Leading Change Checklist

1. What are the forces pressing for this change? Can I articulate them in such a way that the majority of people in the group affected will be convinced of the need for change to occur?

2. Is the organization capable of adapting to this change? Is there a positive work environment? Strong leadership in place?

3. What is the desired end result? Can this be clearly stated? Or, is it still vague and yet to be determined from further work of a team of people? If you think it is clear, then write it out.

   - Why is it better than the status quo?

   - What must the organization do differently?

   - What must the organization stop doing?

4. Who needs to be involved in order for this to succeed? Who will lead this change effort?

5. What messages need to be communicated about this effort and what's the best way for these messages to be sent?

6. How can I best involve the people whose support is critical for this effort to succeed? What is the right balance of involvement and being directive?

7. What initial actions could be taken that would have greatest likelihood of success?

8. Where will we most likely see resistance? How will we view that resistance? How will we treat those who resist?

9. How will we get the organization to see the benefits of this change? How can we make the link between this change and those benefits?

10. How can we cement this change into place and avoid backsliding?

AFTERNOON: LEADING CHANGE

1. Short presentation on ZF research on organization's ability to change, with emphasis on the quality of leadership and the positive nature of the work environment. Refer to aggregate 360 degree feedback data that sheds light on how this organization currently stands on those dimensions. (20 minutes)

2. Importance of this topic and how organizations suffer if leaders don't drive change in a timely manner. (Hewlett-Packard example.) (5 minutes)

3. Change is broad concept, with huge differences in scope, magnitude or degree; and also huge differences, depending on what level being addressed (individual, team, division, or total organization. (10 minutes)

4. Participants are then asked to identify a change issue on which they will work during this activity. Preferably this is a real issue they face back on the job. (If someone doesn't have an example, then they can use one from the exercise earlier in the morning.) Participants will then apply a Change Leadership Checklist to their own issue, and be prepared at the end of the afternoon to present their own change plan to another participant. (10 minutes).

5. Leading Change Checklist: (See attached list). This is the basic framework for the session. (20 minutes to review)

6. Each step in the process will then be covered, with exercises and activities and brief presentations on research and theory. (120 minutes)

7. Participants will end this session with a plan for the implementation of their own change initiative having been thought through and documented. (30 minutes)