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Customizable Soft-Skills Courseware

Leading Through Change

Instructor Guide

Instructional design and learning philosophy

We are committed to providing the best core-skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring, and evaluating training
- Meaningfulness — connects the topic to the students' past, present, and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Contents

Chapter Three: Leading the Change

Chapter Four: Anchoring Change

Chapter Five: Communicating and Reinforcing Change

Course objectives

Successful completion of this course will increase your knowledge and ability to:

◊   Define what change looks like and feels like

◊   Identify different reactions to change and evaluate how the change will affect people in your organization

◊   Recognize change resistance and explore various sources of resistance

◊   Recognize the eight mistakes organizations make during change

◊   Evaluate and compare the various roles of team leaders

◊   Develop commitment strategies to change

◊   Design the elements of a change communication plan

◊   Align systems and structures to the change

◊   Identify the characteristics of bounce-back people and organizations

Chapter One

EFFECTS OF CHANGE

Preprogram assessment

To what degree do the current changes affect our organization in the following areas?

Instructions: "1" indicates a minimal effect while "10" represents a major effect.

1. Staff morale   1 2 3 4 5 6 7 8 9 10
2. Staff productivity   1 2 3 4 5 6 7 8 9 10
3. Management morale   1 2 3 4 5 6 7 8 9 10
4. Management productivity 1 2 3 4 5 6 7 8 9 10
5. Customer service   1 2 3 4 5 6 7 8 9 10
6. Quality   1 2 3 4 5 6 7 8 9 10
7. Trust   1 2 3 4 5 6 7 8 9 10
8. Company loyalty   1 2 3 4 5 6 7 8 9 10
9. Job security   1 2 3 4 5 6 7 8 9 10
10. Job stress   1 2 3 4 5 6 7 8 9 10
11. Personal stress   1 2 3 4 5 6 7 8 9 10

Total _____

Average _____

The two areas with the highest scores _____

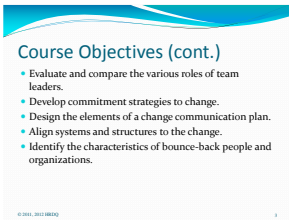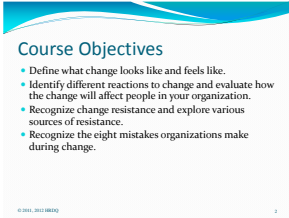The two areas with the lowest scores _____

Sidebar

Course Objectives
- Define what change looks like and feels like.
- Identify different reactions to change and evaluate how the change will affect people in your organization.
- Recognize change resistance and explore various sources of resistance.
- Recognize the eight mistakes organizations make during change.

Course Objectives (cont.)
- Evaluate and compare the various roles of team leaders.
- Develop commitment strategies to change.
- Design the elements of a change communication plan.
- Align systems and structures to the change.
- Identify the characteristics of bounce-back people and organizations.

Allow a few minutes to complete the assessment. Point out that change affects the most important areas in an organization—and the impact can be both positive and negative.

What change looks like

Change manifests in various forms with diverse results and emotions.

Given: Change won't go away; it will only increase.

Given: We need to learn to embrace change.

Instructions: Locate on the chart below the potential for a change in your basic business model versus a change in your products or services (or technology) over the next two to five years. Then plot these on a flipchart so the group can determine how much impact the change will have on other participants in the near future.
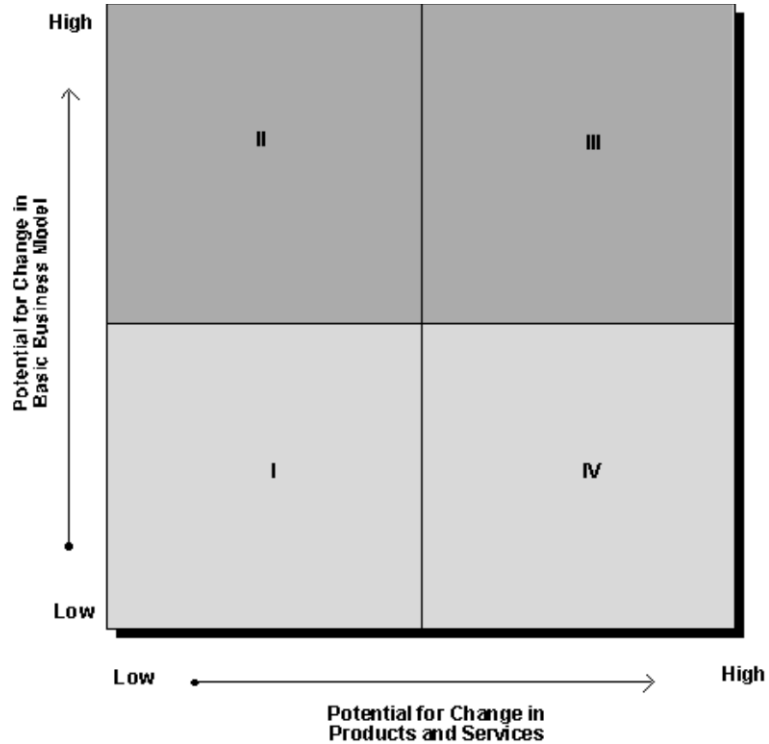
Quadrant I – Business as usual

Quadrant II – Change management for the employee

Quadrant III – Major change management for everyone

Quadrant IV – Change management for customer, vendor, partner

Learned Helplessness
- Victim mentality
- Believe people owe them
- Respond inactively, negatively, or reactively to change

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Helpless people are those with a "victim mentality," a general mindset that people owe them. They respond inactively, negatively, or reactively to change (never proactively). Their behaviors tend to make others responsible for them. They are opposite of owners who have learned to take control of their own space and self-talk.

Learned Optimism
- Take control of their own space and self-talk
- Have ability to make choices
- Respond proactively to change

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Optimism begins with intercepting self-talk and replacing it with a preferred state.

An optional exercise is to write the words "victim" and "owner" on flipcharts at the front. Leave the words unexplained until the conclusion of the module, and then discuss the differences as outlined above.

Learned helplessness versus learned optimism

Many people feel helpless when facing the loss they perceive in a change initiative. Dr. Martin Seligman identified individuals who had *learned helplessness* and contrasted them with those who could learn optimism. Those who *learned optimism*—the ability to make choices and not be victims of a scarcity mindset—fared better by every human and performance measure.

Change can leave people feeling helpless. You don't want them to learn helplessness; you want them to learn hopefulness. How can you help them do that?

Learned helplessness		
General mindset	Typical responses to change	Possible behaviors

Learned optimism		
General mindset	Typical responses to change	Possible behaviors

How change responses manifest at work

Some people are predisposed to resist change while others are predisposed to create it.

Resistance/receptivity axis

Instructions: Using initials, identify several colleagues' dispositions toward change along the following axis.

Resistant to Change   Receptive to Change
-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5
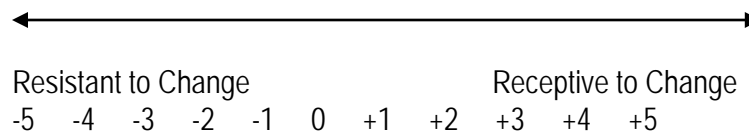
Change orientation

More people are in the conservative and progressive categories than are in the traditional and radical categories.

-5   -4   -3   -2   -1   0   +1   +2   +3   +4   +5
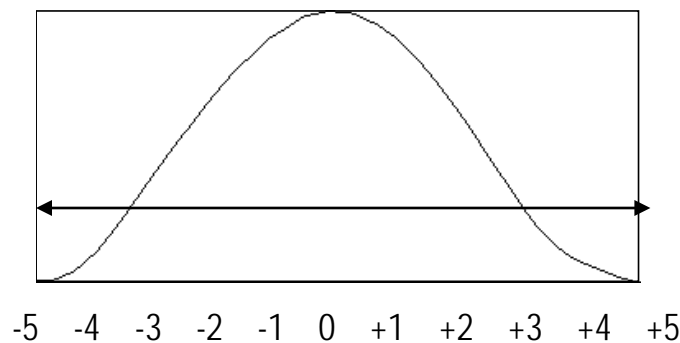
Traditional   Conservative   Progressive   Radical

Traditional _____

Conservative _____

Progressive _____

Radical _____
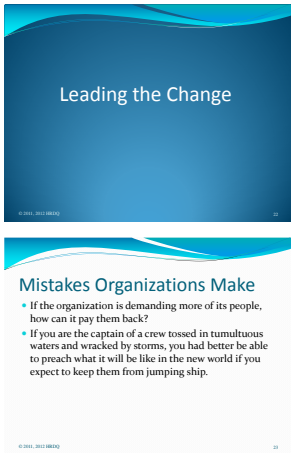
Introduction to leading change

Change doesn't just happen. Leaders create change.

If you are the captain of a crew tossed in tumultuous waters and wracked by storms, you had better be able to preach what it will be like in the new world if you expect to keep them from jumping ship.

During change, productivity and morale decrease. How can you hold people responsible for results, and not mere activity?

Who leads the change effort?

As organizations "fine-tune" with minor change initiatives, the communication typically comes from a Human Resources function.

As organizations "reengineer" (or moderately overhaul), typically a change management team or transition team leads the change under the guardianship of an executive leader.

As organizations "reinvent" (or radically overhaul) with change, the change is directly executive driven. Usually a change or transition team manages and communicates the process, but a senior leader is devoted to directly drive it.

Careful of culture clash

Change takes time. "Fine-tuning" can be ongoing and require only months, whereas radical overhauls can require three to five years. In efforts to speed the change process, executives often step in to directly drive it, but they may try to drive it around the people.

If the culture of a company is a highly participative culture, this direct intervention creates a culture clash in which those loyal to the company resist the change to preserve the culture. This leads to a significant passive resistance and outward defiance.

Case study

Instructions: In small groups, read the case study and explore the various thoughts, emotions, and behaviors in this department. Where have you experienced similar circumstances? What were the results?

An IT department is adding new help desk software. The new director of the department ordered it because he found success using it at his last assignment. However, nobody in this department wants it. In fact, before he came to this department, a process improvement team had identified another application that seemed to be better. "Now we are stuck with it," and "There is no way we can provide good service with this junk," are comments frequently heard around the department.

What are people feeling?

_____

_____

What will be their likely response to the natural bugs that occur with a new application?

_____

_____

How will they behave toward customers?

_____

_____

What should the IT director have done?

_____

_____

What can he do now?

_____

_____

There are two views of an organizational change: the objective view (what is actually transpiring) and the subjective view (each individual's perception of the change). There are as many individual perceptions as there are employees in the organization.

There is also the view of executive leadership, which is not to be confused with the organizational change itself. Unfortunately, the chasm between the subjective view of leadership and the subjective view of the frontline is often a great gulf.

According to the journal *National Productivity Review*, nearly 50% of employees believe that management cheats and lies. According to the Council of Communication Management, nearly two-thirds of employees believe that management cheats and lies after a restructuring.

Two views of organizational change

"Change is the process by which the future invades our lives."

—Alvin Toffler

◊   The objective view

◊   The subjective view

From an organization's view it is simple: "Change or die." From the view of the humans in the organization, it is equally simple: "Change is strange." In fact, the organization sees change as survival while individuals tend to see it as a threat to their security. Thus, communicating and reinforcing in myriad ways is the most critical aspect of change management.
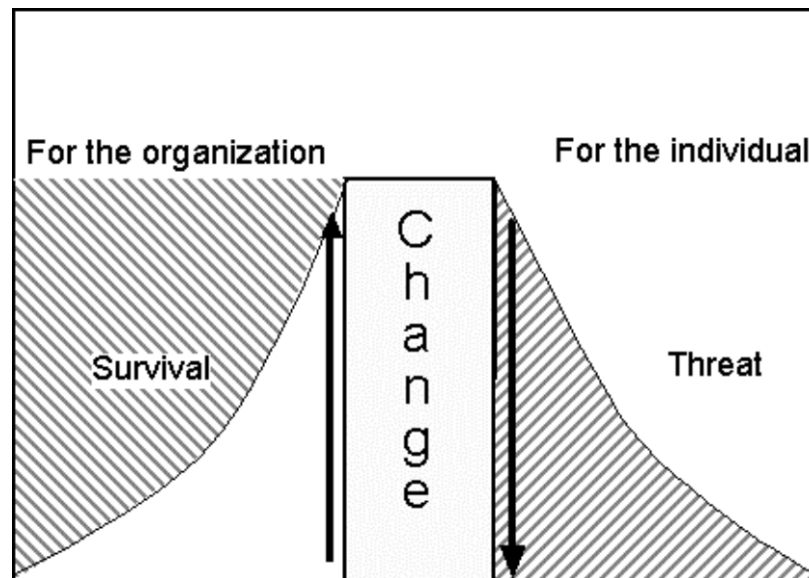
This graphic represents the organizational view of change as survival versus the individual view of change as a threat to personal security.

Case study

Instructions: Read Part 1 of the case study, then discuss in small groups answering the first set of questions. Note effective and ineffective principles for reinforcing change.

The Case of the FQB Government Agency

Regional employees: 1,300
Budget: $1.2 billion

The FQB is a large federal regulatory agency with nearly a dozen regions across the United States.

Part 1:

The new regional administrator, "wishing to empower frontline workers," slashed several layers of management over a six-week period. Most of the managers took jobs doing frontline work, training, or special projects, but a few left the agency entirely. During this same period, the new administrative staff developed geographically based, self-directed work teams consisting of existing employees. They were provided two days of training in self-directed work teams, meetings, and facilitation, and an introduction of what the new, most customer-friendly teams would be doing.

Issue: The region was wracked by pandemonium, mistrust, and sabotage.

Questions:

What are the workers feeling?

_____

What are the managers feeling?

_____

What kinds of behaviors are being exhibited?

_____

What are the new administrative staff and its regional administrator thinking, believing, and doing?

_____

The following case study will reveal appropriate and inappropriate communication methods during a change initiative.

Make sure the groups fold in preceding training topics such as implicit contracts, subjective reality, and mistrust of leadership during a change initiative.

The answers to these questions may be obvious, but get the groups to drive to the deeper issue. At the conclusion of each set of discussion questions, read out each group's discovery.

Remember, the particular questions and answers aren't as important as getting them thinking, asking their own questions, and driving to underlying principles.

Systems and structures

Ask: Are we rewarding results or rewarding resistance?

Measure change; reward results

If the organization is demanding more of its people, how can it pay them back?

Aligning organizational practices with the change

◊ Measure performance that satisfies the demands of the change

◊ Reward behavior that supports the change

◊ Provide disincentives for behavior that does not support the change

◊ Create a burning platform (demonstrate that there is more pain in not changing than in changing)

◊ Alter hiring and orientation practices to support the change

◊ Alter job descriptions and team descriptions to support the change

◊ Train to support the change

◊ Form teams and link team coaches to support the change

◊ Alter the physical environment to support the change

◊ Alter budget and financial reporting to support the change

◊ Train people to negotiate roles

◊ Reward risk takers and early adapters

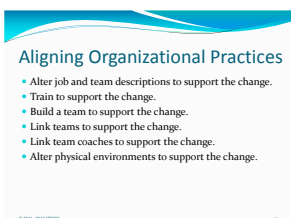
Organizational Alignment

Throughout a change project, the initiative needs to be aligned properly throughout the organization. When things don't go as well as we planned, we blame people. We need to examine the alignment of organizational systems and structures that will, in turn, determine the performance of the people.
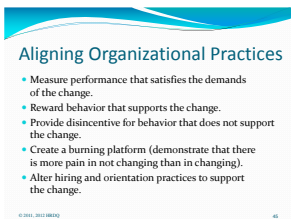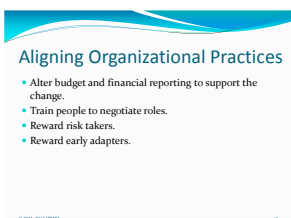
Aligning Organizational Practices
- Measure performance that satisfies the demands of the change.
- Reward behavior that supports the change.
- Provide disincentive for behavior that does not support the change.
- Create a burning platform (demonstrate that there is more pain in not changing than in changing).
- Alter hiring and orientation practices to support the change.

Aligning Organizational Practices
- Alter job and team descriptions to support the change.
- Train to support the change.
- Build a team to support the change.
- Link teams to support the change.
- Link team coaches to support the change.
- Alter physical environments to support the change.

Aligning Organizational Practices
- Alter budget and financial reporting to support the change.
- Train people to negotiate roles.
- Reward risk takers.
- Reward early adapters.

Defining bounce-back

Bounce-back is the resiliency that individuals and organizations show during and after times of personal and organizational upheaval.

Bounce-back people

We all know bounce-back people whose indomitable spirits and resilience overcame seemingly insurmountable changes.

Instructions: In small groups, list five examples of bounce-back people who learned to master hardship, adversity, and the rolling waves of change through control, commitment to cause, and rising to meet the challenge face-to-face. Instead of justifying why they could not change, they fought the odds. What were the personal characteristics that kept them empowered throughout their ordeals?

Name	Characteristics
1.	
2.	
3.	
4.	
5.	

Traits of Bounce-Back People

The three characteristics of bounce-back people are:
- Control
- Commitment
- Challenge
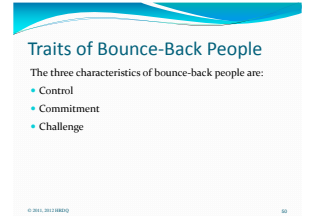
In a University of Chicago study, researchers identified people who were "hardy" with regard to change. The three characteristics that hardy people exhibited were: control, commitment, and challenge.

- Control is the belief and action that indicates you are not a victim, but an owner, and that there are always areas of personal control regardless of external circumstances.

- Commitment is the connection to a higher cause and a higher purpose than mere subsistence.

- Challenge is the hope that you can conquer, or at least contend, despite the odds.

Watch the groups as some may list emotional events, while others need help.

Tie answers to personal responsibility, the power of choice, control, commitment, challenge, vision, goals, humor, etc.

Course review

1. Change at work results in the same grieving cycle as bereavement
        a. True
        b. False.

2. Emotions that are typically elicited by change include:

    a. Hopelessness

    b. Fear

    c. Uncertainty

    d. Hope

    e. All of the above

3. Which of the following types is a change "booster rocket" but can be disruptive in times of stability?

    a. Traditional

    b. Conservative

    c. Progressive

    d. Radical

4. List at least three ways an organization can foster a sense of urgency.

    _____
    _____
    _____

5. Which of the following is NOT a key component of a good vision?

    a. The role of employees remains open

    b. Goals are stated specifically

    c. Every employee understands what is driving the change

    d. Every employee shares in and can articulate the vision

1. a.

2. e.

3. d

4. Create a crisis, expose poor performance, set a vision beyond business as usual, measure performance, link everyone to customers, talk about opportunities and mutual gain sharing, measure and reward cross-functional performance.

5. a

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Rosemary C. Rulka, MS, SPHR
President
R.C. Rulka Consulting, LLC

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