



MAKING
VISION
REALITY
LTD

CHANGE AGENT TOOLKIT

Craig Williams



Overview of Change Facilitator's Toolkit

Background to the Toolkit

This toolkit arose out of work for a government department. We were asked to develop a “master class” on Building Capacity on the subject of change agency. In developing this workshop, we quickly realised that the change agents would require a toolkit of resources to assist in the process of identifying changes and ensuring a solid action plan is achieved.

The Change Agent's Toolkit was born.

Why a toolkit?

“The people with power at the top of the corporation have got used to pushing and threatening. People like you and me are on the receiving end. We learn to live with it, to adapt, to make a limited and calculated extension of commitment”

Tony Page, “The Diary of a Change Agent”

I am Craig Williams, I am now in my mid-fifties (where did the time go) and I have spent my career making change happen. I have been at the end of seniors wishing change to take place and having to find ways to implement their desires. In that time I have learned a great deal and found that my energy, drive and enthusiasm are not enough. I found others using tools or came across tools that have made the task easier. Therefore, I gathered up these methods and used them.

This collection is a compendium of methods that I often use in my work as a management consultant, I know these tools work. They may take practice, just as any tool takes to gain maximum effectiveness.

It is my wish that others use these tools and find that they help make the task of change easier. Many will be familiar, others will be brand new. I have found that often tried and tested methods work for one group and with others, you need something completely different.



The Toolkit

The tools are designed to be used both by a change agent in preparing and during change and in facilitated sessions. In the kit are four types of tools:

Diverging Tools	Diverging tools are useful at the start of a change initiative or facilitated session. They are designed to begin the process of closing the current state and introduce a future state.	Goal/ Reality
Opening/ Idea Creation Tools	In the early stages of a change, the future is not clear. These tools are designed to introduce new ideas and creativity.	Goals/ Options
Focusing Tools	As the term suggests, these tools are designed to reduce down the ideas generated in the previous phase and focus on the agreed way forward.	Options
Closing Tools		Way Forward

The four types correspond to the Coaching Model of GROW for:

- Goals
- Reality
- Options
- Way forward

Facilitators Tool Matrix

	Tool	E/F	Vision	Customer/ Stakeholder Requirements	Current Reality	Opportunities	Do It
Diverging Tools	Intervention Brief	E/F			X	X	
	Myths and Facts about...[Change]	E			X	X	
	Four Dimensions of Leading Change	E	X	X	X	X	X
	Powerlines Analysis	E			X		
	Partnership Assessment Questionnaire	E/F			X	X	
	Partnership Development Checklist	E/F	X	X	X		
	The Change Equation	E/F	X	X	X		
	Level of Commitment	E/F			X	X	X
	Types of Change	E/F	X				
	Facilitated Workshop Checklist						
Opening/ Idea Creation Tools	Setting Expectations/Ground Rules	E		X			
	Broken Squares Exercise	E		X	X		
	Brainstorming	E	X	X	X	X	
	Dividing Squares	E					
	Johari's Window	E					
	Film Storyboard	E	X	X	X	X	X
	Front Page News Exercise	E	X	X	X	X	
	PESTEL Analysis tool	E/F		X	X	X	X
	SWOT Analysis	E/F		X	X	X	X
	Nine Dots Icebreaker	E		X	X	X	X
	Random Words Activity	E	X	X	X	X	X
	Symbols Exercise	E	X		X	X	
	Toilet Bowl of Change	E	X		X	X	
Vision Checklist	E	X	X	X	X		

Change Agent's Toolkit

Focusing Tools	Car Park List	F				X	X
	Jacobs Ladder	E/F	X	X		X	X
	Change Card Sort Tool	F					X
	Change Success Predictor	F			X	X	X
	Decision Matrix	F				X	X
	Forcefield Analysis	F			X	X	X
	Stop, Start, Continue	E/F		X	X	X	X
	Fishbone Analysis	F		X	X	X	X
	Impact Analysis	F		X	X	X	X
Closing Tools	Partnership Development Checklist	F				X	X
	Action Planning Tool	F					X
Other Tools	Communications Plan	F					X
	Change Facilitator's Skills Assessment						
	Personality Types	E/F			X	X	
	McKinsey's 7S Framework	E/F	X	X	X	X	X
	Six Thinking Hats	E/F	X	X	X	X	X

Each tool can either **E**xpand or **F**ocus or both. Tools marked E will help open up discussions, whilst those marked F are designed to focus the ideas down into action.



Diverging Tools

Assignment Brief checklist

Introduction

This tool helps to clarify the assignment and ensure an understanding at each stage of expectations. It allows the consultant to assess their strategy and refine the tactical approach they wish to adopt. The appropriateness of the strategy is subject to the answers to the following questions:

Pre-Assignment (before meeting client)

Who is/are the client(s)?

What are the important elements that may be impacted by the assignment?

Who is the primary contact?		Telephone:	
Email			

What are they like as a person?

How was the Change Agent invited to work with the client?

What are the consultant's ideas or theories about the client and their needs at present?
--

What could go wrong with the assignment?
--

Are there any problems or feedback that may be relevant about the client and their needs?

Initial Contact Meeting with Client

What are the objectives of the intervention, and how will the results be measured?

How clear are the various elements of the Client as what the real issues/problems they are attempting to solve?

What are the important moving and restraining forces in the Client that impact the objectives

Are there recognised “champions for change” within the Client?

What is being asked for/accomplished? What is the requested timescale? What is the likely timescale?

What issues/concerns does the client voice both about their needs and the possible assignment?

How do they feel about the Change Agent facilitating this work?

How ready are the client and others for the change?

Myths and Facts about... [Change]

Activity

This simple tool is designed to be used when rumours are rife and leaders wish to spell out what is true and what is not.

Procedure

1. On a flipchart draw a table with two columns one headed up MYTH and the other FACT,
2. Ask the group what they wish to know and what they have heard.
3. Write the participants comments in the relevant column – determining what is Fact from Myth.

Example: Myths and Facts about Change

Myth	Fact
You can control the rate and elements of change	<ul style="list-style-type: none"> • We cannot predict the future or control it. • We can learn to adapt and be flexible • Change is the very essence of life
You manage change	<ul style="list-style-type: none"> • You manage attitude • You manage emotion • You manage activity • You manage your perceptions • You manage focus • You manage communications • You manage the way people learn
People are part of the problem with change	<ul style="list-style-type: none"> • Only if you make them

Four Dimensions of Leading Change

Activity

Use to help senior leaders understand their pivotal role they play in change. Effective leadership is key to delivering change.

Procedure

1. Model below can be used as a checklist or as an aide in discussing any change initiative.
2. Ensure that any plan includes these as key milestones
3. Incorporate the organisation’s own view of this model in any change management project charter.

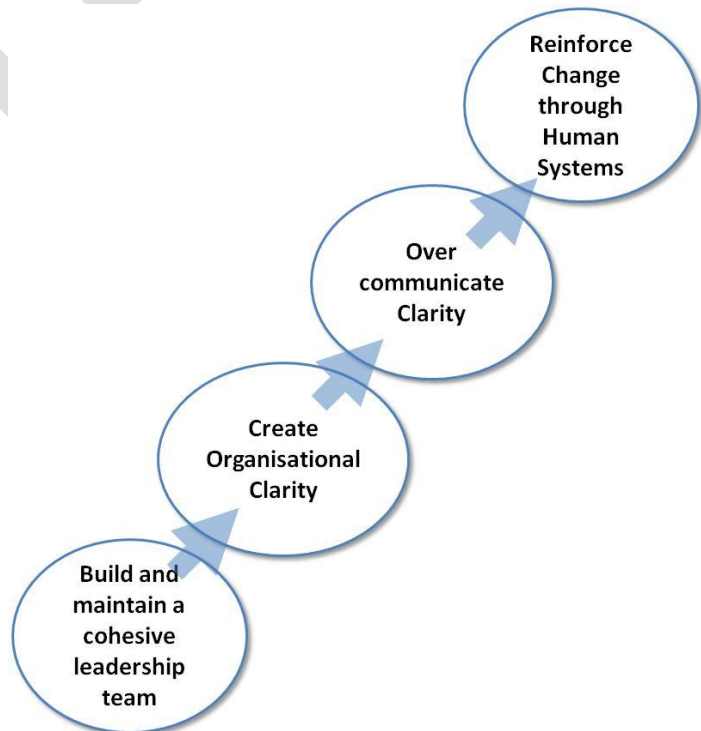
Inspire	Mobilise	Enable	Navigate
<ul style="list-style-type: none"> • Develop vision • Be role models to new behaviours expected – must act as a coherent team • Coach and sponsor the change 	<ul style="list-style-type: none"> • Ensure vision is shared through the organisation • Listen and respond to stakeholders – staff, customers and suppliers – • Ensure feedback from key stakeholders • Active communication and engagement with key stakeholders 	<ul style="list-style-type: none"> • Focus on ensuring adequate skills and resources to make change • Invest in infrastructure projects • Decide and delegate 	<ul style="list-style-type: none"> • Set direction and prioritise the changes and activities • Coordinate across the organisation • Set targets and review progress

4. Create clarity around the change and how it fits with what the organisation is all about. Here are some questions that help achieve this....

Clarify the following:

- Why the organisation exists
- Which behavioural values are fundamental
- What specific business is it in
- Who is it competing with
- How is the organisation unique
- What are the change plans to enhance these aspects
- Who is responsible for what

Source: Patrick Lencioni, The Four Obsessions



Being a Change Agent

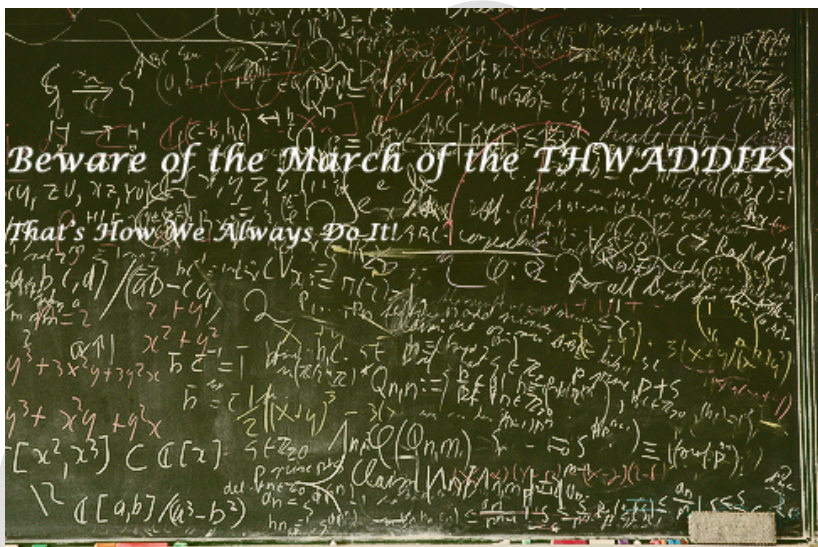
I hope that you find the toolkit of use. There are some simple messages I would like to conclude with:

Key Messages:

- 70% of change initiatives fail because of poor change management (UK Institute Of Directors study conducted in 2001)

The 12 Excuses for why change fails and building a plan to overcome

- Misunderstanding of what change is - Change seen as a fixed destination and not a journey
- Lack of planning and preparation – no clear end, no roadmap to get there
- Change programme has no clear vision - Where and how are we going to get there?
- Goals are set, but too far in the future - The 7-year plan syndrome, no short-term wins built into the programme
- The quick-fix option - Change is more than a poster. So it must be more than quick wins
- The legacy of previous change - Lack of spirit and energy for the journey
- “The how we always do it – it’s the way we do things around here” - Old habits die hard
- Fear of failure - Will I be blamed? Will people leave?
- Employee resistance - From Commitment to Condemnation
- Disregarding the domino effect - No reward for new culture and changes
- Ill-prepared employees - No training to overcome the hurdles
- Poor communication - Grapevine management - too little, too late



Remember - Beware of the THWADDIES – that’s how we always do it.

Source: Audit Commission report into why change fails in public sector organisations.

Getting it Right

Using the Coaching model of GROW (Goals, Reality, Options, Way Forward), to get the change right here are the essential questions to ask yourself:

The fundamentals of change agency require constant vigilance on some key factors:

Be Outcomes Focus – change wants evidence of results

- What is that you are trying to achieve – how will this benefit the organisation?
- What would success look like when you have achieved the change?
- What are the key things that have to be done to achieve this success?
- Focus on the senior team – they need to actively lead the change and be visible; are they?

Perception of the Change

Ok, now you have answered these questions, honestly ask yourself:

- How is the change perceived in the organisation?
- What are the levels of commitment like categorised by Leaders, Middle Managers and Front-line?
- How can you move these groups to being motivated to make the change?

Change Agent Toolkit

- What work streams may be needed to achieve the envisaged outcomes/success measures?
- Use the McKinsey 7S Framework to think through the areas requiring activity.

It's about change – often of values and behaviours

- Remember the shared values element of the 7S Framework. What values, behaviours, and/or ways of working are critical to the change?
- How is the top team modelling these?
- What needs to be done to get these understood and part of the DNA of the organisation?
- What changes do you need to model to symbolise what needs to be done differently?

Don't throw the baby out....

- What exists that supports the change the organisation is seeking?
- What evidence do you have good practices in the organisation
- Can it be used as a platform?
- How will the story be captured to ensure the knowledge gained through the change is not lost?

Prepare, prepare....

- How are you going to organise the change?
- How are you going to prepare those impacted by the change?
- What is the human plan and how well does it support the tactical plan?
- Communication is the essential an ingredient/tool for making changes happen.

The best laid schemes o' mice an' men

Gang aft agley (from "To a Mouse" by Robbie Burns)

- Are there competing plans/changes taking place in an organisation?
- How is this to be resolved?
- How are you going to measure progress?
- What structures will be in place – (Programme Board, Programme Team, etc.)

Acknowledgements

I would like to thank all my clients, who have put up with my maverick ways and who have often been guinea pigs to my trying out new tools and methods. I know from their feedback that I have been largely successful over the years.

This is not a fully comprehensive set of tools. There must be hundreds more. If anyone has any that they would like to see in a future version of the toolkit, then please email me.

The final thank you is to you, the reader. I hope you get a great deal of use out of the tools. I am more than happy to help you, if there is something you don't understand or would like to use a tool and would like a little guidance. Again, contact me.

If I have used a tool that someone has a copyright on, then I am sorry and intend no harm. My intention is to help make positive changes take place in any organisation. Let me know and I will attribute any work you believe is yours.

Good luck with making change happen....

Contact Details

Craig Williams, craig@makingvisionreality.co.uk

Web: www.makingvisionreality.co.uk

Sample