

## Change Leader's Roadmap: Quick Overview

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The Change Leader's Roadmap is a nine-phase process model built to help you plan, design, and implement your content and people changes. It organizes your process for moving your organization from where it is today to where it needs to be to ensure continued success in your marketplace. As a roadmap, the model doesn't tell you what to change; instead, it provides guidance for how to change so that you get your intended business outcomes while simultaneously engaging your people in positive ways that bolster your culture, change readiness, and capability to succeed.

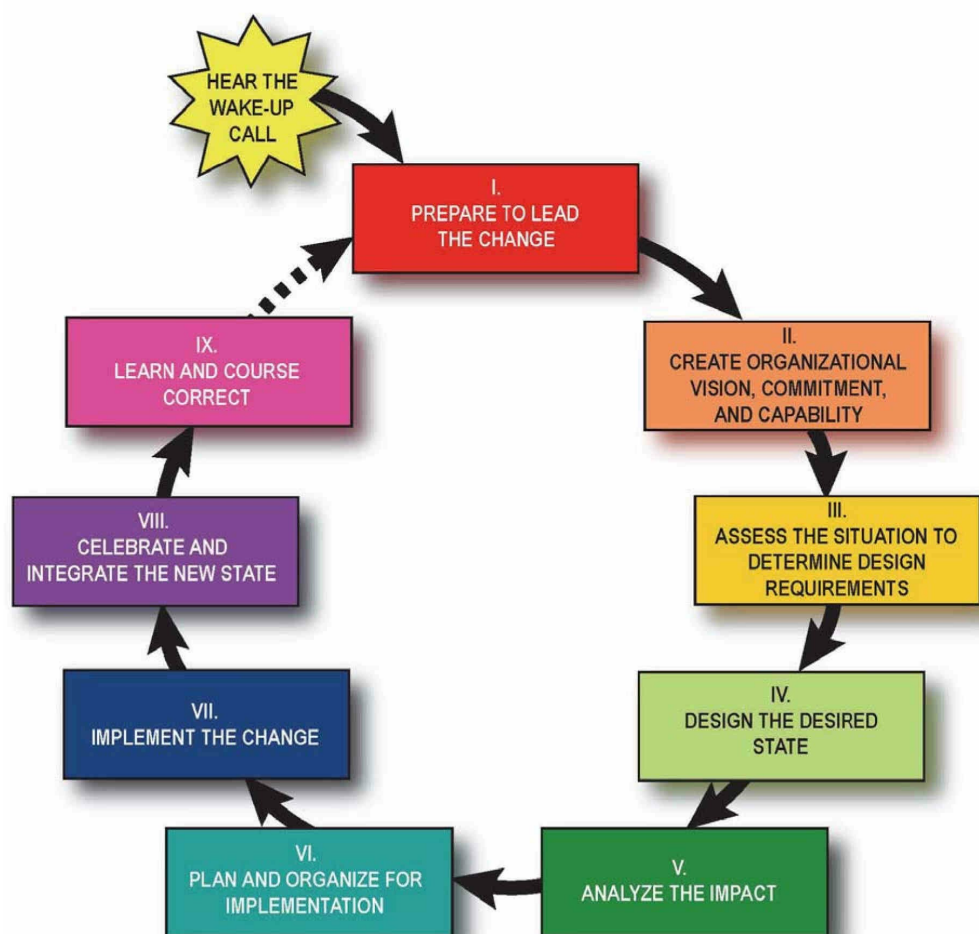
The Roadmap embeds the essential human dynamics of transformation within the concrete tasks of changing structures, systems, processes, or technology. Our research demonstrates that inadequate attention to the people dynamics of engagement, commitment, behavior and mindset change, relationship between leader teams, culture, and emotional reaction is a certain guarantee of failure. These critical tasks are not "bolted on" as an afterthought or as a nice-to-do in the Roadmap; they are integrated right into the tangible "content" work the Roadmap specifies.

The Change Leader's Roadmap is the heart of Being First's Change Methodology. The resources we have built around it offer a full range of guidance: conceptual to detailed. Consequently, the Roadmap can be used by leaders who fill the various change leadership roles—from the change sponsor who only needs to understand the 30,000 foot picture, to the change process leader, project team member, or change consultant who need more detail to ensure tangible success.

For ease of use, the Roadmap is organized like a project management methodology. Each of the nine Phases consists of Activities, which are further made up of Tasks. The work happens at the Task level; the Activities and Phases simply organize the Tasks into a logical flow for better understanding and application. In our most detailed resources, each phase includes not only key activities and tasks, but also task deliverables, work steps, tools, assessments and checklists.

Although designed for transformational change, The Change Leader's Roadmap can be tailored for all types of change, as well as for any magnitude of change effort. Smaller, less complex changes will require selective tailoring of the phases, activities, and tasks in the model.

## The Change Leader's Roadmap



The depiction of the nine phases of the Roadmap represents the inherent logic and flow of the activities of leading and achieving real change—the full terrain of content and people requirements. However, do not be fooled into interpreting the model's sequential nature to mean that you must complete one phase before you proceed to the next. Not so. In reality, you may be in two, three, or even four phases simultaneously. Furthermore, you may do the work of several phases in parallel!

The Roadmap is not a lock-step project management approach. Transformation is too dynamic for that, and requires constant course correction. Consequently, the Roadmap prescribes nothing. Instead, it is a navigation system, a thinking discipline that makes you aware of what change tasks you might need to engage in; it then helps you decide what to do and how to do it. We have built it to be comprehensive, leaving nothing out. You will never want to do everything described in the Roadmap. Instead, you will want to do as little as possible, yet enough to succeed. Select only the key tasks that your change requires.

## Overview of The Change Leader's Roadmap Phases

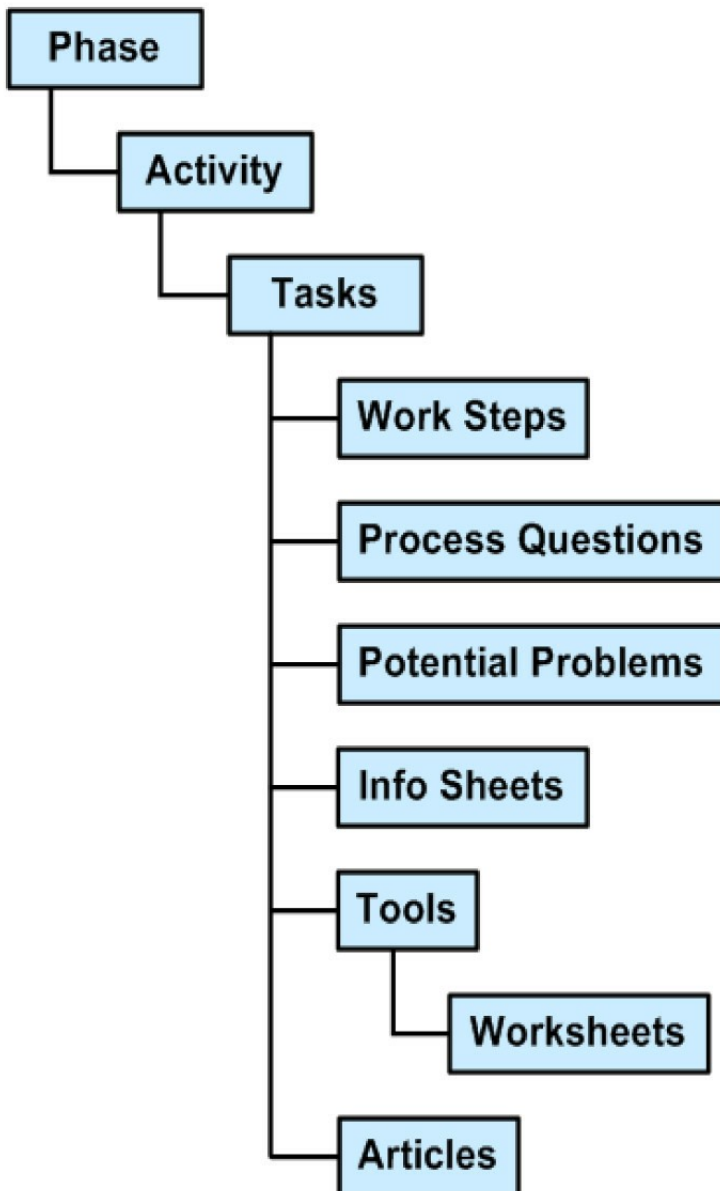
### Phase Structure

Each phase of the Change Leaders' Roadmap divides into ten components:

- Phase
- Activity
- Tasks
- Worksteps
- Process Questions

- Potential Problems
- Info Sheets
- Tools
- Worksheets
- Articles

Each of these components resides in a specific part of this structure to provide logical information flow and context.



### Phase I – Prepare to Lead the Change

In Phase I, you set the leaders of the change and your organization up to succeed from the beginning. It is the most important phase, addressing the key people and process decisions you must make to get your change effort off to a strong start. Its purpose is to prepare your leaders to lead the change successfully by accomplishing six activities:

- Starting up and staffing your change effort with the best change leaders and expertise

- Determining your case for change, the accurate scope of change, and your desired outcomes
- Assessing your organization's level of readiness and capacity to take on and succeed in the change at this particular time
- Building your leaders' capability to collectively commit to the change, effectively lead it as an aligned team through to fruition, and to model the mindset and behaviors required for it to succeed
- Clarifying the overall change strategy, governance, change process resources, and project integration plans for achieving your results, and how you will engage and communicate with your entire organization in ways that reflect your values and guiding principles
- Establishing the optimal conditions and change infrastructure to achieve your change

With all of these “ducks” in order, your leaders have assured their ability to work as a unified team, have established the conditions for the change to succeed (including identifying your employee engagement plan, communication plan, and training plan), and are capable of leading the organization through the thick and thin of your change as it unfolds.

## **Phase II – Create Organizational Vision, Commitment, and Capability**

In Phase 2, you take your clarity, leadership alignment, and Phase I decisions out to the organization. You announce your case for change and your change strategy: how the overall effort and sub-initiatives will be defined, integrated, and orchestrated over time. Your purpose here is to build organization-wide understanding, commitment, momentum, skills, and the capacity to succeed in the transformation, especially among your key stakeholders. In your communications and engagement, you and your change leaders begin to model the behavior and thinking that you are asking of your organization, and actively engage people in creating your new future.

Ideally, the entire organization affected by the change participates in the creation of a compelling vision of the future that will bring the organization greater success. In organizations that have a history of doing well in their old state, the leaders create bold actions to wake the organization up to the need to transform. Without understanding that the old way of operating is gone, your people will not be motivated to change. So, this phase mobilizes the necessary understanding, builds readiness and capability, and prepares all stakeholders for aligned action.

## **Phase III – Assess the Situation to Determine Design Requirements**

You will now use the desired outcomes and vision you created in Phases I and II to generate design requirements for determining the actual future state that you will implement. In Phase III, you assess the current reality in the organization for three key pieces of information:

1. What you already have that serves your desired outcomes.
2. What you must stop doing or dismantle.
3. What you need to create afresh to make your vision a reality.

You will also gather information from your customers, and surface important best practices in the industry that you want to embed in your desired state. These activities provide you with clear parameters to use to generate the best scenario for implementation. They also build the expectation for change within your organization. In all these tasks, you use your engagement and communication plans to ensure employee involvement. The more you engage people in doing this work, the more they will buy-in to the change.

## **Phase IV – Design the Desired State**

In this phase, you design the specific organizational and cultural solutions that will enable you to successfully achieve your vision. The resources and vehicles you use to design your desired state can be critical drivers of momentum and excitement—or deterrents—for the future. If you use external experts to do your design work, you may get a sound solution, but also may alienate your in-house resources and employees who have a greater understanding of the organization's strengths and weaknesses. If at all possible, engage key in-house stakeholders in your design process, with or without external experts. And design to fulfill your design requirements from Phase III!

## Phase V – Analyze the Impact

Once you have your preferred future state design, you must assess the magnitude of impact it has on your existing organization, its culture, and your people—all in preparation for planning a realistic implementation process. Impact analysis is an essential step in understanding just how much work is required to put your desired future in place. This is a great opportunity to engage your resisters, if you have not already...it is here that you want to know why they think the change will NOT work! This will inform you about any further work needed to ensure a successful implementation. Or, it may alert you to the need to redesign (go back to Phase 4) because the impacts of your current design are more than your organization, resources, or timing can tolerate.

## Phase VI – Plan and Organize for Implementation

With lists of impacts and issues needing attention before implementation can occur, you can now identify the actions required to officially implement your desired state. You integrate actions as much as possible for efficiency and to optimize your resource utilization, and develop your Implementation Master Plan. Only when you know the actual work required to put the future state in place can you realistically identify your timetable for implementation. Once this is clear, you also ensure that the organization is prepared for implementation and has the time and skill to see the changes through while continuing the ongoing operation effectively. And of course, a key part of your Implementation Plan includes human issues like training needs, emotional support, and continued communications and engagement.

## Phase VII – Implement the Change

Now it is time to carry out your Implementation Master Plan to achieve your desired state. Undoubtedly, your roll out will not go as planned. They never do, especially if your change is transformational. So, you must build in ways to legitimately monitor what is happening and what is needed, and then course correct both the plan and your desired state design as required. Implementation is the phase when your people will realize how real the change is and when required to actually behave differently, may have a range of predictable emotional reactions that you have not yet seen. It is your job to support your people through their reactions, to being able to let go of the past, and to continue on their path to the future.

## Phase VIII – Celebrate and Integrate the New State

At this point in the process, it is time to celebrate achieving your desired state, and to let your organization know that they are now living in the new state, although the process has not ended and changes will continue to happen. Reward your people's support for the changes to date and recognize all of the hard work they have contributed to achieve your new state. In this phase, you must also support people's integration and mastery of the new behaviors and work practices required to make the change successful. Just because people have taken on new roles or new technology does not guarantee that they know how to succeed with them, or how everyone fits into the larger picture of the change across the organization. So, you will plan working sessions and communications to ensure that your people learn what works, iron out remaining operational kinks, and continue to refine the new state as they learn how to make it work most effectively. This occurs in individual work groups as well as across departments, functions or processes, in support of the organization as a whole.

## Phase IX – Learn and Course Correct

By this point in your change process, you have been learning and course correcting your roadmap and outcome all along. This phase focuses you on four important activities to conclude this round of change:

1. Creating mechanisms to continuously improve your new state.
2. Evaluating and learning from your well designed and implemented change strategy and change process plan—on behalf of the continuous improvement of your change leadership.
3. Improving your organization's readiness and ability to lead future changes successfully.
4. Closing down the existing change process by dismantling your temporary change infrastructures and conditions that no longer serve the needs of your new organization. (Keep in mind that frequently, leaders decide to maintain some of their change structures because they have discovered how useful these structures are for their resilience.)

## Summary

The nine phases of The Change Leader's Roadmap take you from start-up through to successful completion, and prepare you for the next round of changes that inevitably knock at your door. Tailor these phases and activities, and where you consciously decide to skip key steps or decisions, be sure to first consider the impacts of doing so. Customize your process to each change effort you are leading, and encourage your stakeholders to identify "Best Change Practices" for your organization and its unique needs. Make The Change Leader's Roadmap your own so that it provides your organization and change efforts the greatest chance for success. Best of luck on your change journey!