What it is

A series of questions to consider in planning organizational change

What it can do

This tool can assist you to:

- o Bring transformational change perspective to planning organizational change.

- o Supplement the data gathered through formal assessments.

- o Ensure a comprehensive and systematic approach to implementing change.

When to use it

When contemplating the initiation of an organizational change process

How it works

The digital version of this PDF form can be filled out using Adobe Reader. It can be downloaded at: http://www.stproject.org/resources/tools-for-transformation

NOTE: Depending on the nature and scope of the change process, various questions will be more or less relevant, but there is potential value in considering each of the following guide questions.

Step 1   Review the items listed in the template that follows.

Step 2   For each item, identify what is currently in place or will be needed to ensure successful transformation in each of the three domains of the Wheel of Change.

Hearts & Minds

What is currently in place or will be needed to ensure that:

Purpose/Vision

☐ People can connect the change to their deeper purpose for doing this work.

☐ People share a clear and compelling vivid picture of what success would look like.

☐ People are committed and aligned with the change process.

Beliefs

☐ People believe that they have some power to influence the change process.

☐ Potentially limiting beliefs and assumptions are named and addressed.

☐ Conditions are created for creative thinking, breakthroughs and new paradigms to empower the change.

Emotions

☐ Feelings such as cynicism, resistance to change, anxiety, and anger that might potentially impede or derail the change are skillfully surfaced and addressed.

☐ Positive emotions are inspired to help fuel the change process.

☐ There is ongoing support and development of individual and collective emotional intelligence.

Belonging

☐ There is a collective sense of ownership over the change process throughout all levels of the organization, beginning with top leadership.

☐ The trust and partnerships necessary for change are cultivated within and across organizational silos.

☐ Safe spaces are created to name and successfully address significant barriers to trust and peoples' sense of belonging – including issues around social identity, inclusion, power and privilege.

Behavior

What is currently in place or will be needed to ensure that:

Norms

☐ Clear norms/team agreements are established that are tied to the
success of the change.

☐ There is shared commitment and ownership of the norms
(especially among top leaders)

☐ Everyone at all levels of the organizations understands how they need to act
(and not act) to help implement the change.

Communication

☐ Top leaders model authenticity and transparency, especially regarding
the change process.

☐ There is an excellent communication plan for the change process that keeps
people well-informed and well-engaged.

☐ There is a flow of honest, timely feedback throughout the organization to ensure
the learning critical to the success of the change.

Habits

☐ There is conscious, sustained practice of new habits (consistent with
the new norms).

☐ There is adequate time for the reflection and evaluation needed for learning.

☐ There is an environment of acceptance for "mistakes" that is integral to learning.

Skills

☐ There is a thorough assessment of what skills will be needed to develop or acquire
in order to implement the change.

☐ There is sufficient training in the critical skills needed for successful implementation
of the change, both technical skills as well as personal and interpersonal mastery.

☐ Adequate support is available for those playing key roles in the change process
(mentoring, professional coaching, peer coaching, etc.)

Structures

What is currently in place or will be needed to ensure that:

Strategies

☐ There is a well thought-out plan for the successful launch and implementation of the change process

☐ Plans include performance metrics to support successful implementation of the change plan

☐ Implications of the proposed changes for existing organizational strategies have been thoroughly explored and addressed

Organizational Structures

☐ Structures that best support implementation of the changes are in place or created as part of the change process

☐ Existing organizational structures are assessed for their alignment with the proposed changes

☐ Potential implications of the changes for existing organizational structures have been thoroughly explored and addressed

Processes

☐ Processes that best support implementation of the changes are in place or created as part of the change process

☐ Existing organizational processes are assessed for their alignment with the proposed changes

☐ Potential implications of the changes for existing organizational processes have been thoroughly explored and addressed

Technology

☐ Existing technology has been assessed to ensure maximum support of the proposed changes.

☐ New forms of technology have been explored to empower the change and offer possibilities of breakthroughs.

☐ The potential role of technology in the transformation is fully integrated into the change process.