How to Use the Change Framework to lay out the context for organization change and for each Change Initiative.
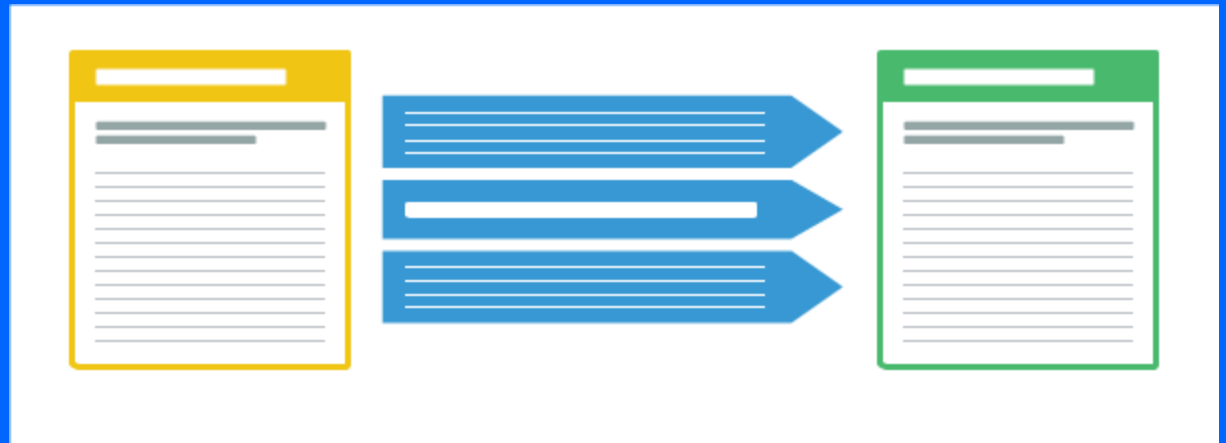

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Method

If the leader thinks s/he knows what needs to change and that everyone is aligned, ask:

- **How do you know your team knows what you want to do**; why don't we ask them just to verify?

- If they all say what you expect them to say, a positive step towards getting what you want done will have been taken just by bringing it to the center of their attention.

- If it turns out that some or all of the team are not as aligned as expected, then remedial steps can be taken.

Survey the leader's top team and ask them each:

- To describe the **current state**, that is: how things are today.

- **What really good things happen if we change and what really bad things happen if we do not?**

- To describe how things would be in the future if their ideal changes were successfully implemented.

- **What needs to be done** in order to get from where things are today to where things would ideally be next?

- **What will make it hard** to do what needs to be done in order to get from today to the targeted next state?

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Consolidate and assess collected responses.

- Review results with the leader to bring him/her up to speed on the group's data. Look for and discuss fully any points the leader finds confusing or surprising.

- Convene an offsite with the leader and the leadership team to review collected data, reach consensus on each of the five topics, and decide what needs to be done.

- At the offsite, review survey responses with the group one question at a time in the order above. Highlight responses that are the same or similar thereby indicating progress towards consensus.

- Guide the group to discuss the data until agreement is reached on **how things are today, why things need to change, and how things would be if the desired change had been implemented.**

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Use the Change Framework to summarize the group's work.

- The Change Framework is **a convenient way to visualize and store the group's consensus** using a diagram similar to that originally introduced by Richard Beckhard and Wendy Pritchard in _Changing the Essence: The Art of Creating and Leading Fundamental Change in Organizations_, Jossey-Bas Inc., San Francisco, 1992.

- Fill out the **Change Framework** to make a clear and compelling case for each initiative. Iterate with the team until all members are crystal clear about each initiative.

- If participants share their thinking openly, fully, and honestly they can go a long way towards achieving clarity and alignment. An effective leader then holds the results of these efforts and furthers their development, communicates progress to stakeholders, and assigns, aligns and drives resources in their pursuit.

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Change Framework

Case for Change

What really good things happen if we change?
What really bad things happen if we do not change?

Current State

How things
are now.

Target State

How things will be
after the change.

What must be done to achieve the Target State.

Barriers

What will be hard about implementing the
actions needed to achieve the target state?

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Tips for Filling Out the Change Framework

- Use to tell the story not to figure it out.

- Current and target state entries are in present tense.

- Strategic initiatives begin with verbs.

- For every entry in target state there must be:
  - A corresponding entry in current state.

  - Something in the case for change that motivates the target state.

  - A way to measure where it is now and where it is to end up being (to know when the intended benefit is realized).

- Planning horizon is far enough out so as to not be constrained by the present.

- It is ok that the goal as originally conceived is never (rarely) reached due to changing circumstances along the way.

- Fill out chart in this order: left-top-right-middle-bottom.
  - When you get to the bottom you may need to add more to the middle.

  - Along the way tweak prior entries as needed.

- When done, step back to see if the chart tells a story that hangs together and makes sense. E.g., level of detail for states vs. initiatives often varies; bring them in synch.

- Prepare a separate chart for each strategic initiative.

Summary points on using the Change Framework.

- A well formulated initiative, using the **Change Framework,** tells a story about w**here things are, why they need to change, how things would be if the intended change occurred and what must be done to get from here to there.**

- A well crafted change framework is rational, compelling, and flows smoothly from the present through to the future.

- Follow the tips to piece together the context and the story for each of the initiatives the organization must do next to stay on track to long-term growth and performance.

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Initiatives are one thing but action is another.

- Many management off-sites produce a list of initiatives. After intense effort and exhilarating breakthroughs. A list without context, though, fails to reveal the motivation and importance behind each initiative and so makes it difficult to communicate or to muster the energy, resources, and commitment beyond the session needed to implement them.

- Using the **Change Framework** instead of a simple list helps but even still, far too often, the same initiatives are again listed at the next offsite with little if any progress since last time simply because no one was put in charge and resources never allocated to implement them.

- Upon reaching agreement, the group may feel drained but good about what it has accomplished. It is important to make sure the group knows it has done great work and come a long way **but there is still more important work to be done**. Their effort may be for naught unless one more step is taken.

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Initiative-to-Action

Initiative to Action

Date:

Initiative ID: Executive Sponsor: Team Leader:

Team Members:

Opportunity:

Approach:

Time Table:

What you will watch to know how things are going and when the initiative is completed:

Key Considerations:

Name:

Method

- Take a few minutes to **fill out an Initiative-to-Action template** for a specific initiative, preferably one the leader would like the team member to sponsor.

- **Lead the group in a brief discussion** about the assigned initiative.

- Each team member, in turn, briefs the group on their initiative using the filled out Initiative-to-Action form. As each speaks, the rest of the leadership team adopts the mindset of close adviser and on the same team as the one speaking. Their objective is to ensure that the key points from the group's work are captured so that the best thinking of the group is at-hand and in mind as efforts to progress with the initiative proceed on the heels of the session.

Summary points on using the Initiative-to-Action Form.

- Filling out and briefing the **Initiative-to-Action** form launches the governance process and gets a leadership team member into the role of the initiative's executive sponsor and on-the-hook to make progress on behalf of the group.

- As such the team member becomes accountable to the group for progress on their initiative.

- Motivation and commitment soar and the odds of making progress go up as well.

- Over the ensuing performance period, the leader calls on each team member at some point to brief the group on how their initiative is progressing.

Resources
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Free

- IntelliVen blog

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- Select tools, insights, videos, and presentations

- Course syllabus, reading list, windows-of-time

Fee-based

- Board-in-a-Box
- Management Team Workshops
  - Executive Performance Assessment
  - Strategy Development
  - Initiative-to-Action
  - Contracting and Governance
  - Culture Development
- Manage to Lead Workbook
- Executive Training
- Executive Coaching

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