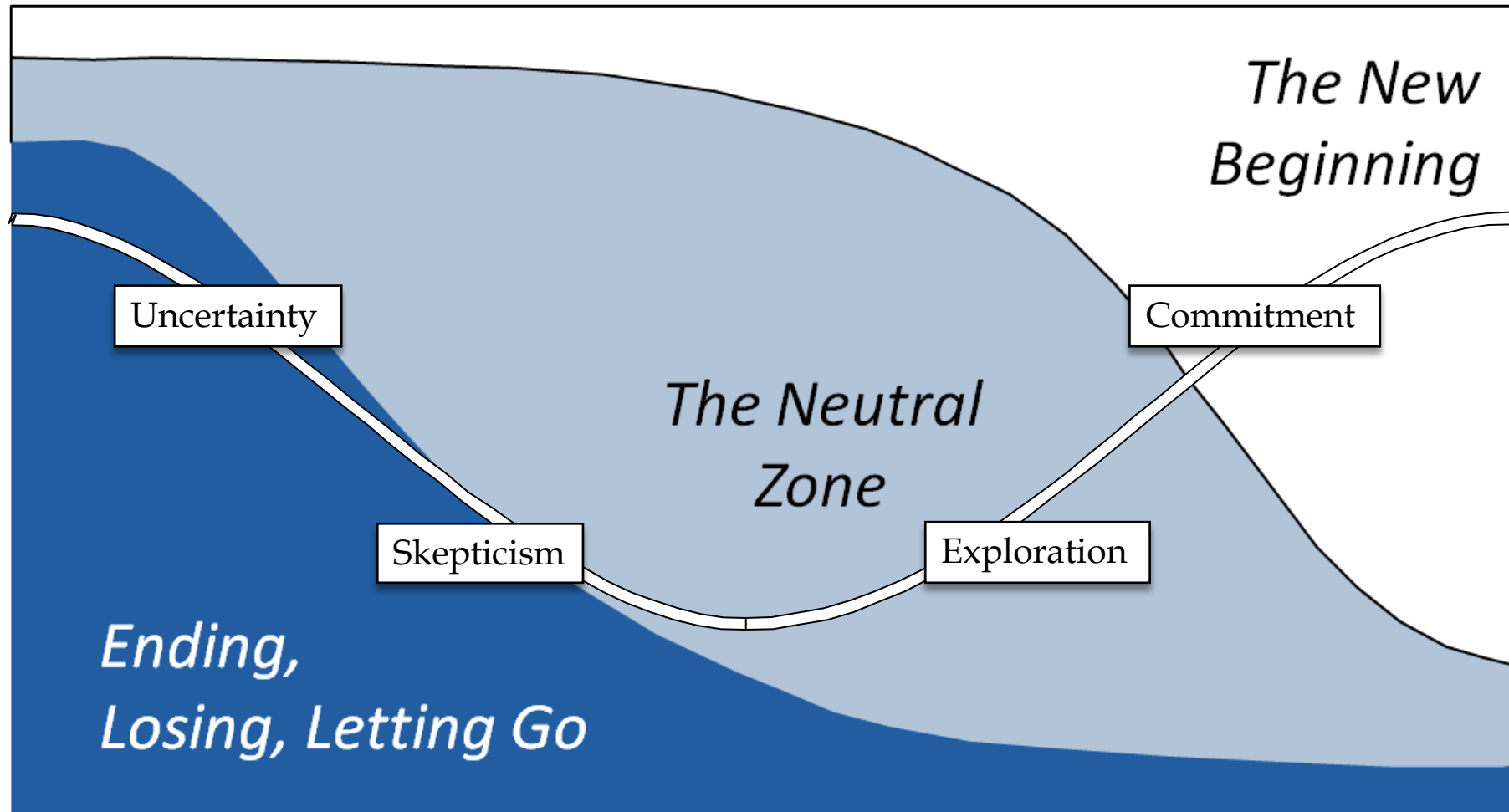
- Individuals React to Change Differently
- Resistance to Change is Normal but not always Logical
- An Individual's Adjustment to Change takes Time
- Change requires Individual Energy, Risk, and Emotional Investment

Managing Change: Transition Process Phases



Adapted from *Managing Transitions*, William Bridges

Managing Change: Transition Process Phases





Ending Phase

Ending

Emotional Response

- Shock
- Excitement
- Anticipation
- Denial
- Insecurity
- Fear
- Anger
- Sadness

Common Behaviors

- Inconsistent productivity
- Increasing questioning
- Greater urgency or need for information
- Increased blaming & criticism
- Increased absenteeism
- Public or private withdrawal
- Sabotage / displaced aggression

Adapted from Managing Transitions, William Bridges



Recognizing Losses

Until feelings are dealt with, focus will continue on loss. Identifying and recognizing feelings of loss is necessary to make new beginnings

Loss of:

Attachments - People, Relationships, Teams, Organizational Identity

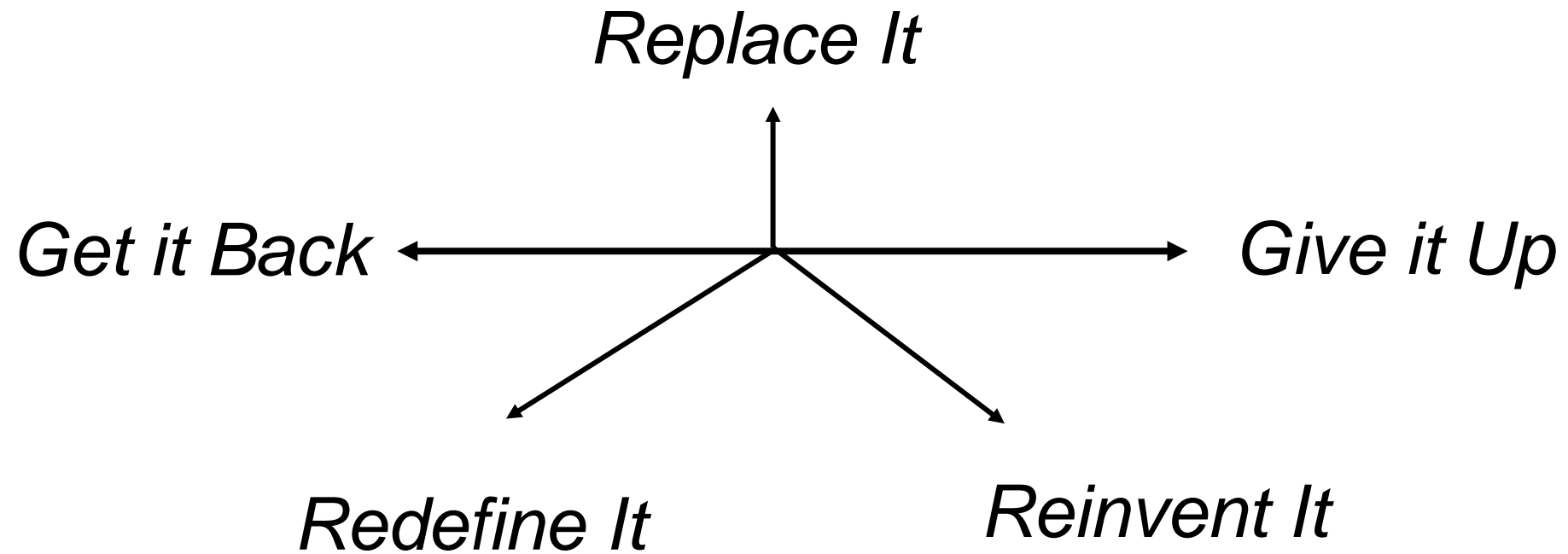
Influence - Areas of Responsibility, Status, Identity

Structure - Time and place of work, schedule, routines, procedures

Meaning - Change ends our belief in what the organization stands for



Dealing with Losses



Transition Zone



“Chaos often breeds life, when order breeds habit”

Henry Adams

Emotional Response

- Anxiety
- Skepticism
- Creativity
- Innovation
- Resistance
- Depression

*Transition
Zone*

Positive Behaviors

- Idea generation & Suggestions
- Opportunity and Possibilities
- Willingness to try new things

Negative Behaviors

- Unsure of what direction to move
- Absenteeism / Turnover
- Misunderstanding and Miscommunication
- Increase in the rumor mill

Adapted from Managing Transitions, William Bridges

New Beginnings



Emotional Response

- Relief
- Ambivalence
- Acceptance
- Belonging
- Energized

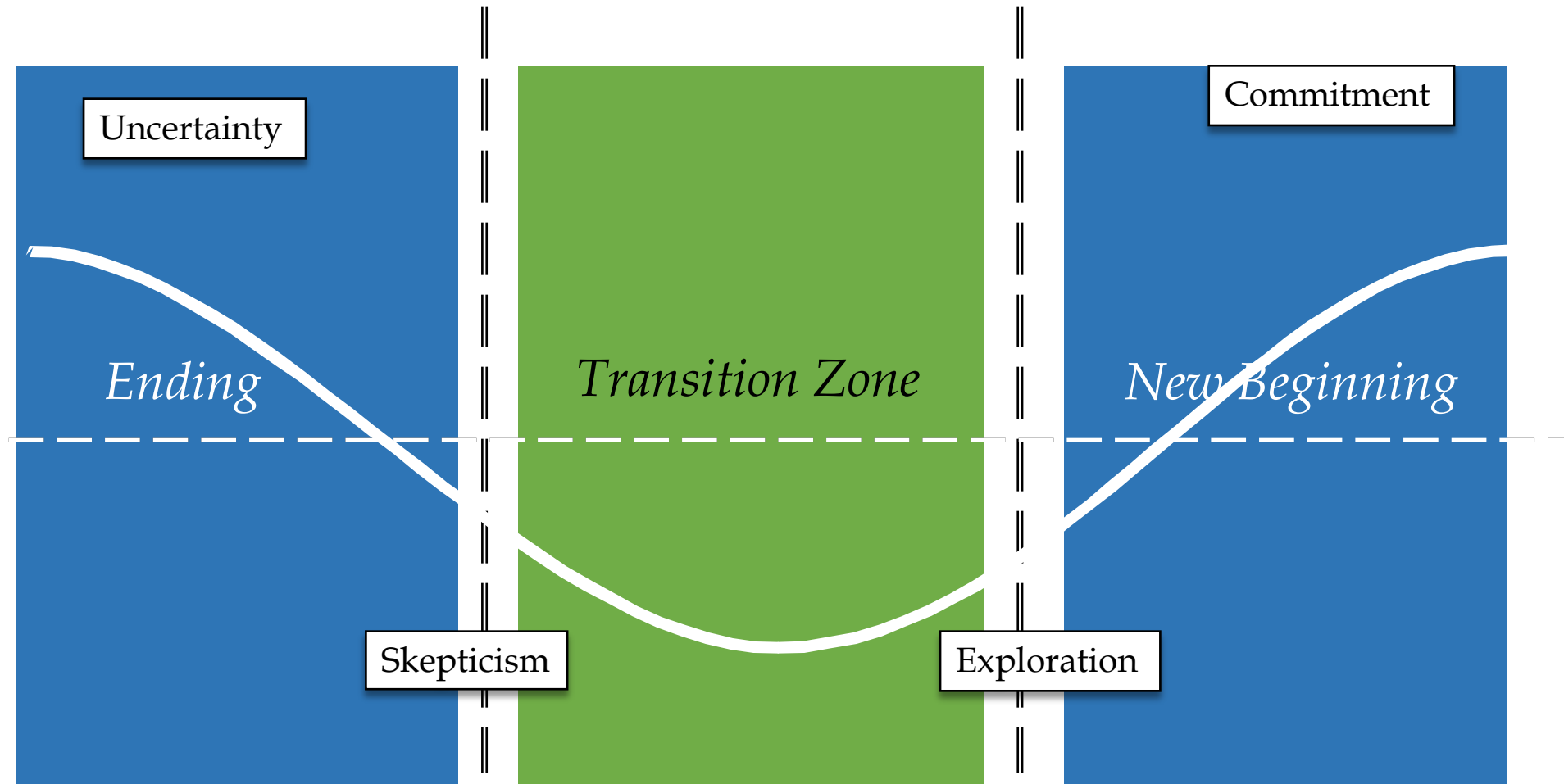
Common Behaviors

- Increased input and creative suggestions
- Increased learning
- Positive regard for change
- Increased teamwork and cooperation
- Focused & Productive

New Beginning

Adapted from Managing Transitions, William Bridges

Managing Change: Transition Process Phases



Adapted from Managing Transitions, William Bridges

Introduction & Your Change Story



Introduce yourself and share with the other person a change that you experienced in your life – personal or professional and the impact that it had on you:

- Feelings you experienced
- Gains or Losses
- How it changed you or those around you

**Change is inevitable.
Growth is optional.**

– John C. Maxwell

Each person should take about 2-3 minutes to tell your story



ADKAR

Change Management - ADKAR



- Developed by Jeff Hiatt / Prosci – 1998
- Focuses on change at the individual level
- ADKAR model focuses on how to create the right conditions for those affected by change to eventually adopt the behaviors and new ways of working.



ADKAR



Awareness → **Desire** → **Knowledge** → **Ability** → **Reinforcement**

Awareness

Create an understanding of the need to change – Why is change necessary? Why is it happening now? What is wrong with what we are doing today? What will happen if we don't change? What's in it for individuals?

Desire

Create the desire to support and participate in the change. Dependent on the nature of the change, credibility of the person leading the change, history – effective leading and influencing is needed to create desire.

Knowledge

Give knowledge so people can understand how to change and what to do – provide training and education – detailed understanding of new tasks and ways of working.

Ability

Provide the skills to implement change on a day to day basis. Involve subject matter experts, provide performance monitoring, training, feedback, development.

Reinforcement

Create the ability and environment to sustaining the change and keep it going, keep the momentum moving forward – celebrations, recognition, rewards, etc.

ADKAR in practice



ADKAR Discussion Questions

What elements of the ADKAR model did the father skip / not address?



How would you have used the ADKAR model to more effectively improve the boy's batting?



Exercise – Applying ADKAR - Personal

Best way to understand the usefulness of ADKAR is to apply it to a personal situation. Identify a change you are having difficulty making in another person (friend, family member, work associate) Complete the table below, select a change you have been trying to make happen and that is not working regardless of your continued effort.

Change – briefly describe the change you are trying to implement:

Awareness



Desire



Knowledge



Ability



Reinforcement

Awareness

What can you do to build awareness of the need to change?

Desire

What can you do to increase the desire to make the change happen?

Knowledge

What can you do to increase the knowledge of How to Change?

Ability

What can you do to build the skills and abilities?

Reinforcement

What can you do to reinforce and retain the change?



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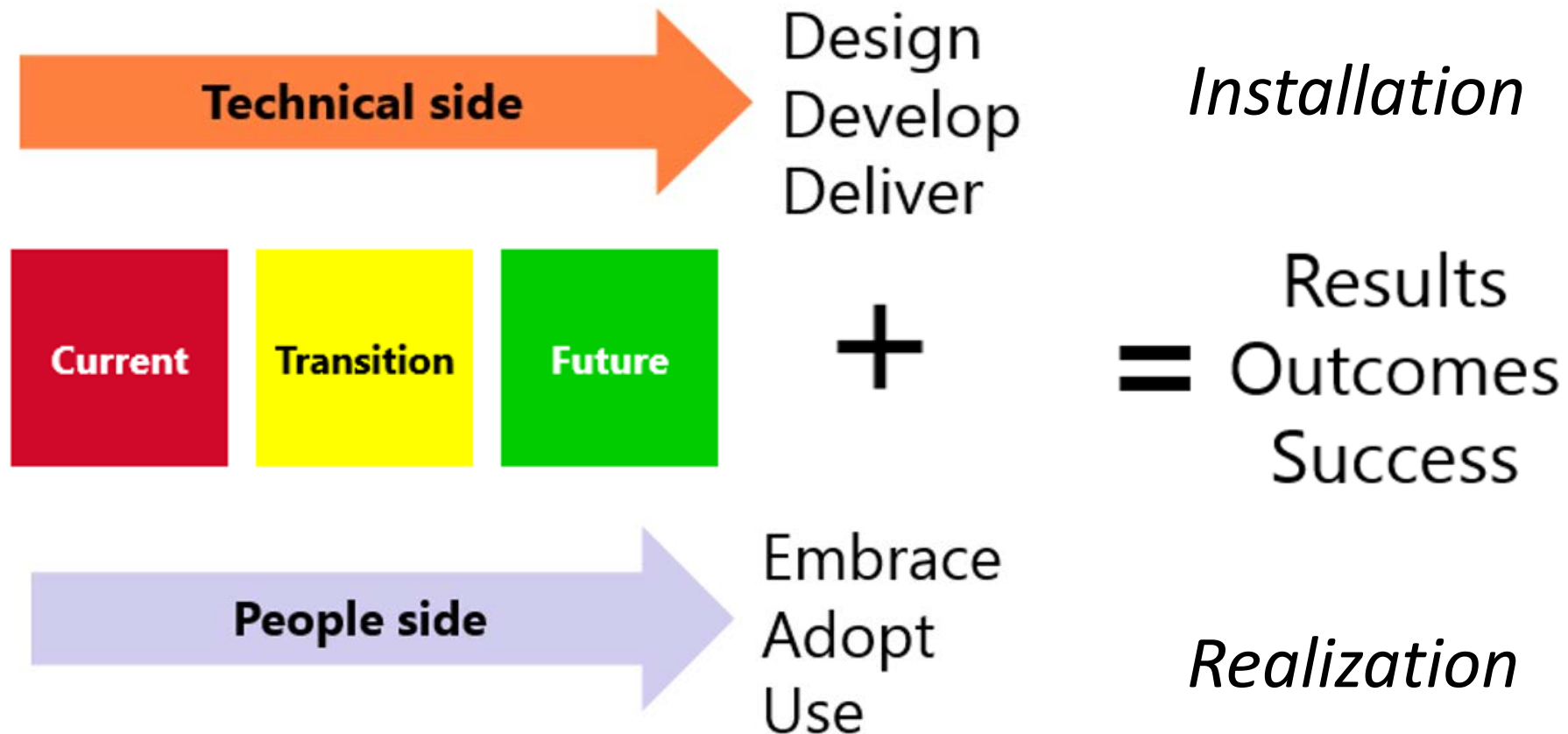
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Two dimensions of organizational change

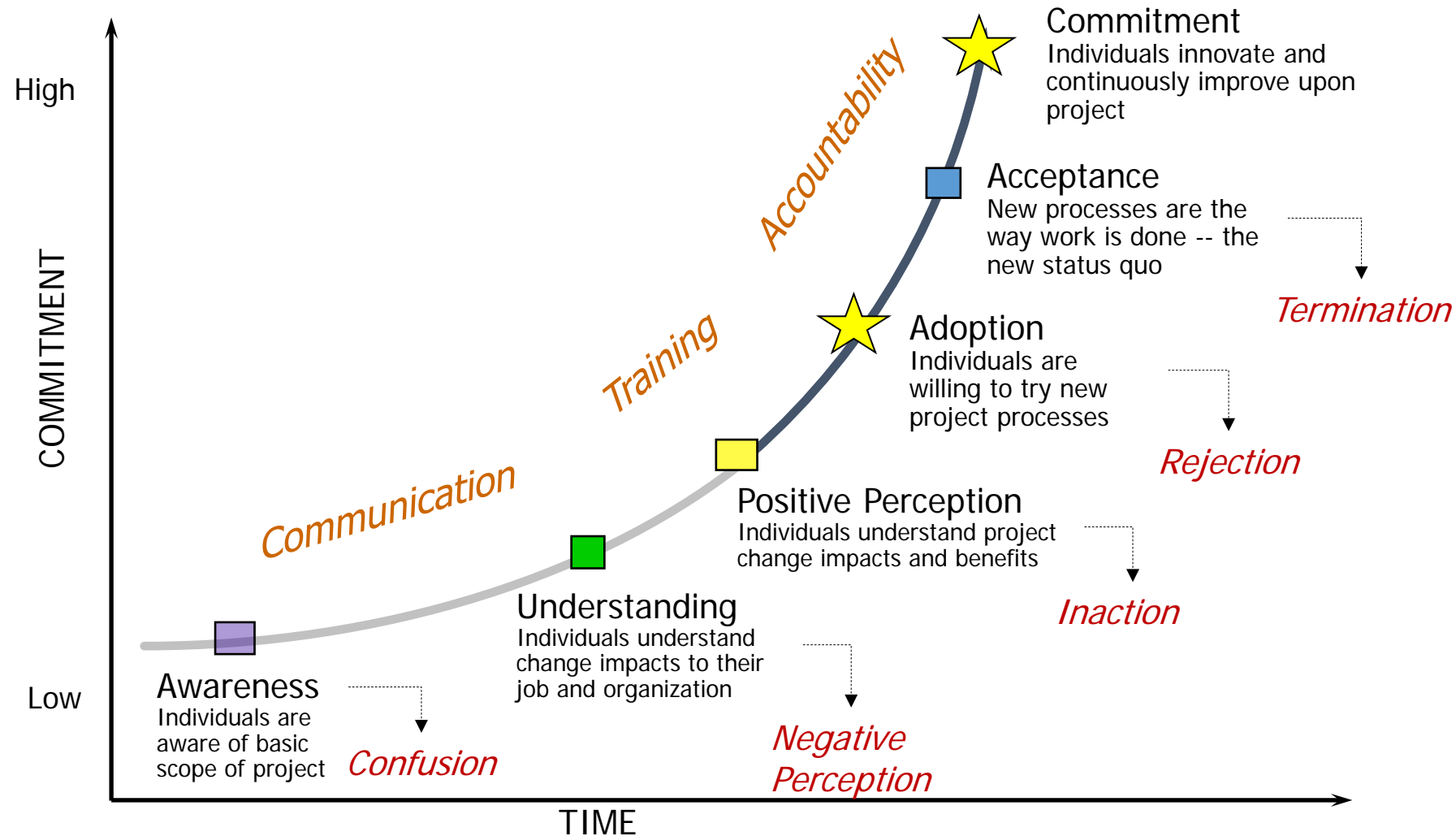




Over 75% of changes fail to reach their goals ... WHY?

1. Lack of buy-in that change is needed
2. Lack of active involvement from leaders to lead change
3. Failure to get the right people on board
4. Turf battles between departments, management, etc.
5. Change Capacity – too many projects and work

Build stakeholder commitment moving them up the curve





Session Roadmap

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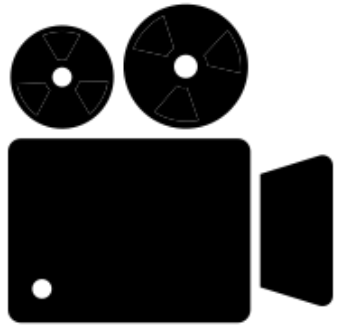
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Video – Leadership Lessons from the Dancing Guy





One of the **TOP** reasons why change fails

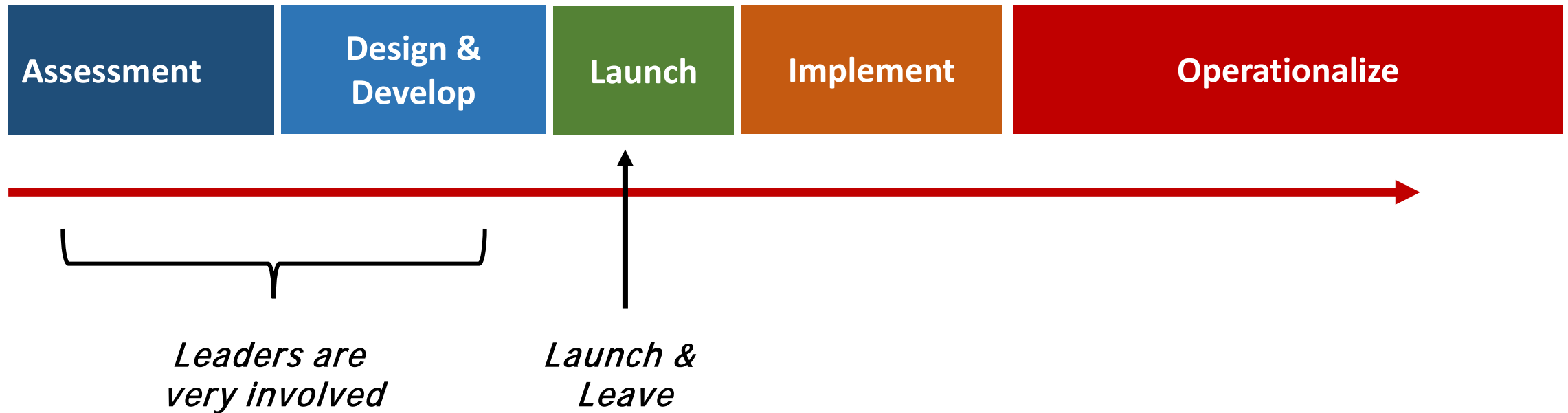
**Lack of active involvement
from leaders to lead change**



*What many leaders do when
it comes to change*

Launch & Leave

Typical Phases in Change Project



BANK OF AMERICA CHICAGO MARATHON



Life's better when we're connected



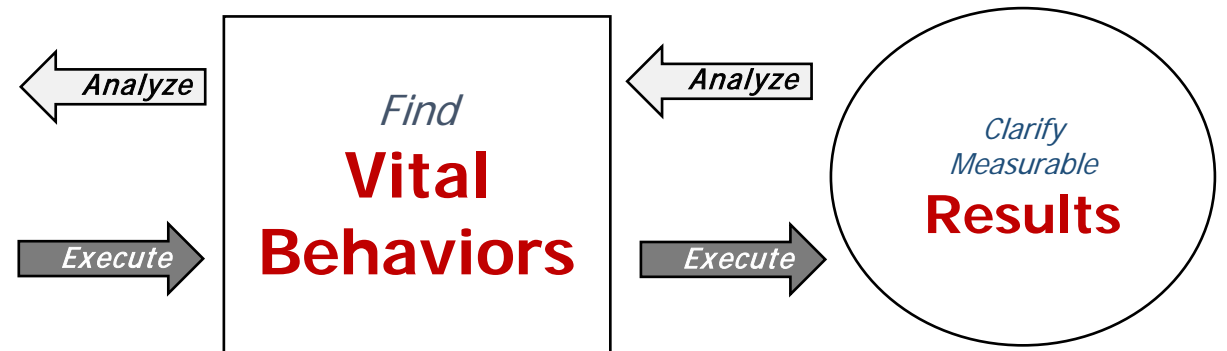
Life's better when we're connected



Influencing Others to Support Change

Using Six Sources of Influence to manage change

	Will	Skill
Personal	Explain Why – “WIIFM”	Build Knowledge, Skills, Abilities
Social	Peer Success Peer Recommendation	Peer Assistance Team Assistance Team Work
Organizational	Design Rewards Demand Accountability	Remove existing support system Implement new support system



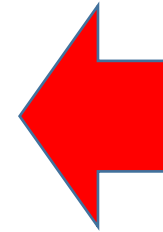
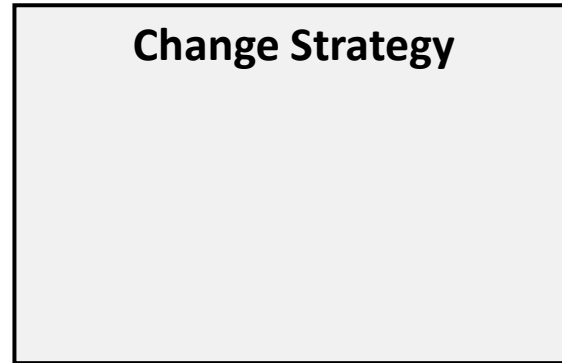
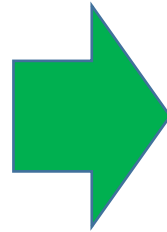
Force Field Analysis

The Force Field Analysis Worksheet is used to identify the elements in the organizational culture that will support (help) or prevent (hinder) your project from being successful. A Change Strategy is needed to leverage the Help elements of the Culture and address the Hinder elements of the culture.

Culture - Help

What are cultural elements that will help?

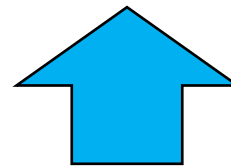
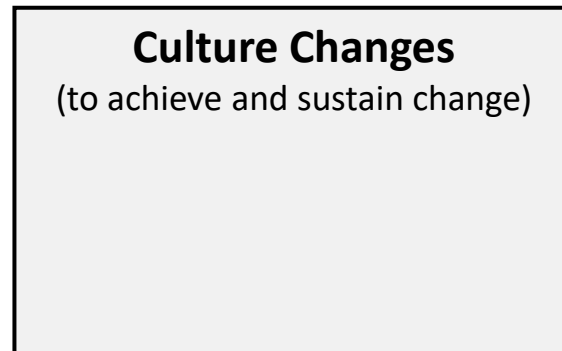
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-
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Culture - Hinder

What are cultural elements that will hinder?

-
-
-



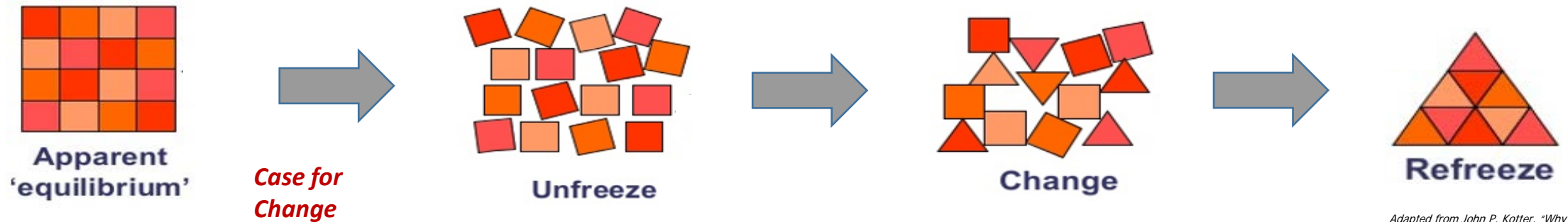
Culture - Enhance

What are cultural elements can be added to further enhance the success of the change?

Organizational Culture



Urgency to Change – Building a Case for Change



Adapted from John P. Kotter, "Why Transformation Efforts Fail," Harvard Business Review, .

Leaders Need to Create a Sense of Urgency:

People need to understand WHY they should change before they begin considering a change.

You cannot force change - you must gain buy-in.

Communicate a compelling case for why change is needed.

Elements of a Case for Change

The Case for Change needs to answer WHY at three levels



Business Level

Why does the Business need to change in this area. How will it help us:

- Better serve our customers?
- Beat our competition?
- Better partner with our suppliers?
- Achieve our goals and strategies?
- Be Faster, Better, Smarter?



Work Level

Why do we need to change how we work (process, roles, technology).

What aspects of how we perform our work today does not help us achieve our goals, serve our customers, etc.

Functional, Operational, Process data should be used.



Individual Level

Why do I need to change?

How will this change help me:

- Learn new skills
- Build experience that will benefit me and my career
- Make my job easier, better, faster

How will I be held accountable and rewarded?

Tell a story to hook your audience

Facts Tell ... Stories Sell



Five Elements of a Great Story

1. Hook - Connection
2. Protagonist
3. Antagonist
4. Tension / Awareness
5. Transformation



5 Minute Exercise – Creating a Sense of Urgency

Pick a change effort in your organization (current, past, future)

How well was the **business case defined** at the 3 levels to **create a sense of urgency for change?**

	<i>None Defined</i>	<i>A few Sparks</i>	<i>There is Smoke</i>	<i>Fire is Burning</i>	<i>Fire is Strong</i>	<i>We have To Jump!</i>
Business	0	1	2	3	4	5
Work / Function	0	1	2	3	4	5
Individual	0	1	2	3	4	5

Building a Stronger Case for Change

What can you do to **build a stronger case for change** (Business, Work, Individual) and how can you communicate the case for change in a **powerful way** that will create a strong sense of urgency to change?

Taking Action on Personal Change

“Be the change you wish to see in the world.”



Change Readiness Assessment Questions

Risk Factor	Change Readiness Assessment Questions
Value Proposition	<ul style="list-style-type: none"> • Why is the organization implementing the change? • What are the business reasons for undertaking the change from both a quantitative and qualitative perspective? • What is the cost failure to Company? • Can Company afford the cost if the change fails to meet management expectations?
Vision Focus	<ul style="list-style-type: none"> • What does the future look like with change capabilities realized? • How well is the change vision understood by executives, management and employees? • To what extent can executives, management and employees accurately describe the change vision? • What are the key components of the Change vision from a people, process, technology and strategy perspective?
Communication & Migration Plan	<ul style="list-style-type: none"> • How will the organization migrate to the future state with Change capabilities? • Has a migration plan been developed? • Has the migration plan been communicated to stakeholders? • Have the stages of migration been described?
Sponsorship	<ul style="list-style-type: none"> • How much support truly exists to make the Change vision a reality? • Have executives taken the time to understand the transformed processes and how they will be enabled by technology and processes? • Do executives understand the organizational infrastructure implications of the Change vision? • Are executives acting as role models for the Change transformation? • Are executives holding themselves and their direct reports accountable for supporting the implementation of the Change project?
Training	<ul style="list-style-type: none"> • How skilled are individuals in the technical and organizational skills required to successfully migrate to the Change state? • Have individuals been trained to respond effectively to resistance and act as role models exemplifying the future state? • Do employees have easy, immediate access to policy, process and business documentation necessary to perform their jobs? • Does Company provide adequate technical support to employees who use computer systems, printers and other electronic tools?
Culture / Stakeholder Resistance	<ul style="list-style-type: none"> • Is the culture aligned with the future-state Change vision? • How much resistance exists among the stakeholders? • Have stakeholders been identified by interest group? • Is the resistance due to lack of information about the transformation or due to motivational / behavioral issues? • Does the organization have the time to obtain stakeholder buy-in?
Organization / Infrastructure	<ul style="list-style-type: none"> • Are the key organizational infrastructure processes (e.g., organization structure, rewards, performance measurement, training, leadership style) aligned with the future-state Change vision and reengineered processes?
Competing Initiatives	<ul style="list-style-type: none"> • What other projects and initiatives will affect the transformation? • Have key initiatives been prioritized and rationalized? • Have initiatives been inventoried to identify how resources are being consumed?

Managing Organizational Change and Personal Transitions

August 14, 2024

Large Group Discussion

Key Takeaways

- Plan is written in pencil
- End to end review
- Resistance is normal but not always logical
- Change is personal. Successful change is inclusive
- First follower legitimizes leader
- Manage the environment, not the fish/people

Large Group Discussion

Challenges

- Time
- Disconnect bet. Sr. leadership and staff
- Not understanding what is going on in employees' personal lives
- Change management usually not structured in
- Realize that everyone may be at different places on the change curve
- Lack of understanding employee's lives
- Don't forget buy-in at next level down – do loops

Strategies

- Know that people will be concerned about change affects their personal lives
- Due diligence
- Interpersonal communication – debriefs and next steps. Get feedback on feelings
- Easier to get buy in if there is a relationship
- Be mindful of labeling/terminology
- Know what people have going on at work – capacity/ability
- Leader showing their own vulnerabilities
- Leaders need to address resource scarcity – don't overcommit

Wrap-up and next steps

Schedule & Connect with your coaching partner (*CG/Fellow*) & **Inclusion Cluster** (*Executive Sponsor, Direct Manager of Fellow, Corporate Guide, and Fellow*)

Look for opportunities to apply principles from today's session in your day-to-day, especially in today's new "normal"

Next two months: Podcasts on CII website for all. Corporate Guides and Fellows complete the final IDI Assessment in October.

Closing Ceremony: October 30 at Mesirow Financial, *invitation is forthcoming*