



See & Free

Organizational Transformation Guide

By Jennifer Longnion

Getting Started

Purpose of this Guide

The purpose is to help guide the thinking process of those who are involved in designing and leading transformational change initiatives. In order to increase the success rate of changes implemented, one must think through the various aspects of the change process and what will truly be required to achieve success.

This Toolkit:

- Provides a common language, process and tools to manage through change
- Provides a set of steps and tools to make sure people are prepared for what will be different
- Describes the role of leaders in leading a change
- Provides a checklist of key considerations to help employees be ready, willing and able to do their jobs effectively
- Serves as a guide for helping employees transition to a new way of doing things

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Understanding Change

What is Change Management?

Change Management is:

- Enabling people to manage the steps required to drive change
- A process of implementing a well-planned, structured approach to managing a business change
- A set of processes, activities and tools used to bridge the gap between “Today and Tomorrow” - allows employees to see the difference
- A method for aligning people, process and technology with other changes taking place to convert to a “new way of doing things.”

Understanding Change

Types of Change

Types of Change	People Risk	Transitional Change	Transformational Change
Description	<ul style="list-style-type: none"> • Rarely disrupts major patterns of work • Requires little more than just installing new tools or procedures • Doesn't disrupt power or roles/relationships within the organization • Doesn't require significant change management process/tools 	<ul style="list-style-type: none"> • Moderately complex and/or moderately predictable. • Can't be implemented easily within current structures. • The changes that need to happen are relatively clear. • With help from others who have been successful in similar changes (consultants, role models from other companies, etc.) it's possible to implement a process for the change that reliably leads to success 	<ul style="list-style-type: none"> • Fundamentally changes the culture of the organization and/or the way the organization does business. • Both highly complex and very unpredictable. • Destination or end state may not be clear, and all of the aspects of the change are not known. • Focus is not on one change, but on creating the capacity for different kinds and levels of performance. • An interactive approach is used in implementation, learning along the way to create momentum forward. • In extreme cases, these are changes that are focused on creating something that does not exist today – anywhere. • Models for benchmarking may not be available.
Types of Business Opportunities	<ul style="list-style-type: none"> • Policy or procedure changes • Hardware upgrades • Contract updates • Office moves 	<ul style="list-style-type: none"> • New leader acclimation • Instituting new quality standards • Minor systems technology implementation 	<ul style="list-style-type: none"> • System-wide technology deployment • Functional/department restructure

Our Approach to Change

Utilizing a structured approach to manage change has been shown to be a major contributor to achieving success. Using the simple approach below, The See & Free Organizational Transformation Framework can significantly increase the speed of transition and achievement of positive results.



The change process is iterative and cyclical. The process is not sequential and linear. For example, you will re-visit the Stakeholder Analysis and Engagement plan through the project to update and revise it as new information becomes available or as changes in the project occur.

S&F Org Transformation Framework

The steps of this process are designed to help individuals understand what they need to do differently after the change is in place, as well as help the organization to develop a common view of what the future looks like, why the change is needed, what will be the same, what will change and the business results to be achieved.

Key steps in The See & Free Organizational Transformation Framework are:

1

Build the Case for Change

Clarify what is driving the need to change, then define and align leadership around the business case and vision

2

Drive Commitment

Gain commitment, connect with key stakeholders to understand the change's people and business impact

3

Develop a Plan

Outline the approach and actions required to move Stakeholders through the change stages and ensure the organization is prepared and equipped to execute and sustain results

4

Take Action

Apply rigorous and consistent project management process to drive results

5

Make Change Last

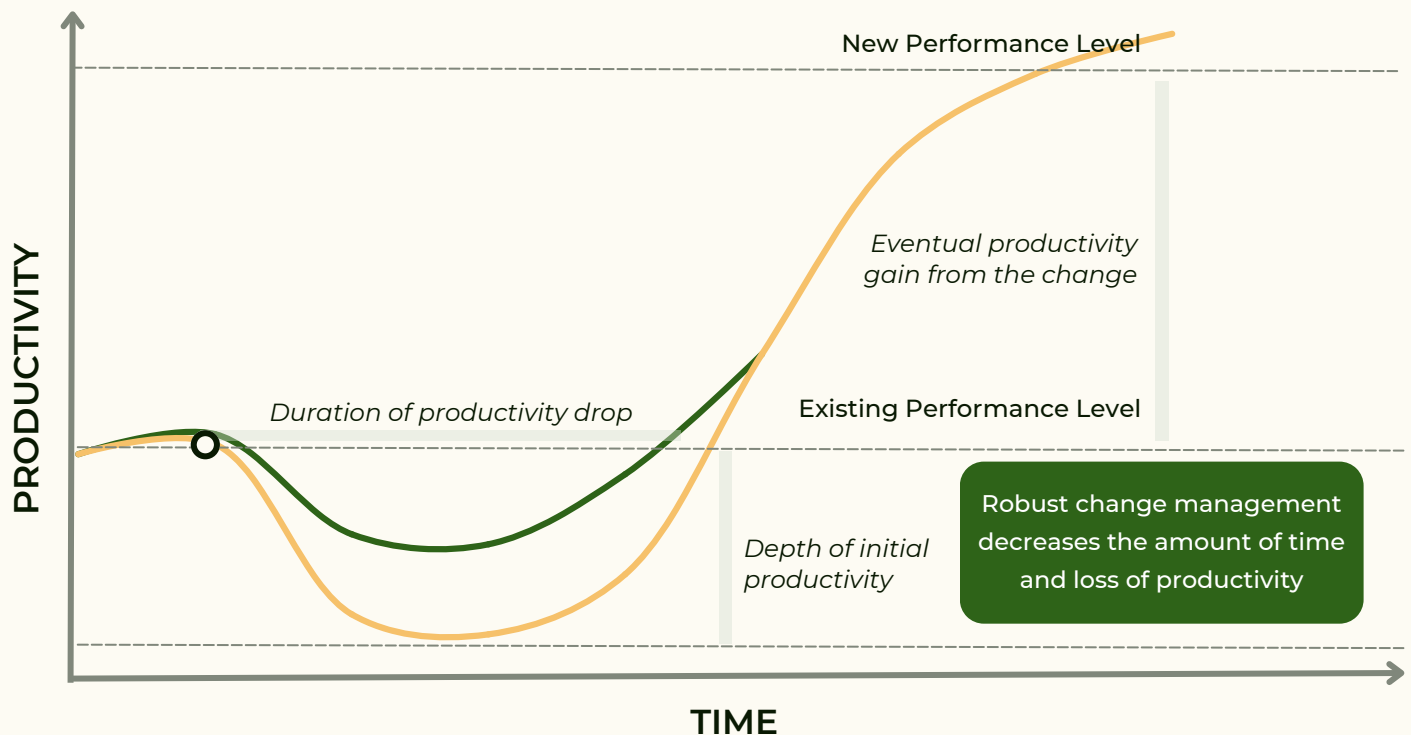
Track and monitor to: manage risk; continuously improve; ensure sustainability of the change

Building the Case: Case for Effective Change Management

Change management - as it relates to business - is only beneficial if it drives accelerated results. The reality is that there is typically a drop in performance with the onset of a change, as seen in the William Bridges model. Through proactively managing the transition, the goal is to minimize the depth and duration of the performance drop. If change is not managed effectively, the drop in performance may persist and the business goals of the change never achieved.

A number of key studies have shown a clear and definitive correlation between the effectiveness of change management and the achievement of project objectives or desired business results.

William Bridges Model



Driving Commitment: Change Roles & Engagement Model

Our Roles in Driving Change

Change Role	Description	Type of Stakeholder
Sponsor	Sponsors are leaders who authorize a change – providing the direction, people, time and money for a change	Executives and senior-level leaders
Champions	Champions endorse a change – advocating for the change and providing guidance to the Change Lead. Champions could be several leaders working together	Steering Committees, Directors, Front-line managers, Team or department leaders
Change/Project Lead	Leads have responsibility for a change initiative. Leads design, develop and implement the change approach and plan	Project managers, Team leads, Managers, Employees
People Managers	Managers who have the most direct impact on influencing an employee's choice to accept or reject the change.	Team Lead, Managers
Change Expert	Change Experts have specific knowledge, skills, and methods for driving change	Organization Effectiveness Consultants, Change Management Leads, HR and PAC Business Partners
Those affected by the Change	Everyone who is directly impacted by the change and has to change the way they do things	Employees (at all levels), other Stakeholders within and external to the System (Customers, Suppliers, even Consumers)

Driving Commitment: Change Roles & Engagement Model

Engagement Model for Successful Change



THINK – Do we understand “what” is changing?

- Do we understand:
 - The process
 - The details
 - What’s expected
 - What good looks like
- We need to answer the “What” questions.



FEEL – Do we know “why” we are changing?

- Do we buy-in to the process/see the benefits?
- We need to answer the “Why” questions.



ACT – Do we know “how” to change?

- Do we perform the behaviors we’re looking for?
- Do we have the skills/knowledge necessary to do things the new way?
- We need to answer the “How” questions, observe actions and model specific behaviors.

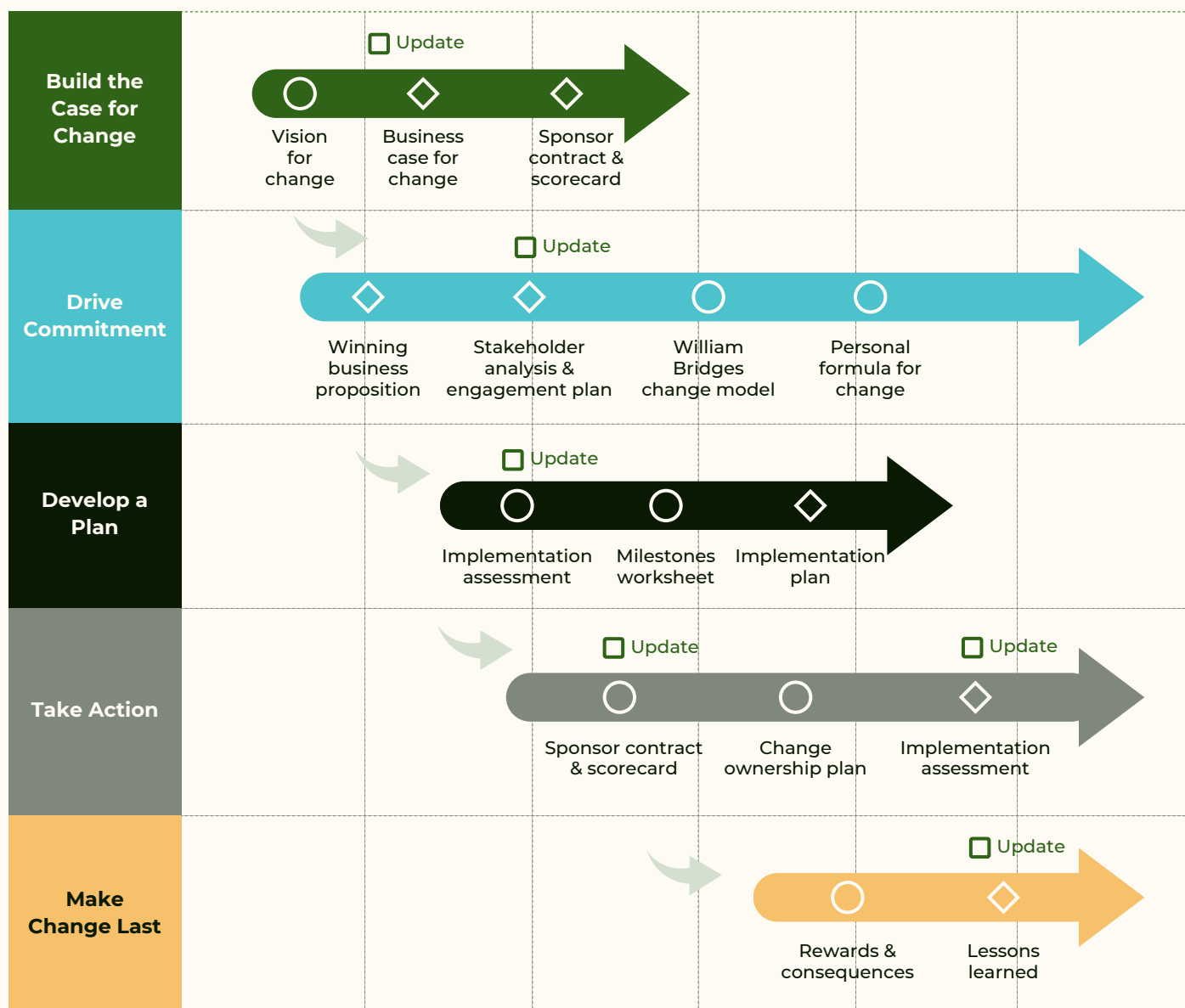
In the THINK-FEEL-ACT model, for individuals to want to engage in a change, the first thing they require is a clear picture of what is expected of them. An easy way to set expectations is by clarifying: 1) what they need to know, 2) why they should care, and 3) how they should take action.

Thinking through what you want your stakeholders to Think, Feel and Act at every stage of change is critical to success.

Developing a Plan: Change Roadmap & Checklist

Roadmap

Use this roadmap to guide you through organizational change. The Roadmap illustrates the phases of the change process and the associated tools. The change process is cyclical in nature. The chart following the roadmap is the Change Checklist that summarizes each of the phases in the process



◇ Core Tool – An essential deliverable for a successful change project

○ Supportive Tool – A recommended or supplemental tool depending on need

□ Update – Recommended timing to assess progress against your stated vision & business case based on change adoption and sponsor commitment

→ An iterative use of a tool that spans one or more phases



Developing a Plan: Change Roadmap & Checklist

The See & Free Change Checklist

Phase	Questions	Tools	Think-Feel-Act
Build the Case for Change	<ol style="list-style-type: none"> 1. What is the current business situation? What is impacting your organization – growth, revenue, profits, cost, market share, efficiency, competitive environment? What facts or data do you have to support your current assessment? 2. What is your possible performance? What benchmarks or standards have you analyzed? 3. What is the gap between current and possible results? 4. What would have to change – people, process, and technology – to achieve possible results? 5. What are the benefits of change? What are the consequences of doing nothing at this time? 6. Who is most invested in achieving possible future state? Do they have the authority and resources to invest in that future state? Have they provided clear direction to work on this change? 	<input type="checkbox"/> Vision Template <input type="checkbox"/> Business Case for Change <input type="checkbox"/> Sponsor Contract and Scorecard	THINK <ul style="list-style-type: none"> • The need for change and Vision ("Picture of Success") is clearly defined and agreed upon by Sponsor(s) FEEL <ul style="list-style-type: none"> • Leadership is aligned and committed to the Vision • The benefits of the change are compelling and key stakeholders accept why the change is necessary, important and urgent ACT <ul style="list-style-type: none"> • Leaders have issued a clear mandate for change
Drive Commitment	<ol style="list-style-type: none"> 1. Have we identified the talent – who have credibility and a proven track record of success – to help us steward and lead this change? 2. Have we identified all stakeholders necessary for success? 3. What is staying the same? What is specifically changing – how will these change impact our stakeholders? Changes in activities, roles, jobs, reward systems, etc.? 4. What are the specific approaches we will use to ensure success with each stakeholder group? 5. How have we communicated the need, benefit, and future state vision to all impacted stakeholders? Do they understand why the change is important? 	<input type="checkbox"/> Winning Business Proposition <input type="checkbox"/> Stakeholder Analysis <input type="checkbox"/> William Bridges Personal Transition Model <input type="checkbox"/> Personal Formula for Change	THINK <ul style="list-style-type: none"> • The need for change and Vision ("Picture of Success") is clearly understood by key stakeholders. • Key stakeholders and key change impacts have been identified FEEL <ul style="list-style-type: none"> • The benefits of the change are compelling and key stakeholders believe that the change will improve business results. • Leaders relate to the concerns and circumstances of those impacted directly or indirectly the change ACT <ul style="list-style-type: none"> • Leaders provide a clear picture of the future and listen compassionately to key stakeholders to understand their perspectives of and reaction to the change. • An empowered team is created to manage and lead the change effort



Developing a Plan: Change Roadmap & Checklist

The See & Free Change Checklist [contd.]

Phase	Questions	Tools	Think-Feel-Act
Develop the Plan	<ol style="list-style-type: none"> 1. How prepared is the organization for what's coming? What are potential risks or watch-outs? 2. What specific actions will we take to prepare and engage stakeholders at each stage – including communication, training, and other mobilization strategies? 3. What is our plan to ensure that we deliver against our objectives on time and within budget? What rigors and routines need to manage an effective implementation? 4. How have we communicated our plans? 5. Have we clearly outlined the specific and manageable milestones that we must achieve in order to reach our Vision? 6. What must be in place to achieve each milestone? And what organization improvement results from each milestone? 	<ul style="list-style-type: none"> <input type="checkbox"/> Implementation Assessment <input type="checkbox"/> Milestones Worksheet <input type="checkbox"/> Implementation Plan Template 	<p>THINK</p> <ul style="list-style-type: none"> • The steps, activities and resources necessary to succeed are clearly outlined in a plan. • The critical milestones of the change are understood by key stakeholders. <p>FEEL</p> <ul style="list-style-type: none"> • Stakeholders feel prepared for what's coming and want to engage in the change • Stakeholders are confident that the change milestones, if achieved, will lead to success <p>ACT</p> <ul style="list-style-type: none"> • Key project roles (sponsor, lead, implementers) know exactly what is expected of them and what actions they need to take to implement the change
Take Action	<ol style="list-style-type: none"> 1. How will we execute our plans? How will we manage project accountabilities? 2. How will we track and monitor progress against key milestones and metrics? 3. How will we identify issues and make mid-course corrections? If the need for a mid-course correction arises, who do we involve and how? 4. What are our quick wins? How will we utilize quick wins to gain momentum? 5. How will we share and celebrate key milestones? Success? 6. How will we ensure that communication enhances the commitment and involvement of the stakeholder population? 	<ul style="list-style-type: none"> <input type="checkbox"/> Change Ownership Plan 	<p>THINK</p> <ul style="list-style-type: none"> • The project management process is clear – with clear steps, routines, accountabilities, and tracking process in place <p>FEEL</p> <ul style="list-style-type: none"> • Stakeholders believe that progress is being made and have the opportunity to celebrate success. • Stakeholders begin to see and celebrate milestone successes which encourages engagement and continued momentum through the change cycle. <p>ACT</p> <ul style="list-style-type: none"> • Key stakeholders execute actions according to plan and report progress

Developing a Plan: Change Roadmap & Checklist

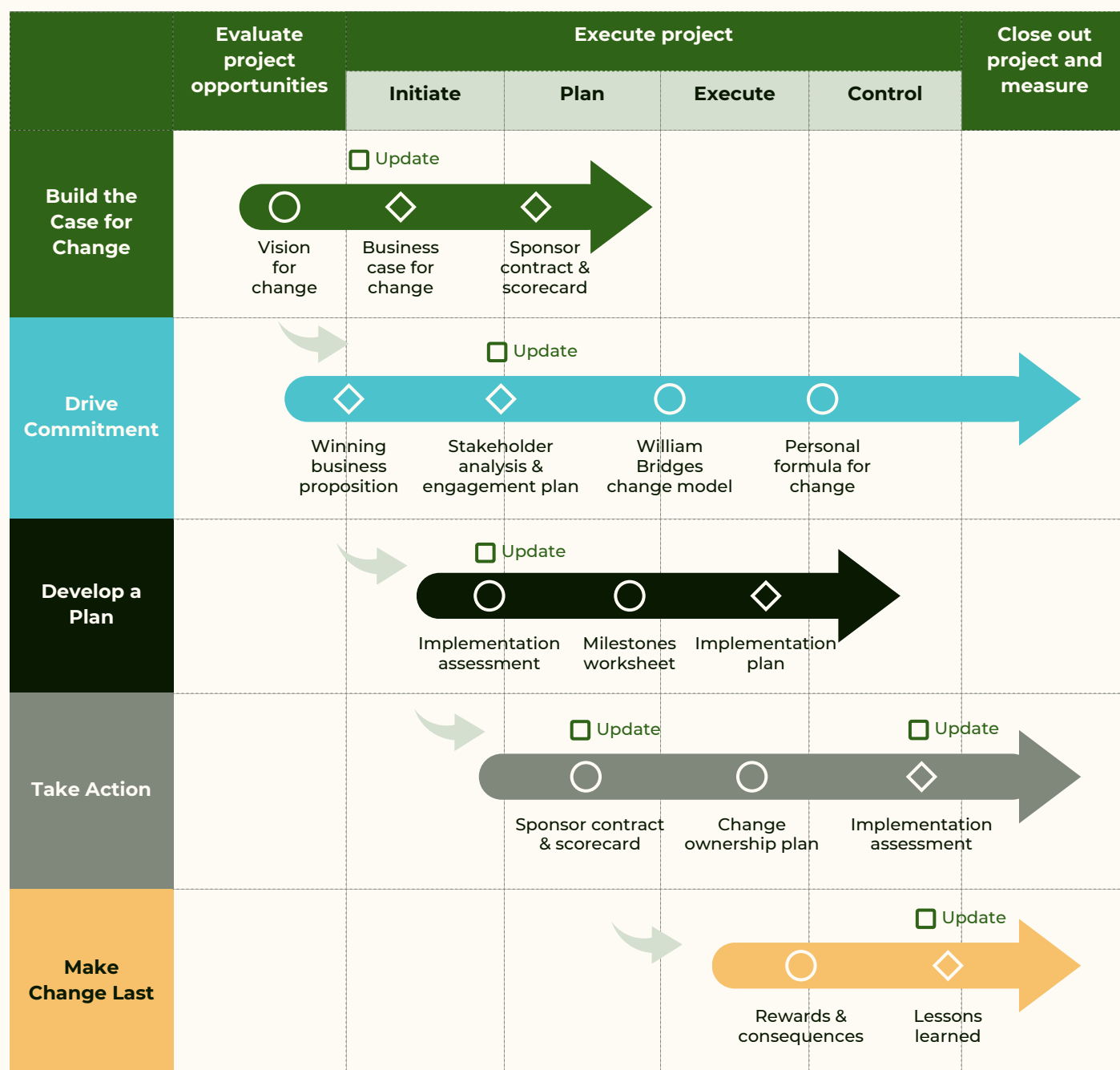
The See & Free Change Checklist [contd.]

Phase	Questions	Tools	Think-Feel-Act
Make Change Last	<ol style="list-style-type: none"> 1.How will we create, align, and leverage management routines, process and systems to sustain the change? 2.What worked? What did not work? 3.What is the role of the leader in sustaining the change? 4.How will we share and celebrate success? 5.What is the plan to transfer learning and knowledge to maintain future accountabilities? 6.What is our strategy to encourage continuous improvement and innovation? 7.Do we have the right elements in place (rewards, process changes, cultural norms, systems, etc .) to sustain the change? 	<ul style="list-style-type: none"> <input type="checkbox"/> Rewards and Consequences <input type="checkbox"/> Lessons Learned 	<p>THINK</p> <ul style="list-style-type: none"> • Stakeholders are aware of milestones and successes. • Organization elements –such as relevant processes, technology, metrics and rewards-are in place to sustain change <p>FEEL</p> <ul style="list-style-type: none"> • Stakeholders have the opportunity to share feedback and see that their feedback is being utilized to improve implementation over time <p>ACT</p> <ul style="list-style-type: none"> • Organization elements are in place to sustain the change • Continuous improvements are made to improve and course correct the implementation before veering too far off the projected path • Stakeholders have the knowledge, skills and tools necessary to deliver results

Taking Action: Managing Projects & Change

Roadmap Aligned With Project Management Steps

How to align the phases and tools with the steps in the project management process.



◇ Core Tool – An essential deliverable for a successful change project

○ Supportive Tool – A recommended or supplemental tool depending on need

□ Update – Recommended timing to assess progress against your stated vision & business case based on change adoption and sponsor commitment

→ An iterative use of a tool that spans one or more phases

Making Change Last: Evaluation & Closeout

The Change Checklist By Project Management Steps

This roadmap illustrates the change management activities that may be emphasized during each phase of a project or initiative.

	Evaluate project opportunities	Execute projects				Close out project and measure
		Initiate	Plan	Execute	Control	
ACTIVITIES	<ul style="list-style-type: none"> Assess why the change is needed Outline the Vision or "Look of Success" Define business opportunity & benefits of the change Contract with key sponsor 	<ul style="list-style-type: none"> Gain clear direction & resources for the work to move forward Assemble a team to lead or steward the change Communicate the Vision – the Winning Business Proposition Assess implementation history & feasibility 	<ul style="list-style-type: none"> Define specific current state (from) & future state (to) view of change Determine the type of change and degree of impact – what will be different & the same for each group affected? Determine approach to Change – how to equip & prepare those affected Develop a robust implementation plan Assess organization & personal readiness 	<ul style="list-style-type: none"> Update sponsor contract; prepare sponsor(s) for implementation role Prepare people & organization for change Institute management & measurement routines Implement plans Determine change ownership & sustainability approach 	<ul style="list-style-type: none"> Track and monitor completion and effectiveness of implementation Communicate, collect and act on feedback Assess ongoing risks and challenges Institute rewards and consequences 	<ul style="list-style-type: none"> Update sponsor contract(s) for ongoing change ownership Track and monitor performance post implementation Implement actions to address issues Implement change ownership plan Celebrate success
	<ul style="list-style-type: none"> Vision for Change Business Case for Change Sponsor Contract & Scorecard 	<ul style="list-style-type: none"> Implementation Assessment Winning business proposition 	<ul style="list-style-type: none"> Implementation Plan William Bridges Personal Transition Model Personal Formula for Change Stakeholder Analysis and Engagement Plan Milestone Worksheet 	<ul style="list-style-type: none"> Change Ownership Plan Sponsor Contract & Scorecard 	<ul style="list-style-type: none"> Implementation Assessment Rewards and Consequences 	<ul style="list-style-type: none"> Lessons Learned Change Ownership Plan Sponsor Contract & Scorecard

Making Change Last: Evaluation & Closeout

The Change Checklist By Project Management Steps [contd.]

OUTCOMES

Evaluate project opportunities	Execute projects				Close out project and measure
	Initiate	Plan	Execute	Control	
Think: <ul style="list-style-type: none"> The Vision ("Look of Success") and need for change is clearly defined and agreed upon by Sponsor(s) Feel: <ul style="list-style-type: none"> Leadership is aligned and committed to the Vision The benefits of the change are compelling and key stakeholders accept why the change is necessary, important and urgent Act: <ul style="list-style-type: none"> Leaders have issued a clear mandate for change 	Think: <ul style="list-style-type: none"> The need for change and Vision ("Look of Success") is clearly understood by all key stakeholders Key stakeholders and key change impacts – both business and people impacts – have been identified The critical milestones of the change are understood by key stakeholders The steps, activities and resources necessary to succeed are clearly outlined in a plan The project management process is clear – with clear steps, routines, accountabilities, and tracking process in place Feel: <ul style="list-style-type: none"> Key stakeholders believe that the change will improve business results Leaders relate to the concerns and circumstances of those impacted directly or indirectly by the change Stakeholders are confident that the change milestones, if achieved, will lead to success Stakeholders feel prepared for what's coming and want to engage in the change Act: <ul style="list-style-type: none"> Leaders provide a clear picture of the future and listen compassionately to key stakeholders to understand their perspectives of and reaction to the change An empowered team is created to manage and lead the change effort Key roles (sponsor, lead, implementers) know exactly what is expected of them and what actions they need to take to implement the change Stakeholders have the knowledge, skills and tools necessary to deliver results Key stakeholders execute actions according to plan and report progress 				Think: <ul style="list-style-type: none"> Stakeholders are aware of milestones and successes – the benefits of the Change are evident Feel: <ul style="list-style-type: none"> Stakeholders believe that progress is being made and want to celebrate success Stakeholders have opportunities to share feedback and see that their feedback is being utilized to improve implementation over time Act: <ul style="list-style-type: none"> Organization elements – such as relevant processes, technology, metrics, and rewards – are in place to sustain the change Continuous improvements are made to improve performance over time



Going Further: Toolkit and Support

To access the entire Organization Transformation Toolkit with Core Tools, reach out to heythere@seeandfreeconsulting.com. Toolkit costs \$33.50.

See & Free is your one-stop shop for pragmatic, proven organization effectiveness solutions. If in need of expert guidance implementing your change we can supply qualified change consultants to support your transformation journey!

Check us out: www.seeandfreeconsulting.com

Reach us at: heythere@seeandfreeconsulting.com

Removed Pages

What's in it for you?

Accelerating Business Results

Operational Risk	People Risk	Your change management efforts may fail when:
<p>Operational risks are risks that prevent the organization from demonstrating optimum performance and driving shareholder value. Some include:</p> <ul style="list-style-type: none"> • Slow to respond to external or internal changes (markets, regulations, etc.) • Lack of continuous improvement • Competitive disadvantage 	<ul style="list-style-type: none"> • People risks are risks the organization will face if the organization does not effectively manage change. Some include: • People and culture not aligned to changes • Employees resist and undermine change initiatives • Increased turnover, loss of talent and knowledge 	<ul style="list-style-type: none"> • There is no sense of urgency. • There is not a powerful enough guiding coalition (sponsors, stakeholders). • There is no vision and no plan to communicate that vision. • There are no short term wins planned or created. • There are no plans to manage endings and their impact on people. • There are no plans to navigate or support people through the neutral zone. • There is a lack of sustainability. • There are no plans to create new understandings, embed new values, new attitudes and new identities into daily routines.

What's in it for you?

Types of Business Opportunities