

INTRO TO CHANGE MANAGEMENT





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INTRODUCTION



BEFORE WE BEGIN...

ALIGN ON KEY TERMS AND THEIR DEFINITIONS

- What is **CHANGE**?
 - Altering process inputs (tools/resources) in an effort to alter process outputs (products/services).
 - Used to either fix a problem or to make a process better.
- What is **CHANGE MANAGEMENT**?
 - Structured approach to leading people through change.
 - Not just managing change well, but managing people well through change.
- How do you know if change is not managed with excellence?
 - The problem persists. (root cause was not fixed)
 - Upstream/Downstream problems appear.
 - Customers/Employees struggle to accept the change for a prolonged period of time.



MANAGING CHANGE WITH EXCELLENCE

- There's no "one size fits all" strategy – because you're dealing with people!
- Those successful at managing change know how to adapt their techniques to fit their situation.
- **This session is designed to rapidly improve your ability to lead others through change.**
- You'll be exposed to change management strategies that are provided across multiple industries, universities, and businesses, as well as content that's unique for Fifth Sierra clients.

CHANGE MANAGEMENT SEASONS

THREE MAIN SEASONS THAT EVERY EXCELLENT CHANGE MANAGER MUST MANAGE THROUGH



UNDERSTANDING THE RELATIONSHIP BETWEEN PEOPLE AND CHANGE

the foundation of your preparation



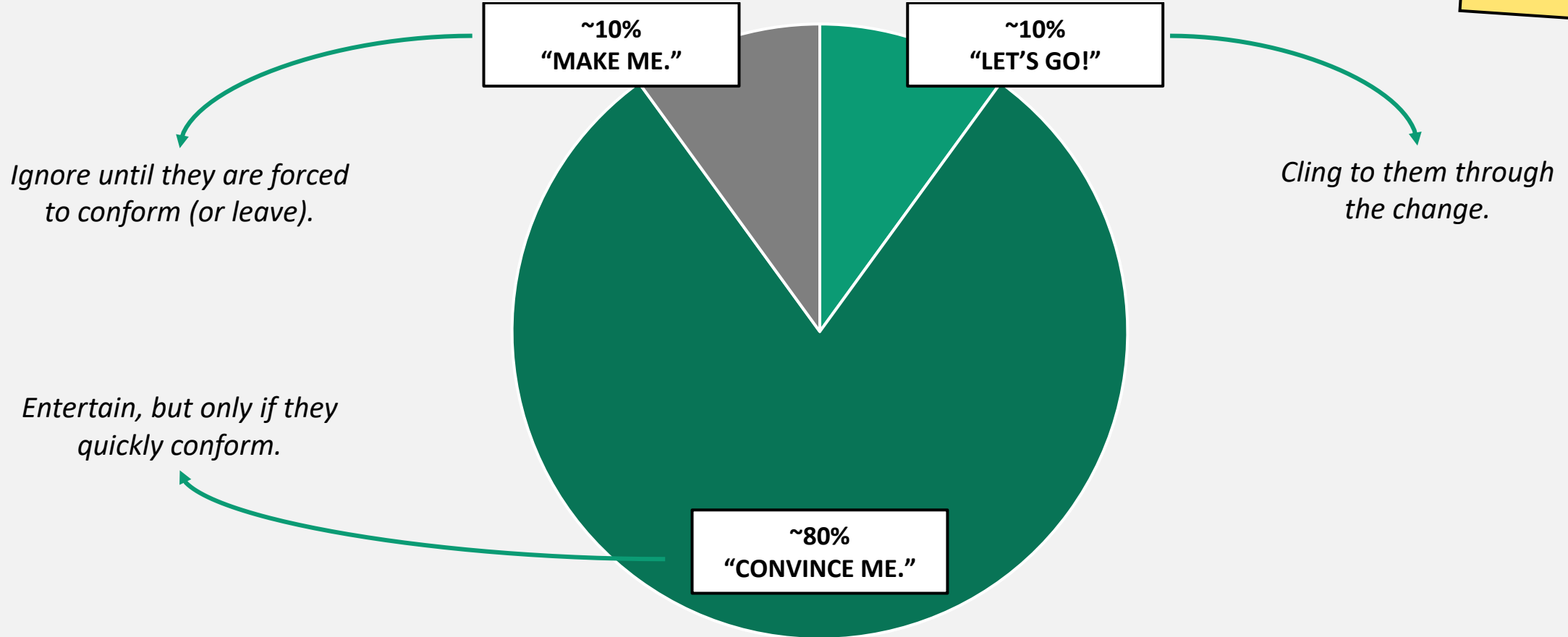
SECTION INTRO

- Each **CHANGE** is unique, ranging from small/expected to large/unexpected.
- Every person is unique and every person's reaction to change varies. However, there are some consistencies that experts have identified.
- People like to feel in control. For this reason, they often resist change, especially when it's unexpected, because of the perceived loss of control.
- Understanding the relationship between people and change helps us become more effective at change management at both the individual and enterprise levels.

VARIED RESPONSES TO CHANGE

BROAD CATEGORIES OF CHANGE RESPONSE AND THE **TRADITIONAL APPROACH** TO MANAGING THEM

Strengths of this model?
Weaknesses?



Credit: Givanildo Figueiredo while KPO for Embraer in 2014.

PERSONALITY TRAITS

A NEW WAY OF LOOKING AT PERSONALITY TYPES AND HOW TO LEVERAGE THEM

- In the book StrengthsFinder 2.0, Don Clifton teaches that every personality trait has both a **BALCONY** (at their best) and a **BASEMENT** (at their worst).*
- CliftonStrengths Assessments determine personality traits (strengths) for yourself and the people you interact with.
- There 4 Domains and 34 Personality Traits within those Domains.
- Companies purchase CliftonStrengths for their employees to increase productivity.
 - More than 29M have taken the Assessment.



Reference: <https://www.gallup.com/cliftonstrengths/en/252137/home.aspx>

*Content has been updated to use the terminology MATURE vs. RAW for traits dynamics.

ASSESSMENT EXAMPLE

GALLUP®

CliftonStrengths®



SURVEY COMPLETION DATE: 10-10-2019

Depending on the order of your themes and how you responded to the assessment, some of your themes may share identical insight statements. If this occurs, the lower ranked theme will not display insight statements to avoid duplication on your report.

Your Top 5 Themes

1. Context
2. Harmony
3. Empathy
4. Arranger
5. Developer

There are 4 Domains
and 34

Context (Strategic Thinking)

People strong in the Context theme enjoy thinking about the past. They understand the present by researching its history.

Balcony Descriptors: robust historical frame of reference, learns lessons from past, knows how things came to be, leverage knowledge of the past.

Basement Descriptors: slow to move, slow to react to change, closed-minded, lives in the past.

Harmony (Relationship Building)

People strong in the Harmony theme look for consensus. They don't enjoy conflict; rather, they seek areas of agreement.

Balcony Descriptors: negotiator, see both sides of a situation, great at asking questions, able to arrive at consensus, great facilitator.

Basement Descriptors: weak, indecisive, not confrontational, avoids conflict.

Empathy (Relationship Building)

People strong in the Empathy theme can sense the feelings of other people by imagining themselves in others' lives or situations.

Balcony Descriptors: creates trust, brings healing, knows just what to say, customizes approach to others.

Basement Descriptors: "soft", moody, over-involved.

Arranger (Executing)

People strong in the Arranger theme can organize, but they also have a flexibility that complements this ability. They like to figure out how all of the pieces and resources can be arranged for maximum productivity.

Balcony Descriptors: flexible, organizer, juggler, aligns and realigns tasks to find the most productive, efficient, conductor.

Basement Descriptors: lacks structure, too flexible, doesn't follow rules or procedures, constantly changes priorities, lacks vision.

Developer (Relationship Building)

People strong in the Developer theme recognize and cultivate the potential in others. They spot the signs of each small improvement and derive satisfaction from these improvements.

Balcony Descriptors: grows talent in others, teacher, coach, mentor, enjoys helping others succeed, invests in others.

Basement Descriptors: not a strong personal contributor, too much time on low-potential people, spectator, passive observer.

Take note that this person has multiple strengths in the **Relationship Building** Domain.

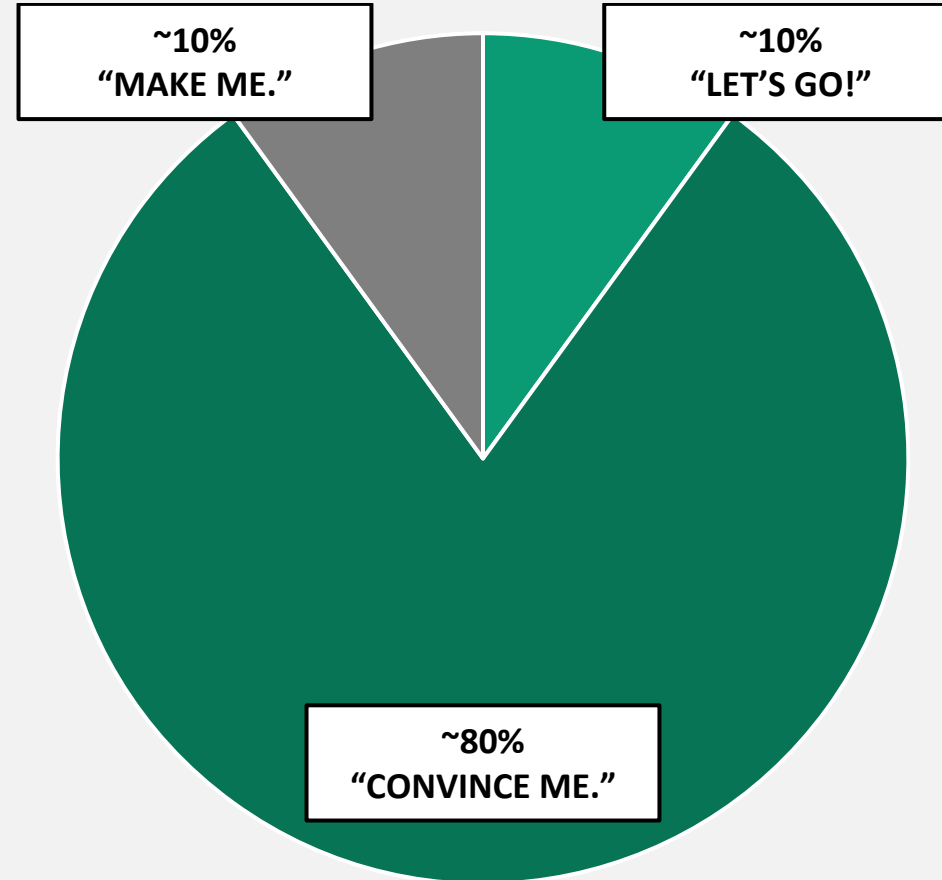
ACTIVITY

How might
CliftonStrengths
knowledge influence
how you manage
people through
change?

- Assign a different theme to each group:
 - Analytical (Strategic Thinking)
 - Woo (Influencing)
 - Adaptability (Relationship Building)
 - Achiever (Executing)
- Imagine you're managing a team that's dominant in your assigned theme.
- What are the balcony/basement characteristics?
- When you need to communicate a change, what would your strategy be? How does knowing their theme(s) influence your strategy for change management?



VARIED RESPONSES TO CHANGE



REMINDER:
Every personality trait
has a Balcony and a
Basement!

RESPONSES TO CHANGE 2.0

A NEW LOOK AT CHANGE RESPONSES AND A REVISED STRATEGY FOR ENGAGING EACH RESPONSE TYPE

	-	+
"LET'S GO!"	Blind Follower Struggles to give critical feedback	Cheerleader Accelerates implementation
"CONVINCE ME."	Devil's Advocate Hinders implementation with frequent arguing	Learner Refines implementation with wise questions
"MAKE ME."	Saboteur Refuses and sabotages implementation	Strongest Influencer A force multiplier when on your side

RESPONSES TO CHANGE 2.0

A NEW LOOK AT CHANGE RESPONSES AND A REVISED STRATEGY FOR ENGAGING EACH RESPONSE TYPE

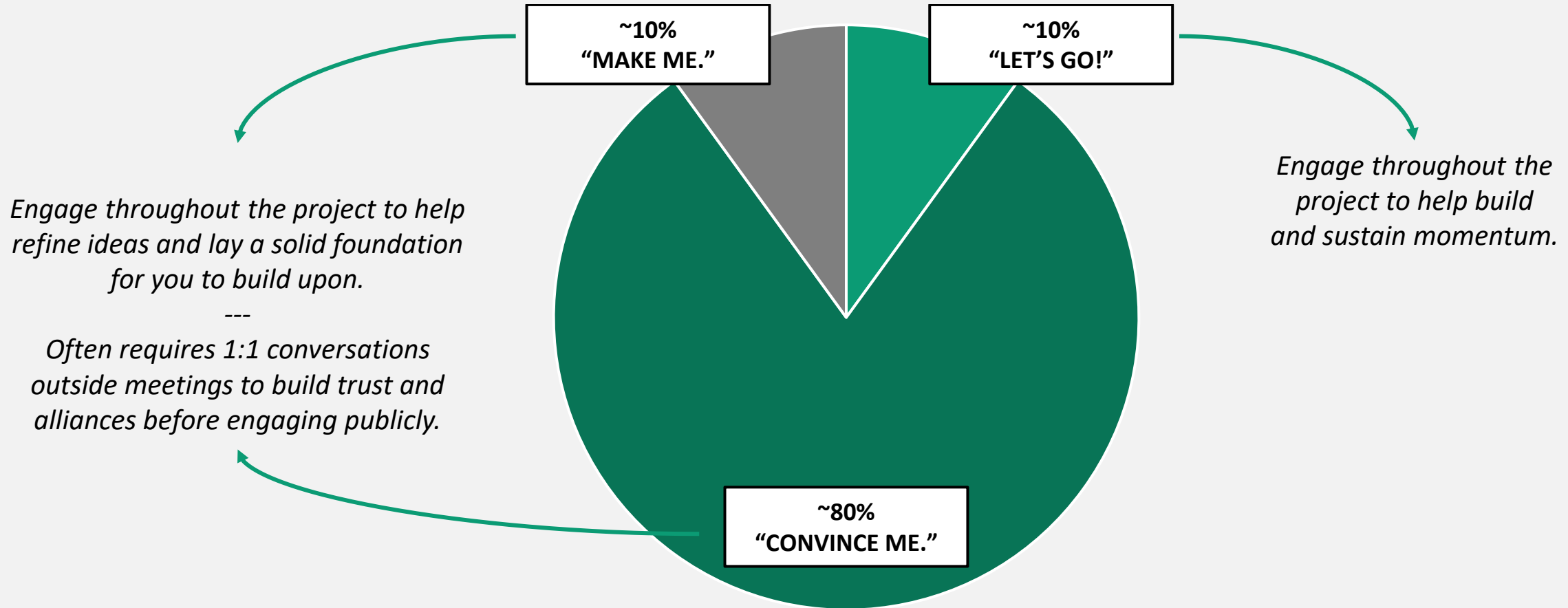
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Non-Utilized Resources for many businesses during change.



RESPONSES TO CHANGE 2.0

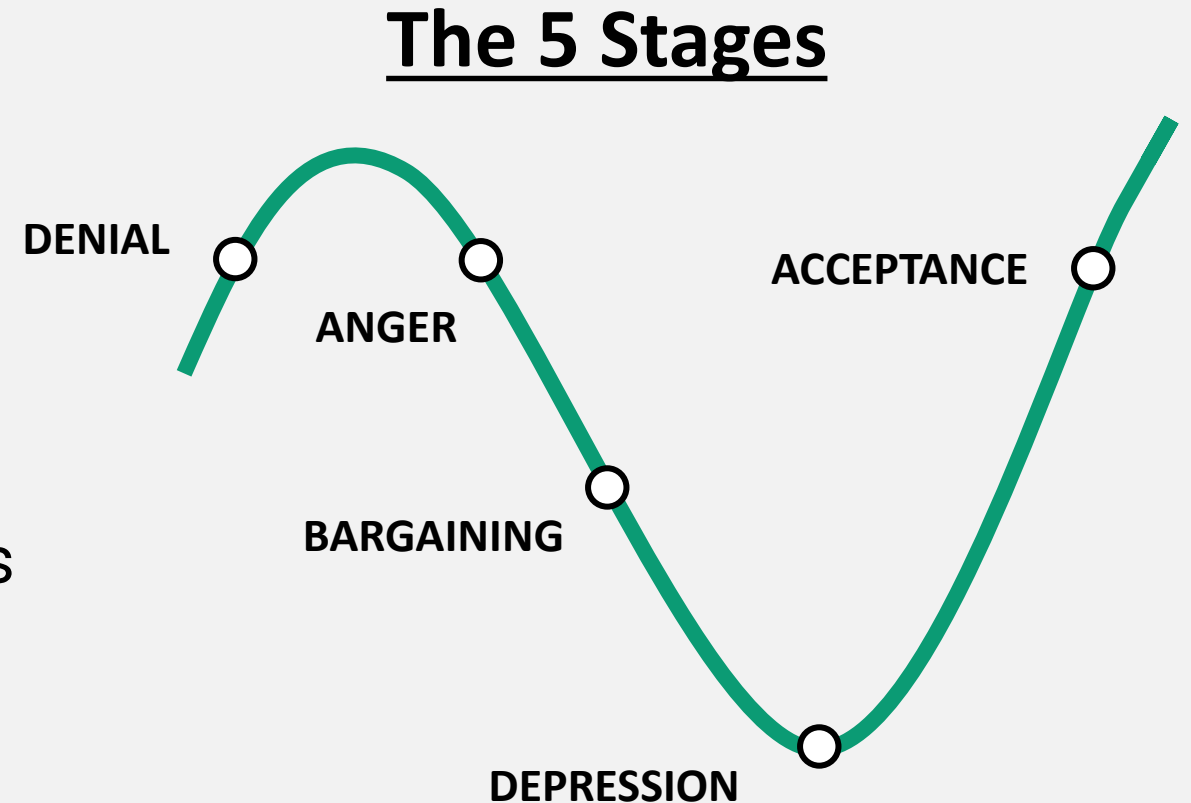
A NEW LOOK AT CHANGE RESPONSES AND A REVISED STRATEGY FOR ENGAGING EACH RESPONSE TYPE



RESPONSES TO SIGNIFICANT CHANGE

COMMON STAGES PEOPLE GO THROUGH WHEN PROCESSING EXTREME CHANGE

- Regardless of themes or personality traits, when change is significant, people tend to follow a similar 'processing' process.
- Introduced by Swiss-American psychiatrist Dr. Elisabeth Kübler-Ross in 1989, "The 5 Stages" (aka "The Change Curve") is a model for how humans process significant change.

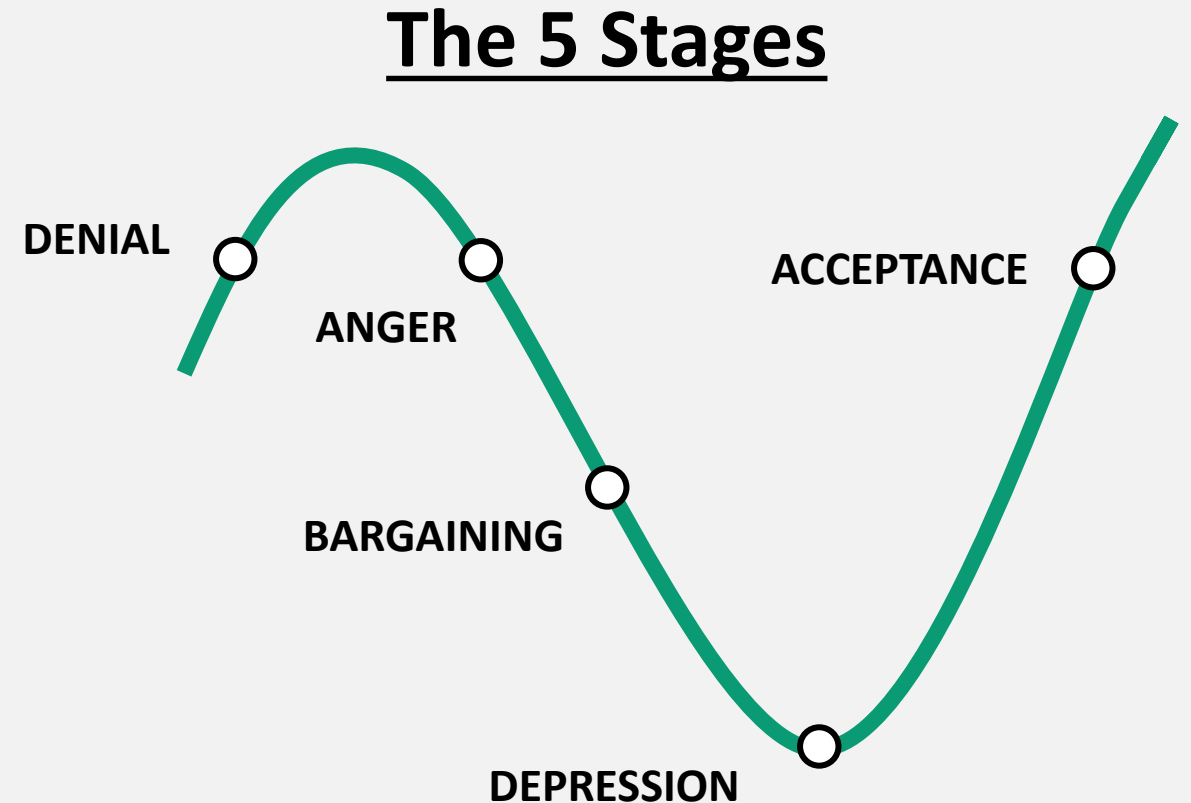


Reference: [Kübler-Ross Change Curve®](#)

RESPONSES TO SIGNIFICANT CHANGE

COMMON STAGES PEOPLE GO THROUGH WHEN PROCESSING EXTREME CHANGE

- **DENIAL** – Disbelief; Searching for evidence that it cannot be true
- **ANGER** – Frustration; Easily triggered and emotionally abrasive, especially towards reminders of the change
- **BARGAINING** – Negotiating; Attempting to use logic to avoid the change
- **DEPRESSION** – Strong feelings of sadness; Lack of energy
- **ACCEPTANCE** – Willing to integrate the change; Feeling more positive

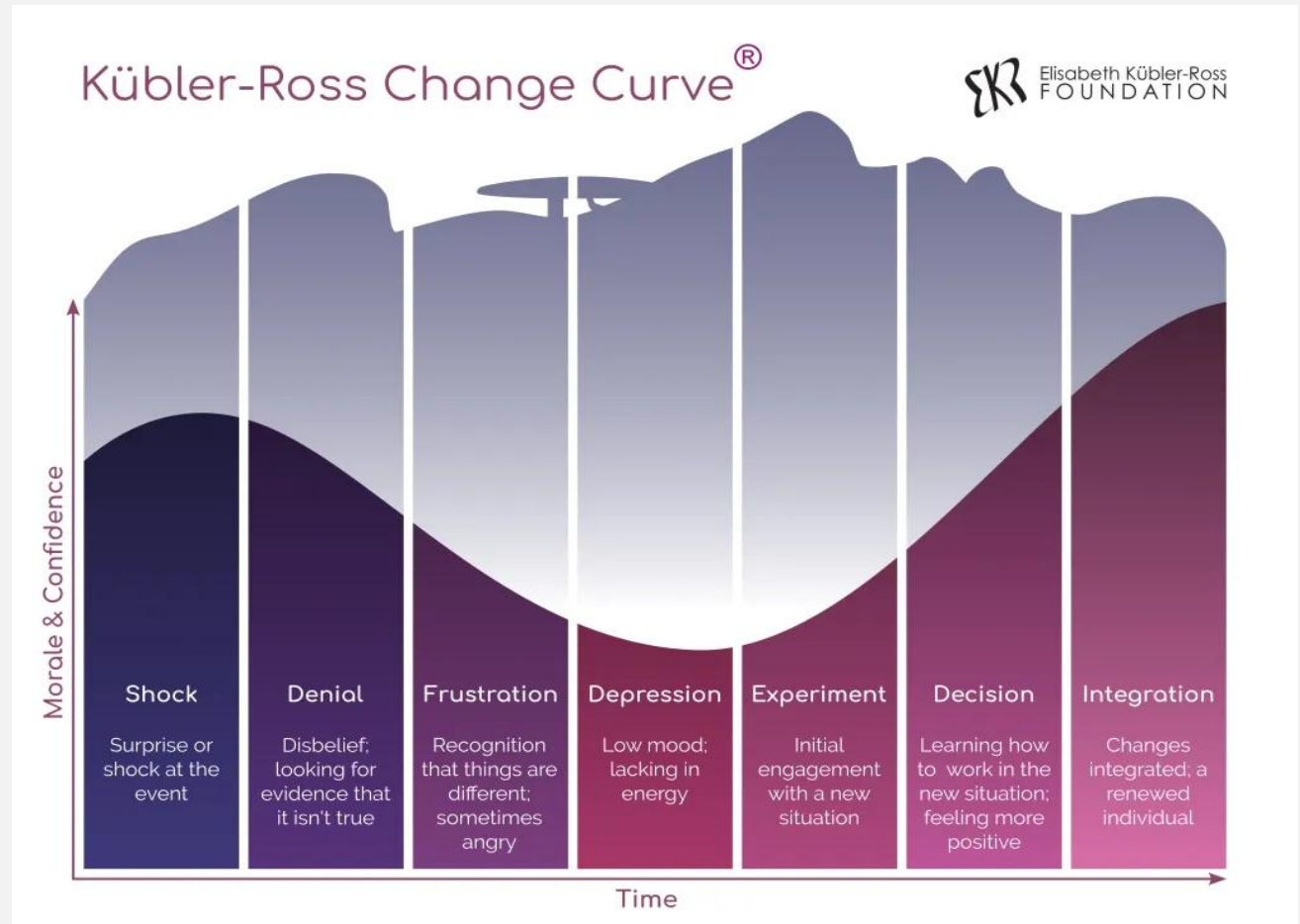


Reference: [Kübler-Ross Change Curve®](#)

RESPONSES TO SIGNIFICANT CHANGE

COMMON STAGES PEOPLE GO THROUGH WHEN PROCESSING EXTREME CHANGE

- Many different versions of The Change Curve have been created, since.
- Dr. Kübler-Ross even updated her model, added and editing multiple stages.



Reference: [Kübler-Ross Change Curve®](#)

RESPONSES TO SIGNIFICANT CHANGE

COMMON STAGES PEOPLE GO THROUGH WHEN PROCESSING EXTREME CHANGE

- Phases can occur in a different order or even appear to repeat.
- Phases can look different for each person.
 - Example: It's possible for someone experiencing **DEPRESSION** to appear joyful, causing people to believe they're through the curve, when they actually are not.
- Duration of each phase can vary between people.
 - Example: A person might appear "stuck" in **DENIAL** for an extended time.
- Understanding the Change Curve helps us have more empathy and patience with others when they're going through significant change.
- A high-stress environment causes reactions to be more volatile.
- The goal of Change Management is to help people navigate The Change Curve efficiently. (aka. "shortening the curve")

Reference: [Kübler-Ross Change Curve®](#)

SEASON 1: PREPARATION

getting ready for change



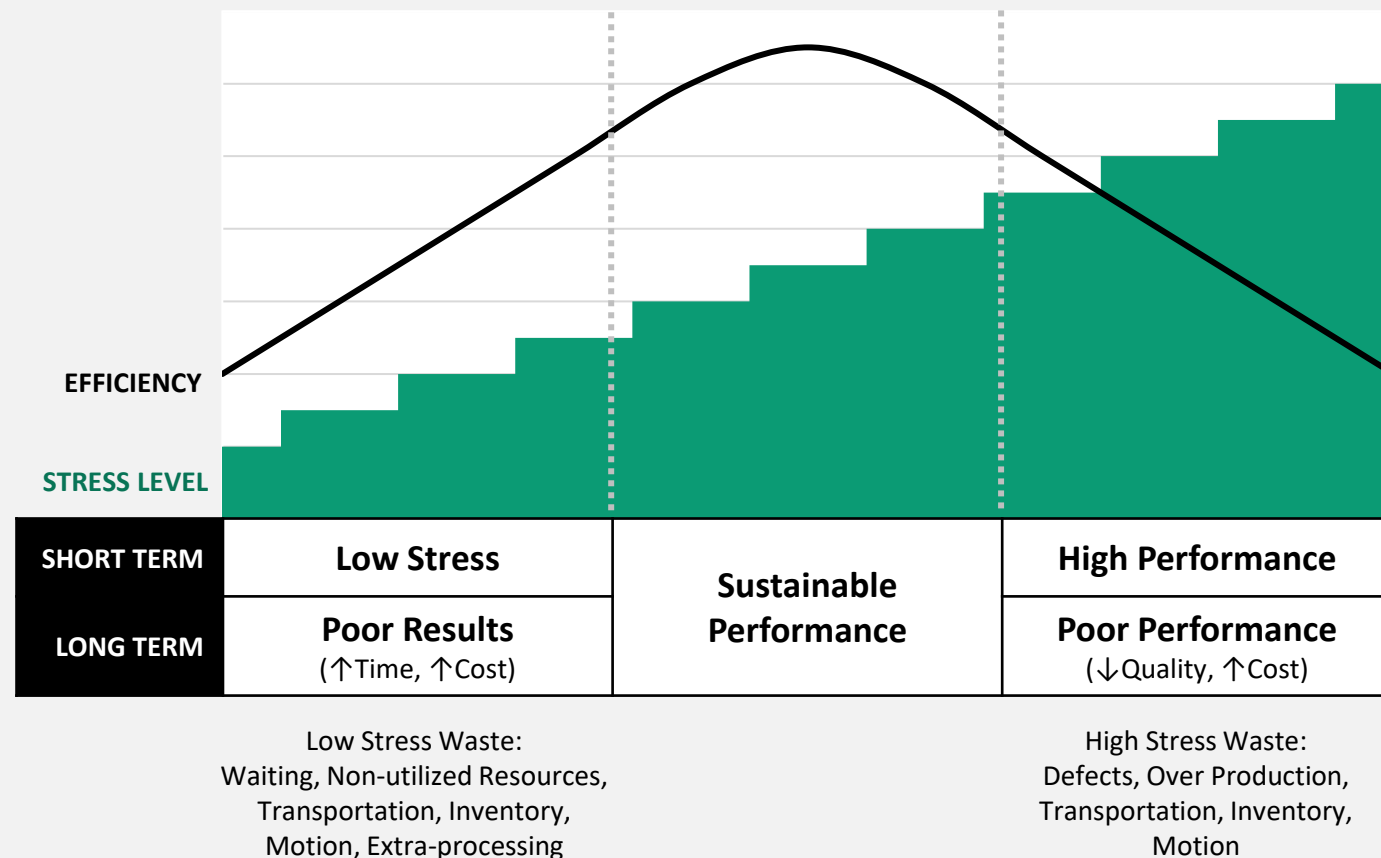
SECTION INTRO

- A key component of Change Management is planning.
- Knowing *when* to do something is just as important as knowing *how* to do it.
- Most leaders use their “gut” or instincts to prepare for change. Although this can be an effective strategy, it’s not easy to replicate or sustain.
- When possible, use data and proven processes to manage change. This removes the burden from you personally and helps you deliver strategic decisions with replicable and sustainable confidence.

EXISTING STRESS LEVEL

IDENTIFYING THE LEVEL OF STRESS THAT CURRENTLY EXISTS IN YOUR BUSINESS

- Stress $\neq$ Bad
- Processes (and people!) are most efficient when there's a healthy level of stress.
- Occasional fluctuations of stress levels are normal.
- Just like on a guitar, high stress over time will cause a "string" to break and strings with low stress will have a "flat" performance.
- Low and High Stress environments also tend to exhibit more **WASTE**.



IDENTIFYING THE STRESS LEVEL

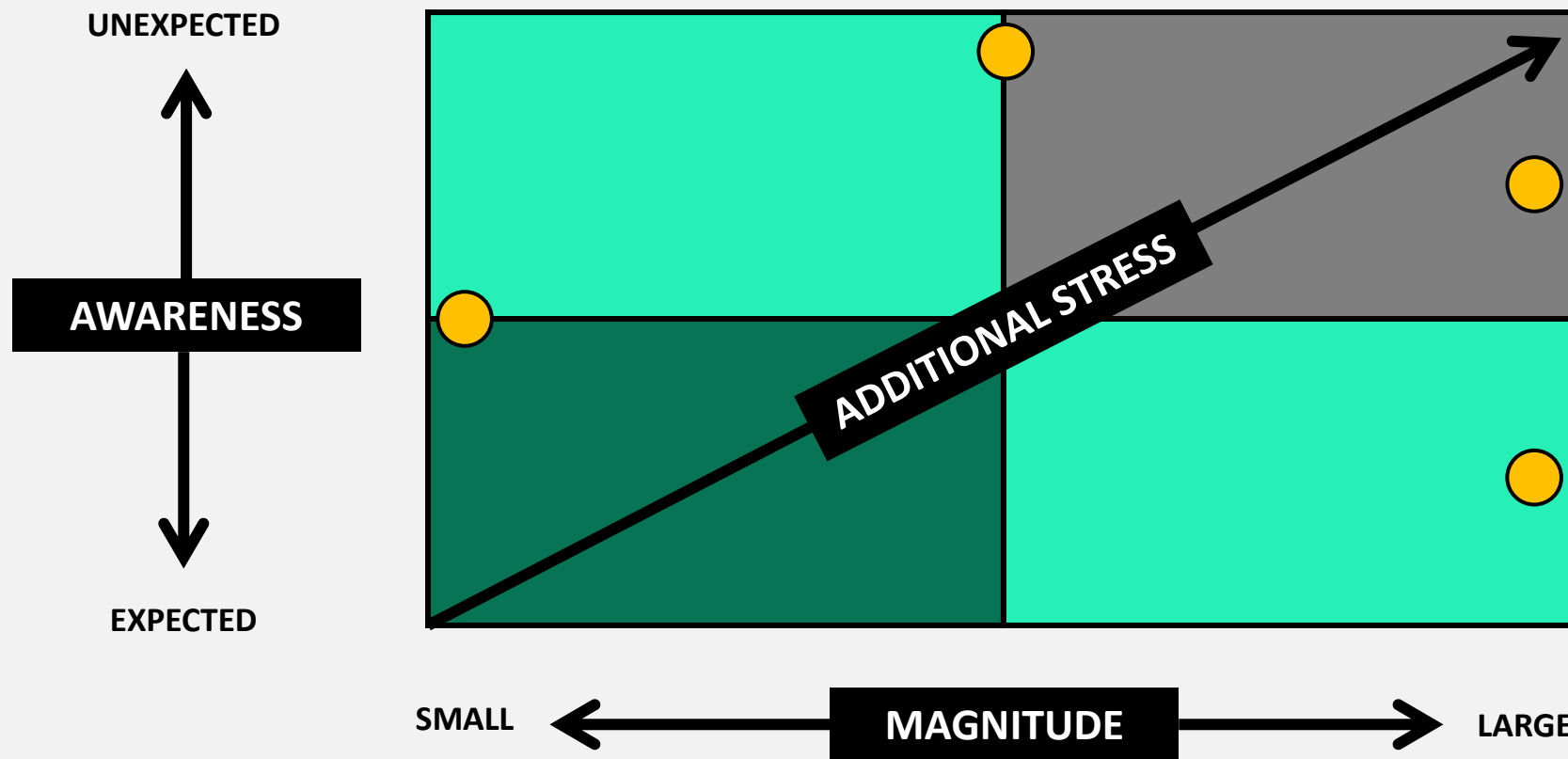
TIPS TO CAPTURE THE LEVEL OF STRESS CURRENTLY EXISTING IN YOUR BUSINESS

- Do not assume you know the level of stress in your business.
- Listen to the Voice of the Customer (**VOC**).
 - You have both internal and external Customers. Both choose to invest money/time into your business and have expectations in return. Staying in-tune with customer voice will help you understand stress that might exist due to unmet expectations. KPIs, Surveys, Round Tables can all help you capture VOC.
- Frequently perform **GEMBA WALKS** in your Operations areas.
 - Gemba Walks are a Lean data collection tool; Participants observe work being done, without interfering (unless someone is at risk of physical harm) and use the experience to inform business decisions; A great way to collect internal VOC.
- Monitor PTO/Sick Time. Abnormally high/low volumes can indicate high stress.

ADDITIONAL STRESS

IDENTIFYING THE POTENTIAL STRESS A CHANGE WILL PUT ON YOUR BUSINESS

- Changes range from small and expected to large and unexpected
- The same change can be perceived differently by any two people, especially when they have different personality traits/themes.



RISK LEVEL

CALCULATE THE RISK YOUR CHANGE WILL HAVE ON YOUR BUSINESS

A		B		
SCORE	EXISTING STRESS LEVEL	MAGNITUDE	AWARENESS	RISK LEVEL
5	HIGH	LARGE	UNEXPECTED	● HIGH (31 - 50) ● MEDIUM (20 - 30) ● LOW (2 - 19)
4	SLIGHTLY HIGH	SLIGHTLY LARGE	SLIGHTLY UNEXPECTED	
3	MEDIUM	MEDIUM	AVERAGE	
2	SLIGHTLY LOW	SLIGHTLY SMALL	SLIGHTLY EXPECTED	
1	LOW	SMALL	EXPECTED	

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The risk level helps you determine which change management techniques to use.

RISK LEVEL

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1	LOW	SMALL	EXPECTED	

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The risk level helps you determine which change management techniques to use.

RISK LEVEL

CALCULATE THE RISK YOUR CHANGE WILL HAVE ON YOUR BUSINESS

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RISK LEVEL

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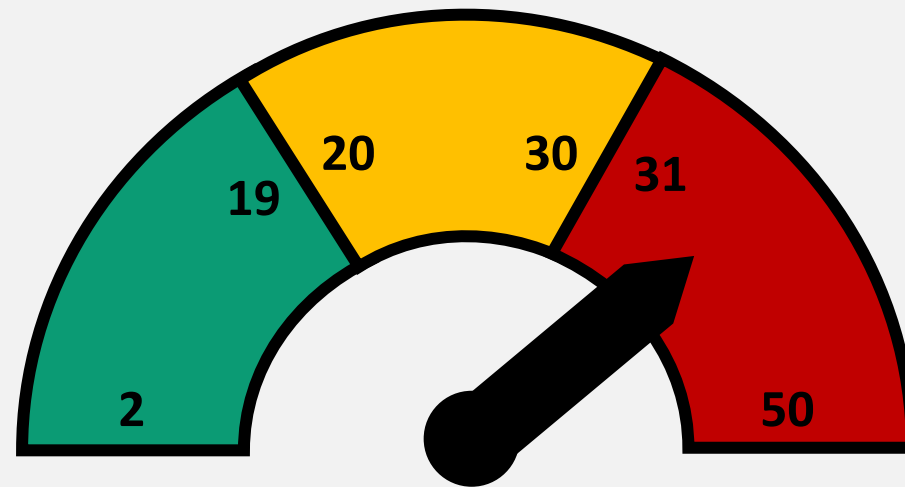
The risk level helps you determine which change management techniques to use.

RISK LEVEL RESPONSES

RECOMMENDED RESPONSES TO RISK SCORES

As with all tools,
use this model to
help you make
business decisions,
not to make the
decisions for you!

LOW
"Good to go!"



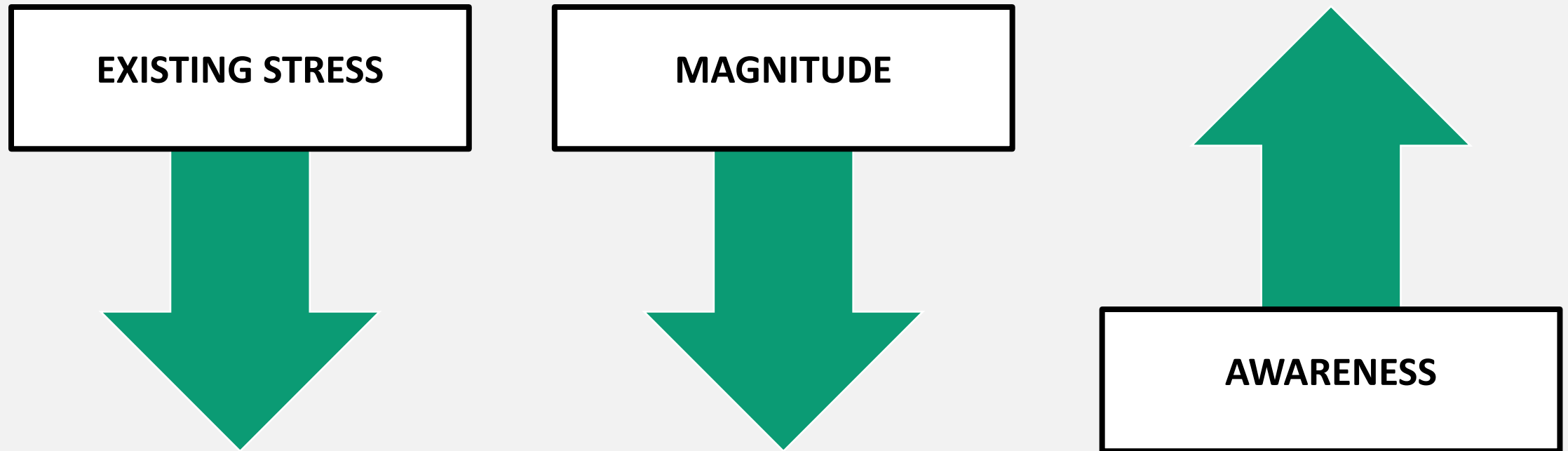
MEDIUM
"Proceed with caution."

HIGH
"Stop! Reduce the risk before proceeding."

REDUCING THE RISK LEVEL*

TIPS TO LOWER AND CONTROL THE RISK LEVEL IN YOUR BUSINESS

$$(EXISTING\ STRESS\ SCORE)^2 + (MAGNITUDE\ SCORE \times AWARENESS\ SCORE)$$



*Focus on reducing what you can control, starting with the greatest impact on risk, first.

REDUCE THE EXISTING STRESS LEVEL

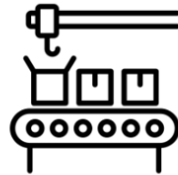
TIPS TO LOWER AND CONTROL THE STRESS LEVEL IN YOUR BUSINESS

- Process **WASTE** (Muda) is often the most significant stressor in an environment.
- There are eight types of Muda:



DEFECT

failing to meet customer expectations



OVER PRODUCTION

when supply (process output) is greater than customer demand



WAITING

activities that halt or delay a process



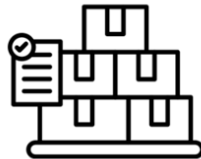
NON-UTILIZED RESOURCE

tools or people that have untapped capability



TRANSPORTATION

movement of things



INVENTORY

collection of materials or resources



MOTION

movement of people



EXTRA PROCESSING

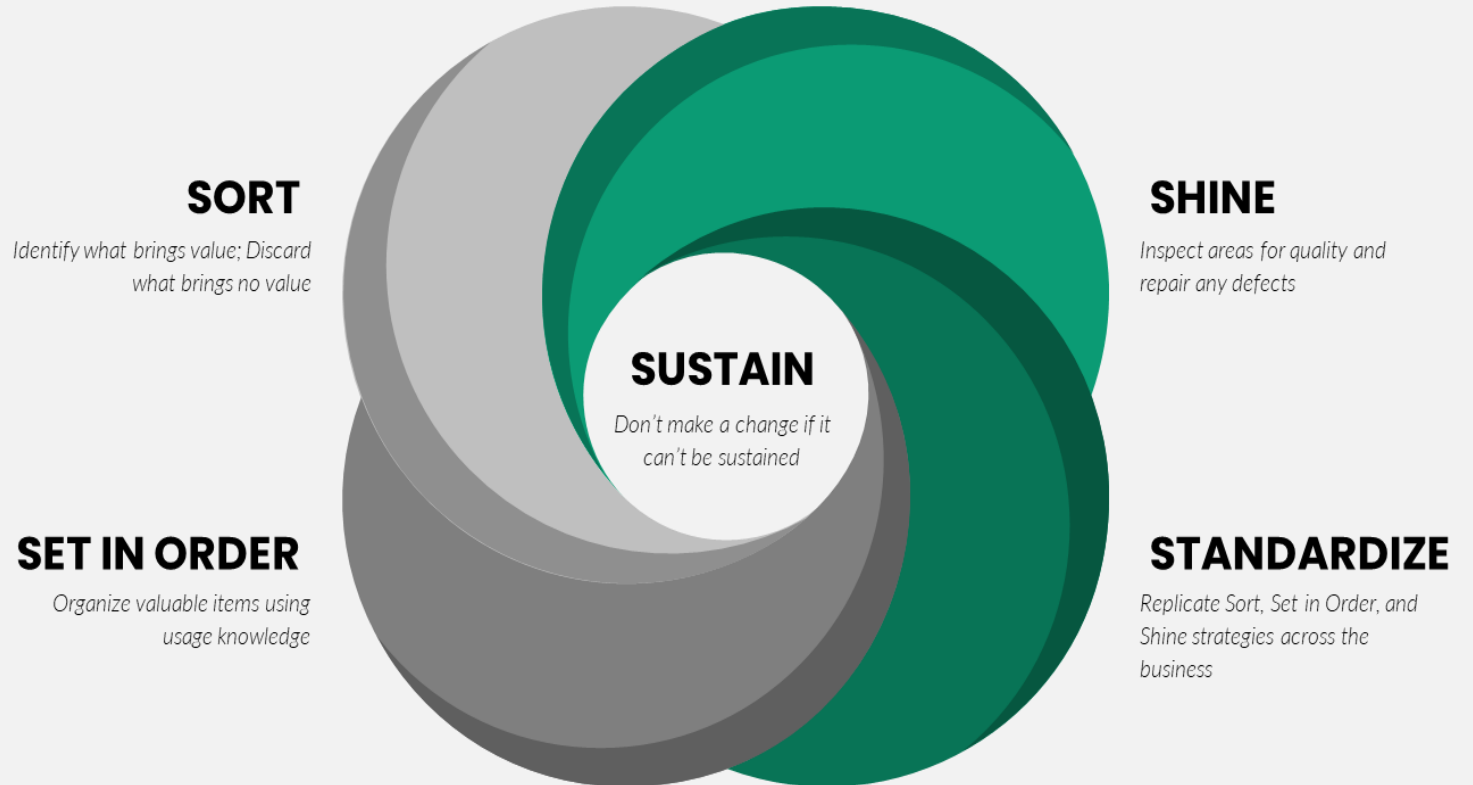
unnecessary steps in a process

REDUCE THE EXISTING STRESS LEVEL

TIPS TO LOWER AND CONTROL THE STRESS LEVEL IN YOUR BUSINESS

- Reducing Muda:

- Train your employees in **LEAN** techniques, such as **5S**.*
- Engage a Lean Consultant to rapidly identify Waste and coach employees through Process Improvement (PI) projects.



***WARNING:** This training can cause **more** stress if employees meet heavy resistance from leadership when applying their new skills.

REDUCE THE EXISTING STRESS LEVEL

TIPS TO LOWER AND CONTROL THE STRESS LEVEL IN YOUR BUSINESS



DMV

Observe a process with lots of Waste through the eyes of Customers.



5S IN MSICU

Watch how applying 5S transformed a supply room from a source of frustration to a source of pride.

REDUCING THE MAGNITUDE

TIPS TO LOWER AND CONTROL THE MAGNITUDE OF A CHANGE TO YOUR BUSINESS

- Consider breaking the change into smaller, incremental changes over time.
- Consider splitting the change into Short-Term and Long-Term Corrective Actions (**STCA/LTCA**).
- Consider a **PILOT** to test the change before full implementation. This gives those impacted a chance to experience the change in a 'lower stakes' environment. Involving them in the Pilot also increases a feeling of control, which reduces stress.

INCREASING AWARENESS

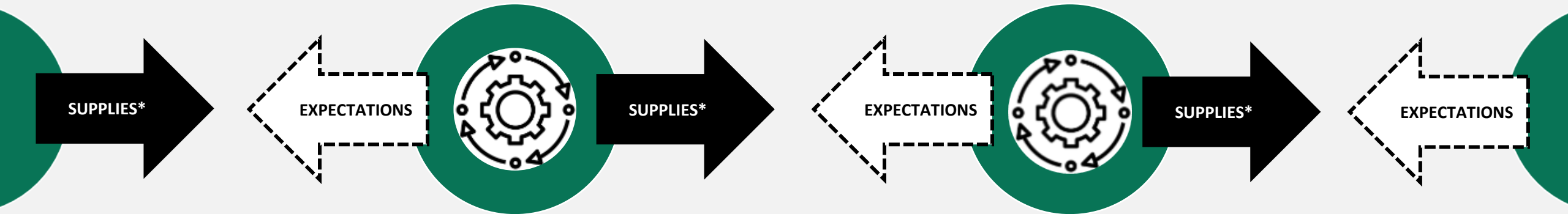
TIPS TO IMPROVE AND CONTROL AWARENESS OF A CHANGE TO YOUR BUSINESS

- From the beginning, involve representatives of stakeholder groups at all levels and various personality themes.
- Prevent blind spots in your communications through Process Mapping.
 - Rarely are people aware of the upstream/downstream impacts a change can have – causing blind spots in communication, resulting in rework and stress during implementation.
 - Engage a Lean Consultant to map the impacted processes and any processes at risk of this 'ripple effect' from the change.
 - **VALUE STREAM** activities such as this will ensure you have a complete picture of all teams that must be made aware of the change.
- Better communication $\neq$ More communication;
Better communication = Better strategy.

VALUE STREAM

UNDERSTAND YOUR CUSTOMER/SUPPLIER RELATIONSHIPS AND THE FLOW OF YOUR BUSINESS

- The flow of value from process to process.
- Concept that all processes are interconnected and rely on one another.
- Some companies refer to this as a Value Chain, where you're only as strong as the weakest link.

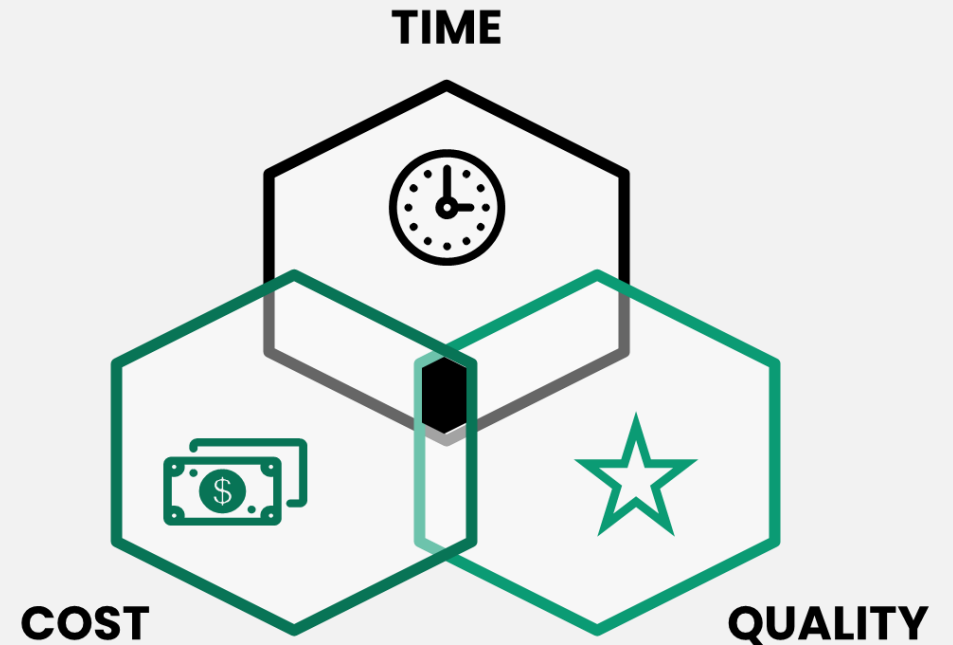


*Supplies can be either products or services

COMMUNICATION STRATEGY

TIPS TO IMPROVE HOW YOU SHARE INFORMATION ACROSS THE BUSINESS

- Consider everyone you're communicating with your **CUSTOMER**.
- No matter the product/service, Customers value three things: Cost, Time, Quality.
- Knowing the Customer helps you tailor your process to meet their expectations and needs – which manages stress levels.
 - Knowing their personality traits helps!



COMMUNICATION QUALITY

TIPS TO IMPROVE HOW YOU SHARE INFORMATION ACROSS THE BUSINESS

EXAMPLE

ANALYTICAL THEME searches for reasons/causes and is likely to question the Quality of a change.

Communicating with this and other Strategic Thinking themes often takes more time, because they desire to understand not just *what* is happening, but *why* it's happening.

TIP: If an Obeya Room is being used, walk them through it, as it tells the story of the change.

COMMUNICATION FLOW

THE TRADITIONAL APPROACH TO COMMUNICATING CHANGE

High amount of stress;
High amount of waste;
Difficult to recover
and implement
another change

DECISION MAKERS
KICK-OFF PROJECT

REWORK REQUIRES
ADDITIONAL RESOURCES
AND COMMS

ENGAGE PROCESS
EXECUTORS

PROCESS
CHANGES

COMMUNICATION VOLUME OVER TIME

COMMUNICATION FLOW

A MORE EFFICIENT WAY OF COMMUNICATING CHANGE

ENGAGE PROCESS

EXECUTORS

DECISION MAKERS

KICK-OFF PROJECT

PILOT
CHANGES

PROCESS
CHANGES

COMMUNICATION VOLUME OVER TIME

Executors are included from day 1, reducing rework, stress, and waste; Minimal recovery time allows the next change to go in work.

COMMUNICATION STRATEGY

TIPS TO IMPROVE HOW YOU SHARE INFORMATION ACROSS THE BUSINESS

The most detrimental communication failure: **Variation in messaging across members of leadership.**

Keep leaders aligned in their messaging by drafting an FAQ document, prior to allowing any communications outside the project team. This serves as a script during communication and ensures any questions they encounter are answered seamlessly across the business.

Aligning *when* leaders are communicating is also key.

SEASON 2: IMPLEMENTATION

managing people through change



SECTION INTRO

- Each process change is an opportunity to improve and should be treated like a PI project – with the same amount of planning and strategy.
- Although a significant amount of communication is necessary, you want it to be high quality, not just high quantity. Think **LEAN!**
- When possible, including project executors in project planning will help a process change be more efficient and less stressful for the business.

IMPLEMENTATION SPEED

Jeff Bezos wrote about High-Velocity Decision Making in his 2016 Letter to Shareholders :

“First, never use a one-size-fits-all decision-making process. Many decisions are reversible, two-way doors. Those decisions can use a light-weight process.

Second, most decisions should probably be made with somewhere around 70% of the information you wish you had. If you wait for 90%, in most cases, you’re probably being slow. Plus, either way, you need to be good at quickly recognizing and correcting bad decisions. If you’re good at course correcting, being wrong may be less costly than you think, whereas being slow is going to be expensive for sure...”

Read the full letter:



HIGH-VELOCITY DECISION MAKING

ACCELERATE YOUR TIMELINES USING TWO-WAY DECISION-MAKING

This knowledge helps accelerate decisions that are low risk – saving time, money, and stress for yourself and your team.

ONE-WAY

Extremely difficult or impossible to reverse.

Seen as high risk.

Take time to carefully consider these decisions.

High volume of communication required



TWO-WAY

If the result isn't desirable, the decision can be undone.

Seen as low risk.

Make these decisions quickly.

Awareness can be lower, without high risk.

NOTE: It's sometimes possible to convert One-Way Doors to Two-Way Doors.

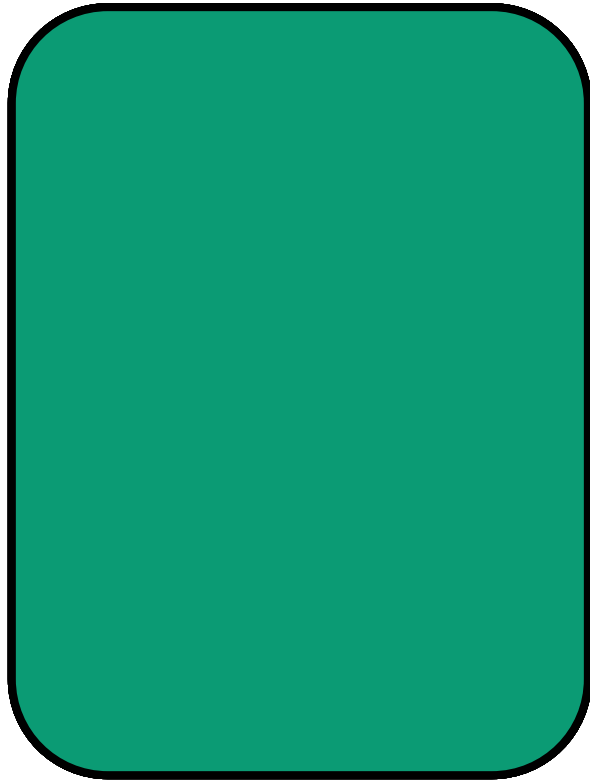
MIND MAP YOUR CHANGE MANAGEMENT STRATEGY

VISUALIZE ALL THE VARIABLES AT PLAY FOR THE UPCOMING CHANGE (IN A MESSY WAY!)

- What personality traits/themes are at play?
- What are the Stress Levels? (Existing + Additional)
- What is the Risk Level? (High/Medium/Low)
- Do you accept the Risk Level?
- Which variables you can influence? (Existing Stress/Magnitude/Awareness)
- What are the potential upstream/downstream impacts?
- Which decisions are involved and are they One-way or Two-Way doors?

ACTIVITY

Talk through how your strategy might be tailored for each scenario, and consider the following in your responses:



- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

ACTIVITY

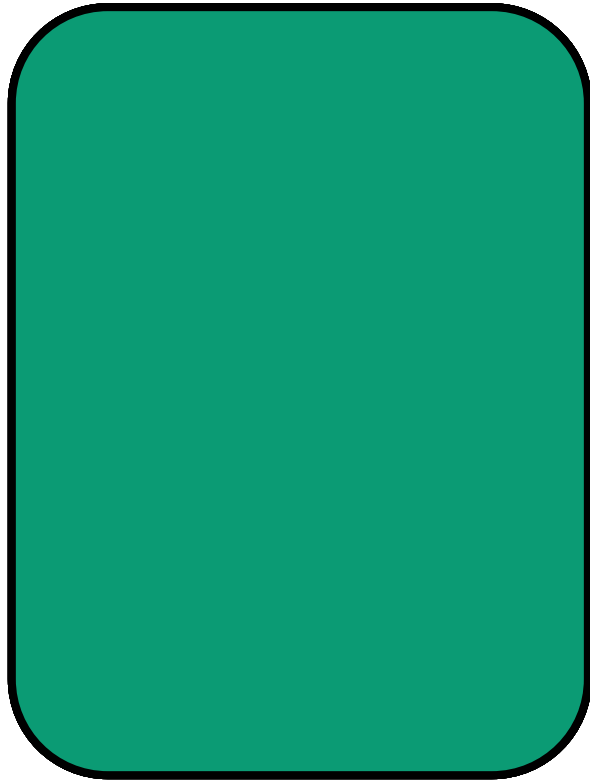
**Talk through how your strategy might be tailored for each scenario,
and consider the following in your responses:**

**CHANGE IN
HAND SOAP
FOR
RESTROOMS**

- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

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ACTIVITY

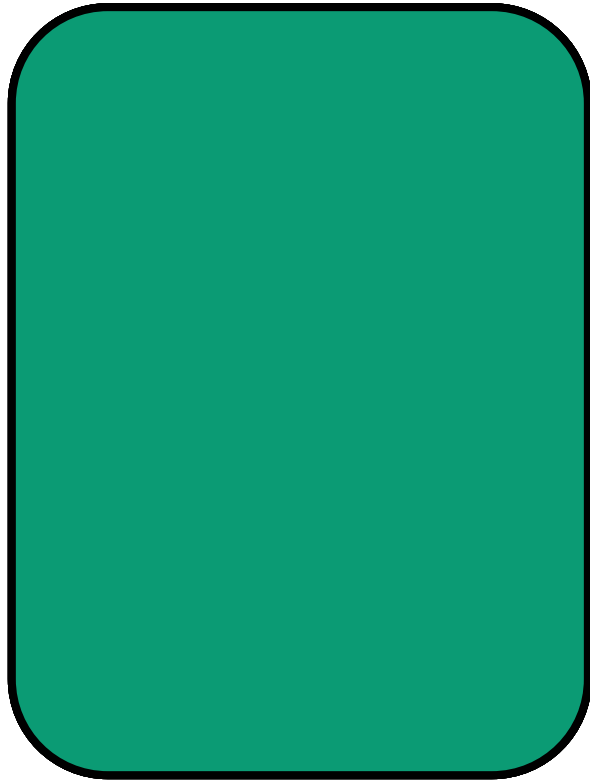
Talk through how your strategy might be tailored for each scenario, and consider the following in your responses:

**SHIFT TO
VIRTUAL
CLASSES
DURING A
PANDEMIC**

- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

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ACTIVITY

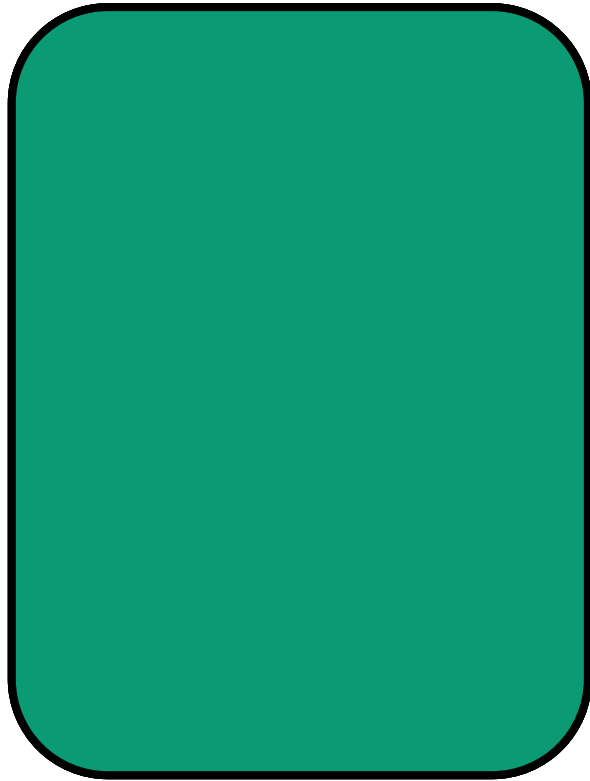
Talk through how your strategy might be tailored for each scenario, and consider the following in your responses:

NEW VP HIRED

- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

ACTIVITY

Talk through how your strategy might be tailored for each scenario, and consider the following in your responses:



- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

ACTIVITY

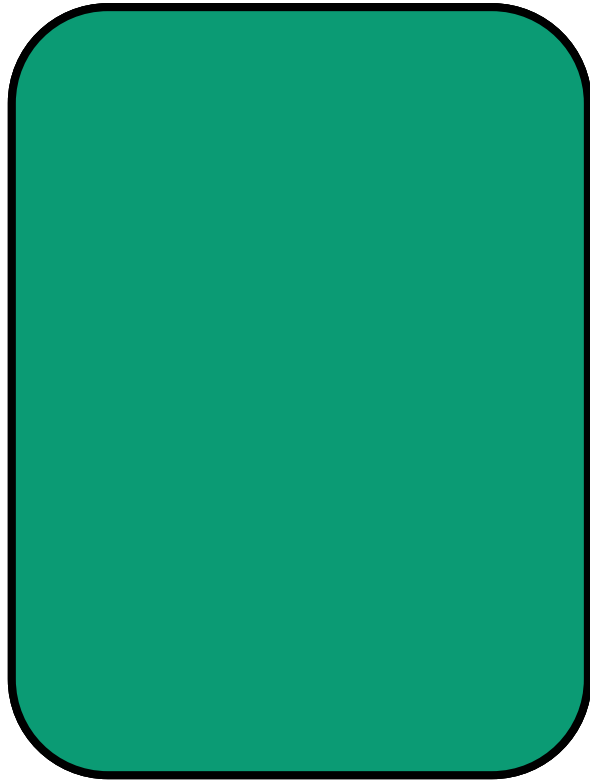
**Talk through how your strategy might be tailored for each scenario,
and consider the following in your responses:**

**CHANGE IN
TEXT BOOKS**

- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

ACTIVITY

Talk through how your strategy might be tailored for each scenario, and consider the following in your responses:



- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

ACTIVITY

Talk through how your strategy might be tailored for each scenario,
and consider the following in your responses:

WILD CARD

- Stress levels (existing/potential)?
- Risk Level and which variables you can influence (magnitude/awareness)?
- Potential upstream/downstream impact?
- One-way vs. Two-way door decision?

CHANGE MANAGEMENT PLAN

PLAN AND VISUALLY MANAGE THE WHO, WHAT, WHERE, WHEN, WHY, AND HOW THROUGH THE CHANGE

- Brings together all your skills: Tailoring communication to match employee theme(s), risk management prior to implementation, accelerating two-way door decisions, overall strategy, etc.
- If you feel stuck, **BENCHMARK** with other companies. You can learn from both good and bad Change Management examples. Copy/Paste (**YOKOTEN**) best practices.
 - What was done poorly that you can learn from?
 - What was done well that you can adapt into your project?
- Set expectation from the beginning with quality communications, then build trust by meeting expectations.

CHANGE MANAGEMENT PLAN

PLAN AND VISUALLY MANAGE THE WHO, WHAT, WHERE, WHEN, WHY, AND HOW THROUGH THE CHANGE



PROJECT NAME:

2023 - NEW UNIFORMS

ACTION	ACTION PLAN	RESPONSIBLE	STAKEHOLDERS		START	DUE	STATUS	NOTES
			CONSULTED	INFORMED				
<i>What is to be done? Pilot? STCA? LTCA? Communication?</i>	<i>Who is to be involved? How is it to be done? 1:1? Singular Team? Multi-Departmental?</i>	<i>Singular person responsible for the action.</i>	<i>Subject Matter Experts (SMEs) that contribute knowledge from varying personality traits.</i>	<i>Person(s) who should be kept aware of the action plan and status.</i>	<i>Specific day? Week? Quarter?</i>		<i>On Deck? On Hold? In Work? Complete?</i>	<i>Challenges? Risks? Escalations?</i>
PILOT NEW GEAR	A-SHIFT FOR ONE MONTH	TIM (CAPTAIN)	NFPA REP. OSHA REP. TOSHA REP. SR. FFs	ALL SHIFTS (A + B + C) UNIFORM CO. ADMIN + PR	3/1/23	4/1/23	IN WORK	TWO FFs NEED TO BE REFIT
NOTIFY EMPLOYEES OF PILOT	CAPTAINS NOTIFY DURING SHIFT CHANGE USING FAQ DOC	CHIEF BUSH	HR CAPTAINS SR FFs	CAPTAINS ALL SHIFTS (A + B + C)	2/1/23	2/6/23	COMPLETE	



CHANGE MANAGEMENT

VISUALLY MANAGE ALL THE ACTIVITIES NECESSARY FOR THE CHANGE YOU'RE IMPLEMENTING

- Showcasing process maps, investigation documents, the change management plan, etc. helps increase awareness and reduce stress.
- Visually manage the change using a Visual Management Board (**VMB**) or dedicate an entire **OBEYA** room to the change (aka. Project War Room).
 - Highly recommend for larger magnitude changes and to support certain personality traits.
- A **WIP BOARD** is a powerful tool for managing tasks through implementation. (aka. Kanban)

ON HOLD	ON DECK	IN WORK	COMPLETE
	   	 	 
	      	  	
 	  		

CHANGE MANAGEMENT

TIPS FOR SUCCESSFUL IMPLEMENTATION

- **Stay alert!** Don't implement and walk away. Manage *through* the change.
 - Stay in contact with your people. Remain aware of balcony/basement themes, and, if applicable, monitor their individual progress through The Change Curve.
- Watch for shifts in stress levels, changes in magnitude, and awareness.
 - It's common for a project to become smaller or larger than anticipated over time. This is sometimes attributed to scope creep. If you notice the scope creeping up or down, address it directly with clear communication.
- If risk rises, course correct your strategy.
 - Use customized communications to keep stress levels low and awareness levels high.
 - Celebrate wins, big and small, using both Lean thinking and awareness of your team's personality types.

SEASON 3: SUSTAINMENT

uphold the good and prepare for future change



SUSTAINING THE CHANGE

TIPS TO LOWER AND CONTROL THE STRESS LEVEL THROUGH CHANGE

If you did well in the first two seasons (Preparation and Implementation), sustaining this change and any future changes is easy.
Sustaining change is only difficult if you executed the first two seasons poorly.

- Consider the Risk Level formula:

$$(EXISTING\ STRESS)^2 + (MAGNITUDE \times AWARENESS)$$

- Magnitude is no longer a factor after the Implementation season is over, leaving Stress and Awareness levels to be managed.
- Stress Level is critical to monitor, because it indicates not only the level of Awareness, but also the quality of your internal processes.
 - You already know how to Identifying the Stress Level and lower it.
 - REMINDER: If the Stress Level remains too high or low, something needs to change.

SUSTAINING A HEALTHY LEVEL OF STRESS

TIPS TO LOWER AND CONTROL THE STRESS LEVEL THROUGH CHANGE

- Adopt a **Governance** process.
 - Group of people that govern which changes are allowed to occur and when.
 - Serves as a mechanism against **CHANGE FATIGUE** – a high-stress or apathetic (“make me”) condition that results from poorly managed change.*
 - Regulates the amount of change you subject your Customers to over time.
 - Keep the Governance team small, so they can be efficient.
 - Ensure members are of varying levels in the org and varying personality traits.
 - Prevent complacency by occasionally rotating a new member in/out.
- Maintain a project schedule
 - Include your queue of projects and planned start/finish dates for each
 - Incorporate **OPTIMUM WIP** to manage stress levels, and sustain consistent throughput by strategically restricting the amount of work you allow at any given time.

*some teach that change fatigue comes from changing a process too often, but if you manage change well, it can happen often without ill effect.

SESSION SUMMARY



CHANGE MANAGEMENT SEASONS

THREE MAIN SEASONS THAT EVERY EXCELLENT CHANGE MANAGER MUST MANAGE THROUGH



CHANGE MANAGEMENT STRATEGY

