Charlotte Wilhelm, *Eagle Vision* of America

Presents:

“Managing Change”

*in the Central Cancer Registry*

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WANTED

141 Job Opportunities

LEADERS/CHANGE AGENTS
All levels should apply
Focus On Your Span of Control!
AGENDA

Welcome/Introductions

Objectives
- Understand that Change is a process and develop specific actions to successfully implement change in your organization.
- Understand how Leadership Behavior is key to successfully implementing change in your organization

- Responses to Negative Change
- How to Manage Transitions “Making the Most of Change”
- Identify Barriers to Change
- Actions to overcome Barriers
- New Beginnings: The Picture, Purpose, Plan and Part
- 5 Key Leadership Practices of Exemplary Leaders
- Summary/Wrap Up
Reaction to Negative Change

Based on Elizabeth Kubler-Ross on “Death & Dying”
Identify Change(s)

- Write down the change(s) that you are responsible for successfully implementing:

- Identify who is responsible for implementing the change(s):

- Date for completion:
Three Phases of Transition

Phase 1 - Endings
- Losses
- Letting Go of old ways

Phase 2 - Neutral Zone
- Redefine
- Creativity

Phase 3 - New Beginnings
- Purpose
- Picture
- Plan
- Part

Adapted from Managing Transitions by William Bridges
Transitions – ENDINGS

- Identify who’s losing what
- Accept the reality and importance of the subjective loss
- Don’t be surprised of overreaction
- Acknowledge the losses openly and sympathetically
- Expect and accept the signs of grieving
- Compensate for losses “No pain, no gain”
- Give people as much information throughout the transition
- Define what’s over and what’s isn’t
- Mark the endings
- Treat the past with respect
- Let people take a piece of the old way with them
- Show how endings ensure the continuity of what really matters

Signals of Endings

- People are angry; from grumbling to rage
- People will bargain to avoid change
- Anxiety or fear, silent or expressed
- Disorientation; confusion and forgetfulness

Adapted from Managing Transitions by William
Managing Endings: A Checklist

**YES  NO**

___ ___ Have I studied the change carefully & identified who is likely to lose what? Including myself, what am I likely to lose?

___ ___ Do I understand the subjective realities of those losses to the people who experience them, even when they seem like overreaction to me?

___ ___ Have I acknowledged those losses with sympathy?

___ ___ Have I permitted people to grieve & publicly expressed my own sense of loss?

___ ___ Have I found ways to compensate people for their losses?

___ ___ Am I giving people accurate information & doing it again & again?

___ ___ Have I defined clearly what is over & what isn’t?

___ ___ Have I found ways to “mark the ending?”

___ ___ Am I being careful not to denigrate the past but, when possible, to find ways to honor it?

___ ___ Have I made a plan or giving people a piece of the past to take with them?

___ ___ Have I made it clear how the ending we are making is necessary to protect the continuity of the organization or conditions on which the organization depends?

___ ___ Is the ending we are making big enough to get the job done in one step?

Adapted from Managing Changes by William Bridges
Endings in Your Organization

Take a couple of minutes and describe what “Endings” looks like in your organization and/or area of responsibility.
Transitions – The Neutral Zone

• Can be a very difficult time
• But also a very creative time
• “Normalize” the Neutral Zone
• Redefine the Neutral Zone
• Create temporary systems
• Strengthen intragroup connections
• Create a Transition Monitoring Team
• Using the Neutral Zone creatively

Signals of the Neutral Zone

• People may be disoriented or self-doubting
• People miss work
• Old problems come back
• Signals get mixed, systems in flux, tasks go undone
• People can become polarized
• Leaders/managers/supervisors/employees try to identify new roles
• Risk-taking increases
• More creative ideas

Adapted from Managing Transitions by William Bridges
## Managing The Neutral Zone: A Checklist

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<th>NO</th>
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<td>Have I done my best to normalize the neutral zone by explaining it as an uncomfortable time which, with careful attention, can be turned to everyone’s advantage?</td>
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<td>Have I redefined it by choosing a new &amp; more affirmative metaphor to describe it?</td>
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<td>Have I reinforced that metaphor with training programs, policy changes, financial rewards for people to keep doing their jobs during the neutral zone?</td>
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<td>Am I protecting people adequately from future changes?</td>
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<td>If I can’t protect them, am I clustering those changes meaningfully?</td>
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<td>Have I created the temporary policies &amp; procedures that we need to get us through the neutral zone?</td>
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<td>Have I set short range goals &amp; checkpoints?</td>
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<td>Have I set realistic output objectives?</td>
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<td>Have I found what special training programs we need to deal successfully with the neutral zone?</td>
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<td>Have I found ways to keep people feeling that they still belong to the organization &amp; are valued by our part of it? And, have I taken care that perks &amp; other forms of “privilege” are not undermining the solidarity of our group?</td>
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<tr>
<td>Have I set up a transition monitoring team to keep realistic feedback flowing upward during the time in the neutral zone?</td>
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Adapted from Managing Transitions by William Bridges
Neutral Zone in Your Organization

Take a couple of minutes and describe what the Neutral Zone looks like in your organization and/or area of responsibility.
Transitions – New Beginnings

• Ambivalence toward Beginnings
• The timing of New Beginnings
• Clarify & communicate the Purpose for changes
• Build a clear Picture of the future and why it is better
• Two things to watch out for
• Create a Plan on how you will implement changes
• Give everyone a Part in the Plan
• Reinforce & reward people for accomplishments

Signals of New Beginnings

• Fear new/different changes
• Old anxieties resurface
• New ways represent risk
• Loss of Neutral Zone
• New commitments
• New values are shared
• New attitudes
• New identities

Adapted from Managing Transitions by William Bridges
Managing The New Beginnings: A Checklist

YES   NO

___ ___ Am I distinguishing in my own mind & in my expectations of others between the start, which can happen on a planned schedule, & the beginning, which will not?

___ ___ Do I accept the fact that people are going to be ambivalent toward the beginning I am trying to bring about?

___ ___ Have I taken care of the ending(s) & the neutral zone, or am I trying to make a begging happen before it possibly can?

___ ___ Have I clarified & communicated the PURPOSE (the idea behind) the change?

___ ___ Have I created an effective PICTURE of the change & found ways to communicate it effectively?

___ ___ Have I created a PLAN for bringing people through the three phases of transition – and distinguished it in my own mind from the change management plan?

___ ___ Have I helped people discover as soon as possible the PART that they will play in the new system – or how the new system will affect the PART they plan within the organization?

___ ___ Have I ensured that everyone has a part to play in the transition management process & that they understand that part?

___ ___ Have I checked to see that policies, procedures & priorities are consistent with the new beginnings I am trying to make so that inconsistencies aren’t sending a mixed message?

(continued)

Adapted from Managing Transitions by William Bridges
Managing The New Beginnings: A Checklist

YES  NO

___ ___ Am I watching my own actions carefully to be sure that I am effectively modeling the attitudes & behaviors I am asking others to develop?

___ ___ Have I found ways, financial & others, to reward people for becoming the new people I am calling on them to become?

___ ___ Have I built into my plans some occasions for quick success to help people rebuild their self-confidence & to build the image of the transition as successful?

___ ___ Have I found ways to celebrate the new beginning & the conclusion of the time of transition?

___ ___ Have I found ways to symbolize the new identity – organizational & personal – that is emerging from this period of transition?

___ ___ Have I given people a piece of the transition to keep as a reminder of the difficult & rewarding journey we all took together?

Adapted from Managing Transitions by William Bridges
New Beginnings in Your Organization

Take a couple of minutes and describe what New Beginnings will look like in your organization and/or area of responsibility.
New Beginnings: The Four P’s

» Purpose
» Picture
» Plan
» Part
Purpose

– Clearly communicate the purpose behind the change
– Explain why the change is necessary & better for the future
– What is the problem? What is the situation that requires this change to solve it?
– Who says so, and on what evidence?
– Continually share as much information is key to getting folks to “buy-in” to the change
Purpose

Take 5 minutes to jot down a few things that describe what the Purpose is for the change in your organization and/or area of responsibility.
– Paint a picture of what the outcome of the change will look like?
– What will the future look like?
– What will it feel to be a participant in it?
– People need to experience it imaginatively before they can put their hearts into it
Now, describe what your picture is for the future of your organization is or will be. Be as specific as you can be. Sometimes it helps to actually draw a picture of how you see the future to be. 5 minutes.
Plan

– Once the Picture is clear, people will find a way to reach the destination
– People need the details of the route from here to there
– Example: Form a Transition Management Team
  » Details the specifics of the change
  » People-oriented
  » Gives ongoing information and training needed
  » Moves forward step-by-step
Plan

What is your plan for your organization? Your people? Yourself? Try to be as specific as you can. 5 minutes.
Part

– People need to know where they fit in the scheme of things
– How does their part affect other relationships within the organization and/or other areas/locations?
– Make sure everyone has a part/role to play (including you)

» Planning Task Force
» Climate Survey Groups
» Problem-Solving Circles
» Transition Monitoring Team
Part

Describe what part you will play and what part you expect your people to play. Be specific. 5 minutes.
Barriers to Implementing Change

1. Using the chart on pg. 20, list the barriers that may prevent you from successfully implementing the change(s) in your organization, department, area of responsibility

2. Categorize these barriers:
   1 – barrier that you can **actively do something** about now
   2 - barrier you can only **influence** now, and
   3 - barrier you **cannot do anything about** now (budget, need more information, software, training, etc.)
Categorizing Barriers to Change

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<th>Change:</th>
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<td>1.</td>
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<tr>
<th>Barriers</th>
<th>Categorize 1, 2, 3</th>
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Actions to Overcome Barriers

1. Choose one barrier in Category 1
2. Write specific actions that you can take to overcome the barrier 
   (example: Arrange for needed training, make a call on software 
   availability, etc.)
3. Include dates for follow up & the date for completion
4. Repeat for each Category 1
5. Use chart on pg. 22.
# Actions to Overcome Barriers

**Change:**

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Actions-Include follow up &amp; completion dates</th>
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<tr>
<td>1.</td>
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People are watching ........ !
DWYSYWD
The Five Practices®

- Model the Way
- Inspire a Shared Vision
- Challenge the Process
- Enable Others to Act
- Encourage the Heart

What is the Leadership Practices Inventory (LPI)?

- 30 behavior–based statements
- Strong reliability and validity
- Significantly correlated with measures of:
  - Leader credibility
  - Commitment
  - Teamwork and empowerment
  - Productivity
  - Performance and effectiveness
  - Reduced turnover and absenteeism
The Five Practices of Exemplary Leadership®

1. Model the Way
2. Inspire a Shared Vision
3. Challenge the Process
4. Enable Others to Act
5. Encourage the Heart

Ten Commitments®

MODEL THE WAY
1. Clarify values by finding your voice & affirming shared ideals.
2. Set the example by aligning actions with shared values

INSPIRE A SHARED VISION
3. Envision the future by imagining exciting and ennobling possibilities.
4. Enlist others in a common vision by appealing to shared aspirations.

CHALLENGE THE PROCESS
5. Search for opportunities by seizing the initiative & by looking outward for new ways to improve.
6. Experiment and take risks by constantly generating small wins & learning from experience.

ENABLE OTHERS TO ACT
7. Foster collaboration by building trust & facilitating relationships.
8. Strengthen others by increasing self-determination & developing competence.

ENCOURAGE THE HEART
9. Recognize contributions by showing appreciation for individual excellence.
10. Celebrate the values & victories by creating a spirit of community.
APPENDIX – Tools to Manage Change

• Developing Action Plans
• Getting feedback from others
• Managing in a World of Non-stop Change: A Checklist
• Rebuilding Trust Checklist
Developing Your “Action Plan”

**Objective:** Using what you learned about “Change” develop a specific Action Plan to implement the “Change” once you return to work.

**Individually:**
1. Review your notes.
2. Finalize any actions to be taken to overcome barriers to the “Change” you are responsible for implementing.
3. Identify any other actions that need to be taken in the Endings, Neutral and New Beginnings’ Zones.
4. Identify any Leadership Behaviors that you need to work on to successfully implement the “Change”.
5. Write a specific Action Plan to include the 4 P’s:
   1. Purpose of the Change (share as much information as you can)
   2. Picture of what the Change will look like in the future (include completion date)
   3. Plan of how the Change will be successfully implemented (additional training, etc.)
   4. Part that each person will play. (yours and/or others)
   5. Include dates for follow-up & completion
Discussing the “Change”

**Objective:** Participants will receive constructive feedback on the “Change” they are responsible for implementing.

**Table Groups:**

1. Each person discusses the “Change” they are responsible for implementing, and the barriers they identified. The rest of the group will listen and provide constructive feedback on things that could be considered to successfully implement the “Change.”

**Timing:** One hour
### Managing in a World of Nonstop Change: A Checklist

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<td>Have I accepted the fact that nonstop change is the unavoidable reality today, or am I fighting it?</td>
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<td>Am I orchestrating my transition management tactics effectively, shifting from change situation to change situation, and from an ending here to a beginning there?</td>
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<td>Do I have an overall mental picture in which the particular transition makes sense?</td>
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<td>If I do not have such a picture, am I working to create one for myself &amp; my people by “connecting the dots” or identifying the particular “end of a chapter” that we may be facing?</td>
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<td>Am I being careful not to introduce extra, unrelated changes while my people are still struggling to deal with the big transition?</td>
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<td>Am I watching out that I don’t stake too much on a particular future that someone is forecasting?</td>
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<td>Am I making (and asking others to make) life-cycle projections to identify &amp; start creating replacements for policies, systems &amp; structures that have passed their midlife points?</td>
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Adapted from Managing Transitions by William Bridges
## Managing in a World of Nonstop Change: A Checklist

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- **YES**  ___ Do I include worst-case scenarios in my change management plans, both for their own sake & as “contrarian” planning?
- **YES**  ___ Am I planning & managing the transition from “occasional change” to “change as the norm” & encouraging others to do the same?
- **YES**  ___ Do I honestly think of the status quo as a temporary & expedient resting place in time of constant change?
- **YES**  ___ Do I talk of change as the best way to preserve the essential continuity of the organization?
- **YES**  ___ Have I clarified the purpose of my organization & helped others under me to do the same for their level of the organization?
- **YES**  ___ Are these purposes distinguished from the objectives that different groups are trying to reach?
- **YES**  ___ Do I have a deep feeling for this purpose, or am I merely mouthing the words?
- **YES**  ___ Have I worked hard to unpack old baggage, heal old wounds, and finish unfinished business?
- **YES**  ___ Do I regularly work to sell the organization’s problems?

Adapted from Managing Transitions by William Bridges
Managing in a World of Nonstop Change: A Checklist on Trust

YES  NO

Am I actively working to rebuild trust in the following ways:

___ ___ 1. Being very careful to do what I say I will do?
___ ___ 2. Listening to people carefully & letting them know what I hear them saying?
___ ___ 3. Understanding what matters to people & working hard to protect whatever is related to that?
___ ___ 4. Sharing myself honestly (without letting honesty be a cover for hostility)?
___ ___ 5. Asking for feedback & acknowledge unasked-for feedback on the subject of my own trustworthiness?
___ ___ 6. Remembering not to push others to trust me further than I trust them?
___ ___ 7. Trying to extend my trust of others a little further?
___ ___ 8. Not confusing being trustworthy with “being a buddy”?
___ ___ 9. Not being surprised if my trust-building project is viewed a bit suspiciously?
___ ___ 10. Constantly reminding myself to tell the truth?

Final Question: What actions could you take to help people deal more successfully with the nonstop change in which your organization currently finds itself & become more able to do so in the future? What could you do today to get started on these tasks?

Adapted from Managing Transitions by William Bridges
Summary

• Change is a process
• Negative Reaction to Change
• 3 Phases of Transition –
  – Phase I – Endings
  – Phase 2 – Neutral Zone
  – Phase 3 – New Beginnings
• Actions to Overcome Barriers to Change
• Developing Your Action Plan
• 5 Leadership Practices of Exemplary Leadership
• Additional Tools - Appendix
• Q&A’s
• Evaluations