

SUCCESS SERIES



CHANGE MANAGEMENT

Management development is a priority for most organizations. This course is targeted for supervisors, managers, and leaders who need practical skills so they can manage people most effectively.

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Change Management and the Triggers for Change

Change management is leading change and innovation throughout an organization. Change is a basic ingredient of life. Recommending, planning, leading, implementing and assessing change are challenges that concern everyone.

This course provides the skills and knowledge you will need for leading change. It will review the forces that drive organizations to change, examine resistance to change, and present a range of approaches for making organizational change more effective.

Change Management offers tangible, easy to use tools and an end-to-end map to help you move through change so that you achieve early wins and build sustained results.

In Change Management you will learn how to:

- identify the triggers for change.
- work with the human dynamics of change.
- minimize the pain of change in order to make it easier to embrace.
- diagnose the impact of change and assess the risk.
- design a communication plan to address the concerns created by change.
- engage the support of others to make change happen.
- determine key success factors for setting a future vision.
- lead implementation.
- apply a set of change management tools that have worked well for others.

What are the benefits of Change Management?

- Understand the role of top management in determining the success of change and innovation.
- Implement strategies for overcoming resistance to change.
- Demonstrate greater mastery of important change management skills.
- Create communication plans that meet the informational needs throughout the organization.
- Use a set of change management tools to be applied in the end-to-end change process.
- Identify quick wins and build sustained results.

1. Demands and Challenges

Change in the workplace presents new demands and challenges for everyone in the organization. Change has always been a part of our lives. However, change is happening faster, with greater impact and consequences than ever before.

Managing change is a basic skill needed in today's business world. Leaders and employees need change management tools to remain productive while meeting the increasing demands they face. Managers need tools to foster innovation for change, gain employee buy-in and implement changes.

Effective change management not only involves changing with the times in order to survive. It also involves setting the pace so you can sharpen your competitive edge.

Some people view change as a disruptive event that creates a turbulent environment. Others view change as an exciting opportunity for growth or improvement. No matter what your views are on change, one thing is for certain. Change is inevitable and ongoing.

Many people associate change with crisis. In the Chinese written language, the combination of two characters represents crisis. One character represents danger, the other represents opportunity. Therefore, you can view change as having both opportunity and potential danger.

What this means is that in a crisis, we need to be aware of the potential dangers. By focusing on the change as opportunity, you will become stronger and you will stand to gain more. Change across organizational boundaries includes mergers & acquisitions, strategic alliances, partnerships and 'extended enterprise' networks, synergies and collaboration across departments, network management and global connectivity, building a 'one enterprise' culture across borders and boundaries.

Human resource challenges such as workforce diversity, the workplace of the future, managing knowledge workers and empowering professionals, knowledge management, and the development of 'learning organizations' are all part of changes initiated from inside the organization.

New organizational models impact every sector, such as industries in the midst of restructuring, the transformation of large public or quasi-public bureaucracies (e.g., hospitals/health care systems or public education), and businesses as a social change agents.

When changes are made as a response to external events, they are driven by the external environment. New technology, customer demands, and increased competition are examples of external events that drive change.

Changes made to create new opportunities or implement innovative ideas come from within the organization or other entity but often are necessitated by the external environment - competition and customer demands.

Many companies are forced to change as a result of external competition from other countries that are supported financially, in part, by their governments. To cope with that onslaught, companies are merging, consolidating, relocating and trying to change in efforts to stay in business.

Globalization is another force that drives change. Companies place a high value on innovation since ideas can come from anywhere in the world.

Globalization has altered the way organizations are run. The traditional organizational structure has been flattened. The vision, mission and values have been modified to drive company goals and employee behavior. A strong emphasis is placed on streamlining processes and return on investment.

The challenge global companies have is to balance meeting local needs in the market while focusing on a global strategy. The changes as a result of globalization are continuous.

And, as you already know, a company does not need to be global to be impacted globally. Even the Mom and Pop store down on the corner is being impacted through pricing, customers competition and perhaps even being acquired.

** Most Americans believe that globalization has a mixture of positive and negative impacts, with the positive ones moderately outweighing the negative ones. A majority sees globalization as quite positive for the economy, American business, and consumers, but attitudes are less positive regarding American jobs and the environment. Globalization is not just an economic process but also a process of the world becoming increasingly interconnected in which values are becoming more oriented to a global context and international institutions are playing a more central role. -- WorldPublicOpinion.org*

Continuous change is described as ongoing and gradual shifts from what is currently known or practiced to what will be known or practiced. This type of change involves incremental steps versus a sudden shift. The focus of this type of change is on work processes or the workplace itself.

New products, process redesign, improvements in service, moving from individual contributors to self-directed work teams are a few examples of continuous change.

Sudden change is driven from the top down as an organization tries to keep up with changes in the environment.

Company mergers and acquisitions, reorganizations, downsizing, spin-offs and divestitures are examples of sudden changes that could occur in an organization. Sudden change that sneaks up on you and comes through an eleventh hour announcement can be devastating.

**Sudden change can also turn your life around in very positive ways. In today's turbulent world, change will happen. The solution is to keep your skills and knowledge sharpened, your options open, and your coping skills readily available.*

Laying the Groundwork for Change

The single biggest impetus for change in an organization tends to be a new manager in a key job.

They come into the new job with a fresh perspective and see the status quo as unacceptable. Their first inclination is to change things. In fact, they were probably hired to make changes. After all, very few managers are put in place to maintain things as they are.

"Hi, I'm Mike, your new manager. I've got some great ideas to improve our productivity!"

There is a clear pattern to the reasons for change failures. Most often the failure is due to a leader's attempt to shortcut a critical phase of the change process.

Sources of Change Failures

Four mistakes are the source of most failures when going through a change process.

The group in the photo (right) is using the most common way of trying to figure out why a change process failed - meeting to discuss what went wrong and lessons learned.

1. At least half of failed change efforts bungle the first critical step - establishing a sense of urgency.
2. Most leaders grossly under-communicate their change vision. The efforts they do make to convey their message are the least convincing choices: speeches and e-mail.
3. Unrealistically thinking about the duration and difficulty of major change efforts is often catastrophic. While it is important to celebrate results along the way, people should not kid themselves or deny reality.
4. Failing to get ALL members of management committed to the change leads to a lot of incipient failure. The perception that large organizations are filled with middle managers who resist all change is not only unfair but untrue. Often it's actually the middle level managers who bring issues to the attention of senior executives. In fact, the biggest obstacles to change are more often those who work just a level or two below the CEO -- vice presidents, directors, general managers, and others who haven't yet made it to "the top" and may have the most to lose in a change.

The world of work is filled with change. Forces, such as increasing competition, rapid technological advances and globalization keep changes coming faster and with more complexity than ever before. An organization needs to develop the ability to not only keep up but to stay ahead of the changes or fall behind.

2. 8 Steps for Leading Change

Research conducted by John Kotter, Ph.D. and others over a period of years with many organizations, concludes that there are eight stages, or flow, in leading change.

The flow includes: make the change urgent, pull together an Advisory Group, create a vision, develop communication strategies, get some quick wins under your belt, keep the momentum going, and finally, create a new culture that allows the new behavior to stick.

This unit expands on the eight stages of change. Other units will address how people resist change, how they move through three phases of transition and how individuals apply five stages of coping with loss due to change.

**As you may already know, and evidence points out, the greatest difficulty in all of the stages is getting people to change their behavior. It becomes the central challenge. One of the approaches to helping people change is to influence their feelings.*

Step 1 – Sense of Urgency

When change efforts are kicked off, the first step is making sure the right people are looking for opportunities and solutions to problems, and are interested in energizing the business unit and organization. This sets the stage for "lets go!"

Ideas for you to ramp up the sense of urgency.

- Show others something tangible that they can hold, touch, smell, see and hear.
- Provide evidence from outside that the competition is taking actions of their own.
- Find inexpensive and easy ways to chip away at complacency.
- Don't underestimate how much the list of behaviors below exist in your organization.

Step 2 – Advisory Group

In turbulent times, the focus of leadership is to address continuing challenges of change and organizational adaptation. This is essential for organizational success, and those leaders with the skills to steer change effectively are in high demand.

The group may be called an Advisory Group, Steering Committee, Guiding Coalition, or Sponsors. Your organization may have other titles for this type of group, but their functions are all very similar.

The advisory group is a team of 5 - 7 leaders who are interested in the success of the change initiative and are willing to set direction and vision, appoint members of a Core Team to run the day-to-day change process, and clear the path so individuals are able to have a successful change plan and implement their solution.

Engaging the right talent for an Advisory Group involves not simply reaching out to whoever happens to be "in charge" of a department, organization, or other function, but it requires assembling the necessary skills, experience, and chemistry as well. A coalition of 20 people who are decent managers but ineffective leaders is unlikely to create meaningful change. The most effective Advisory Group members usually have strong position power, broad experience, high credibility, and real leadership skill.

Vision is a chance for the Advisory Group to produce a clear direction, and to define the change that is needed and how the future will look in meaningful ways. Vision is "painting the picture" of the future.

Spinning out of the vision, setting direction focuses on well-defined major aims of the organization or work unit.

Step 3 – Here are a few ideas for creating vision for you to consider.

- Think about what's over the horizon from your competitors.
- Have a vision that can be stated during an elevator ride from the John Hancock's 95th floor to ground, that is, 33 seconds.
- Add emotion to your vision.
- Make the vision bold to stir emotion in others.
- Think carefully about how quickly you want to introduce change.

Step 4 – Communication Strategy

People want to know what's happening and why. Strengthen communication efforts through internal websites, e-mail, newsletters, hotlines, electronic bulletin boards, meetings, open forums, and formal or informal discussions. Comprehensive and timely information will help keep those involved, or impacted by the change, informed of the project status.

A general rule of thumb regarding communicating during times of change is "Communicate, communicate, communicate." When people are under the stress of adapting to - or anticipating - change, they don't communicate as well so it's very important to take special efforts to communicate well and often.

Over-communication is better than no communication. Seek feedback daily to monitor progress, and keep on top of any new information:

- Get staff input so they take ownership and their ideas take root.
- Use multiple channels -- meetings, memos, one-on-ones -- everywhere you go.
- Be relentless. When you think you've communicated everything, do it again.
- Understand the message you are delivering and they are hearing.
- Define change clearly. Minimize ambiguity and confusion.
- Explain why. Things might be crystal clear to you but you've been immersed in the subject you're addressing far longer than most of the others have. Test your message with someone who is not close to the project.
- Openly examine positive and negative angles, describe downsides early, and also describe the potential benefits.
- Ask for advice. Encourage people to challenge your assumptions.

**Keep communication simple and heartfelt, not complex and technocratic! Address what people are feeling. Help people see the vision through your communication strategies by using existing and new technology.*

Step 5: Remove Barriers

Anticipating potential barriers and facing known barriers is necessary in order to resolve them or minimize their effects. Some barriers are:

- Ineffective planning.
- Poor communication systems.
- Lack of buy-in and support from those who are implementing the change.
- Credibility is missing either in the change process itself or in leadership.
- Ineffective management of resistance.

Create quick wins fast enough to diffuse the critics, pessimists and skeptics.

The momentum gained from quick wins clears the way for more wins.

Make sure your successes are visible and that they address what people care deeply about in their day-to-day work.

Step 6 – A quick win is important for these reasons:

1. Gives feedback to the Advisory Group about the change initiative.
2. Provides an emotional uplift to those doing the hard work.
3. People begin to gain faith in the effort and draw in those who are not yet on board.
4. Takes power away from the "nay-sayers."

When the momentum begins, keep it going and don't let up. Continue with wave after wave of all the small changes needed for the over-all change, not letting up until your vision becomes a reality.

Step 7 – Some of the ideas you can use to keep the momentum include:

- Jettison work that wears you down!
- Keep looking for ways to keep the urgency up!
- Build success stories into your communication strategies.
- Nothing succeeds like results...show them!

Step 8: Make Change Stick

Two examples about making change stick:

1. When a new garden is planted, the ground is prepared, the plants are watered, and the garden is weeded. It is located where there is plenty of sun and it is protected from rabbits (the competition) by small fences.

2. When a new building is constructed, great care is taken to make sure the foundation goes down deep past the frost line and is wide enough to support the planned building on the foundation.

The gardener or builder has a sense of urgency, is guided by a group of people (family or corporate), has a compelling vision, communicates the plan and progress, works hard to remove

barriers, and gets some quick wins such as the tiny growths of green or the solid foundation. The early growth and hardened cement fuel the gardener and builder to do more, and their momentum is geared up and maintained.

If culture is defined as the ideas and customs of a group, then the full-growth garden and inhabited building impact behavior. New ideas are pulled from the garden and building that fuel the groups' cultures even more and the change from muddy garden plot to beautiful and sustaining garden, or from the dark hole to a leading-edge structure help to lock in the new behaviors.

These examples are not unlike what you will have to do for the change you are implementing.

Here are some ideas to help you change behaviors and make the change stick.

- The initiative isn't over until the changes have roots.
- Show new employees what the organization really cares about via your change project.
- Promote people who reflect the new behaviors.
- Keep telling the stories about the project, like people of old around a campfire.
- Keep locking in the continuity of behaviors needed and the results you seek to help the new culture grow.

Core Team

A Core Team is a group of 5 – 7 individuals. Some of them are members of the work unit or function undergoing the change, and some may be subject matter experts.

The Core Team reports into the Advisory Group and leads the employees who are going to work on the change project.

The Core Team must work as a team with each member giving input and taking responsibility for the work of the team. This Core Team has the primary responsibility for making certain the change happens. They are champions, problem-solvers, influencers, and sometimes sympathetic listeners.

Leaders throughout the organization need to draw on reserves of energy and trust to form a Core Team. The pressures of transition make a strong Core Team essential. Beyond the customary team-building retreats and events, real teams are built by doing real work together, sharing a vision and commitment to a goal.

The Need for Simplification

People resist simplicity because they fear it, and they don't understand the value. A simple idea makes us feel open and vulnerable, that is, naked. The issue is magnified if you are surrounded by others who rely on complexity to cover their own ignorance and couch their bets.

<i>Fight complexity!</i>	<i>Embrace simplicity!</i>
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There is so much at work that makes life complex. Much of it can be distilled down to some critical elements and used in a more simplified format. Communication, plans, project specs and more, can all be helped by simplicity. That doesn't mean the space program should be on a 3 x 5

card, but the space program must be clearly communicated to all involved.

Nordstrom is a large, high-end department store. They do very well. Here's an example of simplicity:

Nordstrom Rules:

Rule #1: Use your good judgment in all situations. There will be no additional rules.

Key Success Factors

Leaders on the Advisory Group must convey a vision of the future that is clear, appealing to employees and ambitious yet attainable. Effective visions are focused enough to guide decision making at the Core Team level, but are flexible enough to accommodate individual initiatives and changing circumstances.

The future vision provides the umbrella statement for the key success factors.

Key Success Factors (KSF) are clearly written statements that indicate the measures of the change effort and indicate results. They underpin the future vision. Usually 5 – 7 statements are enough to provide the targets for the change. Some statements may have bullet points with sub-categories.

KSFs need to be clear, single ideas with time or quality measures.

- Reduce turnover of our sales force by 20% in 12 months.
- Create new hiring criteria in 3 months.
- Identify innovative recruiting methods in 6 months.
- Train hiring managers in stronger interviewing skills in 6 months.
- Implement a new program for the sales representative's first 12 months on board, in 9 months.
- Complete this course by this time next week and score 100% on all exams.

Involving the right people to work on the change project is critical. All too often, teams made up of employees who happen to be available.

The Core Team must be representative of key areas impacted by the change and those members will in turn pull in employees from their various functions. Additionally, there may be subject matter experts (SME), from areas outside of the target areas who need to be part of the group reporting into the Core Team.

Selection of others may include those with important experience, or selection may be based on providing employees with certain kinds of experience throughout the project.

**You may be involved with a change now.
Who is on the Core Team and what area or SME do they represent?**

Core Team Member	Area/SME they represent
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.	.

**Is the Core Team the right mix of people for this change process?
How could the Core Team be improved, if at all?**

The Role of Meetings

Meetings are an important part of change projects. They provide opportunities to discuss status, changes, needs and accomplishments. The human side of meetings is that they provide a chance to “get together” and “touch base.”

The frequency of meetings is determined by the group. Usually the Core Team will guide frequency. Members of the Core Team may hold separate meetings with employees affiliated with that part of the project. Core Teams may have daily meetings, monthly meetings, or anything in between. The frequency may vary in different stages of the project. Be flexible and consider the intent of your meeting.

Staying on Track

The Core Team is responsible for keeping the change project on track.

That means, on time and on budget.

The Advisory Group will act as an early warning system if they sense the project is getting off track.

Staying on track involves a well thought out plan with contingencies built in as back up if things begin to shift within the project.

**There are several big items that cause a change project to go off track:*

- *change of scope (shortened time frame or expanded deliverable)*
- *change of vision*
- *new team members*
- *team members leaving.*

All of these require careful planning and discussion to arrive at the best solutions.

We celebrate a sports team’s victory, we celebrate our kid’s accomplishments and we cheer at many other wins. But, at work, we don’t celebrate good efforts and outcomes enough. What’s

enough? That's a judgment call and you have to pick up the comments and nonverbal messages from employees.

Too many people say we don't have budget for celebrating. Celebrations don't have to be extravaganzas! Some of the best are when people bring in their favorite cookie recipe or bake banana bread for the team. It is the age-old need for affiliation and someone saying, "You did a good job."

The benefits of the **8 Steps for Leading Change**, will help you with large or small changes and concurrent change.

Think of two scenarios around a change you're experiencing.

1. The change is handled fairly well, but faces the risk of failing.
2. The initiative uses the **8 Steps for Leading Change**, i.e., make the change urgent, pull together an Advisory Group, create a vision, develop communication strategies, get some quick wins under your belt, keep the momentum going and finally, create a new culture that allows the new behavior to stick.

3. Leading Change Tool Kit

Theories and approaches to change are always helpful, but a proven set of tools to use in leading the change process can be invaluable. When you are under pressure, dealing with time constraints and numerous other variables in leading a change initiative, tools that complement the theories will not only help you and the team members, but they can save your sanity.

In this unit, you'll find tools that include:

- Change Management Checklist
- Change Diagram
- Current-Future Overlay
- Change Compass
- SWOT
- Plus-Delta
- Setting Priorities
- KSESD
- STAR Projects
- Quick Wins
- Risk Assessment
- Force-Field Analysis
- Ripple Effect

Change Management Checklist

A ***Change Management Checklist*** is provided to help you keep track of the change components.

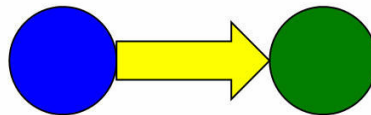
It may be helpful to your change effort to expand or reduce the list or to reorder the topics.

This is a sample.

One item that permeates all of the other items on the checklist is **SIMPLIFICATION!**

	Have	Need	Action
What is the Trigger for this Change?			
Form an Advisory Group			
Establish a Core Team			
SWOT Results			
Establish a Sense of Urgency			
Create a Vision			
Identify the Key Success Factors			
Conduct a Plus-Delta of Current State			
Set Priorities			
Build a Communication Strategy			
Conduct a Risk Assessment			
Conduct a Force Field Analysis			
Apply KCSED			
Remove Barriers			
Initiate STAR Projects			
Gain some Quick Wins			
Build and Keep the Momentum			
Celebrate			
Be Aware of the Ripple Effect			

Change Diagram



Step One	Step Three	Step Two
Current State	Getting There	Future Vision

Below is a high-level outline of suggested activities in each step.

Step One - Current State

- What is the Trigger for this Change? Clarify.
- Form an Advisory Group
- Establish a Core Team
- SWOT Results
- Establish a Sense of Urgency
- Conduct a Plus-Delta
- Simplify

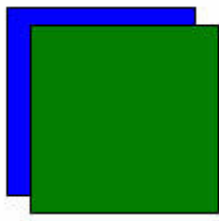
Step Two – Vision

- Create a Vision
- Identify the Key Success Factors
- Set Priorities
- Build a Communication Strategy

Step Three – Getting There

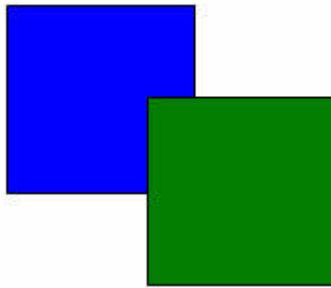
- Remove Barriers
- Apply KCSED
- Initiate STAR Projects
- Gain some Quick Wins
- Conduct a Risk Assessment
- Conduct a Force Field Analysis
- Consider the Ripple Effect
- Celebration

Current-Future Overlay



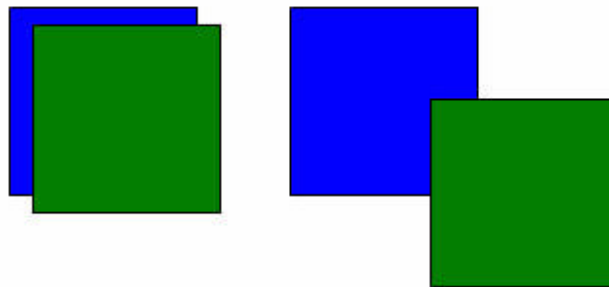
The **Current-Future Overlay** is a simple graphic description of the scope of change. Using two pieces of colored paper or cardboard, the overlay helps individuals and groups visualize “how much” is impacted by the change. The discussion around the overlay is helpful as those leading the change talk about what has to be done, key success factors, planning and expectations for individuals and teams.

If the overlay is close, it shows that the change is manageable and raises comfort levels.



When the overlay depicts greater change between the current state and future vision, the overlay stimulates discussion and usually an adjustment of the spacing.

With greater change, it is helpful to map out a series of steps versus one large step.



Change Compass

You may remember the questions from ninth-grade English class: who, what, where, when, how and why. Let's call them the **Change Compass**, with the first five words as points on the compass and the why in the middle.

Use the compass to figure out what will be done, who does it, when it's due, where it happens and how it gets done.

The level and sophistication of your team will determine how much of the why is addressed. New team members = more why. Experienced team members = less why.

When you have something that requires action, use the **Change Compass** to make sure all of the bases are covered.

Ask "Why?" about all of the other compass points. The questions are listed here as shown below but it is more effective for a group if you draw a compass with five points on a flip chart with "why" in the middle of the circle.

SWOT Analysis

A **SWOT Analysis** is a quick and inexpensive way to get a clear understanding of the change effort by asking a set of questions about the current state.

1. What are our strengths in this area? What's special about us?
2. What are our weaknesses in this area?
3. What are the opportunities for us in this area?
4. What are the threats for us in this area?
5. What additional information do we need?

When the information is displayed on a single flip chart page, or four pages assembled near each other, it makes it possible to view and consider many options that might not surface otherwise.

Strengths	Weaknesses
Opportunities	Threats

Plus-Delta

A quick and easy, effective, and efficient way to make assessments is called **Plus – Delta**. Here's how it works:

- Plus asks: “**What’s going well?**”
- Delta asks: “**What needs to be changed or improved?**”

Under each of those questions you can have categories, labels, or chunks of information. For example, if you are in charge of the print shop, you might look at various phases of the operation from end-to-end and ask, “What’s going well with deliveries?” The team responds. Then ask, “What could we change or improve to strengthen our deliveries?” The team responds with their viewpoints -- be prepared to take a lot of notes.

By investing some time to conduct a **Plus – Delta** you can get a good picture of your area quickly, easily and produce meaningful results.

What's going well?	What needs to be changed or improved?
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.	.
.	.

The intent is to leverage what's going well and take steps to make the changes or improvements so they get moved to the what's going well list.

Setting Priorities

You may end up with a long list of action items from Plus-Delta or another, similar activity. To gain momentum and gain some quick wins, identify those items that are easy to work on and that have a big payoff. The next level would be those items that are hard to work on with a big payoff, and so on.

	Activity	Easy to Work on?	Hard to Work on?	Big Payoff	Small Payoff	Priority
1						
2						
3						
4						
5						
6						
7						

With this approach you may have more than one number one priority. Your number one priorities will be easy to work on with a big pay off. They become your quick wins! Quick wins will get the wheels turning, show initiative on your part and generate tangible results that have been produced by your team with your guidance, or results you've produced yourself.

The above chart is laid out for ease of use; however, you may wish to change it to suit your environment.

KCESD

KCESD is a handy acronym to help cover the bases when deciding what to do with all of the information you'll uncover during the change process.

K is for what you'll Keep as is.

C determines what you'll Consolidate.

E is what you plan to Eliminate.

S is what you will Streamline.

D identifies what you need to Develop.

KCESD	Action Steps
Keep	.
Consolidate	.
Eliminate	.
Streamline	.
Develop	.

STAR Projects

Employees always have a lot to teach supervisors and management. They are closest to the work and know it best. They also have many good ideas. Ask them for their thoughts and ideas.

Turn their ideas and other innovations on your team, into **STAR** (Short-term Action Research) **Projects**.

STAR Projects are focused, 3 to 6 weeks in duration, with 3 to 5 people from your team or a mixed group of your team and other departments. The intent is to find fast breakthrough solutions to targeted problems or opportunities.

STAR Projects are self-running without a supervisor sitting in on the meetings. A manager or supervisor may serve as a resource if asked.

STAR Projects

	STAR	What	Who	When	Where	How	Why
1							
2							
3							
4							
5							
6							
7							

STAR Projects are closely associated with quick wins. Some projects need more information to go forward, that's where the research comes in. They are short-term, meaning 3 - 6 weeks, action-oriented and the team is made up of 3 to 5 core people. They can pull in other resources as needed, but the core team is kept small. The team can be made up from your department, or the members may represent more than one group, depending on project.

Quick Wins

Quick Wins become an important strategy in your change effort. The Deltas from your **Plus-Delta** that have been identified as easy to do with a big payoff become your top priorities, and are called Quick Wins.

With some effort up front, you'll:

- Gain momentum
- Get results on the books
- Fire up the staff/team
- Set the tone for your how you are going to lead

Quick Win Descriptions
<i>Generated new hiring criteria for 3 Java-related positions in the Information Technology Department.</i>
<i>Installed the first of six components of the new software system on 49 workstations, all fully functional with no glitches.</i>
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.

Write your descriptions with clear statements, put in numbers when you can and make them energetic.

Risk Assessment

Most change initiatives carry risk. The risks are either minimal or large enough to shut down the project. Conducting a Risk Assessment helps you identify the risk, assign a value to it and rank order the concerns, i.e., the risks. The process acts as an early warning system to head off risk that has the potential to be a barrier or large impediment to the project.

The steps include:

1. Describe expectations in short, crisp statement, such as **Vendor training is available.**
2. State the risk as the exact opposite of the expectation, i.e., such as, **Vendor training is not available.**
3. If the risk were to occur, on a scale of 1 - 10, how serious would it be for the project? For example, 9
4. Determine the chances of that happening on a scale of 1 - 10, for example, 4
5. Multiply 9 x 4 to get the level of risk, in this case, 36

Sample Change Project: Upgrading Office Software

<i>Expectation</i>	<i>Risk</i>	<i>Serious</i>	<i>Chance</i>	<i>SxC</i>
1. SMEs available	1. SMEs are not available	10	1	10
2. New hardware	2. Have to use old hardware	10	9	90
3. Everyone gets trained on time	3. No one gets trained on time	6	4	24
4. Vendor is stable	4. Vendor bought and change happens	8	9	72

On this project, two risks surfaced that will impact the project:

- Using the old hardware
- The vendor is bought and that will mean changes

By identifying the risks, the project team has time to make adjustments and plans to off-set the risk.

Keep the required documentation for later referral, use flip charts or word documents.

Force-Field Analysis

A **Force-Field Analysis** helps analyze the forces that drive the change and the forces that impede it. The process works well and is easy to do.

The steps include:

1. Write short, crisp phrases that state What's working for the change, project, team, etc.
2. Do the same for What's working against you?
3. Discuss both lists and make any changes.
4. Assign a value to each item on the list from 1 to 5. There will be discussion which gets more on the table with which to work, and you may even add more items to what's working and what's against.
5. Add the values on both lists. Review the items to see if there is anything that can be done to items on the working against list so that it could become a positive. Could it be modified?

Sample Change Project: Upgrading office software.

<i>What's working for us on this change?</i>	<i>What's working against us on this change?</i>
1. 3 subject matter experts 5	1. Hardware not updated 5
2. Excellent vendor training 5	2. Travel across town for training 4
3. Management support 4	3. Training in summer during vacations 4
4. Management will learn first 3	4. Vendor may be purchased 2

In this example, what's working totals 17 and what's working against totals 15. The focus now is on increasing the what's working for us total and decreasing the what's working against us total.

For change to be effective, leverage momentum via what's working, and begin to dismantel the barriers identified in what's working against you.

It is recommended that you keep your information on a flip chart or word document for future reference. The level of detail in your notes leading up to the force field will be determined by the change or the group's need for documentation.

Ripple Effect

Function or area to review that may be impacted by this change.	OK as is.	Change or improve.
Human Resources	.	.
Policies	.	.
Procedures	.	.
Methodologies	.	.
Information Technology	.	.
Sales and Marketing	.	.
Training	.	.
Customer Service	.	.
Coaching	.	.
Equipment	.	.
Safety	.	.

Some additional examples of implementation for change that can be used include, but are not limited to:

- Performance reviews and career development
- Total quality management programs
- Technical processes of one or more functions that need to be updated

You will probably find you use some of the tools described in this Unit more than others. The main purpose is to provide tangible resources from which to choose, so that you can easily, quickly, and inexpensively lead change initiatives.

4. Ripple Effect of Change

The fundamental change initiative rides forward on the backs of several vehicles to implement change. These vehicles consist of policies, practices, programs, events, structures, and assignments that already exist within the organization or that can be created and then used as means for planning and implementing the desired change.

Some examples of implementation of change that can be used include, but are not limited to:

- Human resource policies regarding staffing and compensation
- Staff development and continuing education programs
- Performance reviews and career development
- Total quality management programs
- Anniversary dates and celebrations
- Coupling culture change with the need for a new information system
- Technical processes of one or more functions needing updating
- Regular team meetings
- Industry-wide recognition and awards programs

Human Resources

How would Human Resources be involved with changes? HR may not be involved in the actual change, but the results of the changes may impact several functions within HR.

It is suggested that you get HR involved early on so they can help and support your change efforts and make sure the right HR functions are addressed with sufficient lead time.

Some of the possible HR functions of actions that need to be considered include, but are not limited to:

Hiring criteria for new hires
Competency testing to meet new requirements
Training
Coaching
Performance Reviews

Policies

As a result of the changes you plan to implement, you may realize certain policies, procedures, check lists, and flow charts need to be updated, clarified, replaced, and/or consolidated for efficiencies or developed from scratch.

Additionally, internal/external client/customer changes/expectations/ standards or professional guidelines inform you of something that's different and the changes need to be written into your documents.

What do you do and how do you do it?

- Will you be the one to do the writing?

- Will it be someone on the team and you review it?
- Who else has to review the changes?

Find out early. Some organizations have a very formal process that takes plenty of lead time. Other places make the changes in a single meeting.

Methodologies

There may be a methodology such as a large flow chart that outlines how a process carried out. If it is in place and the change impacts all or part of it, test out the methodology with someone new to the approach. Do the same if part of the methodology is changed. The outcome will be a completed and updated methodology.

Procedures

Methodologies and policies may have step-by-step procedures to be followed. Test the steps that are modified as a result of the change with someone who is not familiar with the procedure.

When individuals who are close to the change and understand it thoroughly review or test the procedure, there is a high potential to gloss over steps or make assumptions that people know things they don't know. Someone who is not familiar with the procedure is the best person to check the new one.

Information Technology

Does the change require the Information Technology department in your organization to do something different? It is always a good idea to have IT representation on the Core Team so they can see how the change will impact what they do, and they can have as much lead time as possible to handle the changes.

Hiring Criteria

As a result of a large-scale change that tripled the product line and increased customer interaction, one company went back to the drawing board to identify the criteria they would use in hiring. Their conclusion was that they could teach certain "tangible" areas but that they would hire people with the interpersonal skills for the positions that interfaced with the public.

Involve HR as soon as you think there may be any changes related to hiring criteria. It takes awhile to make the changes and get them approved so don't wait until late in the project.

Training

Many times a change will require training. One large pharmaceutical house used a lead time of one year to get all of their field representative trained in the new product line before the FDA approved the new drugs. When the drugs were finally approved, the reps were set to go.

The training to implement a change may require a few simple changes in existing training or the training could require a whole new curriculum. Whether a lot or a little training, a change usually requires some kind of training. Don't delay or the momentum will be lost.

Coaching

Perhaps your change doesn't require a formal training program. There are some changes that require coaching rather than training. Coaching can be done one-on-one or small groups and usually doesn't require a lot of lead time or expense.

If you are the one doing the coaching, make sure you know the change and what it means on the job.

Equipment

One East Coast-based communication company implemented hard-hitting new policies that would give them a competitive edge. Unfortunately they neglected to give the technicians the equipment they needed to implement the policies.

For change to succeed, make sure all of the right equipment is available and working, and that everyone who needs to know how to use, does, before the change is in place.

Safety

The project may require safety updates. Don't wait until the changes are implemented to make the changes. Either make them just before the change or concurrently.

Ergonomics: http://www.osha.gov/SLTC/ergonomics/four-pronged_factsheet.html

OSHA has a four-pronged comprehensive approach to ergonomics designed to quickly and effectively address musculoskeletal disorders (MSDs) in the workplace.

Your organization may have a person who comes to your area and conducts ergonomic assessments of the work space. If not, the web site stated here has helpful information including diagrams for setting up a workstation.

This is one area that can be addressed quickly with positive outcomes. Many of the MSDs take a while to show up in a person. Some of your team may be suffering from MSDs now.

OSHA: <http://www.osha.gov>

OSHA's mission is to assure the safety and health of America's workers by setting and enforcing standards; providing training, outreach, and education; establishing partnerships; and encouraging continual improvement in workplace safety and health.

If OSHA standards are part of your job make sure you fully understand their guidelines and then make sure your team follows them.

Set up the idea of a safety culture vs. safety events. That means, safety is part of what people do. No short cuts, not rushed to do the job and they go home with all their body parts.

Any time a change is implemented it effects other areas that may seem removed from the change. Between brainstorming with the Core Team or inviting an HR representative to a meeting you'll cover most, if not all, of the areas that will need to be considered for any changes to their operation.

5. Resistance To Change

Resistance is present in any change initiative. While it is a natural outcome of change, it is a factor that may become a barrier to change. Managing resistance to change is necessary if the change is to be successfully implemented.

Not only do change managers need to anticipate resistance and deal with it, they should also use it as a sign that employees have left the denial stage (***Unit 7, Coping with Loss during Workplace Change***) and are moving forward.

Types of Resistance

Resistance can be active or passive. People will resist change in a variety of ways, usually suited to their personality. Some people resist with good intentions, others to rebel.

Resistance can be beneficial when it acts as a signal that something is wrong with the plan to change and needs to be resolved. However, most of the time resistance can undermine success in implementing changes. That is why awareness of both types is important.

Active and Passive Types of Resistance

Arguing, disagreement, debate, hostility, neglecting to communicate problems, reduced output, and refusal to cooperate are ways that people actively resist change.

Becoming forgetful, practicing avoidance, over-complicating new procedures, stalling, apathy, and not meeting expectations are passive forms of resistance. These may be so subtle that a person may not realize he/she is resisting.

Disruption and Lack of Agreement

The disruption associated with change, not the change itself, is one reason people resist change. Negative outcomes anticipated by this disruption include:

- Uncertainty
- Loss of control
- More work with fewer resources
- Having to learn new skills
- Break from routine

Another reason for resistance is lack of buy-in or lack of agreement with a change. This type of resistance is often due to a lack of trust in leadership, poor communication about the change, and the belief that it will never work.

Fear of Losing Something

Resistance often stems from a fear of losing something.

The following list identifies things people may fear losing through change:

- Job or position/role
- Income
- Security
- Relationships
- Goals for the future

- Control
- Responsibility
- Reputation
- Certainty
- Sense of competence
- Prior negative experience with change.
- Fear of the unknown.

Resistance and Betrayal

Employees who resist may feel as though they've been betrayed. "They're not telling us everything." "They only care about the bottom line, not the people – we're just a number to them."

To minimize feelings of betrayal or deception, it is important to be open in communications – let employees know what you know. Having patience and keeping your emotions intact can also be effective in dealing with feelings of betrayal.

Resistance and Confusion

A sense of confusion adds to resistance. Roles are not clearly defined, tasks and responsibilities shift, and procedures may be unclear. Tools to manage confusion include:

- Be supportive
- Listen
- Focus on successes
- Communicate
- Be visible -- MBWA (management by walking around)
- Keep an open door policy
- Give employees one-on-one time
- Be patient
- Offer guidance and direction

"Why are we doing it this way?"

During change, people often ask, "Why are we doing it this way? The old way worked just fine." Lack of understanding can lead to resistance. Communicating why the change is happening can help reduce resistance. The more you can share, the greater the chance for understanding. Explain the logic that is driving the change. Spell out the reasons why the change is happening and the benefits that can be gained.

Managing Resistance

Managers can help employees get through change with rituals. A ritual is a simple way of letting employees say "good bye" to the old way and help them say "hello" to the new. Rituals are a way to acknowledge the losses people experience. A team luncheon to reminisce past success stories, for example.

Preventing Resistance

Preventing resistance is another way to manage resistance. Some techniques for preventing or reducing resistance are:

- Involve people in the decisions and implementation plans.
- Communicate frequently.

- Implement changes in gradual steps.
- Show your commitment.
- Show leadership through change planning and implementation.
- Empower people.
- Celebrate and reward successes.
- Provide resources needed for the change to occur.
- Use supportive staff as role models.
- Speak in terms of “us” not “we/they.”
- Allow people to take risks.

Recognizing Trouble

When an employee who is working through an organizational change is also experiencing personal problems, the impact can be overwhelming. The employee may begin to feel burdened and not know how to cope.

In cases such as this, management tools to overcome resistance may be ineffective. You and/or the employee may need to seek professional assistance. If your organization has an Employee Assistance Program ("EAP"), take advantage of it. For more information on this, contract your HR Department or the person who handles HR for your organization.

Leadership Commitment

When people realize that the change is here to stay, resistance often tapers off. However, people will probably be looking for signs that the change will fall through.

Management must be resolved to seeing the change through. A manager who demonstrates clear commitment to the change will be successful at getting people to jump on board.

Resistance to change is normal and change leaders should anticipate that it will occur. Resistance can be either passive or active. There are many reasons why resistance occurs. Despite the validity of the reasons, managers need to be able to eliminate or minimize resistance before the change initiative is sabotaged by resistance.

6. Personal Transition through Change

When change happens people often feel overwhelmed, confused, angry, anxious, stressed, worried and helpless. Patterns of behavior typically seen during change include distrust, rumors, increased absenteeism, turnover, low morale, and decreased productivity.

Susan said, "Ever since we reduced staff, I feel so overwhelmed I don't even enjoy coming to work anymore."

Change can be difficult. It has been proven helpful to have a framework for understanding the impact of change. Following are three phases, or transitions, people experience when going through a change: ending, neutral zone and new beginning.

3 Phases of Transition

The 3 Phases of Transition are:

- Phase 1. Endings...disengaging from "what was".
- Phase 2. The Neutral Zone...a confusing in-between state when you're neither where you were nor where you're going.
- Phase 3. New Beginnings...is when you accept your new reality.

These three phases talk about the internal response people have to changes at work or home and help you know where you are at any time as you move from the past to the future.

Important Change You're Facing

If you gain some experience with a single but significant change, you'll be able to work through multiple changes later.

Write a short description of a change with which you're dealing.

.
.
.
.
.
.
.

Transition – Ending

Change begins with an ending. To make a change, you must leave the past. What you knew is no longer. Endings can be painful, so there is a tendency to not want to let go.

Some of the emotions we experience in the ending phase include shock, sense of loss or grief, denial, anxiety, sadness, anger, confusion and resistance.

Observable behaviors of this phase include withdrawal, isolation, grieving, stronger need for information, and sabotage.

During the “ending” state in the change process, people are concerned about the impact the change will have on them. Strategies to help others move through this state include focusing on the emotions of others and communication.

Instead of talking people out of their emotions, (i.e., “Everything will be okay”), acknowledge their feelings as valid and legitimate.

Communicate consistently and frequently. Allow for the communication to be two-way so the opportunity to share what is going on is legitimate.

What's Ending With This Change?

As you think about the change you identified, respond to the following items, and add some of your own if you wish.

What's ending with this change?	Description of the loss.
What I do	.
My friends	.
How people know me	.
Where I go	.
My daily routine	.
Shift in my dreams	.
Meaning in my day	.
The status I've gained	.
.	.
.	.
.	.

Thoughts About What Has Happened to You

Coming to the end and having to let go is hard. It is difficult even when you want the change. You'll need time to sort through the process. In your **Notepad**, jot down a few answers to these questions:

1. Go back to your list and organize your losses into several categories. Look at them differently to minimize the loss.

2. List those parts of your job or your life that will continue into the future, like friends or skills.

3. Take past successes into the future, like an award or plaque. Identify at least 3 items that would be nice to take forward.

a. _____

b. _____

c. _____

Transition – Neutral Zone

During Phase 2, the Neutral Zone, you move from the past to the future; from the old to the new. The transition is a psychological process people go through in order to reach acceptance.

The neutral zone can feel like a “no-man’s land” since you are in-between. You have just let go of what you knew, yet you don’t know what you are supposed to grab onto next.

People often experience feelings of confusion, resistance, anxiety, and indecisiveness during this time

Everything may feel like it is up in the air. Past experiences don’t count like you thought they would and what used to work well, doesn’t anymore.

Think of the neutral zone as a clean slate, a blank word document where you can write new ideas.

Ideas for the Neutral Zone

Look at the neutral zone as an opportunity to look at the empty space between the past and the future. Your earlier list will be a resource to consider for looking at several areas.

1. **Question** your old ways of doing things.
2. Are there **insights** for you to gain from this transition.
3. **Try out** a new idea that may work in your new world.
4. **Brainstorm** ideas and share them with friends or people with whom you work.
5. Get involved in **learning** activities that interest you and help redefine the future.

The lessons found in the neutral zone operate on their own timetable, but they will arrive.

Two Sides of the Neutral Zone in Action

Review what you’ve done so far in Endings and in the Neutral Zone. In the chart below, identify what you’re willing to let go of and what will be helpful in your new work, your new beginning.

I'll let go of...	These will be helpful going forward...
.	.
.	.
.	.
.	.
.	.
.	.
.	.
.	.
.	.

Transition – New Beginning

A **New Beginning** is the start of something new. **New Beginnings** may feel strange or awkward initially. Once you start to feel comfortable with what is new, you are able to see opportunity. It is in this phase where a person reaches acceptance and sees opportunity.

7. What's Going to Happen in the New Beginning?

If you were to make a video of the future, what would it include?

What are you doing?	.
Who is with you?	.
What talents and skills are you using?	.
What have you learned?	.
What will you need to learn?	.

Building on Change for My New Beginning

What an opportunity you have in **New Beginnings**! This is a chance to leverage, to build on and convert the possibilities you identified in the **Neutral Zone** into your new reality.

Here are some keys to help open the door to your **New Beginning....**

1. What's really important to you? Use the **Change Diagram** as a high-level graphic, and apply the 3 steps.
2. Be prepared to modify your plan.
3. Be aware of intrusions on your plan.
4. And, just like the **Leading Change Tool Kit**, go for some **Quick Wins**!
5. How do you need to behave differently to achieve what's really important to you.

Leading Groups through Transition

Managing reactions to change effectively requires an understanding of the difference between change and transition.

The first step in managing reactions to change is to become aware of the many ways people react to change. The next step is to gain further understanding of the reaction and apply coping strategies to deal with the reaction.

There are some basic ideas leaders can use to help individuals and teams through change.

Phase 1, Ending

During the **Ending Phase** in the change process, people are concerned about the impact the change will have on them. Strategies to help others move through this phase include focusing on the emotions of others and communication.

Instead of talking people out of their emotions, i.e., "Everything will be okay", acknowledge their feelings as valid and legitimate.

Communicate consistently and frequently. Allow for the communication to be two-way so the opportunity to share what is going on is legitimate.

Phase 2, Neutral Zone

Employees need a sense of direction in the ***Neutral Zone***. Ways to lead employees through transition include:

- Set priorities and creating short-term goals
- Develop temporary systems
- Listen to employee concerns
- Encourage employee involvement
- Create a climate conducive to employee creativity

Phase 3, New Beginnings

Steps leaders can take to build excitement in ***New Beginnings*** include:

- Communicate the vision of the change
- Offer training to help develop new skills that may be needed
- Celebrate the successes of change
- Give recognition to employees
- Set meaningful goals
- Monitor the change to ensure success of the implementation

Change is here to stay. It happens at work, home and socially. Each time, people move through the 3 Phases of Change. Some individuals go through the 3 Phases in a short amount of time, perhaps less than that day. Other times, the complete transition is never realized.

The information presented in this Unit is intended to provide a framework to help you understand where you are in the transition, why you're feeling the way you do and what's next until you work through ***New Beginnings***.

8. Coping with Loss during Workplace Change

As mentioned previously, when confronted with a change, particularly a change not chosen by them, people tend to focus on what they are losing. Elizabeth Kubler-Ross in her work on grieving identified five stages: denial, anger, bargaining, depression and acceptance. These stages hold true for dealing with all types of loss, including loss due to workplace changes.

They are responses to loss that many people have, but there is no one typical response to loss. Our grief is as individual as our lives, our workplaces, and our changes.

This means that:

1. A change of circumstance of any kind produces a loss of some kind which will produce a some sort of grief reaction, whether large or small.
2. The intensity of the grief reaction is a function of how the loss is perceived. If the loss is not perceived as significant, the grief reaction will be minimal or barely felt.
3. Significant grief responses which go unresolved can lead to mental, physical, or sociological problems including sabotage of work and continuing resistance to change and to change leaders.

Denial

Denial is natural when anticipating or experiencing a change. Denial acts as a defense mechanism to allow us to internally process what is happening.

"This will all blow over." "Once the dust settles, everything will get back to normal." Continuing to follow old procedures and ignoring new processes are all examples of things people say or do when they are in this stage.

It is normal to experience denial, yet a person who gets stuck in the Denial stage will be unwilling to accept or even consider accepting the change.

Anger

Employees experience anger when dealing with change or loss for many reasons. The person may feel like a victim and wonder "Why me?" They may be frustrated by the confusion and seeming loss of control.

Anger is expressed in a number of ways. A person might complain or criticize people or situations, argue, act hostile, or in extreme cases, become violent.

Anger can also be expressed in more subtle ways. For instance, poor performance, tardiness, errors, and missed deadlines may be ways for employees to indirectly express their anger.

Bargaining

This stage occurs when people try to "do this to get that". A person might reason "If I work harder, sell more, etc., my job will be secure." Or "if we do a good job on the team project they won't make us use the new system."

Or, a person might try to convince him/herself "If only I can get through this month/week/project, things will get back to normal."

What are some of the things you've done to hang onto the past?
1.
2.
3.
4.

Depression

There are two types of depression, or two different definitions of depression. When a person says, "I'm depressed," they usually mean they are experiencing a low point or that they have the blues. It's part of life.

The second type of depression, clinical depression, is more severe and may be more difficult for a person to recognize in themselves. They experience physiological as well as psychological changes: change in appetite, weight gain or loss, change in sleep patterns, unexpected anger, and less enjoyment of family and life are common symptoms of clinical depression.

People become depressed for many different reasons. Adjusting to a change, particularly a change they can't control, is one of them. People will move at different speeds through this stage. Do not try to be a psychologist! If you believe that someone - or yourself - is getting "stuck" in depression, consult your HR representative or your company's Employee Assistance Program representative. Signs of depression are:

- A significantly reduced level of interest or pleasure in most or all activities.
- A considerable loss or gain of weight (e.g., 5% or more change of weight in a month when not dieting).
- Difficulty falling or staying asleep; or, sleeping more than usual.
- Behavior that is agitated or slowed down.
- Feeling fatigued, or diminished energy.
- Thoughts of worthlessness or extreme guilt.
- Ability to think, concentrate, or make decisions is reduced.
- Frequent thoughts of death or suicide (with or without a specific plan), or attempt of suicide.

9. Acceptance

It is in this stage that a person has intellectually accepted the change.

Emotional acceptance may or may not have taken place.

It is in this stage that people gain interest in the opportunity that may result from the change.

A person who has reached this stage might say, "Everything happens for a reason."

What are some of the actions that show you've accepted a change?

Your behavior during the change process.	Your behavior once you accepted the change.
.	.
.	.
.	.
.	.

Support People Experiencing Loss

When you are with someone you work with, or someone you supervise, there are several steps you can take to support them appropriately:

Denial

Communication is important to help employees deal with denial. Tell them what you've observed. Confront people with information – let them know what to expect. Give them time to adjust to the idea of change.

Anger

One of the most important things a person can do to help someone who is angry is let him/her vent. Anger needs to be worked out of their system before they can discuss healthy ways to cope. It's also important to empathize and paraphrase what is said to show that you understand what they are feeling.

Bargaining

When an employee is in this stage, you can help by reinforcing the change that will happen. Restating the purpose of the change, the timeframe, and the implementation plan will help refocus the employee on the reality of the situation.

Depression

Don't get caught up in labeling the behavior. If you see some of the indicators listed below, suggest they visit with their MD or EAP program, and keep it confidential.

Acceptance

Acknowledge what you see and hear and support your team member by helping them focus their energy on key activities.

During a period of loss, individuals go through five stages: denial, anger, bargaining, depression and acceptance.

The way someone goes through the five stages will be their unique passage. By understanding the five stages you'll know what is happening to yourself and others.

There are **8 Steps to Leading Change** that include: make the change urgent, pull together an Advisory Group, create a vision, develop communication strategies, get some quick wins under your belt, keep the momentum going and finally, create a new culture that allows the new behavior to stick.

This course on **Change Management** also addressed how people resist change, how they move through three phases of transition and how individuals apply five stages of coping with loss due to change.

Change is a process and it will only happen with a change in behavior. There are a lot of positive outcomes with change; however, at times change can hit like a bolt of lightning and do damage to an individual, work unit or company. The steps, transitions and stages offered in this Unit are tools that will help you on a personal as well as organizational level as you move through the change process.