



CUNA Management School

Change Leadership: How to Inspire, Influence, and Drive Successful Change Efforts

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ASPIRE TALENT
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Pleased to meet you!



Adjunct faculty, Wisconsin School of Business MBA Program, Strategic Management and Human Resources, Consultant for Center for Executive & Professional Development

HR, Training & leadership development professional, 30+ years experience helping leaders, teams, and organizations build skills and capabilities

Certified Professional in Talent Development, Senior Professional in Human Resources, Prosci-certified change management consultant, Predictive Index certified Talent Optimization Consultant

Experience in wide variety of industries including healthcare, financial services, manufacturing, insurance, nonprofit, professional services, and CREDIT UNIONS! (:



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Session Logistics



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A "VUCA World"

NUMBER OF YEARS IT TOOK FOR EACH PRODUCT TO GAIN 50 MILLION USERS:





“It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to **change**”.





Learning Goals

- Explore forces driving the need for change and our role in influencing the success of change initiatives
- Learn how to see change through a new lens as we understand common reasons for resistance in ourselves and others
- Identify common obstacles and barriers we can address and effectively mitigate during change initiatives
- Understand guiding principles of role modeling change leadership to inspire others to reach acceptance
- Learn ways to communicate change in a confident and compelling way while identifying key principles of sustaining change

When poll is active, respond at pollev.com/aspiretalent

Text **ASPIRETALENT** to **22333** once to join

Approximately how many changes can you think of that you are experiencing right now (personally and professionally)?

None

1-3

4-5

More than 5

Consider a big change you experienced either personally or professionally. What are some things you learned from that experience?



What are
some of
the forces
driving the
need for
change in:



The credit union industry?
Your organization?
Your department?
Your role?

What is Change Management?

The application of a structured process and set of tools for leading the people side of change to achieve a desired business outcome.



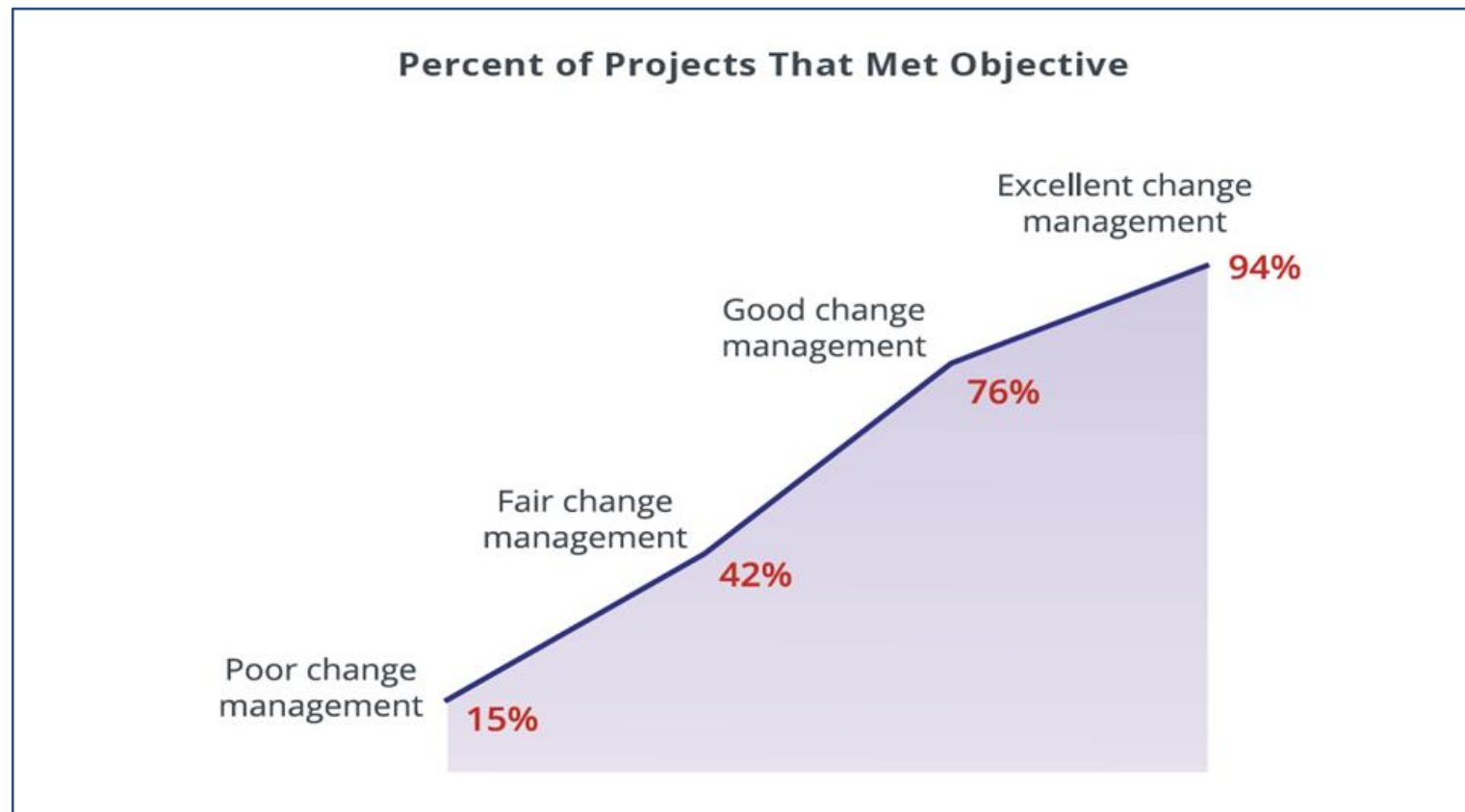
Change Management as a Process

Effective change management follows a repeatable process and uses a set of tools to drive successful change.



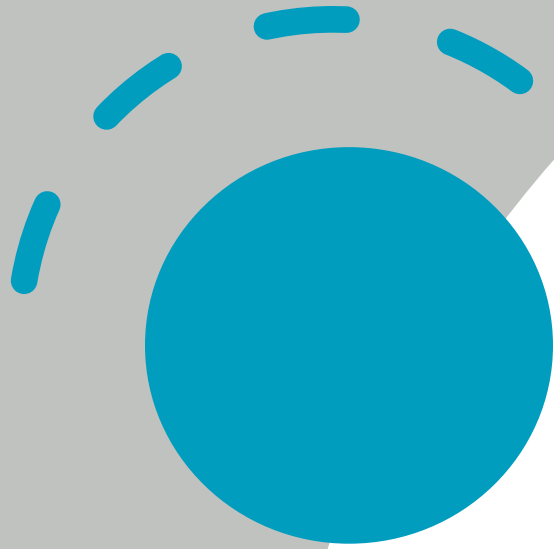
Change Management as a Competency

As a competency, change management is a set of skills that enables change and creates a strategic capability for increasing organizational effectiveness.



Initiatives with excellent change management practices applied are 6 times more likely to meet objectives than those with poor change management practices applied

Prosci



Change Management Happens at Three Levels

Individual
Project/Initiative
Organization



DEAR FUTURE
I'M READY.

Change Readiness Is:

A cognitive state that occurs when people have positive *attitudes, beliefs, and intentions* toward a change.

When readiness exists, there is:

- Greater [openness](#) to new ideas
- Lower [resistance](#) to changing directions
- Earlier acceptance and [adoption](#) of the change



Building Resilience and Agility



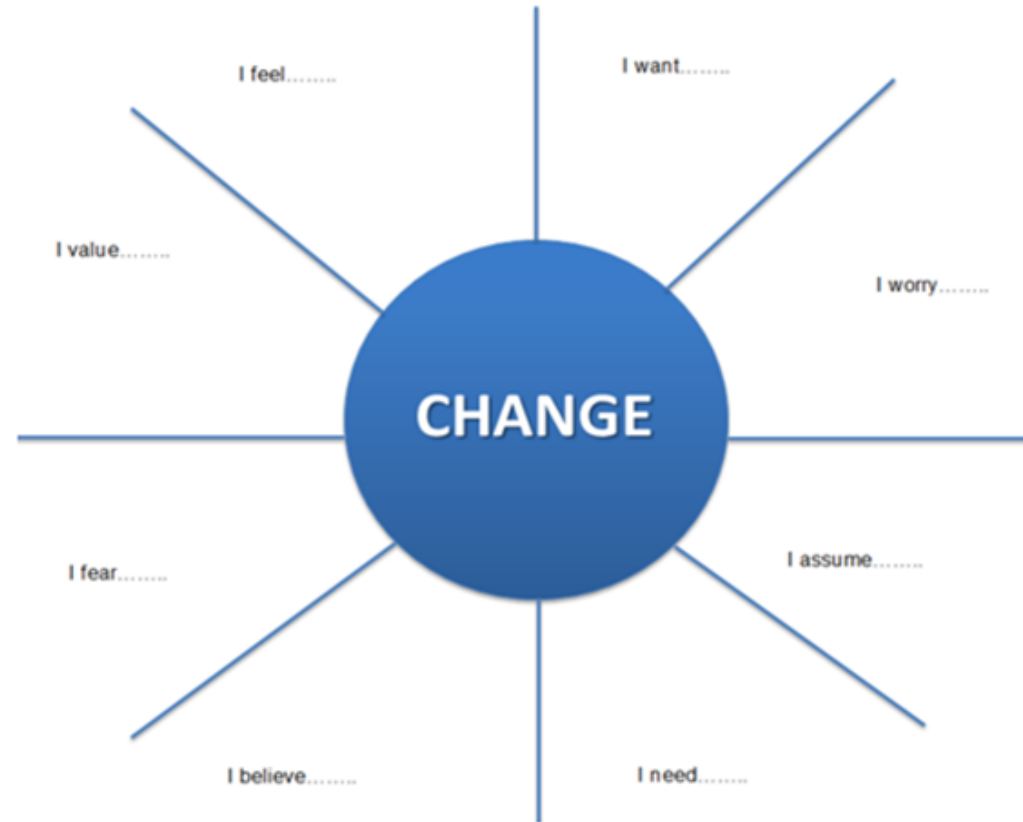
At the heart of organizational agility and resilience is personal agility and resilience
Help individuals build personal change readiness and capacity





Metacognition: Understanding Our Own Personal Change Lens

CHANGE MINDSET ACTIVITY: In the center circle, identify the personal change you are experiencing. Then complete the sentences around the wheel, related to the change.



Reflect on the following questions:

1. How does my current mindset influence my decisions and actions?
2. What aspects of my mindset contribute to my ability to deal well with change and what aspects of my mindset limit my success?
3. How aware am I of my own effective and ineffective ways of being during this time of uncertainty?
4. How can I take personal accountability for my experience during this change?

Changing Our “Change Mindset”

*If we focus on the fear,
anxiety, hurt, or anger,
we continue to suffer.*

*If we focus on the
opportunity,
adventure, learning,
and lessons, we
continue to grow.*

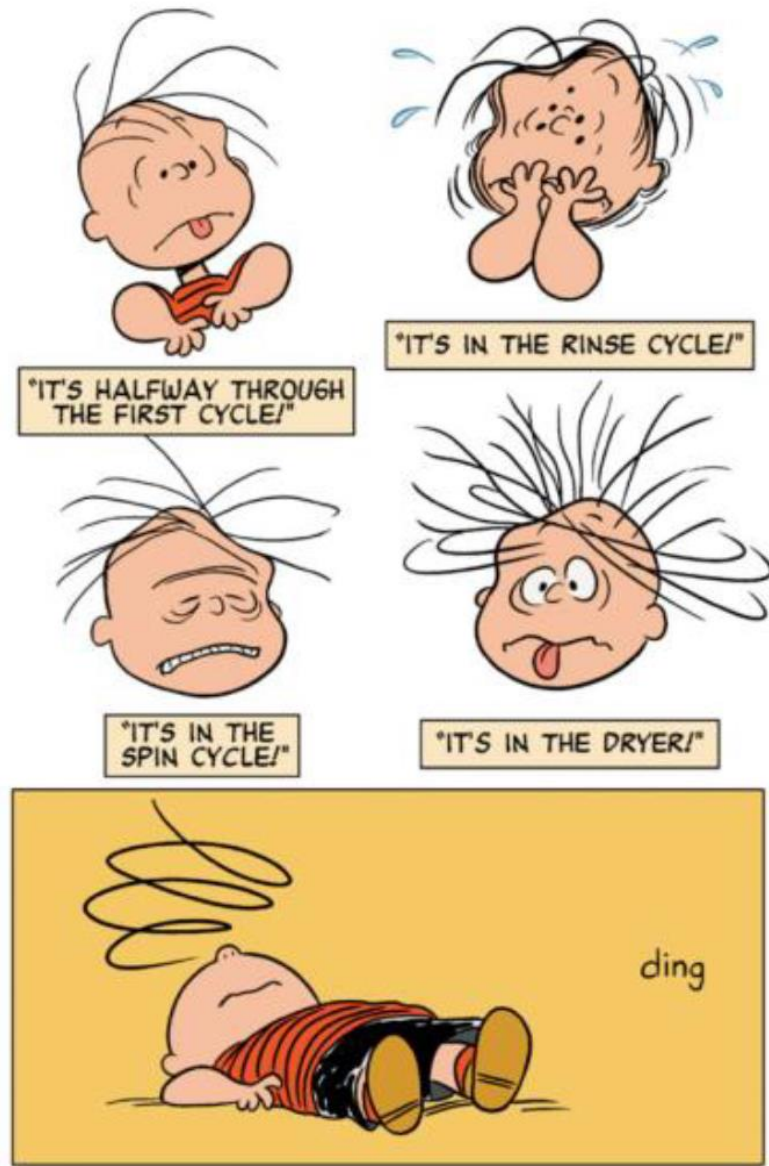




Your Brain on Change



The Dopamine Dilemma



"It's not so much that we're afraid of change, or so in love with the old ways, but it's the place in between that we fear... it's like being between trapezes. It's Linus when his blanket is in the dryer. There's nothing to hold on to."

- Marilyn Ferguson

Your Personal Change Tolerance



I would describe my general change tolerance as...

I really just don't like change

I'm not really crazy about changes generally
as I like the comfort of the "known" but I
can deal with it if I have to

I'm pretty good about adopting change
quickly without much additional effort to
get me there

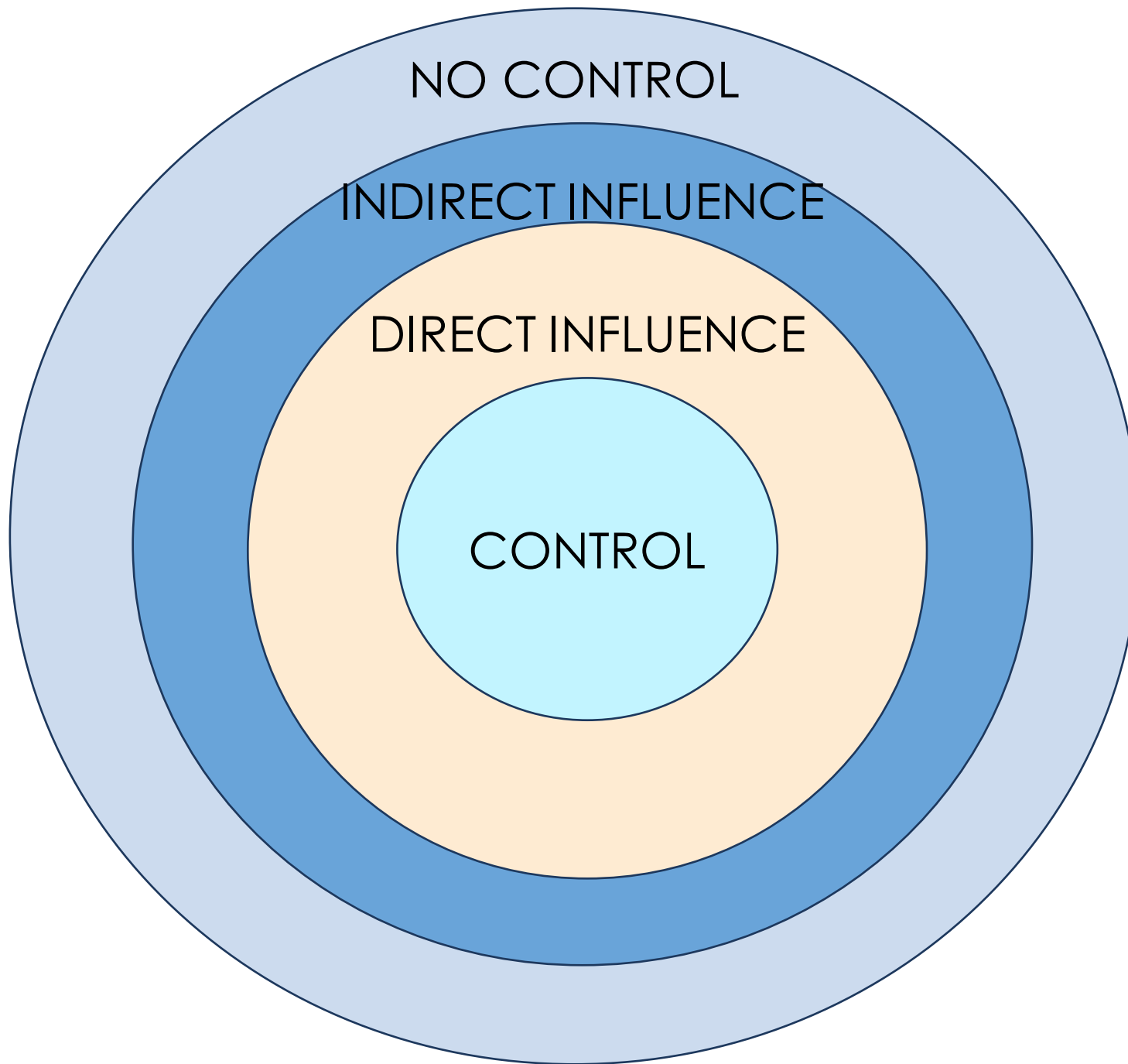
I frankly love change as I like to change it up!

Resistance to change is often driven by:

- How much people value what is being changed
- The level of disruption the change causes in their lives







*Adapted from Stephen Covey,
Circle of Concern/Control*

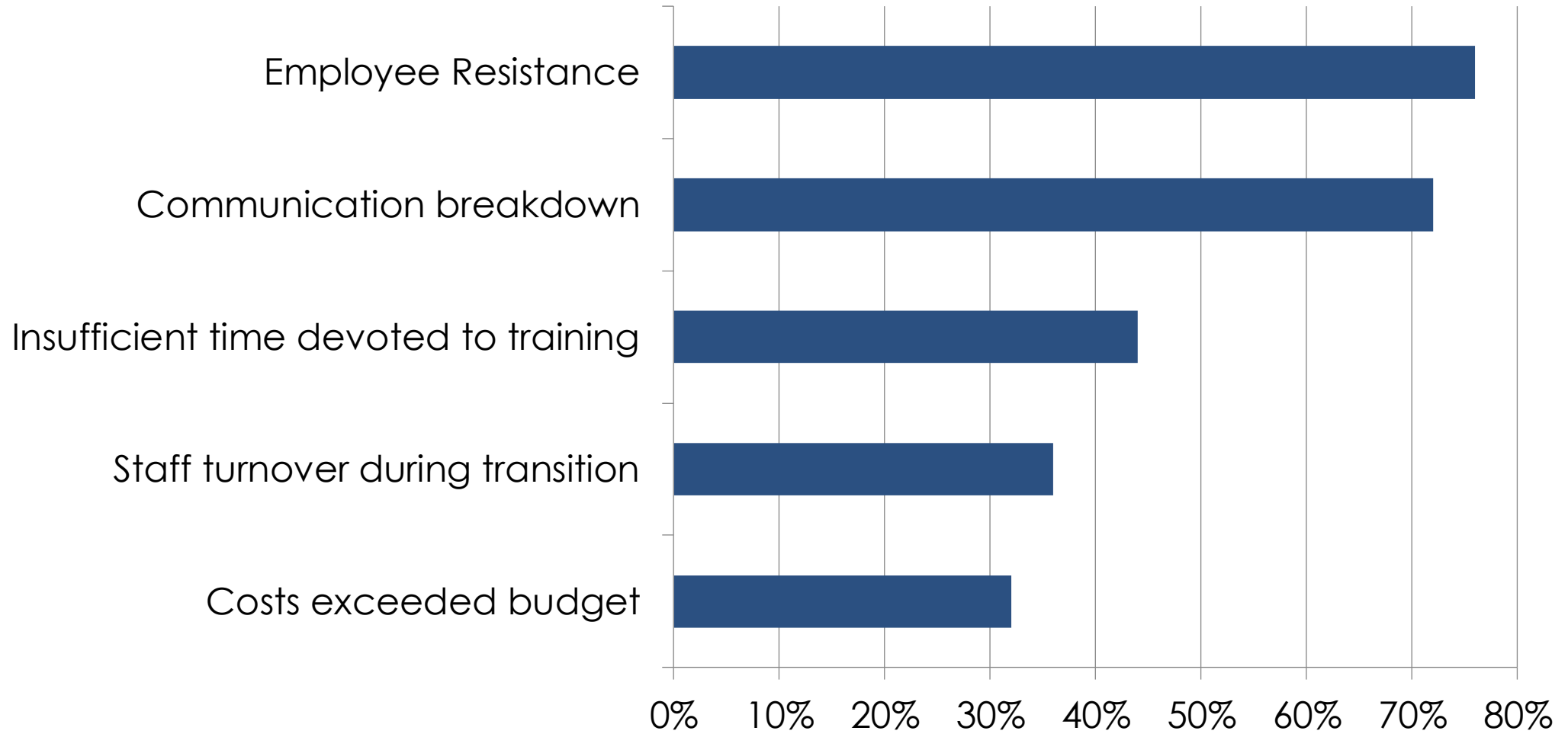
VIDEO: Leadership lessons from the dancing guy



A man in a white shirt and dark pants stands at the entrance of a vast, complex maze made of grey concrete walls. He has his hands on his head, looking overwhelmed. The maze is a complex network of paths and dead ends, stretching far into the distance. The lighting is soft, creating a sense of depth and isolation.

Common Barriers/ Obstacles to Change

Obstacles Experienced During Major Organizational Change



Source: Society of Human Resources Management - study on Change Management

Change Can Be Challenging!

I Like How It Is
Now!

Dealing with
Uncertainty

Feeling
Confused and
Left Out

Feeling
Alone

Dreading
the
Unknown

Apprehension
at Need to
Learn New
Things

Hard to Give
up “Old
Habits”

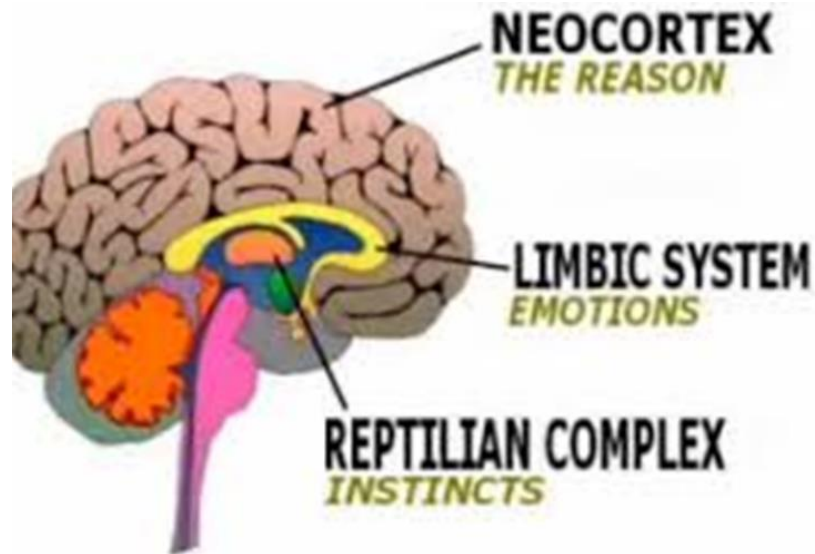
Focusing
on What
We Have
to Give
Up

Loss of
Sense of
Comfort
and
Security

Fear of
Heavier
Workloads

Assumptions
are often
made in the
absence of
facts

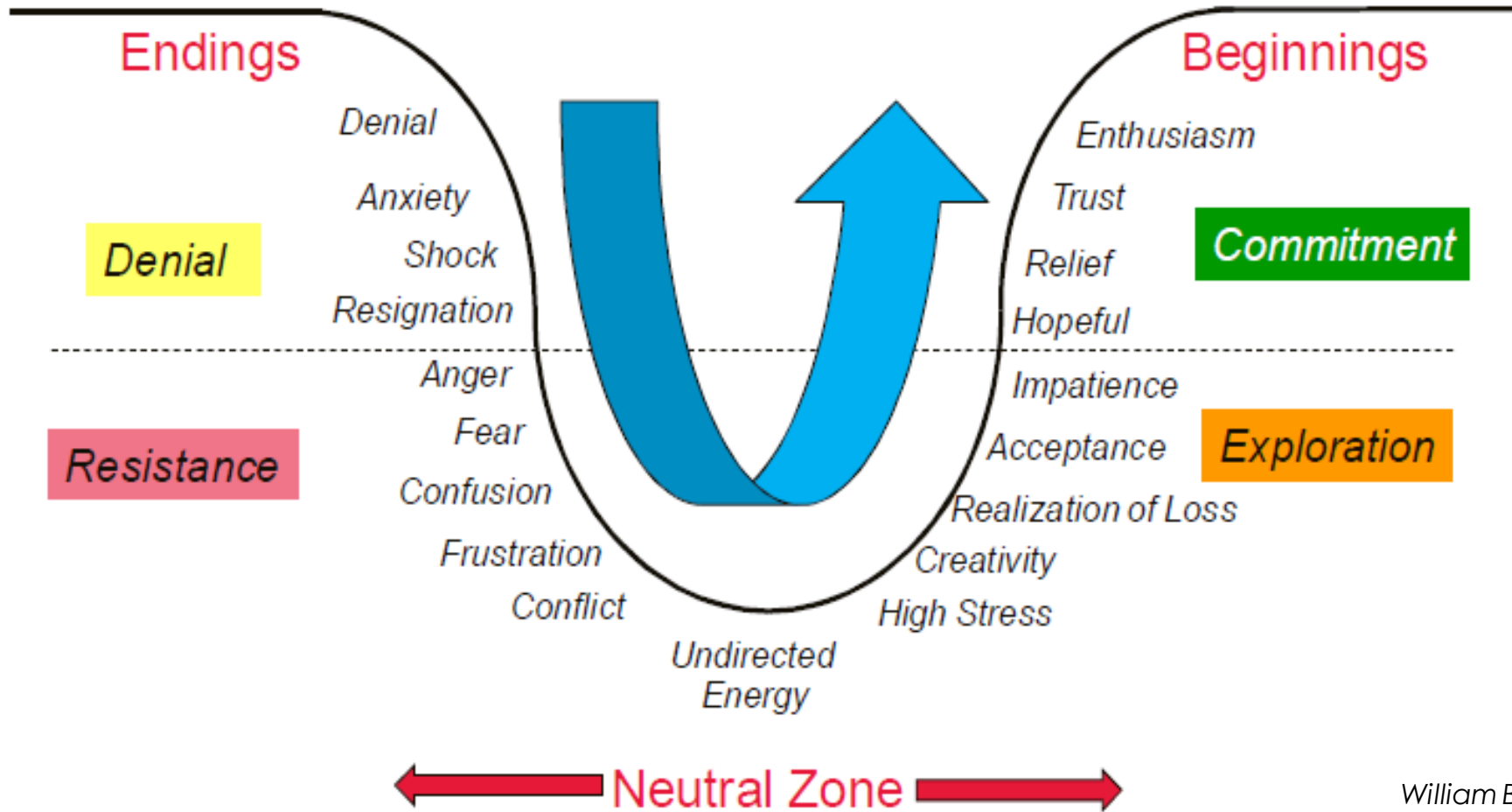
What happens when we feel threatened?



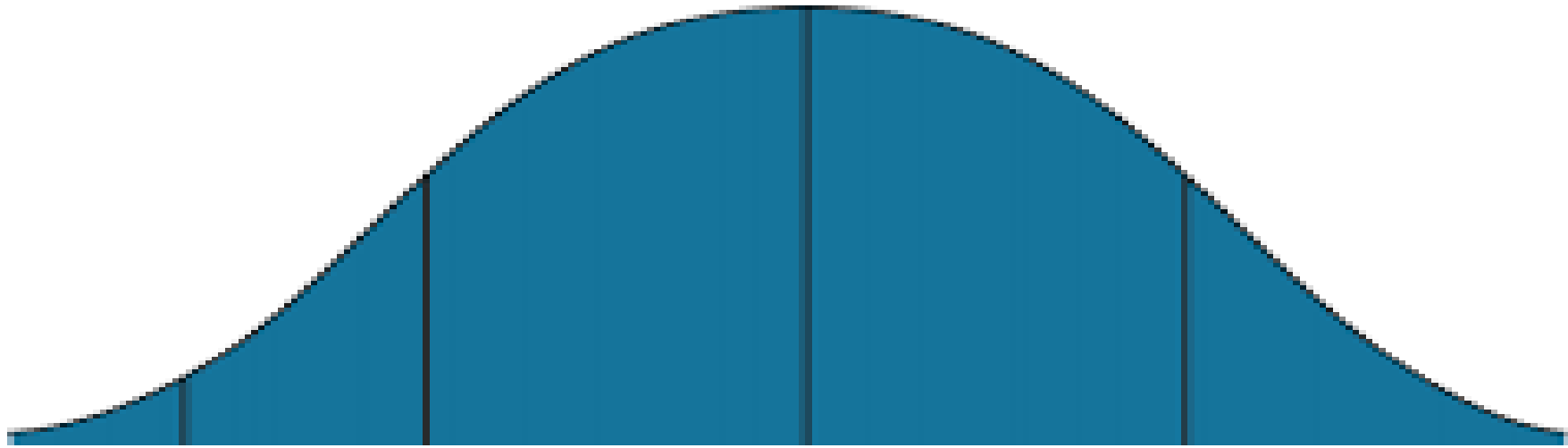
Amygdala Hijack

- Stored sugar, fats, and adrenaline pour into bloodstream
- Heart rate and breathing increases to oxygenate the muscles
- Blood clotting mechanisms activated
- Digestion ceases to divert blood to muscles
- Perspiration and salivation increases, pupils dilate
- Our ability to apply reason and logic can drop by 75%
- It can take nearly 20 minutes to recover from an emotional encounter

Transitions Model



William Bridges



**Outliers/
Vocal
Resisters**

**Silent Majority –
Pragmatists**

**Early
Adopters**

Rogers Adoption Curve

Identifying the Barrier Point

A D K A R

Source: Prosci

A

Awareness of the need for change

D

Desire to make the change happen

K

Knowledge about how to change

A

Ability to implement new skills and behaviors

R

Reinforcement to retain the change once it has been made

Prosci

Brief Description of the Change: Weight Loss	Rate	Notes
Awareness of the need to change?	4	The client has made the first steps of working with a trainer for their weight loss goals.
Desire to make the change happen?	3	Client does not demonstrate a strong internal motivation to losing weight. Most of the interest to improve is from Torey.
Knowledge about how to change?	4	The client knows what he/she needs to do.
Ability to change?	2	The client understands what to do, however it having difficulty keeping his/her commitments.
Reinforcement to retain the change?	1	Since program engagement remains low, no reinforcement is present.

The first score of 3 or less = the Barrier Point and must be first area addressed for change to be successful.

A D K A R

Source: Prosci

Current Change Self-Reflection

What is the change?

Based upon your chosen change fill in the evaluation section and assign a rating for each area on a scale of 1 (low) to 5 (high).

	Evaluation	Rating (1) low – (5) high
Awareness	List the reasons you believe the change is necessary:	Rate your level of awareness for the need for change:
Desire	List the factors or consequence (good and bad) that create a desire for you to change:	Rate your level of desire to make the change happen:
Knowledge	List the skills and knowledge needed for the change:	Rate your level of knowledge about the change:
Ability	Considering the skills and knowledge identified in the previous level, evaluate your current ability to perform these skills or act on this knowledge:	Rate your level of ability to change:
Reinforcement	List the reinforcements that will help to retain the change. Are incentives in place to reinforce the change and make it stick?	Rate your level of commitment to actions that will reinforce the change

The first score of 3 or less= _____

This is the **Barrier Point** and must be the first area addressed for the change to be successful.

A

Awareness of the need for change

D

Desire to make the change happen

K

Knowledge about how to change

A

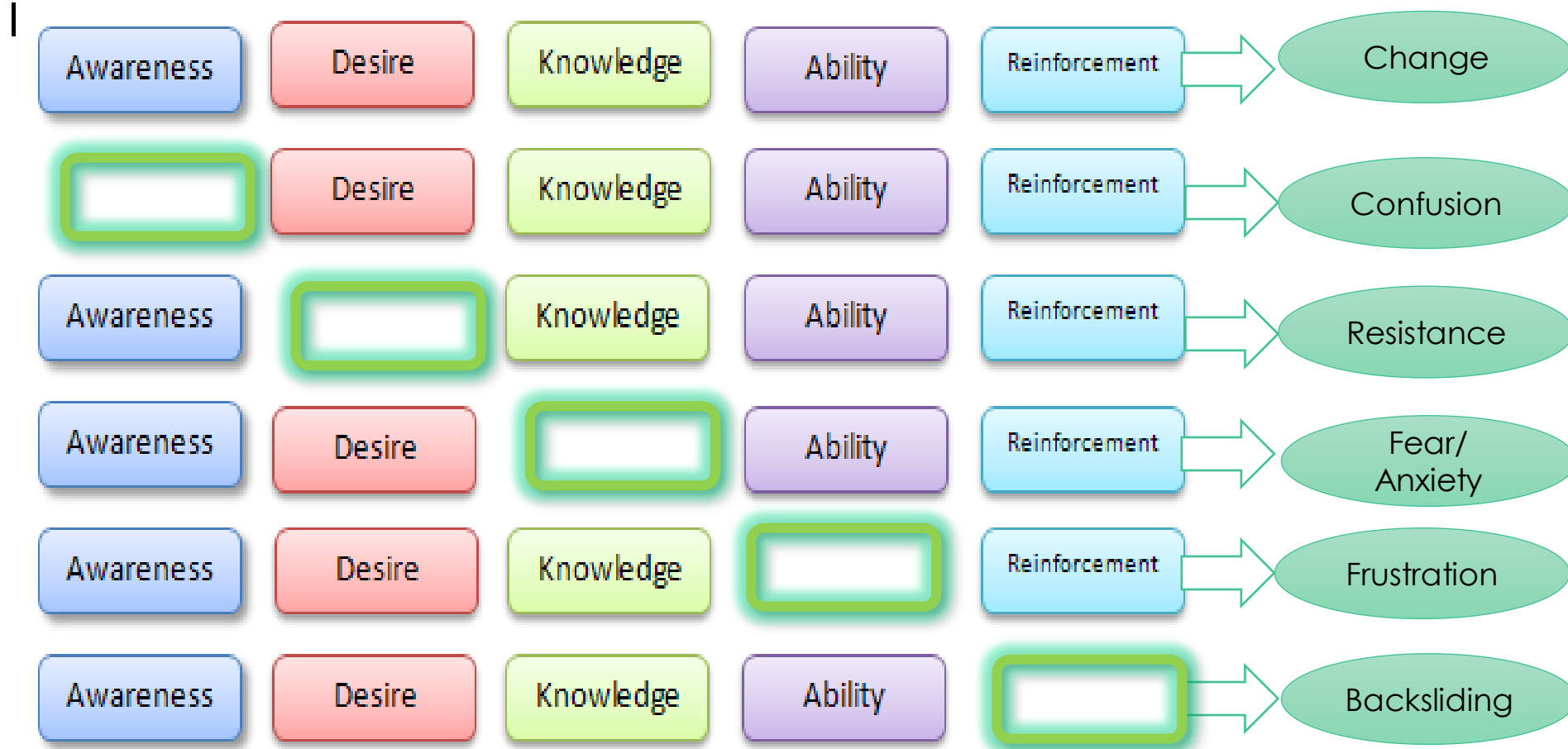
Ability to implement new skills and behaviors

R

Reinforcement to retain the change once it has been made

Prosci

Missing ADKAR



Kotter's 8-Step Change Process



Communicating Change in a Compelling Way



Communicating Change: Key Questions

- Who are my key stakeholders?
- What are the core messages I need to get out regularly throughout this change to ensure it is successful?
- How frequently do I need to communicate and at what key milestones?
- What are the best channels to use for important messages regarding this initiative?
- How can I involve others in the change to create additional buy in?
- What resistance might I anticipate, and from what audiences? How might I mitigate this?
- Who else can I engage as fellow change champion role models?
- How/where can I find and communicate small wins?
- How can I engage and communicate leadership support for the initiative?
- What is my post implementation communication plan to sustain change adoption?
- How and when will I measure and communicate successes?



Communication Plan Template

[illegible]





Sustaining Change Initiatives/Increasing Change Adoption

Your Brain on Small Wins



- The brain experiences bursts of dopamine sparked by the rewarding experience of accomplishing a goal
- One of the best ways to achieve this is break big goals into smaller, achievable milestones so you can experience regular success. You are wiring the brain to attach a dopamine response to accomplishment of your tasks.
- Allow yourself to experience frequent reward as you progress through a series of goals. Dopamine will flow every time you take a step in a positive direction.
- Your brain learns what habits/activities lead to pleasurable feelings and releases dopamine to inspire you to obtain that reward again.

Coach the Change: Key Coaching Questions



- X is a significant change for us. What are your thoughts on this?
- What do you think the biggest benefits will be from this?
- What do you think the biggest challenge will be for people in accepting these changes?
- What do you think could be done to best help support our team through this change? What do you think people need most?
- Is there anything else we haven't thought of or anything we haven't taken into consideration that we should?
- What would be most helpful to YOU in supporting YOU through this change? What do you need most right now?
- How do you feel you could help move the change forward? How do you think you could best help support others/your team?

Make the Case for Change Worksheet

Once you have identified the change you want to initiate, it is essential to build a business case that will allow you to communicate your plan to other stakeholders and create buy-in.

Change/Project Name: _____

Date: _____

Current State:	
<ul style="list-style-type: none">• Where are we now?• What is the present state like?• Provide a brief description of the current situation.	
Factors or Problems:	
<ul style="list-style-type: none">• Why do we need to change?• Why is what we're doing currently not working?• What "threat" or opportunity exists?• What requirement, problem, or need is stimulating the change?• What about the existing situation makes things difficult (e.g., missing deadlines, errors, changing regulatory or business conditions, etc.)	

Costs: <ul style="list-style-type: none">• Define the potential impact if the change does not occur or the issue is not resolved.• Describe the challenges we face if we don't change.• Gather real data where available.	

Future State: <ul style="list-style-type: none"> What would it look like if the change occurred? Describe the future state that can be envisioned and achieved—if only a solution can be found. 	
Benefits: <ul style="list-style-type: none"> What are the benefits of making the change? Why do we want to do this anyway? Provide a brief, concise list of what the project is to accomplish. Describe the anticipated end deliverables, outcomes, or results. 	

Objective: <ul style="list-style-type: none"> Tie the change into the department or organizational business strategy or larger objectives where applicable (i.e. patient safety, etc.). 	
First Steps: <ul style="list-style-type: none"> What initial actions are needed? Include a brief, broadly defined sense of direction, indicating the work to be done and pointing the way toward the desired state. Give a promising solution. What part do we need people to play in planning and implementing the change? Who are the primary stakeholders impacted? How could we get their buy in and input into the change? 	

Capturing Lessons Learned

What went well? What would we want to keep doing/do again next time?

What could have gone better? What would we want to do differently next time?

Tools & Resources for Your Change Management Toolkit



Change and Transition Strategies

ENDINGS – LETTING GO			
Common Feelings	Common Behaviors	What is Needed	Actions and Behaviors
<ul style="list-style-type: none"> • Fear • Denial • Anger • Sadness • Disorientation • Frustration • Uncertainty 	<ul style="list-style-type: none"> • Asking questions • Challenging • Complaining • Failing to see any positive outcomes • Trouble sleeping • Withdrawal • Blame 	<p>AWAWARENESS</p> <ul style="list-style-type: none"> • What is the nature of the change? • Why is the change needed? • What is the risk of not changing – for me, for others, for our patients and families? <p>DESIRE</p> <ul style="list-style-type: none"> • What's in it for me? • A personal choice • A decision to engage and participate 	<ul style="list-style-type: none"> • Identify what each individual may be losing • Accept others natural reactions as they process change • Actively listen. Seek to understand, then to be understood • Provide information about the change – share what is known, what is unknown and when additional information may be available • Respond to questions and be as authentic with your answers as possible • Show empathy and give others time to let go of what they were comfortable with before the change. • Serve as a role model, coach, and mentor for others transitioning • Be sure what you say, what your body language shows, and what you do are congruent with the path forward • Listen to objections, take time to hear and consider the information from the other's perspective • Be open to learning things that may impact the effectiveness of the change
NEUTRAL ZONE – IN BETWEEN			
Common Feelings	Common Behaviors	What is Needed	Actions and Behaviors
<ul style="list-style-type: none"> • Resentment • Low Productivity • Anxiety • Skepticism 	<ul style="list-style-type: none"> • Adjustment • Bargaining • Willingness to get involved 	<p>KNOWLEDGE</p> <ul style="list-style-type: none"> • Understanding how to change • Training on new processes and tools • Learning new skills <p>ABILITY</p> <ul style="list-style-type: none"> • The demonstrated capability to implement the change • Achievement of the desired change in performance or behavior 	<ul style="list-style-type: none"> • Keep the communication channels open and focus on 2-way communication • Create temporary processes if needed to build a bridge from the past to the future • Be visible and stay connected with your team • Provide information about learning opportunities related to the change • Continue to share the vision, purpose, and all relevant information about the new direction • Help others understand how they fit into the bigger picture and what this change will mean to the organization and the patients and families we serve • Act as a mentor for others transitioning • Involve people in trying on new ideas and invite them to be active participants in the change and transition plans • Start training people on the new skills they will need

BEGINNINGS – MOVING FORWARD			
Common Feelings	Common Behaviors	What is Needed	Actions and Behaviors
<ul style="list-style-type: none"> • High Energy • Openness • Renewed Commitment 	<ul style="list-style-type: none"> • Rebuilding • Cooperation • Clear focus and planning 	<p>ABILITY</p> <ul style="list-style-type: none"> • The demonstrated capability to implement the change • Achievement of the desired change in performance or behavior • Commitment to the new direction <p>REINFORCEMENT</p> <ul style="list-style-type: none"> • Actions that increase the likelihood that a change will be continued • Recognition and rewards that sustain the change 	<ul style="list-style-type: none"> • Be patient and continue to share the vision and what things will look like in the future • Create a transition plan that includes key dates when changes will happen, specifically identify what will change, what won't change, how work will be done, and who will be involved in each part of the change initiative • Include others in key components of the change – leverage the skills and talents of others and find ways to involve them in building the future • Clearly define roles, responsibilities, and accountabilities • Develop and communicate ongoing training plans • Help others make emotional connections to the future that helps them see how they are making a positive difference • Define measures of success and discuss how performance will be measured and evaluated • Continue to use the new processes/procedures • Identify ways to make the change stick and continue to reinforce the new direction • Consider appropriate rewards and recognition that help anchor the change • Celebrate success • Create performance support tools and provide resources that prevent backsliding to the previous way of doing things • Keep communication channels open – solicit ideas on how things are working and involve others creating solutions for any part of the change that is not working

Post Initiative Change Evaluation

1. Making the Case for Change:

What went well that you would recommend for future changes?	What you would do differently?

2. Enlisting Stakeholders and Developing a Vision:

What went well that you would recommend for future changes?	What you would do differently?

3. Identifying Potential Barriers and Developing a Plan

What went well that you would recommend for future changes?	What would you do differently?

4. Communicating the Change:



What went well that you would recommend for future changes?	What would you do differently?

5. Removing Barriers:

What went well that you would recommend for future changes?	What would you do differently?

6. Setting Milestones and Acknowledging Progress:



What went well that you would recommend for future changes?	What would you do differently?

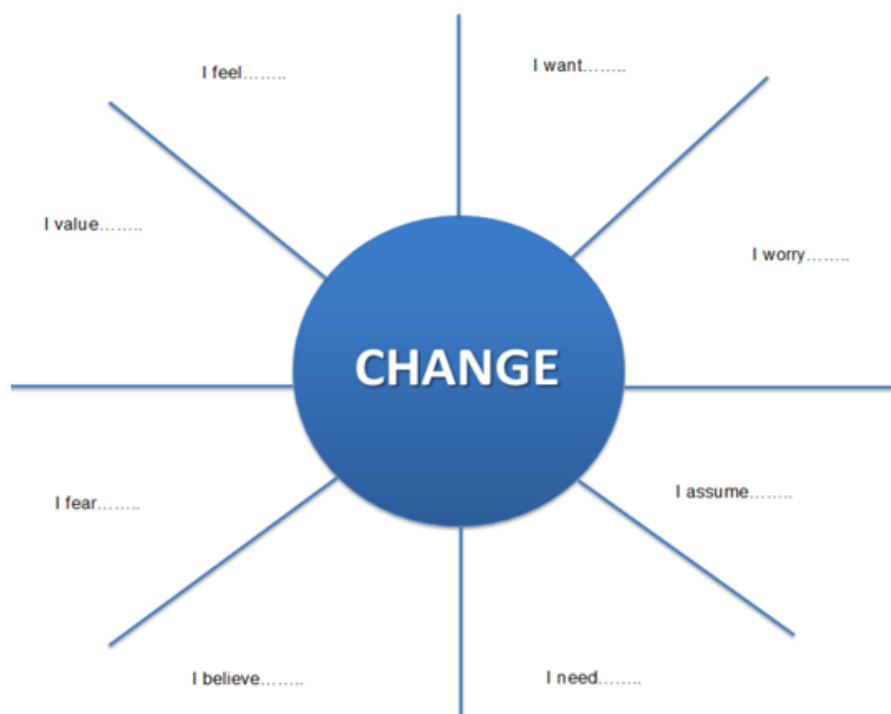
7. Reinforcing the Change:

What went well that you would recommend for future changes?	What would you do differently?

Additional comments:

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CHANGE MINDSET ACTIVITY: In the center circle, identify the personal change you are experiencing. Then complete the sentences around the wheel, related to the change.



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Knowledge Check

go.aspire.li/U9LZE



Additional Reading/Learning

- Leading Change, by John Kotter
- Change Management, by Jeffrey Hiatt & Timothy Creasey
- The Effective Change Manager's Handbook, by Richard Smith, David King, Ranjit Sidhu, and Dan Skelsy
- HBR's 10 Must Reads on Change Management
- The Heart of Change, by John Kotter
- Managing Transitions, by William Bridges



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