Purpose

To increase your ability to lead transformation successfully by:

• Learning how to consciously set up your changes for success through addressing the people and process dynamics of transformation
• Developing an understanding of the CLR process model and how to apply it to further your change project
• Understanding the power of enterprise-level change leadership and its strategic disciplines
• Developing your mindset and skills as a change consultant and leader

Agenda
Day One

• Introduction
• Foundations for Successful Change Leadership
  • Critical Focus Areas: Content, People, and Process
  • Three Types of Change
  • The Conscious Change Leader Accountability Model
• The Change Leader’s Roadmap Methodology
• Enterprise Level Strategic Disciplines for Change
• Influence of Mindset on the Success of Change
• Developing Yourself as a Powerful Agent of Change
• Closing
The Value of Conscious Change Leadership

A - Core business activities
B - Techniques and strategies to improve "A" work
C - Techniques and strategies to improve "B" work; "Improving how we improve the work of the organization: CONSCIOUS CHANGE LEADERSHIP"

FOUNDATIONS FOR SUCCESSFUL CHANGE LEADERSHIP

Critical Focus Areas of Leading Change

Content of Change
The organizational focus of the change (structure, strategy, business process, technology, culture, product, or service)
Critical Focus Areas of Leading Change

People in Change
Handling the human dynamics of change: people's mindsets, commitment to change; emotional reactions, behavior, engagement, relationships, politics; cultural dynamics impacting the change

Critical Focus Areas of Leading Change

Process of Change
The way in which change is planned, designed, and implemented; adjusting to how it unfolds; its A-Z roadmap, governance, integration strategy, and course corrections

Three Types of Change

- Developmental Change
- Transitional Change
- Transformational Change
The Transformational Journey

Current Reality

Vision

Course Correction

Learning

Wake-Up Calls: Feedback telling you to learn and course correct

Worksheet

Determining the Type of Your Change Effort

Developmental, Transitional, or Transformational...which is your primary type of change?

The Conscious Change Leader Accountability Model
The Conscious Change Leader Accountability Model

- Your best strategy for success is awareness of all of the factors that need your attention and must be aligned to produce your results
  - For advance planning
  - While the change is unfolding
  - To ensure sustained results over time

The Conscious Change Leader Accountability Model

The Conscious Change Leader Accountability Model

Four Quadrants

<table>
<thead>
<tr>
<th>Internal</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>ded</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Being First, Inc. • 1242 Oak Dr., DW2 • Durango CO 81301 • (970) 385-5100
© 2010 Being First, Inc. All Rights Reserved.
The Conscious Change Leader Accountability Model

Focus Areas

- Internal
  - Mindset
  - Culture
- External
  - Behavior
  - Systems

The Conscious Change Leader Accountability Model

Five Levels of System

- Individual
- Collective
- Culture
- Systems
- Behavior

The Conscious Change Leader Accountability Model

Design your change process to address all quadrants and all levels
The Change Leader’s Roadmap

Phase II

II. CREATE ORGANIZATIONAL VISION, COMMITMENT, AND CAPABILITY

Activity II.A

Build Organizational Understanding of Case for Change, Vision, and Change Strategy

Activity II.B

Increase Organization’s Capability to Change

Phase III

III. ASSESS THE SITUATION TO DETERMINE DESIGN REQUIREMENTS

Activity III.A

Assess the Situation to Determine Design Requirements

Phase IV

IV. DESIGN THE DESIRED STATE

Activity IV.A

Design Desired State
The Change Leader’s Roadmap

Phase V

Activity V.A
Analyze Impacts of Desired State

V. ANALYZE THE IMPACT


The Change Leader’s Roadmap

Phase VI

Activity VI.A
Develop Implementation Master Plan

Activity VI.B
Prepare Organization to Support Implementation

VI. PLAN AND ORGANIZE FOR IMPLEMENTATION


The Change Leader’s Roadmap

Phase VII

Activity VII.A
Implement the Change

VII. IMPLEMENT THE CHANGE


Being First, Inc. • 1242 Oak Dr., DW2 • Durango CO 81301 • (970) 385-5100
© 2010 Being First, Inc. All Rights Reserved.
Worksheet

Assessing Your Change Process

• What phases or activities are you now in?
• What activities have you done well?
• What activities were overlooked or are incomplete?
• What activities come next?

The Importance of Leading Change Strategically

Competing Initiatives

Shared Vision; No Strategy or Integration

Leadership and Integration Driven by Executive Oversight and Change Disciplines
Change as a Strategic Discipline

- All other key functions in the organization are designed as strategic disciplines
  - Finance
  - HR
  - IT
  - Supply Chain
  - Marketing...

  THE SAME IS NEEDED FOR CHANGE!!!

Approaches to Change as a Strategic Discipline

- Enterprise Change Agenda
- Common Change Process Methodology
- Change Infrastructure and Best Practices
- Strategic Change Center of Excellence
The enterprise change agenda ensures five critical success requirements:

1. Current change efforts are the right ones to execute and fulfill business strategy.
2. Efforts are prioritized, organized, assigned, and optimally paced.
3. Organization has the capacity, stamina, capability, and in-house change resources to succeed in change.

The enterprise change agenda ensures five critical success requirements: (cont’d)

4. Ability to assess and drive required culture change in every major initiative.
5. The best coordination and leverage of all external consultants.

• Follows Strategic Business Planning
• Precedes Operational Planning
• Is revisited throughout the year
• Is set up for each autonomous business unit
• Has one executive in charge of its process and value
Change Infrastructure Elements

- Standard practices: case for change and change strategy
- Governance: roles, charters, decision-making
- Recommended conditions for success and metrics
- Templates for communication and engagement
- Mechanisms to ensure adequate capacity

- Mechanisms for rapid course correction
- Vehicles for multiple project integration ("air traffic control")
- Change leadership competencies: skills, knowledge, behaviors, mindsets
- Roster of best practices and tools
- Electronic information and knowledge management tools

STRATEGIC CHANGE CENTER OF EXCELLENCE
Strategic Change (SC) Center of Excellence

Your organization’s vehicle for:
• Ensuring alignment on how to lead change
• Masterful SC consulting expertise
• Stewarding methodology and best practices
• Access to all change resources
• Supporting mission-critical change efforts
• Continuous professional development

Advancing Strategic Change Disciplines

• Which of the disciplines do you see as most important/needed/of value NOW?
• How can you raise the issue with your executive clients? How would you generate real data to demonstrate the value/need?
• White Paper from Being First for more details…

THE INFLUENCE OF MINDSET ON THE SUCCESS OF CHANGE
Worksheet

Personal Reactions to Change

What are your thoughts and feelings about the change effort you are currently engaged in?

What is Mindset?

- Our worldview; the place or orientation from which we experience our reality and form our perceptions of it
- Fundamental assumptions about reality: core beliefs, values, mental models
- The source of our decisions, actions, and results!

Mindset Demonstration 1

Individual Muscle Test
The Influence of Mindset

Environment: The World We Live In

Interpretation
mindset, fundamental assumptions, beliefs, values

Perception
Internal State
Thoughts
Sensations

Behavior

Results
Action/Performance

Sensations
Awareness
and Change

Leverage Point for Change

“If you continue to think the way you have always thought, you will continue to get what you have always gotten.”

...Marilyn Ferguson

Mindset Demonstration 2

Group Muscle Test
DeveloPING YOURSELF AS A POTENT AGENT OF CHANGE

Your Greatest Strengths

Context: Consulting to/Leading Change

- Knowledge and Skills
- Behavioral patterns
- Mindset/Beliefs/Values/Attitude
- Ways of interacting with others
- Your personal presence
Your Self-Limiting Patterns

- How do you respond when you are outside of your comfort zone?
  
  *(The Good, the Bad, and the Ugly...)*

We respond and live in either an **expanded** state (our strengths and comfort zone) or a **contracted** state (reactive, defensive, etc.)

Self Reflection

### My EXPANDED Ways of Being
- Trusting
- Open
- Curious
- Empowered
- ...
- ...
- ...

### My CONTRACTED Ways of Being
- Afraid
- Doubting/suspicious
- Self-Protective
- Controlling
- ...
- ...
- ...

Self Reflection

### Triggers of My EXPANDED Ways of Being
- Being appreciated
- Being given a new opportunity
- Being asked to be creative
- ...
- ...
- ...
- ...

### Triggers of My CONTRACTED Ways of Being
- Being confronted
- Being blamed
- Fear of failure
- ...
- ...
- ...
- ...

© 2010 Being First, Inc. All Rights Reserved.
Conscious Use of Self

Use contraction/breakdowns/challenges to trigger self-reflection. Notice:

- Your personal reactions
- Your mindset that is generating your reactions
- Your view of the issues/facts
- Your mindset that is causing you to see the issues/facts this way
- Other ways to interpret/see to enable a better outcome

Get to know your expanded self and choose expansion as your way of being!

Thank You!