

Ready. Set. **CHANGE!**[™]

Reacting Smarter. Adapting Faster.
Engaging Together.

Preview Only

Facilitator Guide

These materials are intended for preview purposes only.
Use for training is strictly prohibited.

This product is fully protected by U.S. and International Copyright Law. All text, graphics, sound, code, design, arrangement and content are owned by VisionPoint® Productions, Inc.

Copyright © 2008 VisionPoint® Productions, Inc. All rights reserved.

VisionPoint® and **SMART-START**® are trademarks owned by VisionPoint® Productions, Inc.

Unless authorized in writing by VisionPoint® Productions, Inc., you are not permitted and it is a violation of VisionPoint's proprietary rights to:

- Make a copy of this work in any form
- Digitize, make electronic or provide via downloading
- Embed video in a PowerPoint or similar presentation software
- Broadcast via intranet, satellite, cable or closed-circuit TV
- Resell, rent, loan or make available to another organization

For information or to report unauthorized usage, contact VisionPoint® at (515) 334-9292. Thank you for your cooperation!

These materials are intended for the personal use of the purchaser and/or end user. All other use, including, but not limited to, resale, rental or commercial use, is strictly prohibited, unless authorized in writing by VisionPoint®.

This product is provided as is without warranties of any kind. VisionPoint® and its agents and representatives do not render any legal or professional advice. This product, and any accompanying video, should not be used as a substitute for professional services. If legal or professional advice is needed, please consult with your attorney or professional advisor.

VisionPoint® would like to acknowledge Marcey Uday-Riley, MSW, CPT, and IRI Consultants for their significant contribution to the development of this program.

These materials are intended for preview purposes only.
Use for training is strictly prohibited.

Table of Contents

READ THIS FIRST	1
Letter from the President	2
Program Overview.....	3
Program Benefits.....	5
Program Design.....	6
Learning Objectives.....	8
How to Use this Training Kit.....	9
The Change Response Assessment.....	12
Definitions	14
Icon Key	15
Copyright Reminder.....	16
PLAN THE SESSION	17
Roles and Responsibilities	18
Overview of Agenda Options.....	20
Preparation Checklist	22
CONDUCT THE SESSION	25
Agenda for Two-Hour Training Session	26
Two-Hour Training Session Arrival of Participants	27
Two-Hour Training Session Getting Started	29
Two-Hour Training Session Getting Focused	31
Two-Hour Training Session Understanding Change	39
Two-Hour Training Session The Change Response Strategy™	57
Two-Hour Training Session Video and Discussion.....	63
Two-Hour Training Session Wrap up the Session	81
Agenda for Half-Day Training Session.....	83
Half-Day Training Session Arrival of Participants	85
Half-Day Training Session Getting Started.....	87
Half-Day Training Session Getting Focused.....	89
Half-Day Training Session What's Your Experience with Change?	97
Half-Day Training Session Understanding Change	101
Half-Day Training Session Interpreting The Change Response Profile... ..	121
Half-Day Training Session The Change Response Strategy™	127
Half-Day Training Session Video and Discussion: Clarify	133
Half-Day Training Session Video and Discussion: Communicate.....	143
Half-Day Training Session Video and Discussion: Commit	151
Half-Day Training Session Applying The Change Response Strategy™	159
Half-Day Training Session Putting it all Together.....	163
Half-Day Training Session Wrap up the Session.....	171

These materials are intended for preview purposes only.
Use for training is strictly prohibited.

Letter from the President

Thank you for selecting this VisionPoint® program to meet your training needs. This program has been used and approved by trainers and organizations in several industries and has been updated to reflect current laws, best practices and trends in the workplace.

We're committed to providing you with resources! Reproducible participant materials, video scripts, optional activities and other valuable materials are available to you at www.visionpoint.com. Resources are updated and added regularly so check back while preparing for any new training session.

We're here to support you through the entire training experience! Should you have any questions before, during or after any training session, please feel free to contact us at trainer@visionpoint.com or the VisionPoint® TrainerTALK™ helpline, 800-300-8880 x302. Our master trainers, training program developers and TrainerSelect™ team are available to answer questions, share ideas, facilitate training and customize materials to meet your needs.

Thank you again for choosing VisionPoint! If there is anything I can personally do to make your experience of working with us and our programs more enjoyable or effective, please feel free to contact me directly.

Sincerely,



Laura E. Bernstein

Program Overview

There is virtually no aspect of life that is untouched by change today, and organizations and their workforces are no exception. **Ready. Set. CHANGE!™: Reacting Smarter. Adapting Faster. Engaging Together.** is designed to increase change competency among all employees at all levels so that your organization will be better able to respond and adapt to changes quickly and with less disruption to productivity.

Change in the workplace has taken on a new dimension. It's no longer just an event or initiative. It's pervasive, constant and relates to anything that was done one way yesterday and needs to be done differently today. Today, change encompasses changes in tasks, relationships, marketplaces, technologies, globalization, demographics and more—with all the implications and complications this brings to the workforce. In addition, change comes fast and is rarely flexible. The pace at which cycles of change occur is increasing and will only continue to do so.

In addition, today's workforce includes more global, geographic, cultural and generational diversity than ever before. This workforce is being asked to work together and to quickly and efficiently adapt to whatever comes their way, with minimal disruptions to productivity.

Also, our individual and human reactions to change vary widely. One reason is that our global, geographic, cultural and generational experiences impact how we view and respond to change. Another reason is that there are great differences in our perception and reaction to change due to our innate personalities—how we are “hard-wired,” so to speak.

Given this new environment of change, the huge demographic shifts of the last 20 years and the tendencies of the workforce to respond to change differently, a new set of skills is required. ***Ready. Set. CHANGE!***[™] will provide your employees with the clear and practical strategy they need to understand, respond to and navigate any change in a way that is positive and productive for themselves, their coworkers and your organization.

By the way, we know that your organization has its own unique personality, needs and issues. ***Ready. Set. CHANGE!***[™] was designed with that in mind. The program is flexible enough to be used as the foundation for a new training initiative or you can easily adapt it and integrate it into your existing business training initiative.

Audience

This program is designed for all employees.

Program Benefits

Here are the benefits this program can deliver for your employees and your organization:

For the employees:

- Make informed decisions to commit to change that are based on facts, not assumptions
- Stay in control of their reactions and responses
- Be clear about what is expected of them
- Stay positive and productive during change

For the organization:

- Increase change competency across all levels of the workforce
- Increase the organization's ability to respond and adapt to change quickly and with minimal disruption to productivity
- Establish a shared, common expectation among all employees about how to understand, respond to and navigate change

How to Use this Training Kit

This training kit is designed to provide all the information and materials you need to conduct an effective training session.

The Complete Kit includes:

- This *Facilitator Guide*, which contains multiple agenda options
- Facilitator Resources*, which contain optional activities, handout masters and additional suggestions to assist facilitators
- PowerPoint slides and other reference information, available as *Online Resources**
- Reproducible *Participant Materials*, found both in this kit and as an *Online Resource**
- Reproducible *Self-Study Guide*, available as an *Online Resource**
- One Hour Overview* discussion guide, available as an *Online Resource**
- VHS video – **Ready. Set. CHANGE!™**
- DVD
 - **Ready. Set. CHANGE!™** video
 - Individual Vignettes (without narration)
 - **SMART-START® Change: Responding Better Together** video
 - Insights Interview
- One Trainer Pack (10 highlighter pens, 10 notepads, 10 name tents, 10 certificates of completion)
- The Change Response Strategy™ job aid (one 10-pack)**
- The Change Response Strategy™ wall chart (1)**
- The Change Response Assessment (see pages 12 – 13 in this *Facilitator Guide* for more information and purchase options.)

* To access *Online Resources* for this program, visit www.visionpoint.com. Login, select View Program Resources, then select the program title from the list. If you do not see this program title listed, please contact trainer@visionpoint.com.

** For information on purchasing additional job aids or wall charts, please contact your personal VisionPoint Learning Consultant at 800.300.8880 or email trainer@visionpoint.com.

Preview Only

If you are an experienced training professional, use this guide as a starting point as you prepare for training, and be sure to insert your own style, experience and examples into the session. If you are new to training or the program content, follow the step-by-step instructions, and use the scripted language to help you stay focused on the key points and facilitate an effective session.

As you prepare for a session, be sure to select the agenda option that best meets your organization's training needs, and review the agenda from beginning to end. Determine whether you will use any of the optional activities provided in the *Facilitator Resources*, and if so, where you will insert them. Estimated timeframes for each agenda option assume a group size of 8 – 15 people. If your session will have fewer or more participants, it is important to review each step of your agenda and decide how to best modify discussions and activities to accommodate your group size.

There is always more than one way to approach setting up and positioning activities. This guide provides best practices, based on trainer review and general market needs. Should you have any questions about how to best conduct a particular activity for your organization's unique needs, please contact our TrainerTALK™ helpline at 800-300-8880 x302 or trainer@visionpoint.com. VisionPoint's master trainers and TrainerSelect™ team are happy to answer questions, share ideas and help customize materials.

Overview of Agenda Options

This *Facilitator Guide* provides step-by-step instructions for two agenda options. *Online Resources* are also available for conducting a one-hour overview, plus a self-study option.

You can extend the training session, reinforce key points, customize the training to your organization or provide refresher training programs by selecting from several optional activities that give participants the opportunity to practice and apply what they are learning.

Suggestions for prework and optional activities can be found in the *Facilitator Resources*.

The matrix on the next page will help you select the agenda option that is best for your training session.

Preview Only



Ready. Set. CHANGE!™

Selecting the Agenda Option that is Best for Your Training Session

		Learning Activities						
		Video	Discussion Opportunities	Pre/Post Test	Online Assessment	Key Concepts in Detail through Activities	Case Studies	Guided Application
Two-Hour Training Session	This agenda provides ample opportunity for exploration of key concepts including an overview of behavior styles and how they influence individuals' response to change. No formal assessments are included in this agenda; however, participants will have the opportunity to reflect on their own behaviors related to change. This agenda is ideal for organizations wanting to provide thorough coverage of the material and plenty of time for discussion about organizational change and The Change Response Strategy™.	X	X	X				
Half-Day Training Session	This agenda provides ample opportunity for exploration of key concepts and includes the use of a formal assessment that provides participants a personal profile of their behavior style. The profile is used during the session to help participants understand their natural tendencies to change and integrate this knowledge into their ongoing response to change. This agenda is ideal for organizations wanting to provide thorough coverage of the material and impact employee behavior by providing opportunities to practice applying The Change Response Strategy™.	X	X	X	X	X	X	X
Extended Training Session	This agenda builds on the half-day session by incorporating all of the optional activities found in the <i>Facilitator Resources</i> . This agenda is ideal for maximizing the potential for Level 3 training.	X	X	X	X	X	X	X
Self-Study	Self-study materials are available as an <i>Online Resource</i> and are ideal for individuals who missed training or are new to a work group that has previously gone through training on this topic.	X		X		X		X
One-Hour Overview	This agenda is available as an <i>Online Resource</i> . It uses a discussion guide to introduce key concepts through video and discussion. It is ideal for organizations that have limited time and want to provide participants with an overview of organizational change and The Change Response Strategy™.	X	X					

Agenda for Two-Hour Training Session

This agenda is designed to introduce important information about dealing with change using video and discussion. This agenda is designed as stand-alone, video-based training that provides for an introduction to the topic with guided discussion opportunities.

Step	Item	Time
#1	Arrival of Participants	N/A
#2	Getting Started	15 minutes
#3	Getting Focused	15 minutes
#4	Understanding Change & Behavioral Styles	30 minutes
#5	The Change Response Strategy™	10 minutes
#6	The Change Response Strategy™ Video and Discussion	40 minutes
#7	Wrap up the Session	10 minutes
Total Estimated Time:		120 minutes

Step 1

Two-Hour Training Session Arrival of Participants

Time it takes:

From the time you show up until you start the training program

What it is about:

Managing the environment and getting people settled

What you will need:

- Markers
- Name tents
- PowerPoint Slide #1 (optional)
- Video – ***SMART-START® Change: Responding Better Together*** (optional)

How to do it:

1. Get there first! This demonstrates organization and excitement—and sets a good example. Be sure the room is set up, the equipment works and everything is arranged the way you want it.
2. Display Slide #1 on the screen or begin playing the ***SMART-START®*** video 15 minutes prior to the session start time.
3. Greet participants as they enter the room.
4. Ask each participant to use a marker to write his/her name on a name tent (both sides) in letters that are big enough for everyone to read.



Step 2

Two-Hour Training Session Getting Started

Time it takes:	15 minutes
What it is about:	Introducing participants to the program and each other
What you will need:	<ul style="list-style-type: none"> • Flipchart • Markers • Masking tape • Parking Lot • <i>Participant Materials</i>
How to do it:	<ol style="list-style-type: none"> 1. Introduce yourself in whatever way you feel is appropriate and welcoming. 2. Go over session logistics, including: <ul style="list-style-type: none"> • How long the session will take • When there will be breaks • Where the restrooms and emergency exits are located • Ground Rules • Parking Lot 3. Ask participants to introduce themselves one by one. Ask each person to provide: <ul style="list-style-type: none"> • Name • How long they have been with the organization • What they do in their current job • What could be the benefit to the organization and themselves for learning about adapting to organizational change

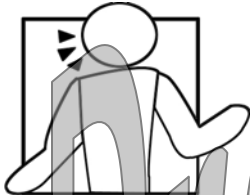


4. Use the flipchart to record the list of benefits.
As you fill up each page, tear it off and tape it up on the wall where everyone can see it. You will use this in Step 3 (Getting Focused) when you discuss what is in it for them.

[Facilitator Note: If the group is too large for individual introductions, consider having participants get into small groups to do introductions. Ask the small groups to create a benefits list on a flipchart and have each group report the benefits they came up with. Or if they already know each other, you can just skip to the discussion of benefits.]



5. Hand each participant a set of *Participant Materials* and say: **We'll come back to this list of benefits in a few minutes.**



6. Transition to Step 3 (Getting Focused). Say: **Let's talk more about adapting to change and how you'll benefit from this session.**

Step 3

Two-Hour Training Session Getting Focused

Time it takes:

15 minutes

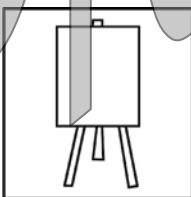
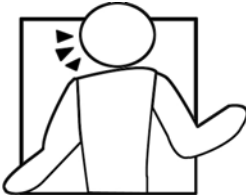
What it is about:

Introducing the learning objectives and what participants will experience and learn

What you will need:

- Flipchart
- Flipchart pages of benefits from Step 2
- *Participant Materials*
- PowerPoint Slides #2 – #4

How to do it:



1. To get people focused, say: **Today's program is about organizational change and how to understand it, respond to it and navigate it. This will allow us to react "smarter" to change, adapt faster to it and engage in it together. Let's get started by talking about what change is.**

What is change?

[Possible Responses: something is different; something isn't the way it used to be]

2. Continue the discussion. Say: **Change relates to anything that was done one way yesterday and needs to be done differently today. What are some examples of changes we've experienced in our organization recently?** [Use the flipchart to record the examples of



organizational changes.]

[Possible Responses: expect a variety of organization-specific responses, including references to strategy, products, technology, the workforce, markets, mergers and acquisitions, tasks, hiring, downsizing, globalization and others]

3. Continue the discussion. Say: **These examples all point toward the fact that change in the workplace today has taken on a new dimension. It's no longer just an event or an initiative, is it? Rather, it's pervasive and constant, and it encompasses all the changes you mentioned and more. And it impacts all of us.**

4. Continue the discussion. Say: **Let's do a quick exercise to demonstrate the impact of change. Pick up your pen or pencil and write your full name somewhere on your materials. [Allow a few seconds.] What's your reaction? How did that feel?**

[Possible Responses: easy; simple; natural]

Now place your pen or pencil in your other hand and write your full name somewhere on your materials. [Allow a few seconds.] What's your reaction now?

Step 4

Two-Hour Training Session Understanding Change and Behavioral Styles

Time it takes:

30 minutes

What it is about:

Understanding various aspects about change and how we experience and react to it based on our behavioral style

What you will need:

- *Participant Materials*
- PowerPoint Slides #5 – #11

How to do it:



Two Kinds of Change

- Change that's imposed
- Change that's participative

1. Introduce the segment by saying: **To respond to and engage with organizational change effectively, it's helpful to understand change and how we typically experience and react to it.**
2. Show Slide #5 and refer participants to pages 5 – 6 in their *Participant Materials, Understanding Change*. Say: **First of all, there are two kinds of change. The first kind of change is change that's imposed on us. It's non-negotiable—we don't have anything to say about it. What are some examples of imposed change?**

[Possible Responses: organizational direction or strategy; policies; technology/software; billing procedures]

The second kind of change is change in

which we participate—we have some kind of role in it or the change comes about because of our own actions or decisions. What are some examples of participative change?

[Possible Responses: implementing imposed change; taking a new job; accepting additional responsibilities; establishing processes to accomplish new tasks]

How might we feel when change is imposed on us?

[Possible Responses: we don't like it; we're resentful; we're not really committed to it]

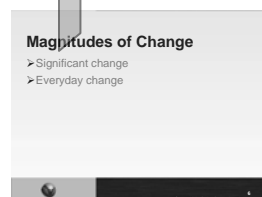
How might we feel when the change is one in which we had a chance to participate?

[Possible Responses: we feel better about it; we have more buy-in/commitment; we feel ownership]

[Facilitator Note: As a more interactive alternative, consider using Slide #5 to briefly introduce and explain the two kinds of change; then divide participants into two groups, assign imposed change to one group and participative change to the other group, and send each group to a separate flipchart for two minutes to identify, write down and share examples of their assigned kind of change.]

3. Show Slide #6 and continue the discussion.

Say: Change also has different magnitudes—it's not all alike. For example, the change might be fairly



Step 5

Two-Hour Training Session The Change Response Strategy™

Time it takes:

10 minutes

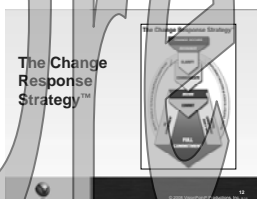
What it is about:

Introducing The Change Response Strategy™

What you will need:

- *Participant Materials*
- PowerPoint Slide #12
- The Change Response Strategy™ job aids (one for each participant)
- The Change Response Strategy™ wall chart

How to do it:



1. Introduce the segment by saying: **Now that we understand more about change, let's talk about a practical strategy we can use for responding to it.**
2. Refer participants to page 10 in their *Participant Materials, The Change Response Strategy™*. Show Slide #12 and say: **The Change Response Strategy™ is a tool you can use in any change situation to analyze a change, surface potentially unconscious feelings about the change and help you know what to say and do to remain positive and productive.**

Earlier we talked about how we typically feel when change is imposed or participative, and we said that we feel more positive and engaged when change is participative. As we talk about The Change Response Strategy™, think about it as a way to help change feel more participative by being actively involved in understanding and responding to change.

When you're faced with any change, there are three decisions you can make, each with its own set of outcomes. One choice is to decide not to commit to the change.

[Facilitator Note: During the discussion, encourage participants to take notes and fill in the blanks on page 10 of their materials.]

What are the outcomes for you and for the organization of deciding to make no commitment to the change?

[Possible Responses:

- For you: it can lead to fear, frustration, status quo, negative feedback from your coworkers or boss; criticism; chastisement; increased distrust; you might decide to leave the organization
- For the organization: it can lead to sub-optimized work, low individual contribution, no diversity of ideas, increased distrust]

Step 6

Two-Hour Training Session The Change Response Strategy™ Video and Discussion

Time it takes:

40 minutes

What it is about:

Demonstrating and discussing The Change Response Strategy™

What you will need:

- *Participant Materials*
- Video – **Ready. Set. CHANGE!™**

How to do it:



1. Introduce the segment by saying: In the video, we're going to focus on four main characters:

- **Blake, a supervisor for a utility company**
- **Jill, an employee in the billing department of a healthcare company**
- **Hoshi, a team leader in a retail organization**
- **Marcus, an employee in a financial services organization**

Over the course of this first segment, we're going to see them board a train and take their seats. As you watch, listen to what they're saying to each other about change.

2. Play the video introduction. From the DVD main menu, select *Video by Section*, then *Introduction*. If you're using the VHS, play the video from the beginning and stop at the





first disguised stop tape.

3. Discuss the video. Ask: **What were the key points of this segment?**

[Possible Responses: change is pervasive and constant; navigating change is a required skill today; everyone reacts to change differently; how we react to change influences others; you can respond to change in a way that's positive for everyone]

4. Refer participants to pages 11 – 13 in their *Participant Materials, Video Observation Form: The Change Response Strategy™*:

Clarify and introduce the *Clarify* vignette.

Say: **Now we're going to focus on the first step of The Change Response Strategy™:**

Clarify. You're going to see Jill telling Marcus about a conversation she had with Ahmad, a coworker, to help Ahmad deal with a recent change at work. As you watch the video, make some notes about the questions on the video observation form.

5. Play the *Clarify* vignette. From the DVD main menu, select *Video by Section* and then *Clarify*. If you're using the VHS, play the video through the *Clarify* vignette and stop at the disguised stop tape.

Step 7

Two-Hour Training Session Wrap up the Session

Time it takes: 10 minutes

What it is about: Identifying actions participants can take to engage with and navigate change; summarizing and evaluating the effectiveness of the training

What you will need:

- *Participant Materials*
- *Training Session Evaluation* forms (found in *Online Resources*)

How to do it:



1. Begin this segment of the session by saying: **Before we conclude, let's take a look at the Parking Lot. Have we addressed everything on it? Are there any additional questions that need to be addressed?** [Answer any questions.]
2. Refer participants to page 25 in the *Participant Materials, Focus on the Future* and say: **Please take a few minutes to think about what we have covered today and how you can apply what we've talked about back on the job. What are two things that you can take back to the job and implement immediately? Write them down in the space provided.** [Allow two minutes.]



3. Ask participants to talk in pairs and discuss their responses. [Allow one minute.]
4. Ask for volunteers to share their answers with the group.
5. Refer participants to page 1 in the *Participant Materials, Pre- and Post-Test* and say: **Let's take a minute to look at the Pre-Test you filled out at the beginning of the session. Please fill out the Post-Test column and then compare it to your responses from the Pre-Test column.**

[Facilitator Note: As an option, consider administering the Post-Test 30 days after the program as a post-training retention evaluation.]

6. Hand out the *Training Session Evaluation* forms; ask participants to fill them out. Collect them from the participants before they leave.
7. Thank the participants for taking time out of their busy day to attend the session.

Agenda for Half-Day Training Session

Half-Day Training Session (approximately 4 3/4 hours)

This agenda provides ample time to discuss and apply key concepts. Times indicated below include one 15-minute break. Remember to add more time if you include any of the optional activities found in the *Facilitator Resources*.

Step	Item	Time
#1	Arrival of Participants	N/A
#2	Getting Started	15 minutes
#3	Getting Focused	15 minutes
#4	What's Your Experience with Change?	15 minutes
#5	Understanding Change and Behavioral Styles	30 minutes
#6	Interpreting The Change Response Profile	20 minutes
#7	The Change Response Strategy™	10 minutes
	Suggested Break	15 minutes
#8	The Change Response Strategy™ Video and Discussion: Clarify	30 minutes
#9	The Change Response Strategy™ Video and Discussion: Communicate	30 minutes
#10	The Change Response Strategy™ Video and Discussion: Commit	30 minutes
#11	Applying The Change Response Strategy™	25 minutes
#12	Putting it all Together	40 minutes
#13	Wrap up the Session	10 minutes

Total Estimated Time: 285 minutes

Facilitator Note: This agenda option uses The Change Response Profile, the report providing results from The Change Response Assessment completed online. Be sure to provide instructions and timeline for completion. See pages 12 – 13 of this guide for more information.

This is a very full agenda. If you expect a large group or anticipate that participants will come to the program with many questions or want to engage in serious discussions about organizational changes, consider scheduling more than a half day for the program.

These materials are intended for preview purposes only.

© 2008 VisionPoint® Productions, Inc.

83

This page may not be reproduced.

Use for training is strictly prohibited.

Step 1

Half-Day Training Session Arrival of Participants

Time it takes:

From the time you show up until you start the training program

What it is about:

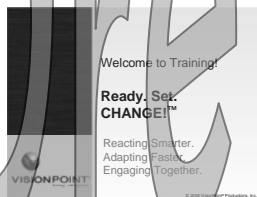
Managing the environment and getting people settled

What you will need:

- Markers
- Name tents
- PowerPoint Slide #1 (optional)
- Video – ***SMART-START® Change: Responding Better Together*** (optional)

How to do it:

1. Get there first! This demonstrates organization and excitement—and sets a good example. Be sure the room is set up, the equipment works and everything is arranged the way you want it.
2. Display Slide #1 on the screen or begin playing the ***SMART-START®*** video 15 minutes prior to the session start time.
3. Greet participants as they enter the room.
4. Ask each participant to use a marker to write his/her name on a name tent (both sides) in letters that are big enough for everyone to read.



Step 2

Half-Day Training Session Getting Started

Time it takes:

15 minutes

What it is about:

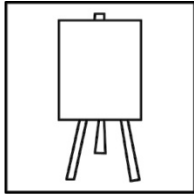
Introducing participants to the program and each other

What you will need:

- Flipchart
- Markers
- Masking tape
- Parking Lot
- *Participant Materials*

How to do it:

1. Introduce yourself in whatever way you feel is appropriate and welcoming.
2. Go over session logistics, including:
 - How long the session will take
 - When there will be breaks
 - Where the restrooms and emergency exits are located
 - Ground Rules
 - Parking Lot
3. Ask participants to introduce themselves one by one. Ask each person to provide:
 - Name
 - How long they have been with the organization
 - What they do in their current job
 - What could be the benefit to the organization and themselves for learning about adapting to organizational change



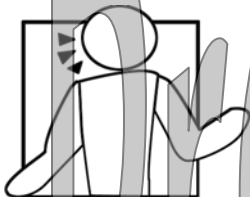
4. Use the flipchart to record the list of benefits.
As you fill up each page, tear it off and tape it up on the wall where everyone can see it. You will use this in Step 3 (Getting Focused) when you discuss what is in it for them.

[Facilitator Note: If the group is too large for individual introductions, consider having participants get into small groups to do introductions. Ask the small groups to create a benefits list on a flipchart and have each group report the benefits they came up with. Or if they already know each other, you can just skip to the discussion of benefits.]



5. Hand each participant a set of *Participant Materials* and say: **We'll come back to this list of benefits in a few minutes.**

[Facilitator Note: As an option, consider asking participants to complete the Pre-test as prework and bring it with them to class or send it to you before the class.]



6. Transition to Step 3 (Getting Focused). Say: **Let's talk more about adapting to change and how you'll benefit from this session.**

Facilitator Note: In addition to this introductory activity, consider using the optional **SMART-START®** activity found in the *Facilitator Resources*. This optional activity uses the video, **SMART-START® Change: Responding Better Together**.

Step 3

Half-Day Training Session Getting Focused

Time it takes:

15 minutes

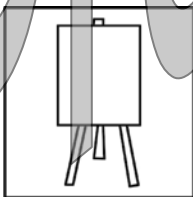
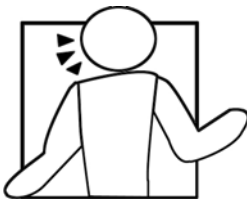
What it is about:

Introducing the learning objectives and what participants will experience and learn

What you will need:

- Flipchart
- Flipchart pages of benefits from Step 2
- PowerPoint Slides #2 – #4

How to do it:



1. To get people focused, say: **Today's program is about organizational change and how to understand it, respond to it and navigate it. This will allow us to react "smarter" to change, adapt faster to it and engage in it together. Let's get started by talking about what change is.**

What is change?

[Possible Responses: something is different; something isn't the way it used to be]

2. Continue the discussion. Say: **Change relates to anything that was done one way yesterday and needs to be done differently today. What are some examples of changes we've experienced in our organization recently?** [Use the flipchart to record the examples of



organizational changes.]

[Possible Responses: expect a variety of organization-specific responses, including references to strategy, products, technology, the workforce, markets, mergers and acquisitions, tasks, hiring, downsizing, globalization and others]

3. Continue the discussion. Say: **These examples all point toward the fact that change in the workplace today has taken on a new dimension. It's no longer just an event or an initiative, is it? Rather, it's pervasive and constant, and it encompasses all the changes you mentioned and more. And it impacts all of us.**

4. Continue the discussion. Say: **Let's do a quick exercise to demonstrate the impact of change. Pick up your pen or pencil and write your full name somewhere on your materials. [Allow a few seconds.] What's your reaction? How did that feel?**

[Possible Responses: easy; simple; natural]

Now place your pen or pencil in your other hand and write your full name somewhere on your materials. [Allow a few seconds.] What's your reaction now?

Step 4

Half-Day Training Session What's Your Experience with Change?

Time it takes:

15 minutes

What it is about:

Introducing the concept of change competence and assessing participants' comfort level with change

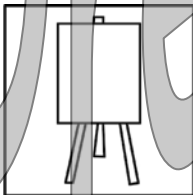
What you will need:

- Flipchart page of examples of organizational changes from Step 3
- *Participant Materials*

How to do it:



1. Introduce the segment by saying: **While everyone reacts to and experiences change in different ways, as you noticed from our first exercise, it's safe to say that anticipating, thinking about or adjusting to change can be challenging for most people.**



2. Refer to the flipchart of organizational changes from Step 3 and say: **Let's spend a few minutes discussing what can be challenging about dealing with changes like these.**



3. Assign participants into groups of three or four (depending on class size). Once they are in groups, say: **In your groups, take a few**



minutes to discuss your personal experience with organizational change and what makes dealing with these changes challenging. Also, select a spokesperson who can present a summary of your group's discussion to the large group. [Allow five minutes.]

4. Ask the spokesperson for each small group to present a summary of its discussion. Say:
Let's start with this group. [Choose one.]

What's your group's experience with change?

[Possible Responses: I'm given a task, but before I can finish it something changes and it's either no longer needed or it has to be done differently; it feels like the work doesn't matter, so why should I even try?; changes come down from "on high" and don't make sense in the "real world"; it feels like we're trying to build the plane while we're flying it; it feels like all of a sudden what I'm doing isn't right or good enough; I know I'm doing the right work in the right way, but then someone new comes into the department and asks for me to do my job differently, and I don't know how much of the request is due to a real need for change or just a style difference; I'm open to change, but I'm never given the time to make the change right or the things I need to make it happen on time; we're just expected to go with the flow and get things done]

[Facilitator Note: As each group finishes, acknowledge its effort by giving praise, clapping, etc.]

Step 5

Half-Day Training Session Understanding Change and Behavioral Styles

Time it takes:

30 minutes

What it is about:

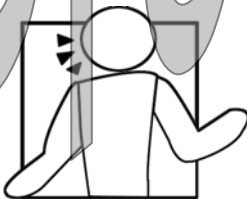
Understanding various aspects about change and how we experience and react to it based on our behavioral style

What you will need:

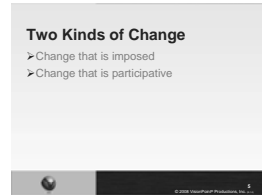
- *Participant Materials*
- PowerPoint Slides #5 – #11

How to do it:

[Facilitator Note: This step in the training session introduces the concept of behavioral styles and gives participants an opportunity to think about what their own style might be. The next step will allow participants to compare their thinking to the results of The Change Response Assessment they previously took. Be sure you know whether participants will each have their profile report with them or whether you will be handing them out during the next step. Language in this step assumes they have not seen their own results yet and that you will be handing the profile reports out in the next step.]



1. Introduce the segment by saying: **To respond to and engage with organizational change effectively, it's helpful to understand change and how we typically experience and react to it.**



2. Show Slide #5 and refer participants to pages 5 – 6 in their *Participant Materials, Understanding Change*. Say: **First of all, there are two kinds of change. The first kind of change is change that’s imposed on us. It’s non-negotiable—we don’t have anything to say about it. What are some examples of imposed change?**

[Possible Responses: organizational direction or strategy; policies; technology/software; billing procedures]

The second kind of change is change in which we participate—we have some kind of role in it or the change comes about because of our own actions or decisions. What are some examples of participative change?

[Possible Responses: implementing imposed change; taking a new job; accepting additional responsibilities; establishing processes to accomplish new tasks]

How might we feel when change is imposed on us?

[Possible Responses: we don’t like it; we’re resentful; we’re not really committed to it]

How might we feel when the change is one in which we had a chance to participate?

[Possible Responses: we feel better about it; we have more buy-in/commitment; we feel ownership]

Step 6

Half-Day Training Session Interpreting The Change Response Profile

Time it takes:

20 minutes

What it is about:

Reviewing and discussing The Change Response Profile (i.e., the results from The Change Response Assessment).

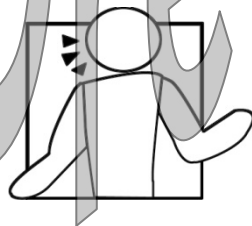
What you will need:

- *The Change Response Profile* report for each participant in individual sealed envelopes to maintain confidentiality
- *Handout #2 – Understanding My Behavioral Style* (page 53 of the *Facilitator Resources*)

How to do it:

[Facilitator Note: This step in the training session uses The Change Response Profile, a report providing results from the online Change Response Assessment. Be sure you know whether participants will each have their profile report with them or whether you will be handing them out during this step. Language below assumes you will be handing them out.]

1. **We're going to be referring back to the descriptions of how different people react to change based on their behavioral style in just a minute. But first we're going to take an objective, unbiased look at your style and how you may respond to change.**





2. Distribute the profile reports. **This Change Response Profile was created specifically for you based on the answers you provided in the online assessment. The profile does refer to you in the third person. That’s intentional and part of the effort to present you with useful, objective feedback. In addition, you’ll see feedback that appears to be directed toward your manager, such as, “Coaching may also include helping Jess become more familiar with the dynamic nature of change.” In fact, I encourage you to discuss these items with your manager because they are actions your manager can take to help support your efforts in responding to change**

Most of all, what’s important to keep in mind is that this is a scientifically-validated, assessment of your individual preferred style when it comes to responding to change.

Step 7

Half-Day Training Session The Change Response Strategy™

Time it takes:

10 minutes

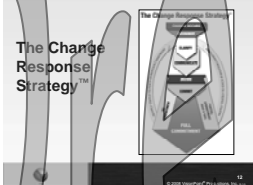
What it is about:

Introducing The Change Response Strategy™

What you will need:

- *Participant Materials*
- PowerPoint Slide #12
- The Change Response Strategy™ job aid (one for each participant)
- The Change Response Strategy™ wall chart

How to do it:



1. Introduce the segment by saying: **Now that we understand more about change, let's talk about a practical strategy we can use for responding to it.**
2. Refer participants to page 10 in their *Participant Materials, The Change Response Strategy™*. Show Slide #12 and say: **The Change Response Strategy™ is a tool you can use in any change situation to analyze a change, surface potentially unconscious feelings about the change and help you know what to say and do to remain positive and productive.**

Earlier we talked about how we typically feel when change is imposed or

participative, and we said that we feel more positive and engaged when change is participative. As we talk about The Change Response Strategy™, think about it as a way to help change feel more participative by being actively involved in understanding and responding to change.

When you're faced with any change, there are three decisions you can make, each with its own set of outcomes.

[Facilitator Note: During the discussion, encourage participants to take notes and fill in the blanks on page 10 of their materials.]

One choice is to decide not to commit to the change. What are the outcomes for you and for the organization of deciding to make no commitment to the change?

[Possible Responses:

- For you: it can lead to fear, frustration, status quo, negative feedback from your coworkers or boss; criticism; chastisement; increased distrust; you might decide to leave the organization
- For the organization: it can lead to sub-optimized work, low individual contribution, no diversity of ideas, increased distrust]

A second choice is to decide to partially

These materials are intended for preview purposes only.

Step 8

Half-Day Training Session The Change Response Strategy™ Video and Discussion: Clarify

Time it takes:

30 minutes

What it is about:

Demonstrating and discussing the first step in The Change Response Strategy™: Clarify

What you will need:

- *Participant Materials*
- Video – **Ready. Set. CHANGE!™**

How to do it:



1. Introduce the segment by saying: **In the video, we're going to focus on four main characters:**

- **Blake, a supervisor for a utility company**
- **Jill, an employee in the billing department of a healthcare company**
- **Hoshi, a team leader in a retail organization**
- **Marcus, an employee in a financial services organization**

Over the course of this first segment, we're going to see them board a train and take their seats. As you watch, listen to what they're saying to each other about change.



2. Play the video introduction. From the DVD main menu, select *Video by Section*, then *Introduction*. If you're using the VHS, play the video from the beginning and stop at the first disguised stop tape.
3. Discuss the video. Ask: **What were the key points of this segment?**
[Possible Responses: change is pervasive and constant; navigating change is a required skill today; everyone reacts to change differently; how we react to change influences others; you can respond to change in a way that's positive for everyone]
4. Refer participants to pages 11 – 13 in their *Participant Materials, Video Observation Form: The Change Response Strategy™: Clarify* and introduce the *Clarify* vignette. Say: **Now we're going to focus on the first step of The Change Response Strategy™: Clarify. You're going to see Jill telling Marcus about a conversation she had with Ahmad, a coworker, to help Ahmad deal with a recent change at work. As you watch the video, make some notes about the questions on the video observation form.**
5. Play the *Clarify* vignette. From the DVD main menu, select *Video by Section* and then *Clarify*. If you're using the VHS, play the

Step 9

Half-Day Training Session The Change Response Strategy™ Video and Discussion: Communicate

Time it takes:

30 minutes

What it is about:

Demonstrating and discussing the second step in The Change Response Strategy™: Communicate

What you will need:

- *Participant Materials*
- Video – **Ready. Set. CHANGE!™**

How to do it:



1. Refer participants to pages 15 – 17 in their *Participant Materials, Video Observation Form: The Change Response Strategy™: Communicate* and introduce the *Communicate* vignette. Say: **In the next video vignette, you're going to see Blake telling Marcus about a change in policy that he and some coworkers had to deal with. As you watch the video, make some notes about the questions on the video observation form.**



2. Play the *Communicate* vignette. From the DVD main menu, select *Video by Section* and then *Communicate*. If you're using the VHS, play the video through the *Communicate* vignette and stop at the disguised stop tape.



3. Discuss the video. Say: **Blake, Stewart and Raphael were all dealing with a change in company policy. What was the magnitude of the change for the organization?**

[Possible Responses: routine—regulatory change happens frequently]

What was the magnitude of the change for Blake and his coworkers?

[Possible Responses: significant because it represented a potential disruption in the workplace and because it seemed to come without warning—they felt blindsided by it]

In what ways did Blake’s reactions affect the situation?

[Possible Responses: he controlled his emotions and made a suggestion about the appropriate way to respond, so he kept Raphael from making decisions/taking actions that would make the situation worse for himself and others, thereby keeping Stewart from following Raphael’s lead; he sought the information he needed, which allowed him to make suggestions about how to implement the change and communicate the reasons for the change to his coworkers]

Based on Blake’s reactions and concerns, what do you think his dominant style is?

Why?

[Possible Responses: amiable—he’s concerned about the “people impact” of this change; analytical—he wanted information to better understand the change; either—he was cautious; he remained calm and served as a

Step 10

Half-Day Training Session The Change Response Strategy™ Video and Discussion: Commit

Time it takes:

30 minutes

What it is about:

Demonstrating and discussing the first third step in The Change Response Strategy™: Commit

What you will need:

- *Participant Materials*
- Video – **Ready. Set. CHANGE!**™

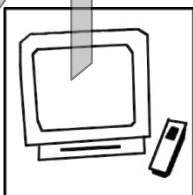
How to do it:



1. Refer participants to pages 19 – 21 in their *Participant Materials, Video Observation Form: The Change Response Strategy™: Commit* and introduce the *Commit* vignette.

Say: In the next video vignette, you're going to see Hoshi telling Marcus about a change in ownership of her organization.

As you watch the video, make some notes about the questions on the video observation form.



2. Play the *Commit* vignette. From the DVD main menu, select *Video by Section* and then *Commit*. If you're using the VHS, play the video through the *Commit* vignette and stop at the disguised stop tape.



3. Discuss the video. Say: **Hoshi and her coworkers were dealing with a change in ownership. What was the magnitude of the change for the organization?**

[Possible Responses: significant because it had to be handled correctly to keep from upsetting and thereby losing employees who would take with them the organization's institutional memory and knowledge of work processes]

What was the magnitude of the change for Hoshi and her employees?

[Possible Responses: significant because it would require a change in some work processes and procedures and possible physical relocation]

In what ways did Hoshi's reactions affect the situation?

[Possible Responses: she challenged her employees' assumptions with logic but didn't respond to the "people" issues they were trying to communicate, which caused the employees to be skeptical and withdrawn; she might have given them the impression that she didn't care about them; she talked about the impact of the change on herself/her career, which caused Kenesha to become defensive; Louis withdrew/disengaged from the conversation]

Based on Hoshi's reactions and concerns, what do you think her dominant style is? Why?

[Possible Responses: analytical—she responded with facts when her coworkers were expressing their personal concerns and

Step 11

Half-Day Training Session Applying The Change Response Strategy™

Time it takes:

25 minutes

What it is about:

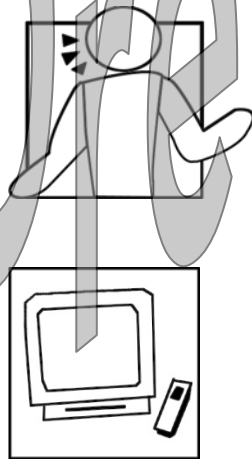
Practicing using the skills in The Change Response Strategy™

What you will need:

- Case study from the *Facilitator Resources* (optional – see *Facilitator Note* below)
- *Participant Materials*
- Video – **Ready. Set. CHANGE!™**

How to do it:

[Facilitator Note: If you would like participants to have another opportunity to apply The Change Response Strategy™, consider using one of the case studies in Optional Activities 4 – 8 from the Facilitator Resources. You can introduce this optional activity after the review of the video in step 3 on the following page.]



1. Introduce the segment by saying: **To begin putting it all together, we'll watch a brief summary of the key points from the video.**
2. Play the conclusion. From the DVD main menu, select *Video by Section* and then *Conclusion*. If you're using the VHS, play the video through to the end.



3. Review the video. Ask: **What have you learned about change?**

[Possible Responses: it's constant; it comes fast; it's not flexible; some change is routine and some is significant; we have to learn to deal with it because it's not going away]

What have you learned about people's reactions to change?

[Possible Responses: we all respond differently to change (i.e., in different ways and at different rates); our responses are based on our styles/preferences; our reactions affect others; it's important to be aware of and manage the impact of our reactions on others]

What are the three steps in The Change Response Strategy™?

[Possible Responses: 1) clarify; 2) communicate; 3) commit]

Why do we need to clarify a change?

[Possible Responses: to understand it; to figure out how and why a change might impact us and others]

Why do we need to communicate about a change?

[Possible Responses: it helps us express our needs, get answers to questions and share our concerns]

Why do we need to make a decision to commit to a change?

[Possible Responses: we owe it to ourselves and our organizations to make a good faith

Step 12

Half-Day Training Session Putting it all Together

Time it takes:

40 minutes

What it is about:

Understanding how individual behavioral styles influence and impact reactions within each step of The Change Response Strategy™

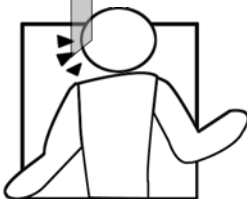
What you will need:

- *Handout #10 – Putting it all Together* (page 69 of the *Facilitator Resources*)
- *Participant Materials*
- The Change Response Profile reports

How to do it:

[Facilitator Note: Select one of the two scenarios provided on Handout #10 for the group to evaluate. Be sure to select the same scenario for each group. Selection can be based on the type of industry or which is more appropriate given the current environment of the organization. You can also create your own scenario based on your industry or a change that may have recently been imposed. DO NOT use a “proposed change” that the company has shared with you as this is not the time to announce a change to the organization.]

1. Ask participants to have their profile reports accessible.
2. Introduce the activity. Say: **Earlier we spent time talking about behavioral styles, and everyone had an opportunity to evaluate their own style and think about how they react to change. Now we are going to put everything we’ve been**





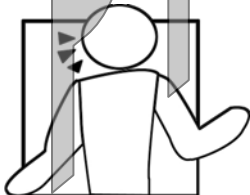
talking about together and review how each style influences and impacts change within each step of The Change Response Strategy™.

3. Say: **Let's get into groups by sitting with people who have the same style.**

[Facilitator Note: Assign four groups by asking participants to sit with others with the same behavioral style. If all styles are not represented you can still proceed and debrief the unrepresented groups yourself or at the end of this activity ask the group to think about and share their perspective on what we might be missing without that style.]



4. Handout the selected scenario from *Handout #10* along with the worksheet on pages 71 – 72 of the *Facilitator Resources*. Say: **In your group, please review the imposed change in the scenario I'm giving you and discuss what you would say and do during each state of The Change Response Strategy™.** [Allow 15 minutes for discussion and group work.]



5. Say: **Let's debrief the imposed change as we evaluate each social style against the stages of change. I want you to include the value of this style to the organization's ability to successfully implement the change.** [Ask each group to share highlights of their conversation. Debrief

Step 13

Half-Day Training Session Wrap up the Session

Time it takes:

10 minutes

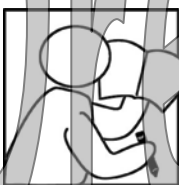
What it is about:

Identifying actions participants can take to engage with and navigate change; summarizing and evaluating the effectiveness of the training

What you will need:

- *Participant Materials*
- *Training Session Evaluation* forms (found in *Online Resources*)

How to do it:



1. Begin this segment of the session by saying: **Before we conclude, let's take a look at the Parking Lot. Have we addressed everything on it? Are there any additional questions that need to be addressed?** [Answer any questions.]
2. Refer participants to page 25 in the *Participant Materials, Focus on the Future* and say: **Please take a few minutes to think about what we have covered today and how you can apply what we've talked about back on the job. What are two things that you can take back to the job and implement immediately? Write them down in the space provided.** [Allow two minutes.]



3. Ask participants to talk in pairs and discuss their responses. [Allow one minute.]
4. Ask for volunteers to share their answers with the group.
5. Refer participants to page 1 in the *Participant Materials (Pre- and Post-Test)* and say: **Let's take a minute to look at the Pre-Test you filled out at the beginning of the session. Please fill out the Post-Test column and then compare to your responses from the Pre-Test column.**

[Facilitator Note: As an option, consider administering the Post-Test 30 days after the program as a post-training retention evaluation.]

6. Hand out the *Training Session Evaluation* forms, ask participants to fill them out. Collect them from the participants before they leave.
7. Thank the participants for taking time out of their busy day to attend the session.