Executing Change in the Organization

The Consultant's Toolkit

Frequently Asked Questions

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What is the conceptual framework of the Toolkit?

The underlying concepts encompassing *The Consultant's Toolkit* are simple and logical. The approach and execution is fresh, innovative, and compelling. The concepts are

Planning—By defining the future, its assumptions, challenges, and priorities

Acting—By considering complexity, readiness, and behaviors

Adopting—By localizing, internalizing, and sustaining the change

Do the exercises and activities all take place within a workshop?

Yes. The Toolkit consists of four workshops, each designed for a different audience: the organization's leadership, the project management team, the managers, and individual contributors.

How are the workshops organized?

The Toolkit includes a facilitator's guide for each of the workshops as well as a copy of each participant workbook. Each workshop has guidelines for set-up and timing, preparation, objectives, and detailed facilitation instructions for implementing and discussing each exercise. The accompanying participant workbooks offer information and provide space for participants to record the outcomes of each exercise and discussion.

Are there any assessments in the Toolkit? If so, what do they assess?

Yes. There are three key change assessments. Each assessment takes approximately twenty minutes to conduct and score.

Change Style Assessment: The Change Style Assessment determines a person's unique "change style." The assessment instrument polls respondents with twenty-one questions formatted as sentence completion, identifies four distinct styles—initiator, protector, collaborator, and questioner—and provides information about characteristics, contributions during change, needs during change, and change tips for each style.

Change Readiness Assessment: A key to successful change is buy-in, support, and readiness to accept the change and its implications on the organization, its people, its culture, and its business. The Change Readiness Assessment identifies the readiness of the organization, its people, its environment, and its infrastructure. The assessment instrument polls respondents with twenty questions in the form of agreement statements and identifies four areas of readiness: organization, individual, culture, and technical.

Change Risk Assessment: This assessment identifies risks, obstacles, and barriers associated with the change initiative. The assessment instrument asks eighteen questions for risk in yes-or-no format, eight questions for complexity in scaled response format, and four questions in written format for obstacles and barriers. It identifies seven areas of potential risk—political, technological, cultural, financial, image, customer, and know-how—and four areas of obstacles and barriers-timeline, resources, commitment, and resistance.

Does the Toolkit speak to the issues related to acceptance and rejection of change?

Yes. Some constituents will view change as a challenge, an energy creator, and a motivator. Others will view change as a threat or an energy sapper, and a few others as a demotivator. Some will drive change, some will enable change, while others will be hesitant and even resist change. *The Consultant's Toolkit* provides the resources to identify and address each of these issues.

What levels of the organization does the Toolkit address?

The Toolkit addresses four distinct constituencies: leadership; the project management team; managers; and the organization's individual contributors.

I'm working with a leadership team engaged in a new change initiative. What kinds of resources does the Toolkit have to help me?

Establishing clear change leadership roles and responsibilities at the beginning of the change effort is imperative to success. It is important that both the executives and those impacted by the change understand who is responsible for various change activities, as well as who owns key change decisions.

Suggested workshop activities include:

Accountability—Establishing Guidelines, Roles, and Responsibilities

Communication—Getting the Word Out, The Compelling Message

Risk and Complexity—Confronting Potential Obstacles and Barriers

Readiness—Launching the Project

What organizational needs do the workshops address?

The component workshops are specifically designed to address both the organization's needs as well as positively engage those affected during the change process. The workshops encompass:

- How to establish clear change leadership roles and responsibilities
- How people impacted by the change understand who is responsible for various change activities
- Who owns and makes the key change decisions
- Who is responsible for determining the desired outcomes of the transformation
- Who is delegated authority to refine the desired outcomes, build the change strategy, prioritize and integrate initiatives, and design the change process
- Who oversees and course corrects the change strategy, initiatives, and change processes as the overall effort develops

What types of organizations will benefit from the change Toolkit materials and processes?

Any organization going through change, whether commercial or not-for-profit, will benefit from the materials and processes contained in the Toolkit. Typical organizations are

- Commercial Enterprises
- Strategic Business Units
- Professional Services Firms
- Not-for-Profit Organizations

- Government Agencies
- Municipalities
- Churches
- Academic Institutions
- And numerous others

What kinds of circumstances provide an opportunity to employ the change Toolkit resources?

Almost any circumstance surrounding change provides an opportunity to employ the concepts and resources found in the Toolkit. Typical opportunities are

- Mergers and Acquisitions
- Reorganizations
- Consolidations
- Major Program or Project Implementations
- Business Refocus
- Global Expansion
- Downsizing
- A Companion to Strategic Planning
- New or Changes in Senior Management
- Culture Shift
- And many others

How can I use the Toolkit in my consulting practice?

The Toolkit is designed to support the consultant's practice by providing easy-to-use resources for any organization going through or anticipating change. The Toolkit also contains a section on consultant roles and includes two project master flow diagrams for organizing and executing the project.

I want to grow my consulting practice to include change management. Will the Toolkit provide me the means to do this?

Yes. The consultant's primary role is one of a change process expert and change coach. Using *The Consultant's Toolkit* will enable you to make the most of the organization's potential abilities, determine and guide the use of appropriate resources, present alternative solutions and options, and help your client organization to successfully implement a change initiative.

We are implementing a new accounting software system that will have a significant impact on how we gather, analyze, and report information. Will the change Toolkit help us in this kind of a transition?

Yes, by all means. Gaining an understanding of the assumptions, challenges, priorities, and impact will benefit the organization at all levels. And the risk, complexity, obstacles, and barriers assessment will provide much needed insight and direction.

We have recently acquired a competitor and plan to roll their operations into one of our existing business units. What tool sets do you have to help us?

Several, actually. First, the managers workshop would be ideal way to establish what's ahead, what will change, understanding people's needs, and how to manage the adoption and localization of the change. The resources for value creation and fits and gaps would be an excellent tool to support the integration of the acquisition, as well.

Our company is growing exponentially and change is a continual process as opposed to a single event. We are considering establishing a change management office to help manage and stay on top of the transitions. How could we use your Toolkit to support this effort?

The change management tools are ideally suited for the situation you propose. The section for planning and organizing includes how to determine the project structure, select key project personnel, determine the project resource requirements, develop a conceptual work plan, identify project risks, determine information needs, and develop a project calendar, events, and timeline.

About the Author

WAYNE R. DAVIS is a senior partner with The Ryan Group, where he heads its consultancy practice serving a diverse client-base in both the private and public sectors. His client responsibilities include domestic as well as international engagements, working with management and senior leadership on planning, change, and performance improvement.

Wayne is the author or co-author of several works on organizational change, including *Game Plan for Change: A Tabletop Simulation to Ignite Growth Through Transformation* and *Team Performance Inventory* (both published by Pfeiffer). He is also the author of several online digital books on metrics and analytics, teaming, and strategic processes, as well as numerous articles and papers.

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