



***Charlotte Wilhelm, Eagle Vision of America  
Presents:***

***“Managing Change”  
in the Central Cancer Registry***

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# **WANTED**

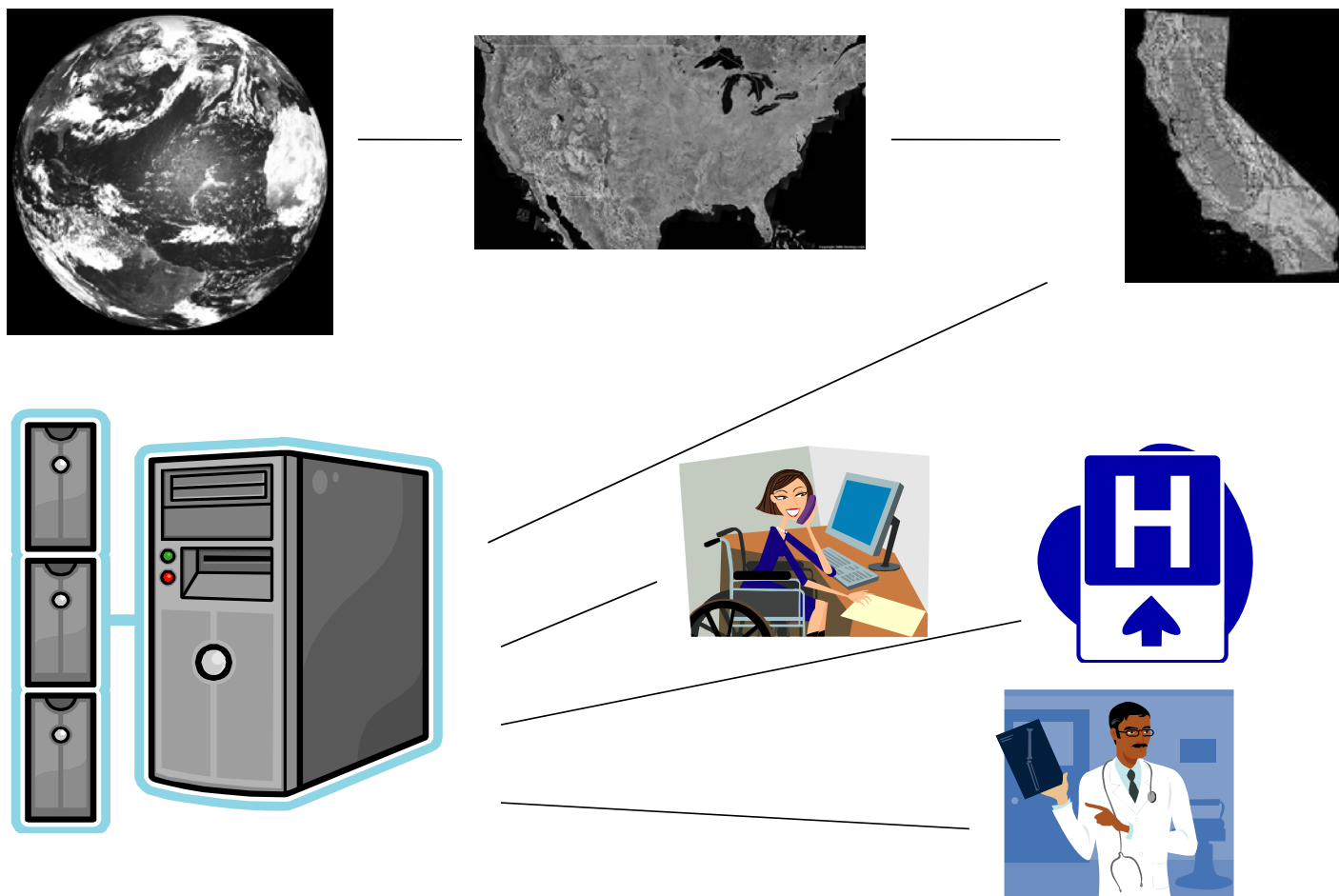
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Job Opportunities

## **LEADERS/CHANGE AGENTS**

All levels should apply

# Focus On Your Span of Control!



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# **AGENDA**

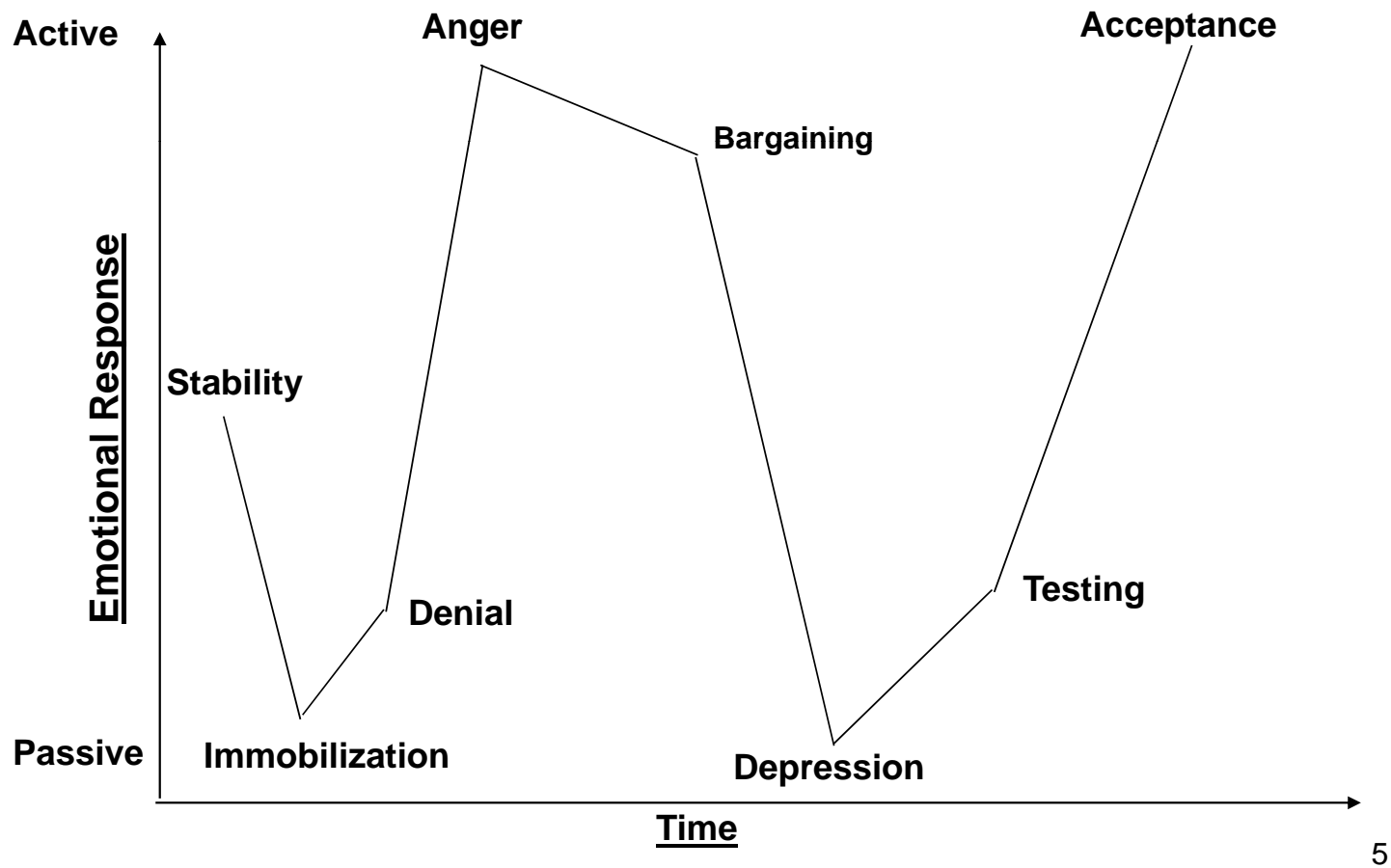
## **Welcome/Introductions**

### **Objectives**

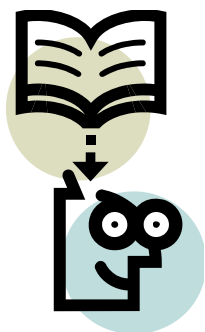
- Understand that Change is a process and develop specific actions to successfully implement change in your organization.
- Understand how Leadership Behavior is key to successfully implementing change in your organization

- ☐ 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



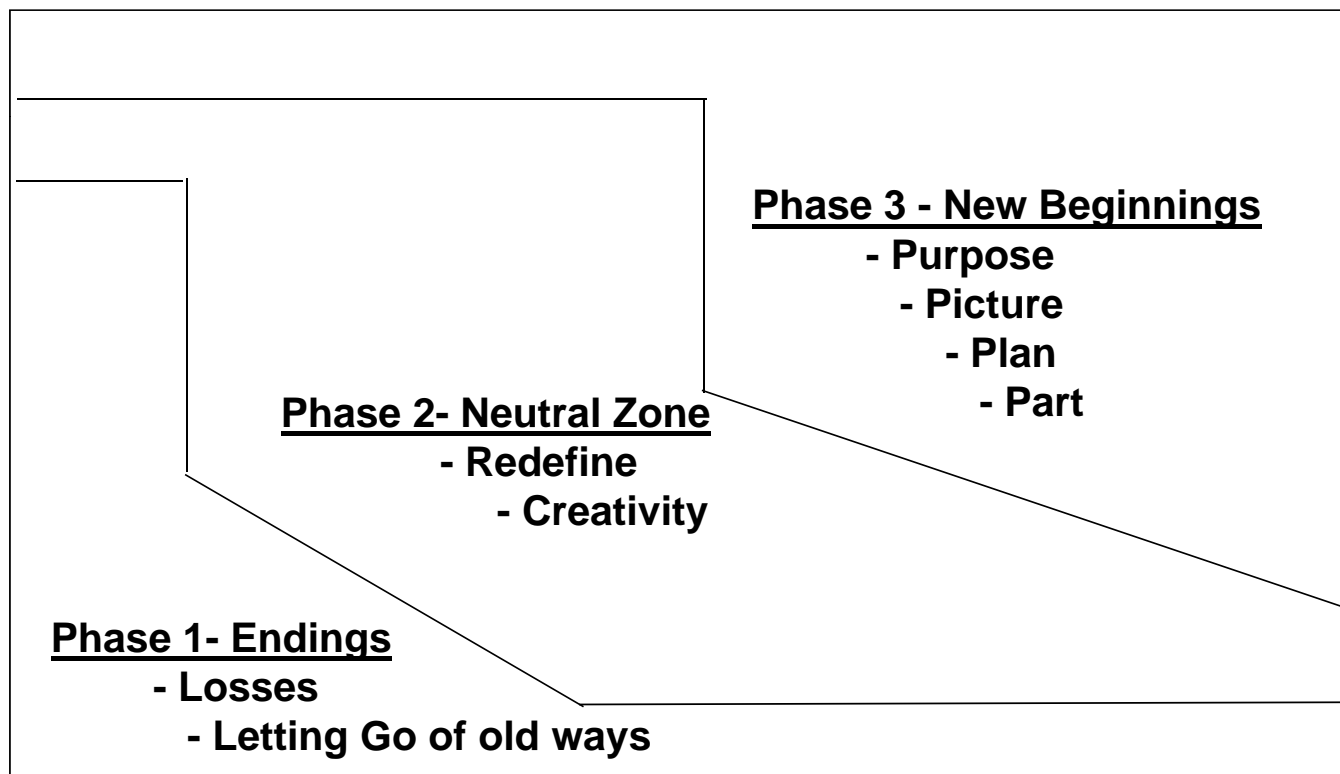
Based on Elizabeth Kubler-Ross on "Death & Dying"



## **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**



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

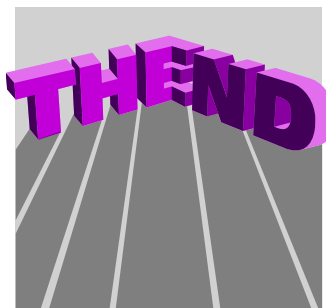


### **Managing Endings: A Checklist**

#### **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

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### **Managing The Neutral Zone: A Checklist**

#### **YES NO**

- |     |     |   |
|-----|-----|---|
| ___ | ___ | 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?   |
| ___ | ___ | Have I redefined it by choosing a new & more affirmative metaphor to describe it?   |
| ___ | ___ | Have I reinforced that metaphor with training programs, policy changes, financial rewards for people to keep doing their jobs during the neutral zone?  |
| ___ | ___ | Am I protecting people adequately from future changes?  |
| ___ | ___ | If I can't protect them, am I clustering those changes meaningfully?  |
| ___ | ___ | Have I created the temporary policies & procedures that we need to get us through the neutral zone?   |
| ___ | ___ | Have I set short range goals & checkpoints?   |
| ___ | ___ | Have I set realistic output objectives?   |
| ___ | ___ | Have I found what special training programs we need to deal successfully with the neutral zone?   |
| ___ | ___ | Have I found ways to keep people feeling that they still belong to the organization & are valued by our part of it? And, have I taken care that perks & other forms of "privilege" are not undermining the solidarity of our group? |
| ___ | ___ | Have I set up a transition monitoring team to keep realistic feedback flowing upward during the time in the neutral zone?   |

Adapted from Managing Transitions by William Bridges

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## **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

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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

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### **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.



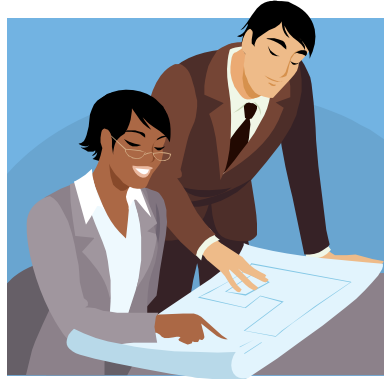
## Picture

- 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



## Picture

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.

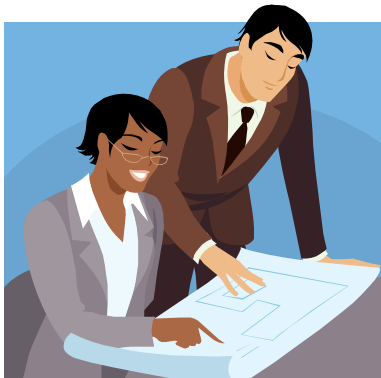


## Plan

- 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

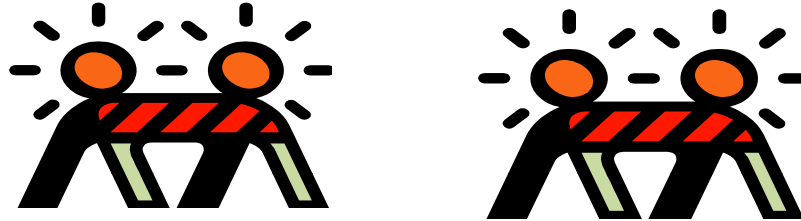




## Part

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**

### **Change:**

1.

### **Barriers**

1.

2.

3.

### **Categorize 1, 2, 3**



## **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:** \_\_\_\_\_

<u>Barriers</u>	<u>Actions-Include follow up &amp; completion dates</u>
1.	1.
2.	2.
3.	3.

# People are watching..... !



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**DWYSYWD**



# The Five Practices®



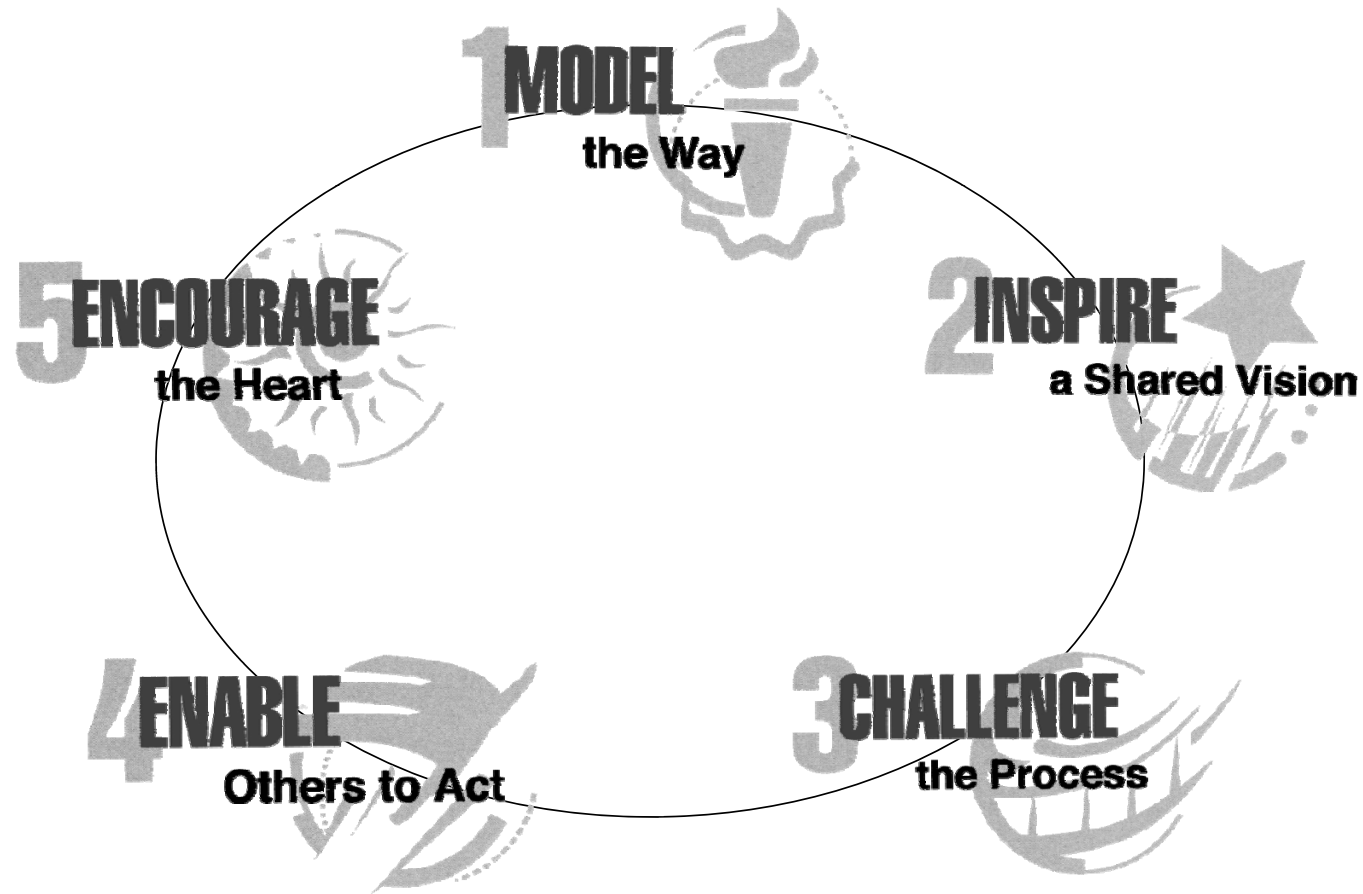
- Model the Way
- Inspire a Shared Vision
- Challenge the Process
- Enable Others to Act
- Encourage the Heart

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# 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®



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# 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.

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## **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**

### **YES   NO**

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

Adapted from Managing Transitions by William Bridges



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

### **YES   NO**

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