

**LEAD NOW! All Access** 

CHANGE MANAGEMENT

# SAMPLE FACILITATOR GUIDE

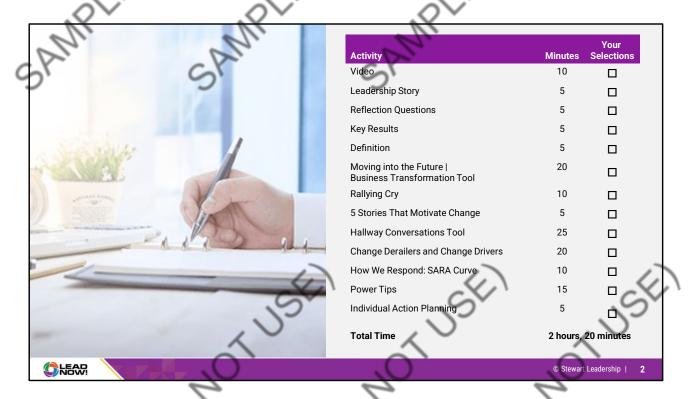


Quadrant: Lead Change | Dimension #18 | External Focus | People Results

Timing: 2 hours, 20 minutes

Customize this experience to meet the needs of your client.

**For virtual classrooms:** Most video conferencing applications allow for breakout groups. Use this feature or another collaboration feature to connect participants to their small groups.



Select activities that support your goals and time frames.

#### Preparation

- · Review this guide and identify the activities you will use.
- · Use this guide to support an individual coaching session or a group workshop.
- The total time for all activities in this guide is about **2 hours and 20 minutes**, but you can select and complete only the activities that fit your audience and schedule.
- For example:
  - Use the Video or Leadership Story.
  - Cover the Moving into the Future | Business Transformation Tool and Rallying Cry or Hallway Conversations.
  - Use the Power Tips activity as a stand-alone exercise.



SAMPLE SAMPLE Customize this agenda based on the activities you select for this client.



#### **VIDEO** | 10m

- 1. Play the Change Management video [7:51]: https://stewartleadership.wistia.com/medias/o5kv0lbuk1.
- 2. Have participants use the questions in their Participant Guides for reflection.
- 3. Lead a discussion using the discussion questions.



#### **LEADERSHIP STORY** | 5m

Tell the "Vision in the Fog" (Leadership Lessons #4/page 35) or related story.

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#### REFLECTION QUESTIONS

- Q: How does the lesson relate to leadership?
- Q: Do you have targets to help you get where you want to go?
- Q: Are you prepared for barriers?
- Q: How can you visualize victory?
- **Q:** Can you think of an example when a change in your organization didn't go well? Why didn't it go well? Did you notice any themes that led to less-than-optimal results?
- Q: What other LEAD NOW! dimensions might you need to leverage to help you manage change effectively?
- **Q:** What are some best practices you use to communicate small- or large-scale changes?
- Q: What are some best practices you use to measure the success of a change initiative?



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#### **REFLECTION QUESTIONS** | 5m

Lead a discussion.

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#### **KEY RESULTS**

#### **BUSINESS RESULTS**

- Effectively responding to a changing marketplace
- · Leading change for sustainable growth
- Managing and reducing risks during change

#### PEOPLE RESULTS

- Clearly communicating the reason for and benefits of change
- Effectively managing various employee reactions to the change
- Securing buy-in from those who will implement the change



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#### **KEY RESULTS** | 5m

- 1. Direct learners to their Participant Guides.
- 2. Lead a discussion.

**Q:** Which of the Business Results and People Results would help you the most to make your communication more effective?

Q: What other results will be achieved if you improve in this dimension?

#### DEFINITION

Change management is communicating a compelling vision, leading, and sustaining changes within an organization.

Effective change leaders know how to optimize the change planning process, test reactions to proposed changes, be active and visible during a change effort, celebrate successes along the way, and communicate the outcomes to all stakeholders.



#### **DEFINITION** | 5m

Q: How do you define change management?

Define change management referring to the definition in the Participant Guide.

- A leader must create and champion change.
- This includes involving all who are affected by the change process and studying previous failed efforts and learning from them.



#### MOVING INTO THE FUTURE | 20m

- 1. Introduce the Business Transformation Tool.
- 2. Direct participants to the form in their Participant Guides.
- 3. Explain that the left side should reflect the current state
- 4. Explain that the right side should reflect the future state they hope to get to as a result of the change.
- 5. Have participants consider a change scenario in front of them.
- 6. Give them 5 minutes to complete the form. Encourage them to be aspirational.
- 7. Pair participants.
- 8. Give pairs 10 minutes to share their forms and hear feedback on their work in progress.

- You can use the Business Transformation Tool to help develop your vision for the change.
- Reinforce the importance of leveraging desired results as a part of identifying where you want to move from and where you want to go.
- These future statements should support your overall desired result and should be aspirational.



#### **RALLYING CRY | 10m**

- 1. Introduce the Rallying Cry tool.
- 2. Explain that a *rallying cry* is a short and memorable statement that can unite team members toward a common purpose.
- 3. Point out the blank area between the Today and Future columns in the Business Transformation Tool. The rallying cry sits between them and creates momentum.
- 4. Point the class to the examples in their Participant Guides.
- 5. Review the questions to consider when creating a rallying cry.
- 6. Give them 5 minutes to brainstorm a rallying cry with their partner.
- Have them write the rallying cry between the Today and Future columns on their Business Transformation Tool.
- 8. Encourage them to repeat this exercise with their teams.

- The rallying cry helps mobilize everyone around the vision.
- The team gets even more invested in it when they have a role in creating the message.
- The Rallying Cry is a great team activity to help create buy-in during a change initiative. This short, memorable statement can serve as their purpose statement.
- It can last for 3 to 12 months or even longer and must support their strategic objectives as a team.



#### 5 STORIES THAT MOTIVATE CHANGE | 5m

- 1. Introduce the 5 Stories That Motivate Change.
- 2. Direct learners to their Participant Guides.

- How we communicate information about the change to various audiences has a significant impact on engagement.
- Typically, managers use one story line to talk about the impact of change. The story line is often only from the manager's viewpoint and has a managerial bias.
- It typically sounds like this: "If we make this change, we will save \$1 million or make \$5 million."
  - That's nice but that story line only engages about 20% of the primary audience.
  - Only 20% of the people are energized and engaged by this.



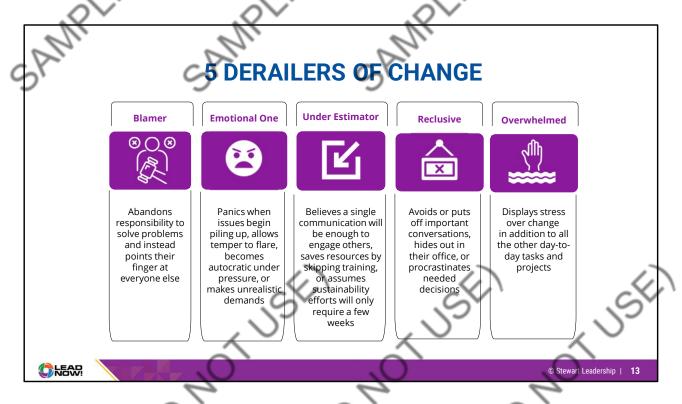
#### **HALLWAY CONVERSATIONS** | 25m

- 1. Introduce the Hallway Conversations Tool.
- 2. Explain that research suggests that 20% of the population is energized by one of five story lines when it comes to change.
- 3. Explain that individuals choose to hear the message you share from their own perspectives and lens.

Q: Does this mean people make things up? What does it mean?

- 4. Direct the group to the table in their Participant Guides.
- Have them work individually to identify a current change they are working through and identify different ways to communicate the change to different audiences with unique motives and interests.
- 6. Allow 10 minutes for individual work.
- 7. Allow 10 minutes for partner sharing.

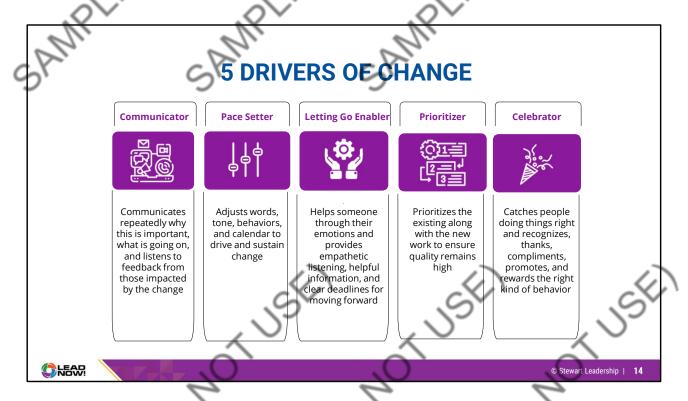
- The storyline, "If we make this change, we will save \$1 million or make \$5 million" only engages about 20% of their primary audience and engages 20% of the people.
- The message people hear may be dictated by the story line coded in their heads. We want to consider what stories we're sharing and adjust them to fit with these various story lines.
- Emphasize things in different ways to engage various perspectives and audiences. As a leader, your challenge is to identify your vision and other communications and tell it five different ways. You want to engage 100% of your audience.



#### **CHANGE DERAILERS AND CHANGE DRIVERS** | 20m

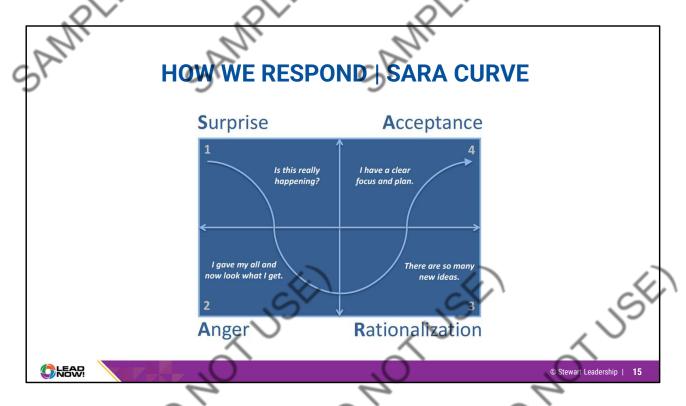
- 1. Introduce the Change Derailers and Change Drivers discussion.
- 2. Review each derailer.
- 3. Have participants circle the roles they have seen and the roles they have played.
- 4. Discuss the characteristics and the impact.
- 5. Transition to Change Drivers.
- Q: Which of these derailers have you seen before?
- Q: What impact has the derailer had on the change?
- Q: Which of these have you been before?
- Q: Where can you coach and redirect these derailers in your organization?

- Leaders set the pace and tone for how the organization reacts and responds.
- Self-awareness is critical. Leaders who are aware of how they come across can adjust and accommodate for different environments.
- When you find these change derailers in your organization, they need your help and coaching.
   Have patience with their concerns, model the behaviors you want to see, and share your vision so they can see where to go.



- 1. Introduce the Change Drivers.
- 2. Review each driver.
- 3. Have participants circle drivers they have seen make an impact.
- 4. Discuss the characteristics and the impact.
- Q: Which of these have you seen before?
- Q: Which of these will be a challenge for you?
- Q: Which of these will come naturally to you?
- Q: Where can you promote and support these drivers in your organization?

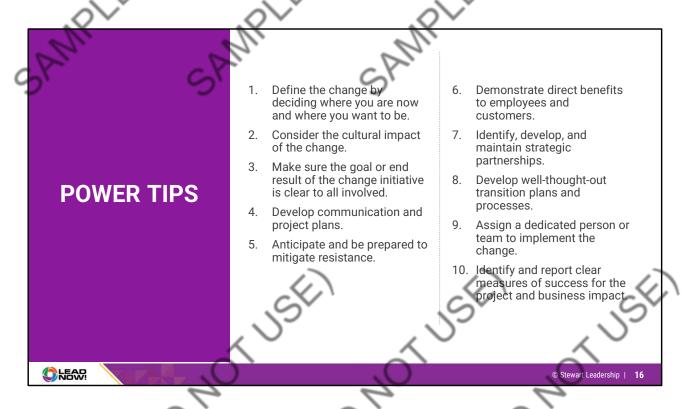
- When you find these change drivers in your organization, amplify their efforts.
- · Give them space and showcase them as models for others.
- These drivers of change are the wind beneath your wings and facilitate your organization's progress.
- Be sure to model these behaviors and walk the talk yourself.



#### HOW WE RESPOND | SARA CURVE | 10m

- 1. Direct learners to their Participant Guides.
- 2. Review and discuss the SARA model.
- Q: How do you react to change initiatives in your world?
- Q: What helps them get from stage to stage?
- 3. Allow 5 minutes for individual reflection.
- 4. Have participants plot themselves, team members, and business partners on the curve.
- 5. Have them begin to draft ways to approach messages for the different quadrants.
- Q: What is the advantage to understanding where others are on the change curve?

- It's a similar pattern when dealing with feedback and dealing with change.
- There are natural stages to dealing with the feelings about the experience.
- Understanding where you are builds empathy for those around you.
- Understanding where your team is helps you adjust your messaging for each stage.



#### POWER TIPS | 15m

Facilitator Note: You can do this activity in either a physical or virtual classroom.

- Divide the participants into groups of 2 or 3.
- Assign the Power Tips so each group has at least two tips to discuss.
- 3. Give them their daily work. Give them 5 minutes to discuss and document how they can each incorporate those tips into
- Have them record their ideas on a shared document or virtual whiteboard.
- Bring the groups back together and ask each to share their best ideas.



#### **INDIVIDUAL ACTION PLANNING | 5m**

- 1. Direct participants to the Individual Action Plan documents they have in progress.
- 2. Give them a few minutes to complete their development plans for this dimension. They won't finish during class—the point is to get started.
- 3. Ask them to reflect on the one thing they will do differently tomorrow.

- Take a moment to think of the results you want to achieve by working to improve how you manage changes in your organization.
- Document one or two desired results along with the supporting actions, people you'll work with, and a due date.
- · What is the one thing you can do tomorrow to make a difference?



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CHANGE MANAGEMENT

# SAMPLE PARTICIPANT GUIDE



#### **OVERVIEW**

Change management is communicating a compelling vision, leading, and sustaining changes within an organization.

Effective change leaders know how to optimize the change planning process, test reactions to proposed changes, be active and visible during a change effort, celebrate successes along the way, and communicate the outcomes to all stakeholders.

#### **REFLECTION QUESTIONS**

**Q:** How does the lesson relate to leadership?

Q: Do you have targets to help you get where you want to go?

**Q:** Are you prepared for barriers?

**Q:** How can you visualize victory?

**Q:** Can you think of an example when a change in your organization didn't go well? Why didn't it go well? Did you notice any themes that led to less-than-optimal results?

**Q:** What other LEAD NOW! dimensions might you need to leverage to help you manage change effectively?

Q: What are some best practices you use to communicate small- or large-scale changes?

Q: What are some best practices you use to measure the success of a change initiative?

#### **Business Results**

- Effectively responding to a changing marketplace
- Leading change for sustainable growth
- Managing and reducing risks during change

#### **People Results**

- Clearly communicating the reason for and benefits of change
- Effectively managing various employee reactions to the change
- Securing buy-in from those who will implement the change

What other results will be achieved if you improve in this dimension?

Notes:

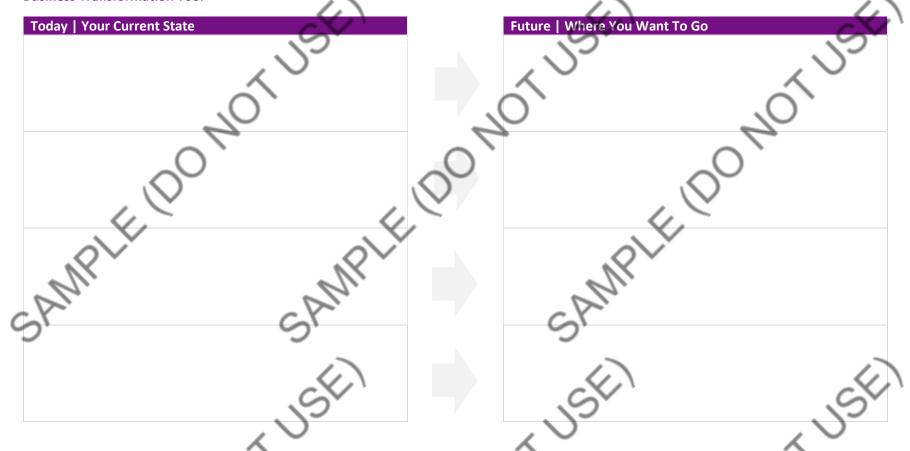
Dimension Participant Guide © Stewart Leadership Page |

#### **MOVING INTO THE FUTURE**

Consider a change initiative in your business. The Business Transformation Tool below can help.

- 1. Identify behaviors and practices that you have today. Write them under the **Today** column.
- 2. Then imagine where you want to go. In the **Future** column, describe what you expect to see in the future. Make it aspirational and compelling!

#### **Business Transformation Tool**



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#### RALLYING CRY

"5-Year Plan in 90 Days!" "Feed Our Customers Now" "Jump-Start Our Clients"

#### A rallying cry:

- Is a simple phrase, symbol, or image that unites people to act
  Prioritizes and cuts through distractions—what not to do
- Is a short-term, #1 focus (30–90 days)

#### What Is Your Rallying Cry?

- 1. Use the space below to brainstorm ideas.
- 2. Consider these questions:
  - What is the greatest value you can provide to your customers?
  - What is the greatest growth opportunity to benefit the organization financially?
  - What is the organization's greatest strength?
  - What is your current situation and how is it different from the future desired state?
- 3. Repeat this activity with your team to develop a common rallying cry to inspire your change initiative. **Notes:**



#### **5 STORIES THAT MOTIVATE CHANGE**

Research suggests that 20% of the population are energized by one of these five story lines when it comes to change. A typical leader uses one story line to talk about the change and therefore only engages 20% of the audience.

- 20% COMPANY: Beating the competition, achieving industry leadership, steering investor or board direction
- 20% SOCIETY: Making a better place to live, building the community, stewarding resources
- 20% CUSTOMER: Making it easier, providing a superior service, experience, or better quality product
- 20% TEAM: Nurturing a sense of belonging and a caring environment, working together efficiently and effectively
- 20% INDIVIDUAL: Considering personal development, paycheck/bonus, empowerment to act

Your audience chooses to hear the message you share from their own perspective and lens. To be effective, adjust your story to engage all audiences as in the example below.

Story	Example
Company	Expenses are growing faster than revenue
Society	To deliver affordable housing, we must be affordable in our prices
Customer	Increased simplicity, flexibility, fewer errors, more competitive prices
Team	Less duplication, more delegation, increased accountability, faster pace
Individual	Bigger, more attractive jobs created

A large US financial services firm recast their change story 3 months into their change effort. Using all five change stories, it lifted employee motivation measures from 35.4% to 57.1% in a month.

#### HALLWAY CONVERSATIONS TOOL

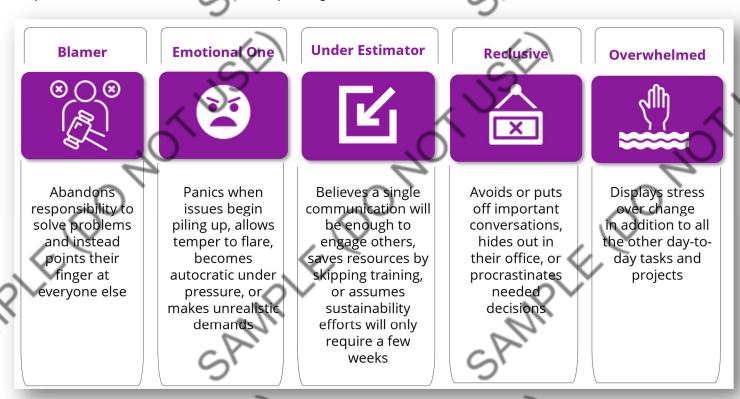
- 1. Identify a current change you are working through.
- 2. Address each topic in the first column.
- 3. Write alternative ways to communicate the change based on the audience you are addressing in each column. Use the **5 Stories That Motivate Change**.

Topics	Company	Society	Customer	Team	Individual
"Here's what the change is about"		SE	. 55		JSK
"Here's why it's important to do"	401		401		401
"Here's what success will look like"	00,		90,	(OC	)
"Here's what we need from you"		MPLE		MPLE	
"Here's what you can count on from me"	Ç	Ala	SA	1,2	

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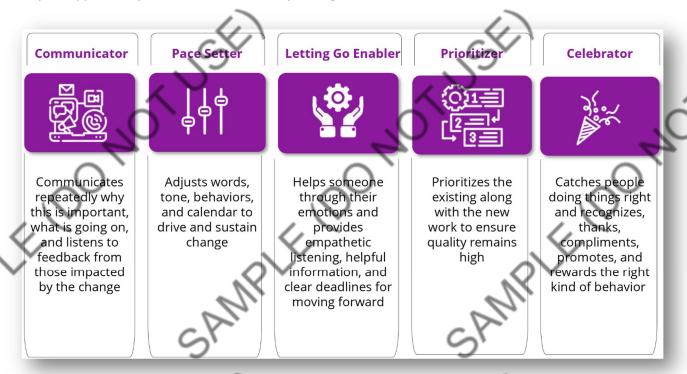
#### CHANGE DERAILERS

- 1. Review each Change Derailer.
- 2. Circle roles you have seen before. What impact has the derailer had on the change?
- 3. Circle roles you have been before. How can you avoid that in the future?
- 4. Where can you coach and redirect these derailers in your organization?



#### Notes:

- 1. Review each Change Driver.
- 2. Circle roles you have seen before.
  - What impact has the driver had on the change?
  - Which of these will be a challenge for you? Which will come naturally?
  - Where can you support and promote these drivers in your organization?

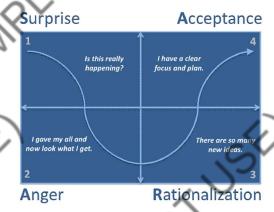


Notes:

#### **HOW WE RESPOND | SARA CURVE**

We all tend to experience change in a similar manner. This is normal and healthy. Recognizing this pattern (SARA) can help you and your team make the change process a positive experience.

- 1. Consider where you are on the SARA curve. Mark your initials there.
- Consider members of your team and where they are on the curve. Mark their initials in the appropriate quadrant(s).
- 3. Consider business partners and where they are. Mark their initials in the appropriate quadrant(s).
- 4. How will you adjust your message based on where individuals are on the curve? Draft notes in the space provided below.

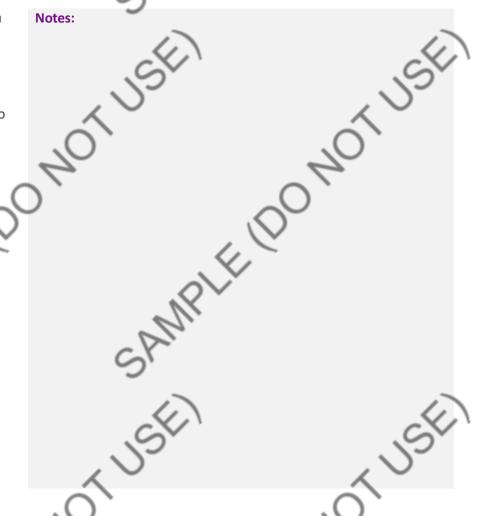


<ul> <li>1. Surprise</li> <li>Shock/numbness</li> <li>"It will be over really soon"</li> <li>"This too shall pass"</li> <li>Disbelief</li> </ul>	Searching for information	<ul> <li>4. Acceptance</li> <li>Inspiration and motivation</li> <li>Teamwork</li> <li>Satisfaction</li> <li>Clear focus and plan</li> </ul>	Searching for new goals and challenges
Your approach:	MPLE	Your approach:	
<ul> <li>2. Anger</li> <li>"This will never work"</li> <li>"I can't sleep at night"</li> <li>Anger; fights and resists</li> <li>Withdrawal from the team</li> </ul>	Searching for empathy and support	<ul> <li>3. Rationalization</li> <li>"I can explain"</li> <li>Frustration</li> <li>"I have too much to do"</li> <li>"I can't focus"</li> </ul>	Searching for priorities and follow-up
Your approach:	Jezz,	Your approach:	JSK

#### **POWER TIPS**

These Power Tips can help you be even more effective as you manage change in your daily work. Use this page to write your thoughts about how you can incorporate them into your own leadership style.

- 1. Define the change by deciding where you are now and where you want to be.
- 2. Consider the cultural impact of the change
- 3. Make sure the goal or end result of the change initiative is clear to all involved.
- 4. Develop communications and project plans.
- 5. Anticipate and be prepared to mitigate resistance.
- 6. Demonstrate direct benefits to employees and customers
- 7. Identify, develop, and maintain strategic partnership
- 8. Develop well-thought-out transition plans and processes.
- 9. Assign a dedicated person or team to implement the change.
- **10.** Identify and report clear measures of success for the project and business impact.

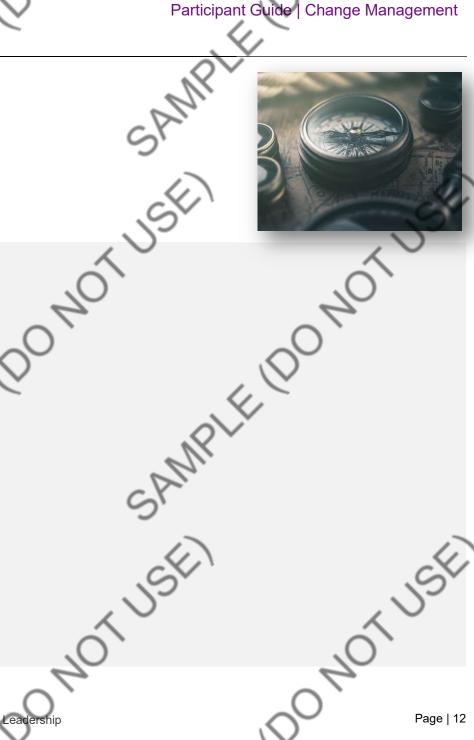


#### ACTION PLANNING

Reflect on the learnings from this workshop.

- 1. What can you add to and/or edit on your IAP?
- MPLEDOM 2. What is the one thing you will do differently tomorrow?

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CHANGE MANAGEMENT

# SAMPLE SLIDE DECK









Activity	Minutes	Your Selections
Video	10	
Leadership Story	5	
Reflection Questions  Kev Results	5	_
Key Results	5	C (D)
Definition	5	20
Moving into the Future   Business Transformation Tool	20	
Rallying Cry	10	
5 Stories That Motivate Change	5	
Hallway Conversations Tool	25	
Change Derailers and Change Drivers	20	
How We Respond: SARA Curve	10	Ą
Power Tips	15	SE,
Individual Action Planning	5	J _
Total Time	2 hours,	20 minutes



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### **AGENDA**

- Why Change Management?
  - Video
  - Leadership Story
  - Reflection Questions
  - Key Results
  - Definition
- Moving into the Future | Business Transformation Tool
- Rallying Cry
- 5 Stories That Motivate Change
- Hallway Conversations
- Change Derailers and Change Drivers
- How We Respond: SARA Curve
- Power Tips
- Individual Action Planning



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LEADERSHIP STORY



## REFLECTION QUESTIONS

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## **KEY RESULTS**

## **BUSINESS RESULTS**

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- JISE SAMPLE DO NOTUSE) 2. Then imagine where you want to go. In the Future column, describe what you expect to see in the future. Make it aspirational and compelling!

## Business Transformation Tool

Today | Your Current State TUSE SAMPLE

Future | Where You Want To Go



## RALLYING CRY

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"5-Year Plan in 90 Days!" "Feed Our Customers Now" "Jump-Start Our Clients"

#### A rallying cry:

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#### Notes:





## 5 STORIES THAT MOTIVATE CHANGE

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## HALLWAY CONVERSATIONS

#### HALLWAY CONVERSATIONS TOOL

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"Here's why it's important to do"		. 4	0		. 4
"Here's what success will look like"		MPL			MPL
"Here's what we need from you"	SE	SP.		SE	SK
"Here's what you can count on from me"	5		<u></u>	7	



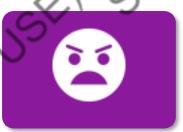
## 5 DERAILERS OF CHANGE

#### **Blamer**



Abandons responsibility to solve problems and instead points their finger at everyone else

## **Emotional One**



Panics when issues begin piling up, allows temper to flare, becomes autocratic under pressure, or makes unrealistic demands

### **Under Estimator**



Believes a single communication will be enough to engage others, saves resources by skipping training, or assumes sustainability efforts will only require a few weeks

#### **Reclusive**



Avoids or puts off important conversations, hides out in their office, or procrastinates needed decisions

#### **Overwhelmed**



Displays stress over change in addition to all the other day-today tasks and projects



## 5 DRIVERS OF CHANGE

# Communicator



Communicates repeatedly why this is important, what is going on, and listens to feedback from those impacted by the change

## **Pace Setter**



Adjusts words, tone, behaviors, and calendar to drive and sustain change

### **Letting Go Enabler**



Helps someone through their emotions and provides empathetic listening, helpful information, and clear deadlines for moving forward

## **Prioritizer**



Prioritizes the existing along with the new work to ensure quality remains high

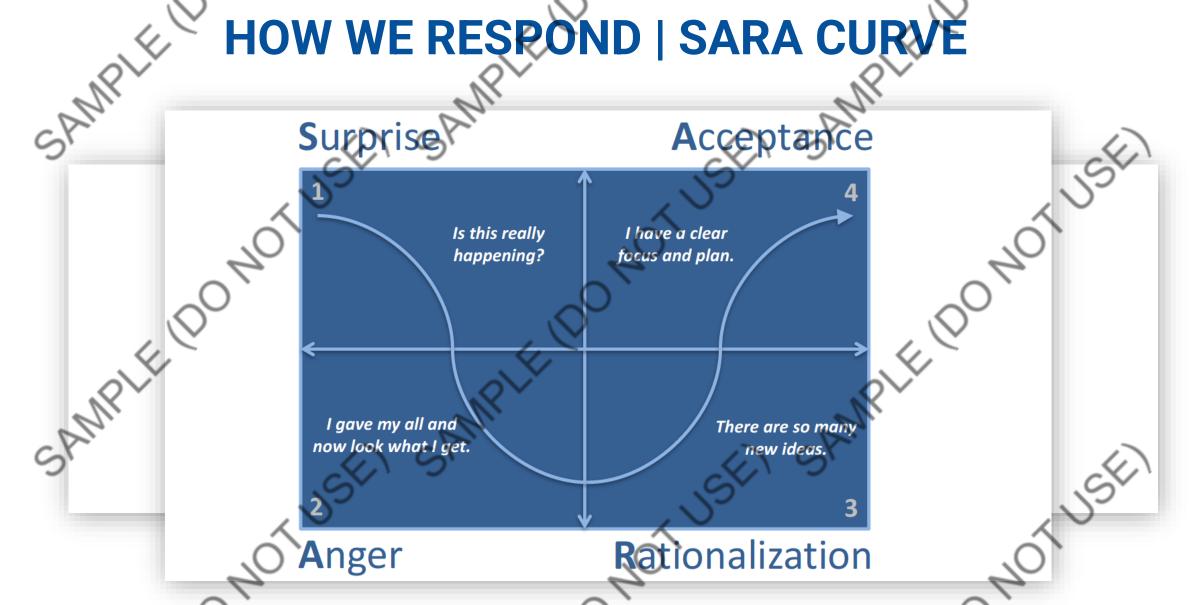
#### **Celebrator**



Catches people doing things right and recognizes, thanks, compliments, promotes, and rewards the right kind of behavior



## HOW WE RESPOND | SARA CURVE





## **POWER TIPS**

- Define the change by deciding where you are now and where you want to be.
- 2. Consider the cultural impact of the change.
- 3. Make sure the goal or end result of the change initiative is clear to all involved.
- 4. Develop communication and project plans.
- 5. Anticipate and be prepared to mitigate resistance.

- 6. Demonstrate direct benefits to employees and customers.
- Identify, develop, and maintain strategic partnerships.
- Develop well-thought-out transition plans and processes.
- 9. Assign a dedicated person or team to implement the change.
- Identify and report clear measures of success for the project and business impact.



INDIVIDUAL ACTION **PLANNING** 

