



Change Management v3

Pre-course Workbook

**Based on the Change Management study
guide**

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Introduction

Change Management looks at the approach to delivering successful transformational change into your organization by addressing the people issues, impact to the organization that exist when change is introduced, and delivery of the change.

Whether you are a Project, Programme Manager or Change Manager, you will find this course provides useful guidance on approaches, theories, tools and techniques that can be used to implement successful change.

We have prepared this guide to assist you to prepare for the course and cut down on the amount of reading required during the course.

We have also prepared a fictional scenario at the beginning of this guide for you to consider the change aspects as we address them.

It is strongly advised that you work through this entire workbook prior to the course as due to the large syllabus, there is little time for additional revision during the course.

You will need to start this pre-course work a couple of weeks before attending the course and it should take approximately 12 hours to complete.

This guide is broken down by the 6 topic areas:

1. Organisational context and approach (OA)
2. People and Change (PC)
3. Change Leadership and Teams (CT)
4. Stakeholder engagement and Communication (SC)
5. Work of the Change Manager (WM)
6. Developing Professional change practice (**Practitioner only**)



Where you see this icon, please read the sections indicated in the bullet points.



When you see this icon, it's a moment for you to reflect on the use of a theory, tool or technique



Where you see this icon, you will be asked to consider how something might be done for the provided scenario

Green Compass Change scenario

Please note that all companies and people used in this scenario are fictional. We will use this scenario to think about some of the theories and practices we are going to learn.

Background

Green Compass Consulting was started 26 years ago to providing strategic business and marketing consultancy. Initially, the three directors started with a small office in London, which has steadily grown over the years and now includes offices in New York and Frankfurt.

Green Compass Consulting currently employs just over 350 people across their three offices, 70 in Frankfurt, 150 in London and 130 in New York.

Their services include Portfolio, Programme and project management consultancy and guidance, Strategic analysis and management, financial management and marketing, PR and advertising services.

Due to environmental pressure and recent governments environmental targets, the company have been conducting a review, to identify changes that will be needed.

Currently, most of the consultants spend a lot of their time either at client sites, working from home and occasionally working in the offices.

The office environment is currently reliant on paperwork and hard copies, which the directors are keen to reduce or better still, eliminate.

After a review of their strategic objectives, the directors at Green Compass have decided to transform the way the organisation works. They have established they want to reduce existing overheads and move to be more environmentally responsible.

Their vision is to create a more flexible way of working for staff and to meet their environmental objectives within the next 3 years.

The change programme

The lease for the London office is due to renegotiated within the next 12 months, so the directors have decided to start the changes in London and then roll out to their other branches in New York and Frankfurt, which will include the following work:

- Refurbishing remaining office space for reduced capacity
- Upgrade equipment and systems to support a paperless office
- Review and redefine working practices and processes, legal compliance and performance management
- Reduction of travel, single use plastics and increasing recycling

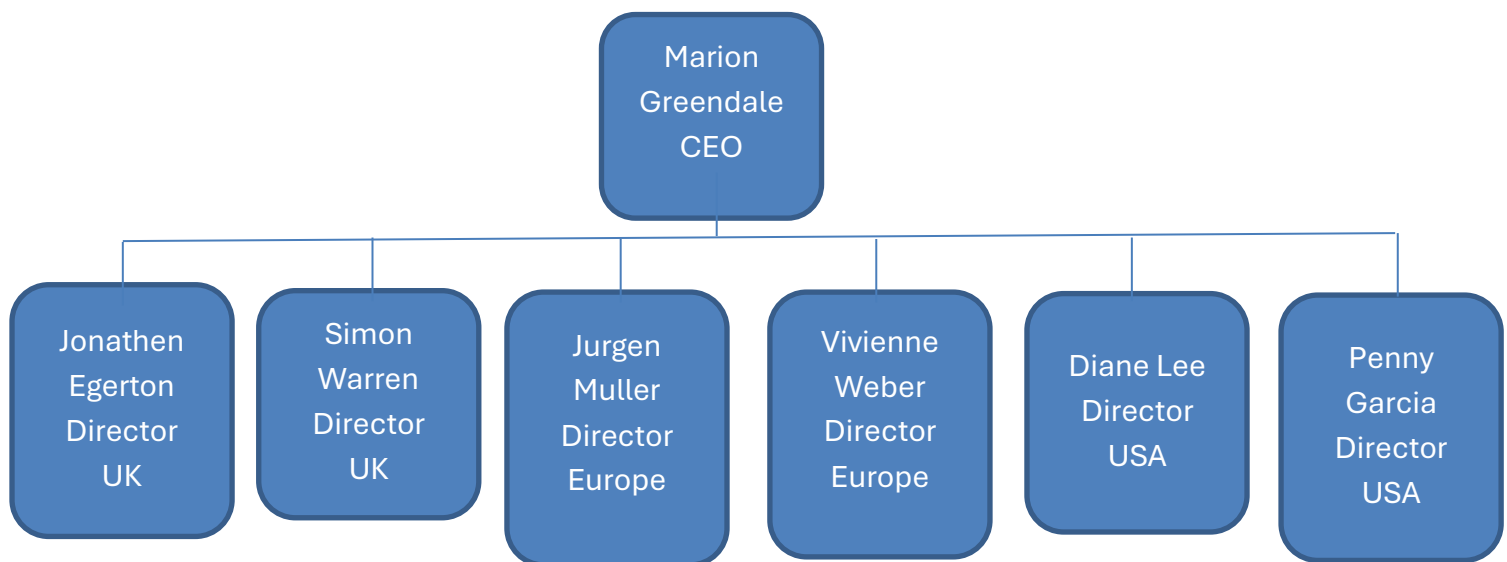
Stakeholders

The board of directors includes the 3 founders from the UK office, 2 directors in Germany and 2 directors from the New York office. Most of the Directors are on board with the programme, but John Egerton, one of the UK directors and Jurgén Muller a director from the Frankfurt office are sceptical about the extent of the change and feel we should just be focussing on the reduced office space for now.

While there are some pockets of resistance, most of the staff in the UK and Frankfurt offices think this change is overdue, but the New York office is seeing a lot of resistance from staff who feel the cost of the changes are too significant for the proposed outcomes and benefits.

The CEO, Marion Greendale is keen to push forward with the change despite the opposition from the board and staff as she firmly believes the transformation is a sensible investment for the future of the business.

Green Compass Board Structure



The Change Management Examinations

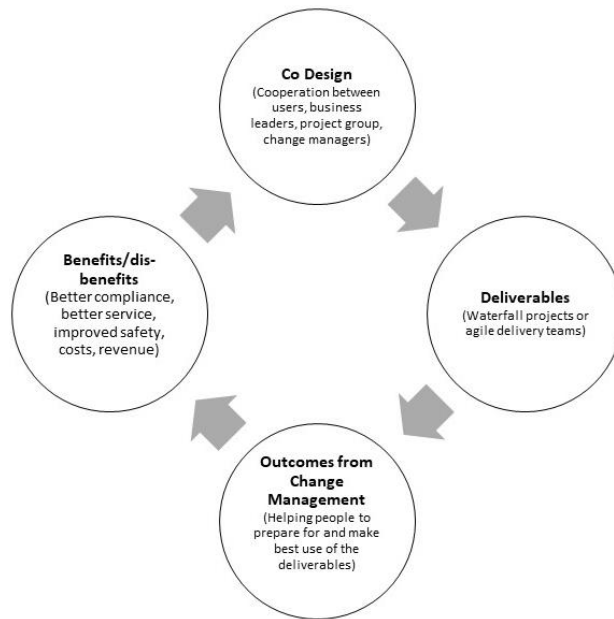
Foundation Examination To test the general knowledge and understanding of the fundamental principles based on the manual.	• 50 questions • multiple choice format • closed book • 40 minutes • Pass mark 25 (50%)
Practitioner Examination To test a comprehensive understanding of principles and theory and application of the Change Management book.	• Scenario based objective paper format • 5 sections worth a total of 80 • open book • 2.5 hours • Pass mark 40 (50%)

Please note that it is a pre-requisite of the Practitioner examination that you pass the foundation paper first.

Organisational context and approach

Before we can start planning the change approach, we first need to understand the context of the change.

The reason we need change is to achieve some kind of improvement or benefits. Through a process of co-design, we can deliver outputs that lead to outcomes that will ultimately deliver benefits.



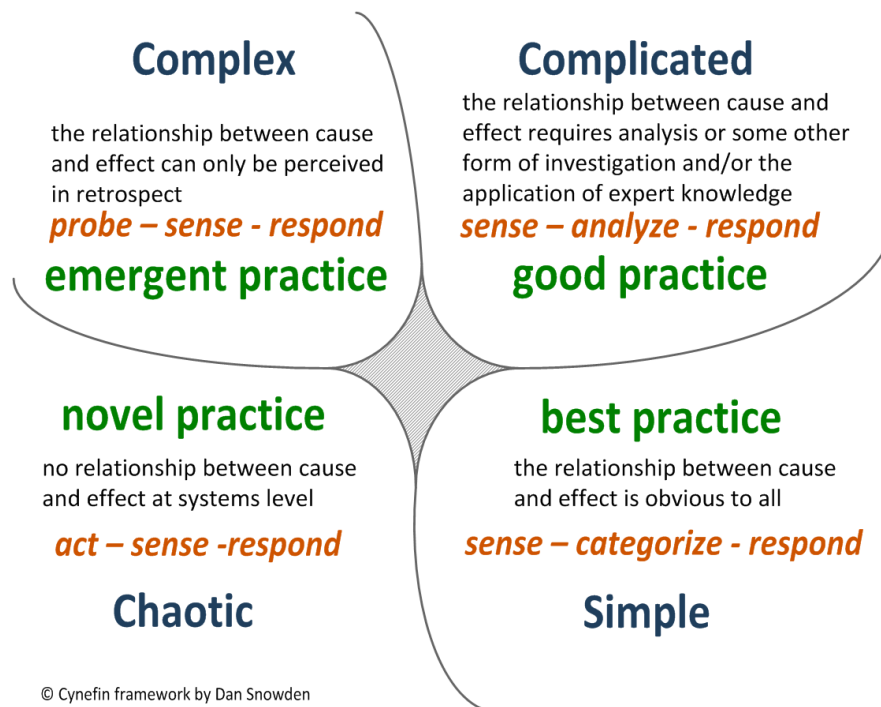
VUCA, Cynefin and Kelman



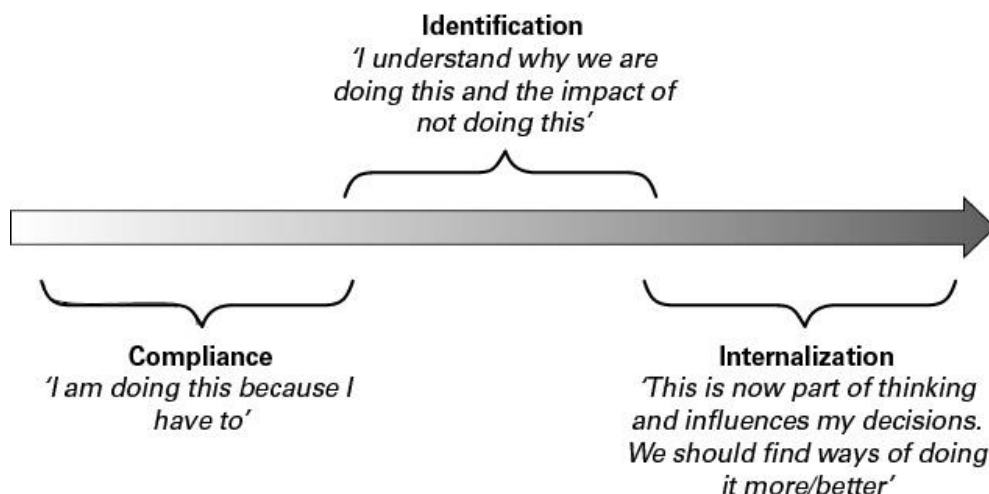
There are many tools we can use to understand the context of the change in the organisation:

- **VUCA** – (section 1.1.3 in the study guide) explains that change can be volatile, have plenty of uncertainty, have impacts and effects that are complex and have a lot of ambiguity.

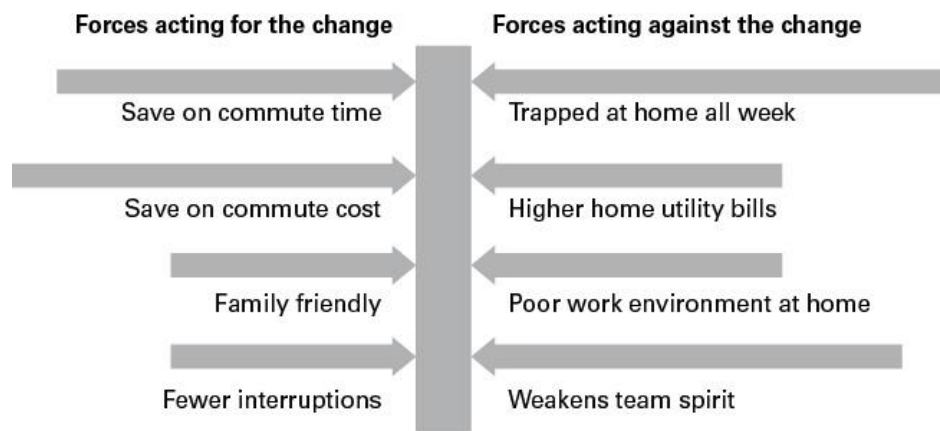
- **Cynefin** – (section 1.1.3 in the study guide) is a great tool for understanding the complexity of the change and provides some guidance on the approach we might take – *It's worth looking up the YouTube video of David Snowden presenting the Cynefin framework*



- **Kelman's** three levels of adoption - (section 1.1.2 in the study guide) provides a way for Change Managers to assess the type of change interventions required and justify the effort of the Change Manager.



- **Lewin's Force Field Analysis** - (section 1.1.7 in the study guide) provides an analysis tool which helps identify the driving forces, both internal and external, for the change and the resisting forces that will work against it.



Example: Moving to working from home for three days a week



Consider a change you are familiar with

- Looking at VUCA, can you see any Volatility, Uncertainty, Complexity and Ambiguity with your change?
- Consider Cynefin – how would you classify this change?
- Force field analysis – what would the driving forces and resisting forces for the change be?

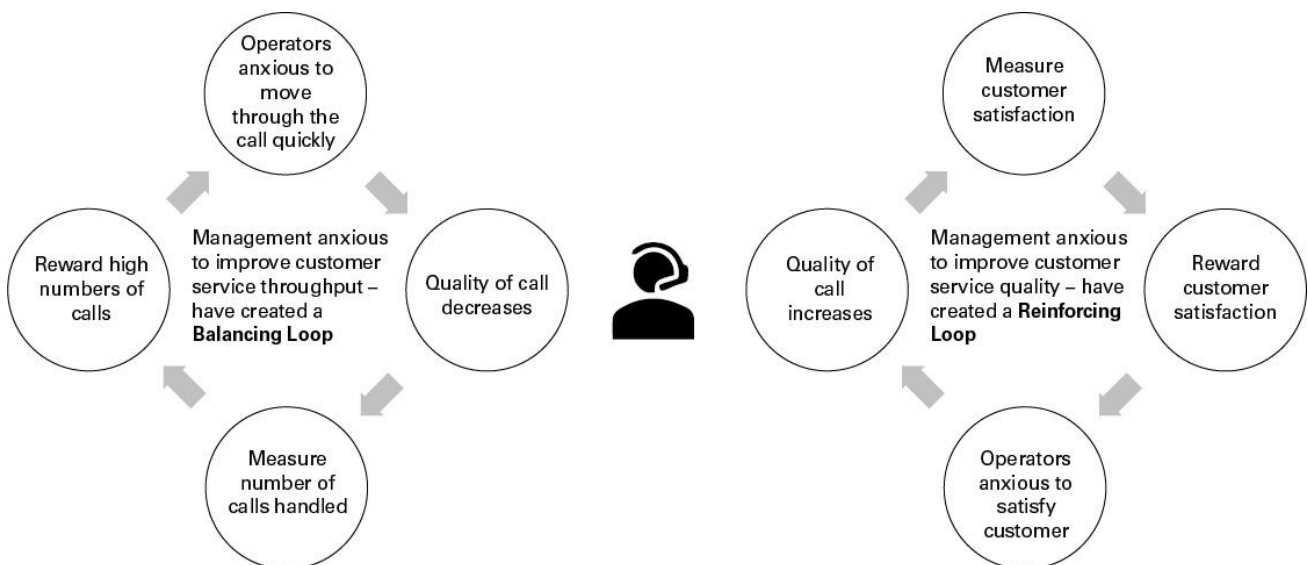
Planned vs Emergent change

There are two ways that change happens in the organisation.

1. Change is planned and delivered strategically, usually driven from the top.
2. Change emerges from somewhere – usually starts small, gains support and momentum and grows.



- **Planned vs Emergent** – (table 1.2 in the study guide) explains the key differences between planned or emergent change
- **Systems thinking** - (Section 1.1.5 in the study guide) explains how it is useful to understand the smaller interacting elements of the change and helps identify intended and unintended consequences.



Organisational culture

The culture of your organization plays a large part in the success of change in the organization.

Culture is described as: “...an established system of accepted behaviours, values, beliefs and assumptions that is widely shared within the organization”



- **Organisational culture** - (section 1.1.6 in the study guide) explains the importance of culture in change and understanding the challenges organisations face. Pay attention to **Edgar Schein’s** views on diagnosing and understanding culture.
- **Trompenaars and Hampden-Turner** describe 3 levels of culture in the organisation.



Scenario activity:

Using the Green Compass scenario, consider Trompenaars and Hampden-Turner’s 3 levels of culture:

- What Change Management activities would you need to undertake to address these 3 levels to deliver a successful change?

Structuring your approach

Once you have understood the context of the change, you will now be able to start planning your approach to change.



- **ADKAR** - (Section 1.2.2 in the study guide) provides a 5-step framework to deliver change

A	<u>A</u>wareness	Awareness of the need for the change. Awareness of the reasons for the change,
D	<u>D</u>esire	A desire to be part of the change. A “buy-in” to the need for change and the clear advantages of achieving it.
K	<u>K</u>nowledge	The knowledge of what to do. What actions are expected? How will new processes, system and machinery be used? What other knowledge is required?
A	<u>A</u>bility	It is one thing to know what to do and another to have the ability. Are there good opportunities to practice? Are there technical support systems in place?
R	<u>R</u>einforcement	Is it working? How is that demonstrated?

- **Evolving the n-step process** - (Section 1.2.3 in the study guide) discusses the propensity of theorists providing stepped processes to deliver change. Pay attention to **Kotter’s** 8 step process and guiding coalition and volunteer army.



Consider a change you are familiar with

- Do you see some of the ADKAR steps being used? If so which ones? Are any missing?
- For a planned change, can you see any of Kotter’s steps being applied? If so how?

Delivery Strategy

How change is delivered should be considered before designing the approach.



- **Big Bang, Phased, Voluntary adoption, Incremental and Iterative** - (table 1.4 in the study guide) explains each of the approaches with an example and what this approach means for change management.
- **Agile practices** – (Section 1.2.5 in the study guide) explains some of the key mindsets, behaviours, tools and techniques that are commonly used in Agile approaches.
- **Agile change practices** – (Section 1.2.7 in the study guide) explains the agile behaviours expected for change managers and some of the Agile techniques that could be used.



Scenario activity:

Consider the Green Compass scenario, what approach to delivery do you feel would work best for this change and why?

Continuous change

Delivering change is rarely linear and often requires a continuous adaptive planning as more is learned.



- **Continuous change management cycle** - (Section 1.2.6 in the study guide) explains the feedback-focussed approach



The Change Strategy

This section provides you with an appropriate outline for a change strategy. Although the contents may vary from one change to another, it's essential to have a guide that will set out the approach and help set expectations.



- **The change strategy** – (section 1.2.8) provides you with the proposed headings and what might be included in the strategy.



Have you seen a Change Strategy?

- What information did it include?
- What may have been missing?

Organisational context and approach foundation style questions

1. In Kotter's 8 step process, which step describes taking steps to change direction in response to external pressure?
 - a. Formulating a strategic vision
 - b. Never letting up
 - c. Celebrating short term wins
 - d. Institutionalizing strategic changes
2. Which statement is correct about Edgar Schein's view on understanding organisational culture?
 - a. He believes it can only be understood using internal resources
 - b. He believes it can only be understood by an external resource
 - c. He believes it can only be understood by senior management
 - d. He believes it can only be understood with both an internal and external view
3. David Snowden's Cynefin framework describes the complex zone as "often safer to take an _____, _____ approach"
 - a. Attentive, sensible
 - b. Immediate, swift
 - c. Experimental, deliberate
 - d. Experimental, emergent
4. In the PROSCI ADKAR model, which activity is likely to support the Ability step in a change?
 - a. Managers have arranged for technical support drop ins over the next few weeks
 - b. Training has been made available for all staff
 - c. Managers are planning meetings to explain the reasons for the change
 - d. The change team are advertising for Change Agents to join the team

5. Which step in the continuous change cycle does this statement happen in: “The change team has identified the need for further Senior Leadership engagement to build momentum for the change”
- a. Discovery
 - b. Ideas
 - c. Prioritisation
 - d. Action
6. The minimum viable change practice is described as “The _____ change intervention that you could make and still accomplish your goals”
- a. Minimum work
 - b. Maximum effort
 - c. Least effort
 - d. Least work
7. Which activity would support Kelman’s Compliance level of adoption?
- a. Staff supporting each other during adoption of the change
 - b. Staff finding ways to improve the changes that have been made
 - c. Staff responding to an order in a crisis situation
 - d. Staff suggesting ideas for tackling a crisis
8. Which of the following describe emergent change?
- 1. Clear direction but the end point is uncertain
 - 2. Associated with a well-defined plan
 - 3. Support from the top, but more participative
- a. 1, 2 and 3
 - b. 1 and 2
 - c. 2 and 3
 - d. 1 and 3

Organisational context and approach foundation style question answers

Question	Answer
1	B - Never letting up
2	D - He believes it can only be understood with both an internal and external view
3	D - Experimental, emergent
4	A - Managers have arranged for technical support drop ins over the next few weeks
5	B – ideas
6	C – Least effort
7	C - Staff responding to an order in a crisis situation
8	D - 1. Clear direction but the end point is uncertain 3. Support from the top, but more participative

People and Change

Differences in people

How people respond to change will differ depending on their personality preferences.



- **Personality types** – (section 2.1.1 in the study guide) describes the different personality preferences and how this can affect stakeholder engagement during times of change. (Table 2.1 in the study guide)



Have you seen different personality types working together to deliver change?

- What are the positive aspects you have seen in having a diverse group of personality types working together?
- What are the challenges you have seen in having diverse groups of personality types working together?
- How do you overcome these challenges?

Neuroscience and change

Neuroscience is described as: “Any or all of the sciences, such as neurochemistry and experimental psychology, which deal with the structure or function of the nervous system or the brain.” *Oxford English Dictionary*

This section studies some of the known human responses to change when different approaches are used.



- **Rewards and threats** – (section 2.1.2 in the study guide) looks at the responses to perceived rewards or threats. Pay attention to the **David Rock, SCARF** table 2.2 in the study guide.
- **Mindset** - (section 2.1.2 in the study guide) This section describes the brain's ability to change its structure to meet new demands and embed new learning.
- **Helping people learn to change** - (section 2.1.2 in the study guide) notes two observations about neuroscience research that are relevant to helping people learn and embrace change: People operate on the basis of mental map and people become what they pay attention to.



Consider your own experiences of change

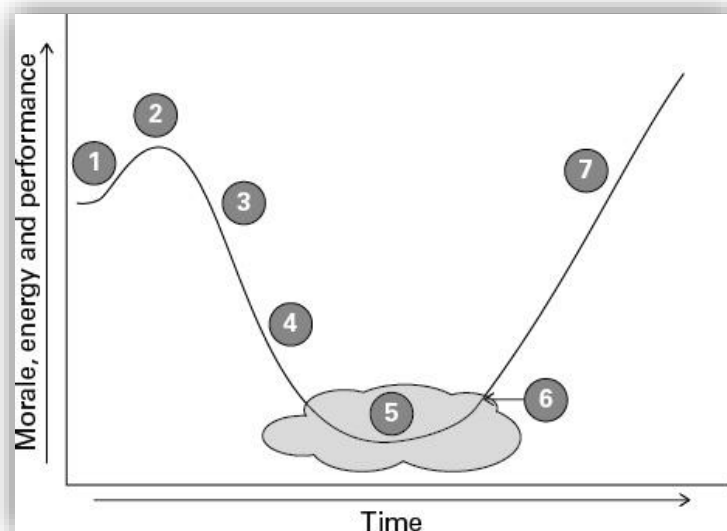
- Can you identify some of the responses you've had previously?
- Understanding where these responses came from, what coping mechanisms can you put in place in the future?

The Change Curve

This section looks at the emotional journey people experience when going through change.



- **Impact of the change curve** - (section 2.1.3 in the study guide) describes the emotions experiences by people in various ways during any type of change in their lives.



- **Bridges transition theory** – (Section 2.1.4 in the study guide) provides some practical advice on how to move through the emotions people experience and move towards acceptance and problem solving



Scenario activity:

There are a number of Directors on the Green Compass board that have not yet accepted the change.
What activities would the Change Manager need to ensure happen, to help move these directors towards acceptance?

Human Motivations and drives

This section focuses on what motivates people to change and the psychology behind it.



- **Rewards and Punishment** - (section 2.2.1 in the study guide) describes the effects of rewarding individuals and their levels of motivation, as well as how punishment may affect individuals during change.
- **Dan Pink** – (section 2.2.1 in the study guide) refers to the three key motivators for Knowledge work.
- **Positive psychology and resilience** – (section 2.2.2 in the study guide) discusses the link between motivation and a positive mindset. Note the section on **Appreciative Inquiry**.
- **The Beckhard and Harris change formula** – (section 2.2.3 in the study guide) describes a formula which uses relative values to determine the motivation levels for change in the organisation

$$C=[ABD]>X$$

- **Edgar Schein Survival and Learning anxieties** – (section 2.2.4 in the study guide) describe how an organisation needs to create a sense of urgency for change by increasing survival anxiety but reducing learning anxiety through reassurance.



Consider your own experiences of change

- What motivational approaches have you seen in your organisation?
- How effective were they and why?
- If they were ineffective, what do you feel could be done to improve this?



Scenario activity:

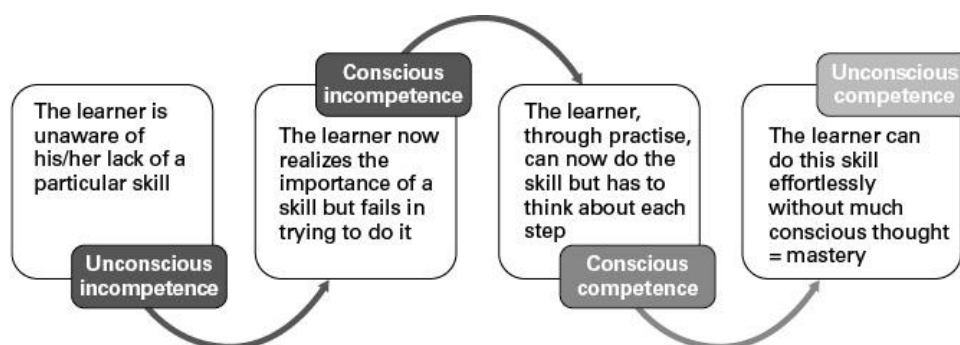
Some of the changes proposed by Green Compass are going to be unpopular. What could the Change Manager do to increase levels motivation in staff and leadership for the change?

Learning and change

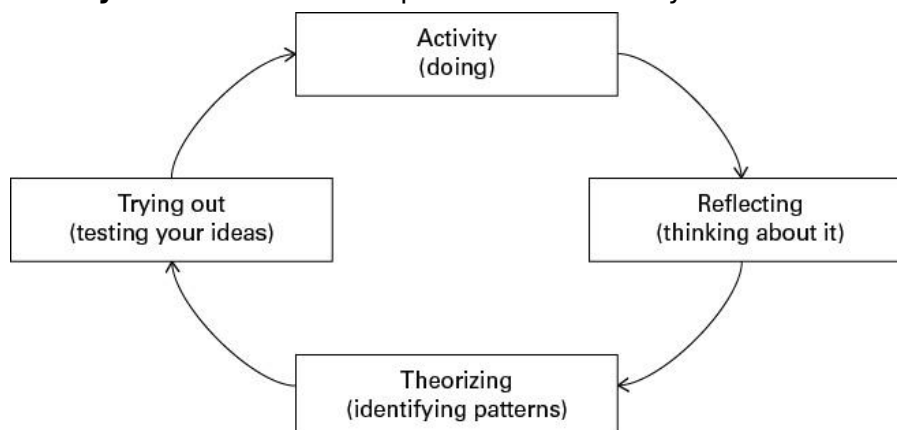
This section looks at the relationship between delivering change and acquiring knowledge, skills and attitudes to implement the change.



- **Competence and learning** - (section 2.3.1 in the study guide) addresses the learning cycle people experience during change the effect this learning dip can have on the embedding of change.



- **Learning preferences** - (section 2.3.2 in the study guide) addresses **Kolb's learning theory** and **Honey and Mumford's** adaption of Kolbs theory



Scenario activity:

Consider the learning that will be required for Green Compass staff:

- What type of learning can the Change Programme provide to address all learning styles to aid learning?

People and change foundation style questions

1. Which learning style is demonstrated when a person prefers to read background information on the reason for the change and details of the project that led to the change being implemented?
 - a. Theorist
 - b. Activist
 - c. Pragmatist
 - d. Reflector
2. Which statement best describes when we have learnt to deliberately do something in a new way?
 - a. Conscious incompetence
 - b. Conscious competence
 - c. Unconscious competence
 - d. Unconscious incompetence
3. Which personality preference likes to work in a systematic methodical way?
 - a. Sensing
 - b. Feeling
 - c. Judging
 - d. Introvert
4. Which part of the change curve is someone likely to be on if they are heard to be saying "It's not fair"?
 - a. Shock and denial
 - b. Anger and blame
 - c. Bargaining and Self-Blame
 - d. Depression and confusion
5. Which of the following actions would be suitable for Bridges Neutral zone?
 - a. Letting people know what will not change
 - b. Identifying the reasons why the current situation cannot continue
 - c. Providing temporary systems and processes to follow
 - d. Celebrating key milestones on the change journey

6. Which of the following is **NOT** one of Pink's three key motivators?
- a. Autonomy
 - b. Mastery
 - c. Value
 - d. Purpose
7. David Rock made two observations about neuroscience research that is relevant to helping people learn and embrace change, which of these recommendations would create lasting change in behaviour and attitudes?
- a. Providing fair access to all information
 - b. Using experiential learning to support change
 - c. Offering the options of periodic reunions with past colleagues
 - d. Encouraging people to learn for themselves
8. Which of the following activities would support Autonomy in Rock's SCARF model and create a sense of control for individuals?
- a. Setting up a working group to work through ideas and issues
 - b. Breaking the change into small steps
 - c. Keeping teams intact
 - d. Thanking people

People and change foundation style question answers

Question	Answer
1	A - Theorist
2	B - Conscious competence
3	C - Judging
4	B - Anger and blame
5	C - Providing temporary systems and processes to follow
6	C - Value
7	B – Using experiential learning to support change
8	A – Setting up a working group to work through ideas and issues

Change Leadership and Teams

Key roles in the change process

This section looks at the roles you will need to have in place to deliver successful change.



- **Key roles** - (section 3.1.1 and table 3.1 in the study guide) describe the key roles and responsibilities for change.
- **The Change Sponsor** – (section 3.1.2 in the study guide) addresses the specific responsibilities of the Sponsor role during change
- **The Change Agent** – (section 3.1.3 in the study guide) addresses the specific responsibilities of the Change Agent.
- **Role of Local Leadership** – (section 3.1.4 in the study guide) addresses the responsibilities of Local Leadership in the change



Consider your own experiences of change

- What roles do you see in place for your changes?
- Do their responsibilities align with those described here?
- What do you feel is missing if anything?

Leadership and psychological safety

Leaders of change need to create an environment of psychological safety. Psychological safety is **the belief that one can take interpersonal risks without negative consequences**. It is a feeling of trust and confidence that allows team members to be vulnerable, share their ideas, and ask for help.



- **Rogers Psychological climate for change** - (section 3.1.5 in the study guide) defines three core conditions for helping people through personal growth and change.
- **Amy Edmondson, Creating psychological safety (voice)** – describes situations that people may feel afraid in and provided a questionnaire to determine the psychological safety of the team members.
- **Carolyn Taylor, how Leadership can shape organisational culture** – (section 3.1.6 in the study guide) describes three mechanisms through which messages are communicated.



Scenario activity:

Consider the Leadership team at Green Compass Consulting:

- What could the leadership team do to ensure psychological safety of staff during the change?
- According to Carolyn Taylor, how could the leadership team communicate with staff to support the change?

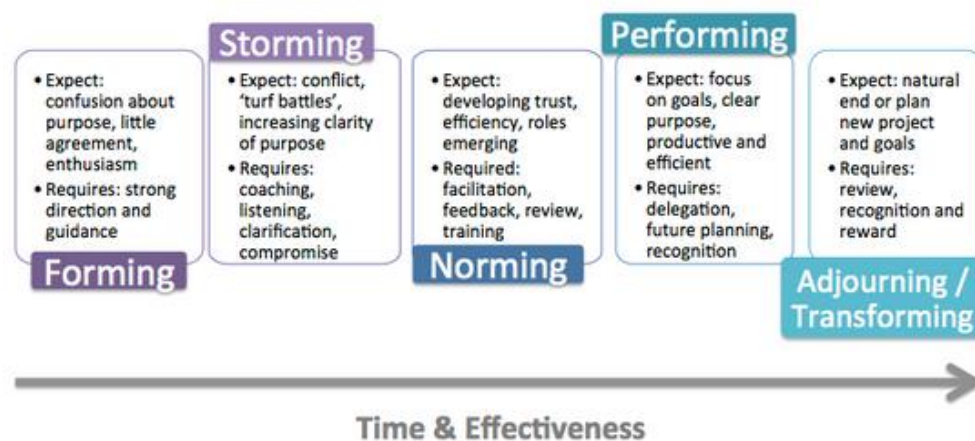
Teams and change

This section addresses the different types of teams you will find in an organisation and how these will contribute to successful change.



- **Team structures and change** - (section 3.2.1 in the study guide) describes the types of teams you are likely to find and their involvement in change.
- **Change agent networks** – this section addresses why Change Agents are essential and things you should consider when creating the network.
- **Tuckman's team development model** – (section 3.2.2 in the study guide)

Tuckman's Stages of group formation



- **Patrick Lencioni, Assessing and growing team effectiveness** – (section 3.2.3 in the study guide) describes five dysfunctional characteristics of an ineffective team.
- **McCauley, harvesting team diversity** – (section 3.2.4 in the study guide) describes the advantages and disadvantages of diverse and similar teams.



Consider your own experiences of change

- Do you have Change Agent networks? How are they structured?
- What are your experiences of a team moving through Tuckman's model?
- What challenges did you experience?
- Have you been part of a team that have a great deal of similarity or diversity? What were the challenges and the positives?

Change leadership and teams foundation style questions

1. Patrick Lencioni describes the five dysfunctions characterising ineffective teams. Which behaviour best describes commitment and follow through?
 - a. Absence of trust
 - b. Lack of commitment to decisions
 - c. Fear of conflict
 - d. Avoid holding one another accountable
2. Which statement best describes the role of a change agent?
 - a. The people who must change
 - b. Data gatherer, educators, advisor, meeting facilitator and coach
 - c. Creates an environment to inspire and support new approaches
 - d. Listen, enquire, clarify concerns with sponsor and line leaders
3. Which of the following is **NOT** one of Carolyn Taylor's three mechanisms through which messages are communicated as a means to supporting changes of culture?
 - a. Behaviours
 - b. Symbols
 - c. Systems
 - d. Environment
4. Which behaviour best describes Tuckman's Norming stage?
 - a. Trust in colleagues is high
 - b. Emotions may dominate over objectives, there is no appetite for compromise
 - c. There is a clear sense of mission
 - d. High dependence on the change manager for guidance and direction
5. Which action by a leader helps create psychological safety in teams according to Amy Edmonson?
 - a. Anonymous polls
 - b. Reframing failures as learning opportunities
 - c. Explaining the reasons for the change
 - d. Encouraging team members to "get involved"

6. Which of the following is NOT a consideration when planning the size of your change agent network?
- a. The geographical spread of stakeholders
 - b. The impact of the change on everyday work
 - c. The level of skill and knowledge of the change agent
 - d. The organisations previous experience with change of this nature
7. Complete this statement “Diverse teams with a high level of psychological safety enjoyed _____ than teams of ‘similars’ with equivalent psychological safety”
- a. Higher well-being
 - b. Moderate well-being
 - c. Low well-being
 - d. Little well-being
8. Hiatt and Creasy suggested that people need to hear about change from which two distinct sources?
- a. The CEO and their peers
 - b. Their Manager and their peers
 - c. The Change Agent and their Manger
 - d. The CEO and their Manager

Change leadership and teams foundation style question answers

Question	Answer
1	B – Lack of commitment to decisions
2	B – Data gatherer, educator, advisor, meeting facilitator and coach
3	D - Environment
4	B - There is a clear sense of mission
5	B – Reframing failures as learning opportunities
6	C – The level of skill and knowledge of the change agent
7	A – Higher well-being
8	D – The CEO and their Manager

Stakeholder Engagement and Communication

Stakeholder Definition and Identification

This section looks at identifying and categorizing stakeholders, analysing and defining how to engage with stakeholders.



- **Stakeholder definition and identification** - (section 4.1.1 in the study guide) describes who stakeholders are and how to identify them.



Scenario activity:

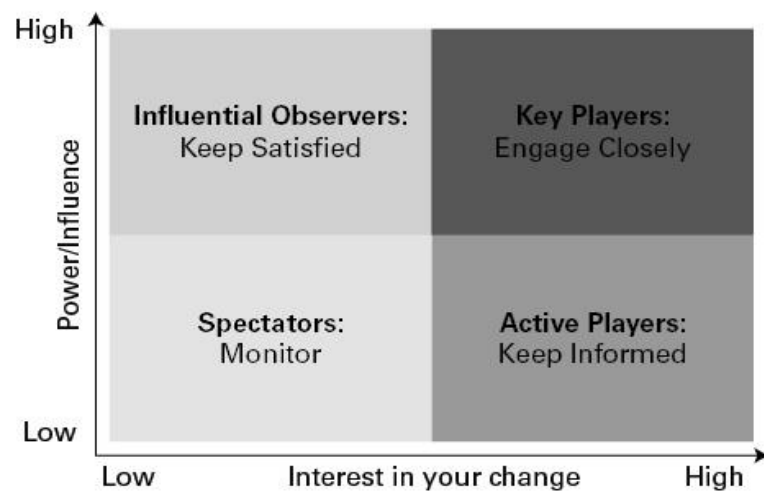
Create a list of potential Stakeholders for the Green Compass Consulting change scenario:

- Who will be positively impacted?
- Who will be negatively impacted?



- **Stakeholder analysis** - (section 4.1.2 in the study guide) describes ways in which to segment stakeholders and establish their interests.
- **Stakeholder mapping and power sources** – (section 4.1.3 in the study guide) describes positional and personal sources of power and stakeholder mapping.

Mapping in two dimensions



Scenario activity:

Consider the list of stakeholders you previously identified for Green Compass Consulting. Based on this early stage of the change, where would you place them in the two-dimensional grid above?

Building engagement

This section looks at how you can engage with stakeholders in the right way, at the right time and with the right amount of information.



- **Barriers to engagement** - (section 4.1.4 and table 4.1 in the study guide) describes potential barriers to engagement.
- **Principles for building engagement** – addressing how you can build and maintain engagement throughout the change.



Scenario activity:

Looking at your list of stakeholders, select one from each quadrant of the interest and influence grid and think about ways you would engage them during the change, noting how this may change from the early stages, during the change and towards the end of the change.

Planning Stakeholder Engagement

This section addresses approaches and tools that you can use to effectively engage with stakeholders.



- **Smythe, setting outcomes for engagement** - (section 4.1.5 and figure 4.3 in the study guide) suggest a journey stakeholders experience during change and how the change effort can respond and adapt communications accordingly.
- **Know-feel-do** – sets out a simple structure to think about outcomes for stakeholder engagement.
- **Stakeholder engagement strategy** – describes the typical contents of a stakeholder engagement strategy.



Consider your own experiences of change

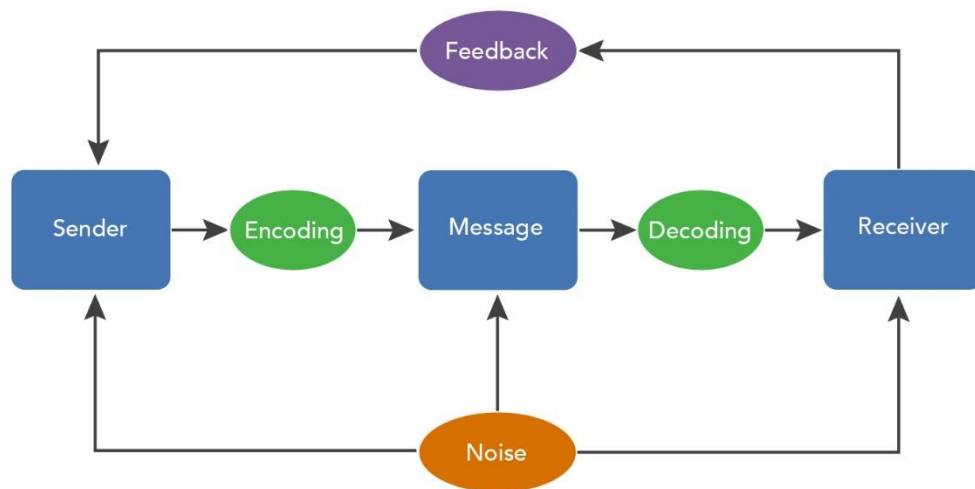
- Which of these stakeholder identification or analysis tools have you used before?
- How effective are they?
- What would you do differently to effectively engage with your stakeholders in the future?

Communication

This section looks at the approach to communicating so that the right level of interaction takes place, with the right people, at the right time, in the right way.



- **Communication theory** - (section 4.2.1 in the study guide) describes the communication process.



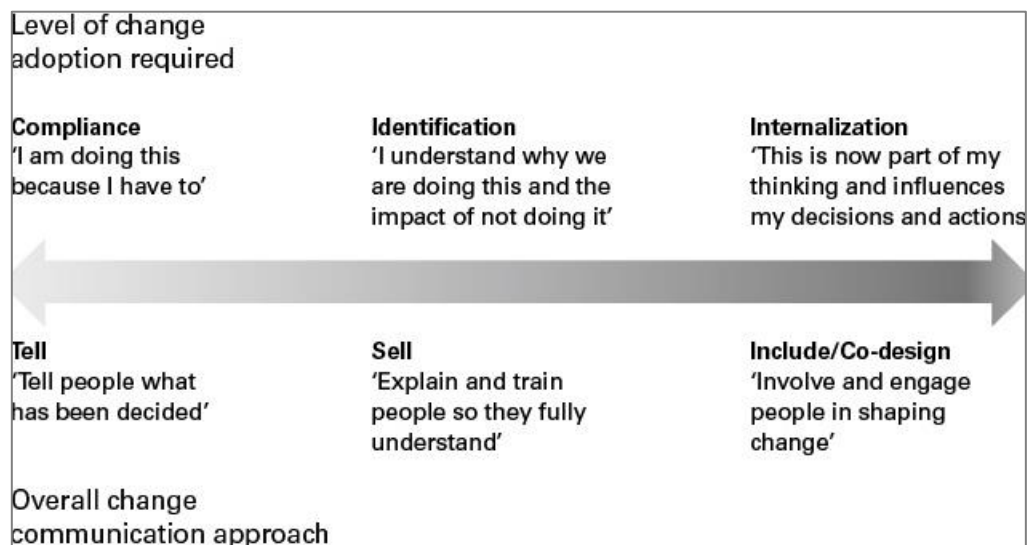
- **Barriers to Communication** - (section 4.2.2 in the study guide) describes the typical barriers to communication and how to overcome them.
- **Cognitive biases** – describes the filters people use when receiving communication.



Scenario activity:

What barriers or biases do you think you might experience in the Green Compass scenario and how would you tackle these?

- **Messaging to communicate change** – (section 4.2.3 and figure 4.5 in the study guide) sets out approaches that can be used to communicate the change and how to apply the Tell, Sell, Include approach and when these would be used.



- **Developing key messages** – (section 4.2.3 and table 4.5 in the study guide) provides you with a structure to put together key messages for stakeholders.



Consider your own experiences of change

- How have messages been communicated during the change?
- Can you identify occasions where “Tell, Sell and Include” have been used?
- How might you approach your communications differently in the future?

Appealing to hearts and minds

In order to successfully win over stakeholders and gain their commitment to the change, you will need to appeal to them on an emotional level. This section looks at techniques you can use to achieve this.



- **Symbolic actions and symbolism** - (section 4.2.4 in the study guide) describes how actions taken during the change can have a symbolic effect on stakeholders.
- **Use of metaphors** – identifies effective ways in which the change can be described so that it appeals to stakeholders.
- **Use of narrative and story** – explains how stories can contribute to successful engagement and commitment from stakeholders.
- **Relevance and timeliness, emotional impact of change, time and simplicity** – all explain approaches that can be used to successfully engage with stakeholders.



Consider your own experiences of change

- Have you seen any of these influencing approaches being used before?
- Were they effective?
- If they were not, what could be done differently to make them effective?

Ways of communication

This section looks at the multiple channels of communication available and which are more effective.



- **Non-verbal, listening, visual, verbal and tone** - (section 4.2.5 in the study guide) describes pros and cons of different approaches to communication.
- **Language style preferences (VARK)** – (section 4.2.5 and table 4.6 in the study guide) describes the different preferences we have for receiving and processing information.
- **Communications channels** – (section 4.2.6 in the study guide) examines one-way vs two-way communication and lean and rich communication.
- **Communications planning** – (section 4.2.7 in the study guide) explains the recommended contents of a communications plan.



Scenario activity:

Consider a couple of the stakeholders from the Green Compass scenario.

- How and when and in what way would you communicate with them?

Stakeholder Engagement and Communication

foundation style questions

1. Which of the following are you NOT likely to find in a Stakeholder Engagement strategy?
 - a. How analysis of stakeholder's influence and interest in change will be done
 - b. The effectiveness of stakeholder engagement activities
 - c. How information used to communicate with stakeholders will be kept confidential
 - d. How stakeholders will be identified and segmented
2. Which of the following statement describes a coercive power source?
 - a. Power derived from a person's role in the hierarchy
 - b. The belief that punishment can be dealt for non-compliance
 - c. Power that enables compensation for compliance
 - d. Power provided by specialist skills
3. VARK language style preferences describes Kinaesthetic preferences as "This term relates to _____ and _____ things"?
 - a. Seeing and reading
 - b. Listening and experiencing
 - c. Doing and reflecting on
 - d. Doing and experiencing
4. Which of the following describes a statement you would find in the communication plan under the heading of stakeholder analysis and engagement?
 - a. We expect a significant level of resistance from this group
 - b. The sponsor will deliver messages to this group of stakeholders
 - c. Workshops will be used to gather ideas for implementation
 - d. Surveys will be used to assess effectiveness of information

5. Which of the following describes the “Sell” approach for effective communication?
1. Head Office has instructed us to move over to a new system
 2. Workshops will be arranged to capture your ideas for functionality required from the system
 3. The new system will enable faster more accurate processing
 4. All staff will receive training to use the new system
- a. 1 and 3
 - b. 2 and 4
 - c. 1 and 4
 - d. 3 and 4
6. Which bias is the following statement demonstrating? “Why do we have to change everything? There are many systems that are still effective”
- a. Confirmation Bias
 - b. Status Quo Bias
 - c. Availability Bias
 - d. Loss Aversion
7. Which of the following factors are considered when determining if communication is lean or rich?
- a. How much activity is involved
 - b. The method of communication
 - c. Who is sending it
 - d. The use of multiple cues
8. Which barrier to engagement does this statement represent?
“I have so much work to do on multiple changes, I’m not sure what I should be focussing on first”
- a. Role overload
 - b. Work-role conflicts
 - c. Resource inadequacies
 - d. Job security

Stakeholder engagement and communication foundation style question answers

Question	Answer
1	C - How information used to communicate with stakeholders will be kept confidential
2	B - The belief that punishment can be dealt for non-compliance
3	D – Doing and experiencing
4	A - We expect a significant level of resistance from this group
5	D – 3 and 4
6	B - Status Quo Bias
7	D - Multiple cues
8	B – Work-role conflicts

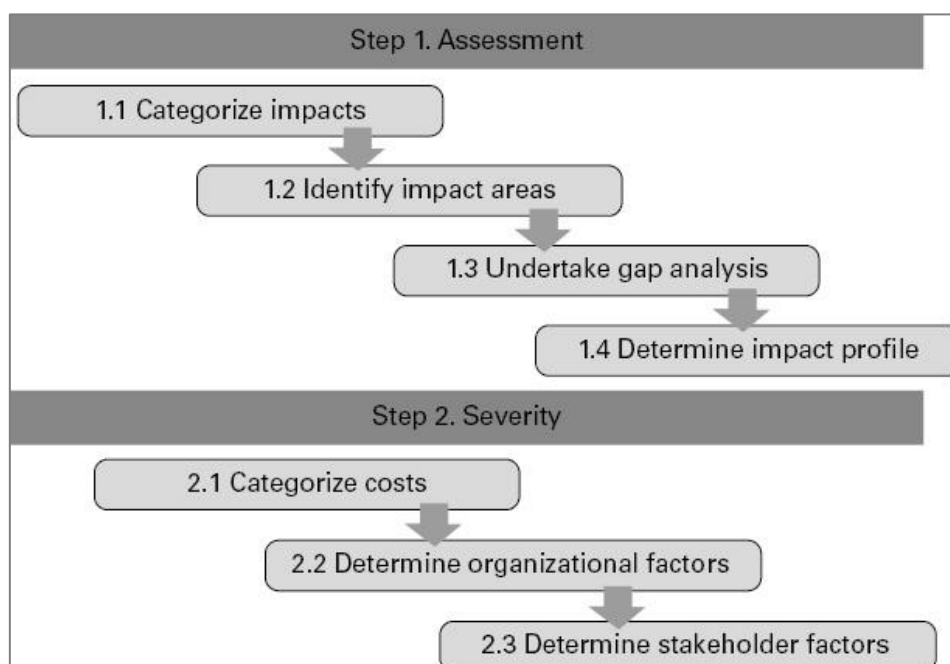
Work of the Change Manager

Assessing Change Impacts and Severity

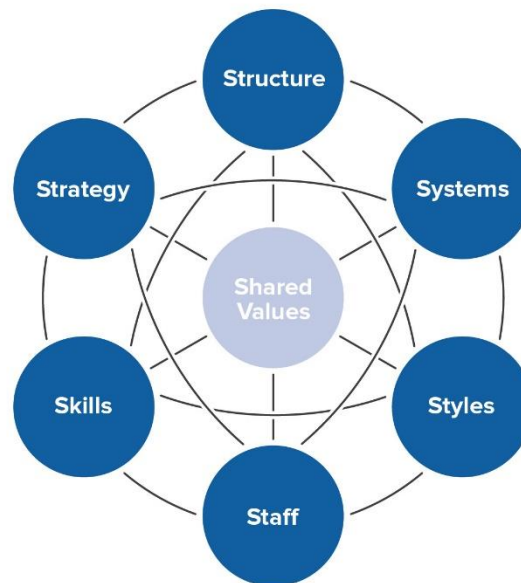
Before diving head first into delivering the change, the Change Manager must understand the impact of the change from a number of different perspectives.



- **Assessing the impact is a two step process** - (section 5.1 in the study guide) demonstrates the two steps of assessment and severity.



- **Assessment of change impacts (step 1)** - (section 5.1.1 in the study guide) looks at first categorizing the impact, identifying impact areas, undertaking a gap analysis and determining impact profiles. (McKinsey 7S Model)



- **Change Impact Severity (step 2)** - (section 5.1.2 in the study guide) looks at categorizing the costs, determining organisational factors and determining stakeholder factors.



Consider your own experiences of change

For a change in your organisation:

- What work has been undertaken to understand the full organisational impact of the change?
- How has that analysis helped to shape the approach to change delivery?

Resistance to change

Examines why resistance happens and strategies you can use to manage resistance effectively.



- **Underlying causes of resistance** - (section 5.2.1 in the study guide) looks at how resistance can be helpful, the brain science of resistance, the reasons for resistance and building a strategy for resistance.



Consider your own experiences of change

Consider a change which experienced resistance:

- What was the cause of the resistance?
- How was it resolved?
- If it was not resolved, what could have been done to resolve it?

Change Analytics

This section looks at how the effectiveness of change can be measured and the process of using metrics to validate this.



- **Measurement types** - (section 5.3.1 in the study guide) looks at factors to consider when defining a change delivery scorecard.
- **Building a change analytics strategy** – (section 5.3.2 in the study guide) looks at Evaluation methods, applying measures appropriately, how to collect data and the limitations of data analytics.



Consider your own experiences of change

- How does your organisation measure the success of change?
- Where could you improve on provide measures for success?

Work of the change manager foundation style questions

1. Which of the following is **NOT** part of the change impact assessment?
 - a. Identify impact areas
 - b. Categorize costs
 - c. Stakeholder analysis
 - d. Determine stakeholder factors
2. Which statement best describes McKinsey's "Systems" from his 7S model?
 - a. The leaders adopt a democratic approach to leadership
 - b. The organization has a hierarchical structure
 - c. There are defined working practices and procedures in place
 - d. All staff attend induction training and skills are assessed 6 monthly
3. When determining organisational factors for impact severity, which of the following is **NOT** one of the considerations?
 - a. The individual responses to change
 - b. The history of change in the organisation
 - c. The culture of the organisation
 - d. The change ability of the organisation
4. Which of the following responses would be an appropriate way to deal with resistance when stakeholders feel that there are too many differences at once?
 - a. Don't plan changes in secret – keep people informed
 - b. Avoid changes for change's sake
 - c. Reward and recognise participants
 - d. Consider gestures to heal the past before focussing on the future
5. When measuring change, using interviews and questionnaires is a _____ evaluation measure?
 - a. Qualitative
 - b. Quantitative
 - c. Leading
 - d. Lagging

6. When categorizing impact, which of the following describes an unintended change?
- a. Delivery of a new system
 - b. Providing a change management course for the Change Team
 - c. Expected disruption to operations while implementing the new system
 - d. Data breach following the implementation of the new system
7. When determining the stakeholder severity, which of the following areas are NOT considered?
- a. Coverage of impact
 - b. Nature of impact
 - c. Complexity of impact
 - d. Overall impact
8. Shaun Oreg identified four key neural factors that influence resistance, which of the following is an example of cognitive rigidity?
- a. Feeling stressed when learning new behaviours or skills
 - b. Focussing just on the upheaval of the change and not the long-term benefits
 - c. Feeling that I'm too old to learn something new and will likely be bad at it
 - d. Feeling forced into a change

Work of the change manager foundation style question answers

Question	Answer
1	C – Stakeholder analysis
2	B - There are defined working practices and procedures in place
3	C - The culture of the organisation
4	B – avoid changes for change’s sake
5	A - Qualitative
6	D - Data breach following the implementation of the new system
7	B - Nature of impact
8	C - Feeling that I’m too old to learn something new and will likely be bad at it

Developing Professional Change Practice (Practitioner only)

Building momentum and sustaining change

Getting change to stick is one of the most challenging parts of implementing change. This chapter looks at ways change can be adopted and sustained successfully.



- **Sustaining change** - (section 6.1.1 in the study guide) addresses understanding change readiness, influencing adoption and using levers and leverage to encourage better adoption.
- **Change momentum and tipping point** – (section 6.1.2 and table 6.1 in the study guide) describe considerations for building momentum and critical mass, roles in achieving critical mass and locating the tipping point.



Consider your own experiences of change

- What actions are you seeing to sustain change in your organisation?
- How effective are these actions?
- Do you identify the tipping point for your change?
- If not, why not and how could it be useful?

Competence and learning for change

Change managers need to focus on promoting learning across the organisation and work with L&D to ensure capability is being addressed.



- **Effective Instruction** - (section 6.2.1 in the study guide) looks at a number of different ways instruction can be effective, including: Using the senses, the nine events of instruction and adapting methods to learner preferences.
- **Learning needs and objectives** – (section 6.2.2 in the study guide) addresses what you will need to ensure capability exists including: KSA Charts, defining what is to be learned, Learning objectives and evaluating learning.



Scenario activity:

Using the Green Compass scenario.

- Write up a couple of learning objectives for the office staff which will be using the new digital systems which are replacing paper-based systems.

Coaching to support change

Coaching has become an important skill set to enable change professionals to facilitate and build capability and new ways of working.



- **Active listening** - (section 6.3.1 and table 6.2 in the study guide) explains the importance of active listening in coaching and key behaviours for active listening.
- **Developmental feedback** – (section 6.3.2 in the study guide) provides guidance on providing feedback on development.
- **Framework for coaching** – (section 6.3.3 and table 6.4 in the study guide) refers to the GROW model for effective coaching.



Consider your own experiences of change

- Consider a time when you have been coached – what made it successful/unsuccessful?
- Consider a time when you have provided coaching to someone, what were the outcomes? Could the coaching session have been improved? If so how?

As this section will be examined by the practitioner paper, no sample foundation style questions have been provided.