

Change Leadership

A Discussion and Activity Guide for Leaders

Change starts here.

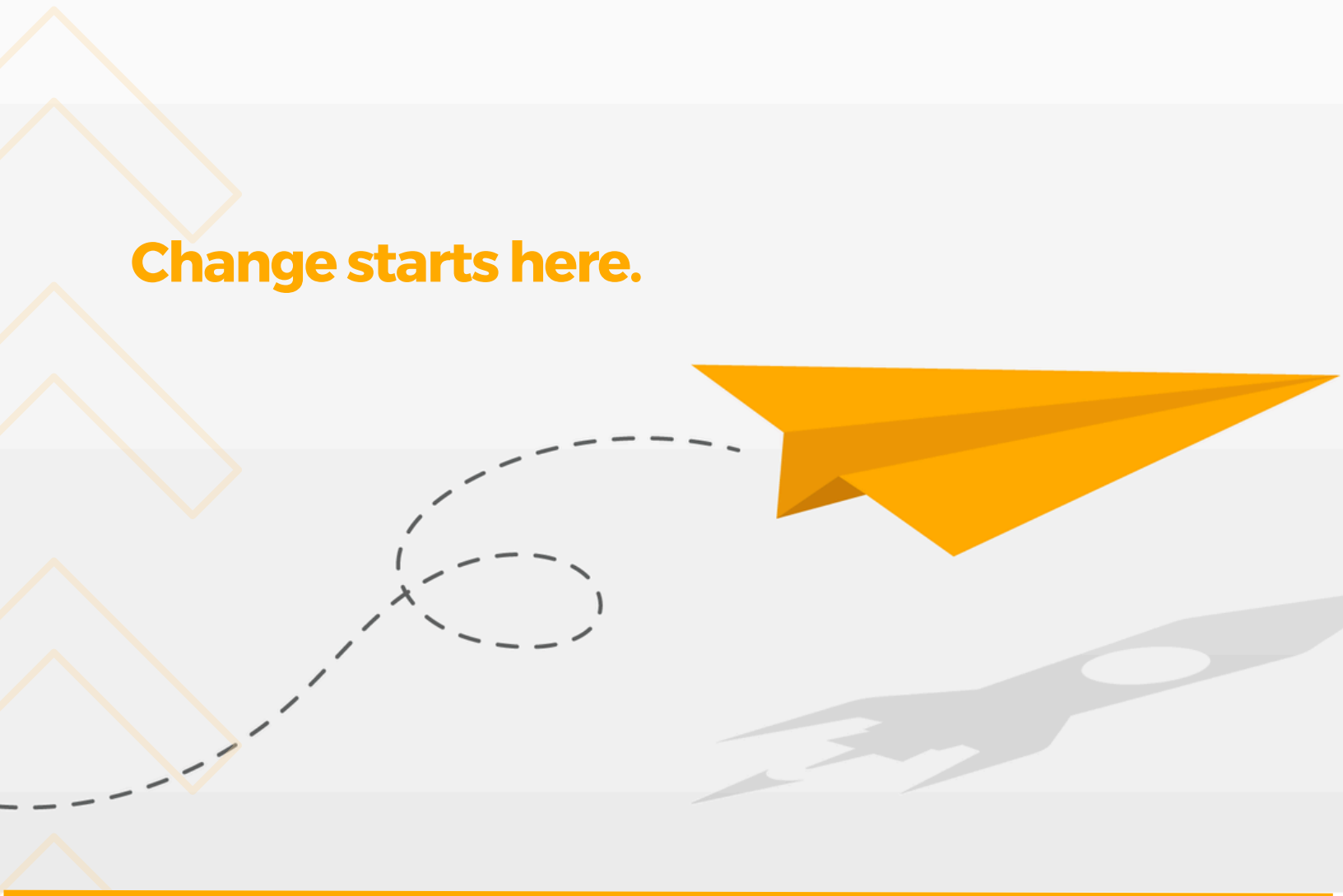


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Introduction



Change is inevitable,
but with the right guidance and support, it can also be an opportunity for growth and success.



We help leaders and employees navigate the complexities of change, providing the tools and support needed to implement new initiatives and achieve desired outcomes successfully. With our services, organizations can not only survive but thrive.

Defining Terms



Strategy

Strategy refers to a comprehensive plan formulated to achieve specific goals and objectives over time. It encompasses the determination of the mission, vision, and core values of an organization, followed by the development of detailed plans and allocation of resources to achieve these objectives. The strategy involves understanding the competitive environment, internal capabilities, and how the organization can position itself to achieve a sustainable future while simultaneously realizing its vision. It's a high-level blueprint guiding the direction of an organization.

Change Management

Change Management is a systematic approach to the transition or transformation of an organization's goals, processes, or technologies. The purpose of change management is to implement strategies for effecting change, controlling change, and helping people to adapt to change. It involves managing the human and organizational aspects of change, including changes to business processes, systems and technology, job roles, and organizational structures. Change management ensures that changes are implemented smoothly and successfully to achieve lasting benefits.



Why focus on change management?

Strategy and change management, while both pivotal in guiding an organization towards success, diverge significantly in their core principles and execution. The crux of strategy lies in carving out a long-term direction and objectives for an organization. It is the art of crafting a roadmap that charts out the future course, focusing on achieving sustainable competitive advantages and meeting overarching goals. This strategic blueprint often originates from the upper echelons of an organization, a top-down approach where senior leaders envisage the future and plot the course to navigate there.

Contrastingly, change management adopts a more human-centric focus, delving into the realm of how these strategic decisions translate into actual transformation within the organization. It acknowledges that change – whether stemming from a new strategy or external forces – is inherently disruptive and challenging on a personal and organizational level. Change management thus centers around guiding people through this transition, managing both the technical and emotional journey of adapting to new ways of working, thinking, and behaving.

The distinction also becomes apparent in how these processes unfold within an organization. Strategic planning, with its long-term horizon, sets the stage for what needs to be achieved. Change management, on the other hand, steps into the picture to handle the immediate, often tumultuous, period of transition. It is about breaking down the strategic vision into manageable, palatable changes that people can understand, accept, and adopt.



In this landscape, the role of leaders becomes quintessential, especially when a new strategic plan is on the horizon. Leaders are not just architects of strategy but also the torchbearers of change. Their responsibility magnifies in building a culture that is not just receptive to change but actively embraces it. This involves nurturing an environment where adaptability and flexibility are ingrained in the organizational fabric. Leaders must champion the cause, bridging the gap between strategic objectives and individual contributions. They are tasked with creating a narrative that resonates, making the abstract tangible, and the intimidating accessible.

Moreover, leaders play a crucial role in managing the human side of change – recognizing and addressing resistance, fostering open communication, and ensuring that the workforce is supported throughout the journey. They are the ones who allocate resources thoughtfully to aid the change process, constantly monitor progress, and remain agile to course-correct as needed. By doing so, they don't just implement change; they cultivate a change-ready culture, priming the organization not only for the current strategic shift but for a future where change becomes a constant, navigable companion.

In essence, while strategy sketches the destination, change management is the journey. Leaders stand at this intersection, steering the organization from envisioning a future state to living it. Their role transcends mere planning; it's about inspiring, guiding, and sustaining change. It is a testament to the notion that successful implementation of a strategy is as much about the hearts and minds of the people involved as it is about the objectives and the resources.

Change Leader Qualities



Visionary

Leaders must articulate a clear, compelling vision that aligns with the long-term strategy of the organization. This involves not just setting the direction but also inspiring and motivating the team towards achieving these strategic goals.



Empathetic

Understanding and addressing the human side of change is crucial. Leaders need to empathize with their team's concerns and challenges, providing support and guidance throughout the change process to ensure a smooth transition.



Cultivator

Cultivating a change-ready culture within the organization is a key responsibility. Leaders should foster adaptability and resilience, ensuring the team is prepared and equipped to embrace ongoing changes and future transformations.

We want to help you **foster a culture of innovation and adaptability**

In your roles as leaders, you're not just overseeing programs and policies but also leading dynamic teams through the ever-changing landscape of student affairs. This workbook is crafted to be your ally in that journey, focusing on enhancing your skills in leading change and developing your personal efficacy in change management.

Change is a constant in student affairs, and your ability to navigate and lead through these changes is crucial - especially as you launch a strategic plan. This workbook offers practical tools and insights to help you guide your team with confidence and effectiveness.

Inside, you'll find:

- Strategies to effectively communicate and implement change within your team.
- Techniques to manage the diverse reactions and emotions that change can evoke.
- Ideas for fostering a supportive and collaborative environment amidst change.
- Guidance on building a team culture that embraces and thrives on change.

As you delve into this workbook, you'll gain the skills and knowledge to not only lead change effectively but also to enhance your own leadership style, ensuring that you and your team are well-equipped to handle the dynamic nature of student affairs.



Strategic Transformation

A Guided Approach

Change in higher education institutions is unique due to their complex structures and the diverse array of stakeholders involved, including faculty, staff, and students (Kezar & Eckel, 2002). The introduction of a new strategic plan often brings with it a wave of uncertainty and apprehension. The process of guiding an organization through the intricate landscape of change is both an art and a science. This journey demands a comprehensive and thoughtful approach to ensure its success. The steps outlined in this process provide a structured framework for leaders to effectively manage and facilitate change, addressing both organizational and individual needs.



Clarify the Vision

This step involves ensuring that every team member understands the various components of the new strategic plan and its overarching intentions. It's about breaking down the plan into digestible parts, explaining how each element aligns with the organization's goals and vision, and helping them to interpret the “why” of the plan.



Connecting Individually

This step focuses on helping individuals see how their roles and responsibilities align with and contribute to the strategic plan. It's about creating a sense of ownership and personal investment in the plan's success.



Connect Your Department

This step aims to align departmental objectives and activities with the strategic plan. It's about helping your staff understand how the work of your functional area(s) contributes to the broader organizational goals.



Address Concerns

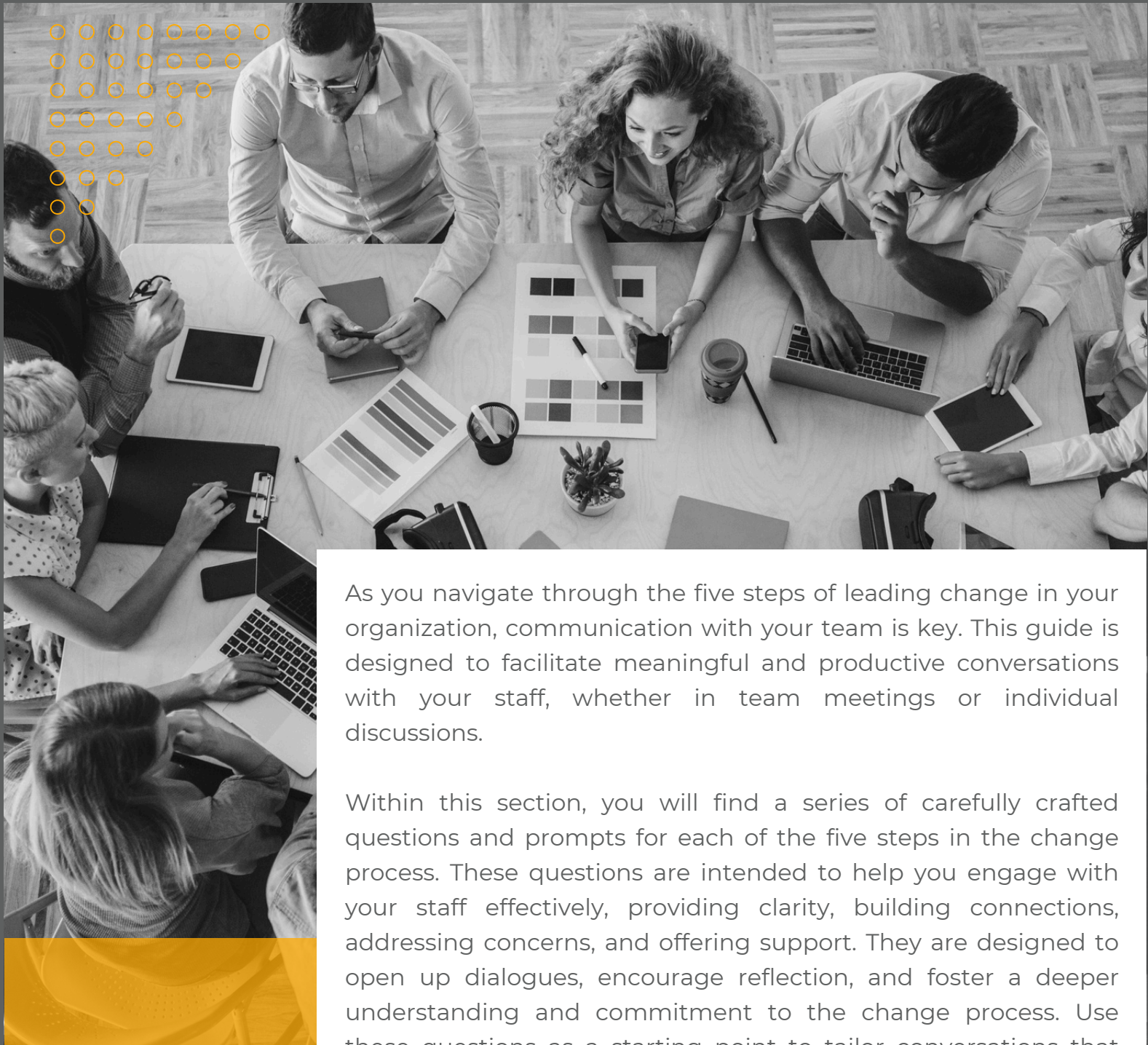
This step is crucial in addressing any apprehensions or uncertainties team members might have about the strategic plan or the change it entails. It should occur after the previous steps have laid a foundation of understanding and connection.



Offer Support

The final step involves identifying and providing the support team members need to adapt to and thrive amidst the change. The aim is to ensure every team member feels equipped and confident to navigate the changes, fostering a supportive and resilient organizational culture.

Discussion Guide



As you navigate through the five steps of leading change in your organization, communication with your team is key. This guide is designed to facilitate meaningful and productive conversations with your staff, whether in team meetings or individual discussions.

Within this section, you will find a series of carefully crafted questions and prompts for each of the five steps in the change process. These questions are intended to help you engage with your staff effectively, providing clarity, building connections, addressing concerns, and offering support. They are designed to open up dialogues, encourage reflection, and foster a deeper understanding and commitment to the change process. Use these questions as a starting point to tailor conversations that meet the specific needs and dynamics of your team.

Clarifying the Vision

Your aim is to ensure that every team member has a clear and comprehensive understanding of the new strategic plan. This involves elucidating the plan's objectives, its alignment with the organization's mission, and its impact on individual roles.

Discussion Questions

1. What are your initial thoughts on the new strategic plan?
2. How do you think this plan aligns with our overall mission and vision for the division? What about for our department?
3. What parts of the plan do you find most exciting or promising?
4. Are there any aspects of the plan that are unclear or confusing to you?
5. How do you see this plan impacting your day-to-day work?
6. What do you think are the most significant changes that come with this plan?
7. How can we better communicate the goals and objectives of this plan to the entire team?
8. In what ways do you think this plan will benefit our students and the institution?
9. What additional information would help you understand the plan better?
10. How do you think we can measure the success of our contribution to this plan?

Facilitation Tips

Setting: Choose a comfortable and open environment conducive to learning and asking questions.

Visual Aids: Have a copy of the strategic plan printed or available on the screen or a tablet.

Active Listening: Pay attention to verbal and non-verbal cues to gauge understanding and address any confusion immediately. Their faces will register confusion before they will share it verbally.

Connecting Individually



Encourage team members to see how their roles and personal goals align with the strategic plan. This helps in fostering a sense of ownership and motivation towards the plan. This also helps them understand how they fit into the bigger picture and contribute toward the overall mission of the organization.

Discussion Questions

1. What aspects of the plan resonate with your values and professional goals?
2. How can this plan help you grow or develop in your role?
3. What opportunities do you see for yourself as part of this strategic change?
4. How can your skills and experiences contribute to the success of the plan?
5. In what ways do you feel personally connected to the goals of this plan?
6. What part of the plan excites you the most?
7. How do you think your daily work will contribute to the larger goals of this plan?
8. How do you see yourself making a difference in this strategic shift?
9. How do you see your role evolving with the implementation of the plan?

Facilitation Tips

Mixed Modality: You can start these conversations as a team, but make sure to follow up in 1:1s after people have had a chance to digest and once they fully understand the plan and have had questions clarified.

Empathetic Leadership: Show genuine interest in team members' aspirations and how they connect to the plan.

Personal Stories: Share your own connections to the plan to model how personal alignment looks.

Body Language: Maintain open body language to create a more inviting and engaging atmosphere.

Connect Your Department



Assist your team in understanding how their departmental work fits into the broader goals of the strategic plan, promoting a sense of collective purpose. Think about existing goals and priorities and be prepared to discuss the connections.

Discussion Questions

1. How do you think our department's work aligns with the new strategic plan?
2. What role do you see our department playing in the success of this plan?
3. How can we modify our departmental goals to support the strategic plan better?
4. What are the strengths of our department that we can leverage in this change?
5. In what areas does our department need to grow or adapt to align with the plan?
6. How can we collaborate with other departments to support the strategic plan?
7. How do you think this plan will impact the services and programs we offer?
8. Are there new initiatives or projects that our department should consider under this plan?
9. How can we ensure that our department remains flexible and adaptable as the plan evolves?

Facilitation Tips

Prework: Make sure you have a basic understanding of your vision for your department's connection to the plan. Do not walk into this conversation cold - your staff will pick up on this!

Don't Overgeneralize: While a case can be made that almost anything can fit into the vision of the strategic plan, try to be specific in the connections you make for you staff as to not dilute the mapping process.

Inclusivity: Ensure all department voices are heard, acknowledging diverse perspectives.

Encourage Creativity: Motivate teams to think creatively about how their department can contribute to the plan's goals.

Address Concerns



As a leader, these conversations center on creating a trusting environment where team members can openly express their concerns about the change. This phase is crucial for acknowledging and addressing apprehensions, ensuring your team feels heard and supported. Your empathetic and transparent handling of these concerns is key to maintaining morale and fostering a positive attitude towards the change.

Discussion Questions

1. What concerns do you have about the changes brought by the strategic plan?
2. What uncertainties or fears do you have regarding this change?
3. Are there aspects of the plan that might be challenging for our team?
4. How can we work together to overcome any obstacles you foresee?
5. How can we make sure that your voice is heard and considered in this process?
6. How can we maintain open and honest communication as we navigate these changes?
7. What steps can we take to build trust and confidence in the direction we are heading?

At this point in the process, the focus shifts from asking questions to actively listening and responding to your team's concerns. This stage is less about initiating inquiries and more about providing a platform for team members to voice their apprehensions and questions. As a leader, your role is to offer reassurances and solutions, not to introduce new doubts or concerns. It's vital to approach these conversations with sensitivity and an open mind, ensuring that you are addressing the actual issues your team members are facing rather than inadvertently adding to their uncertainties. This step is key in building trust and confidence within your team, showcasing your commitment to a supportive and transparent change process.

Facilitation Tips

Private Setting: If concerns are specific to individuals, choose a setting that ensures privacy and comfort for more sensitive discussions.

Reassurance: Provide reassurance and support, showing that their concerns are valid and will be addressed - *even if you don't have an answer right now.*



Offer Support

Now, your focus is on identifying and providing the support your team needs to navigate the change. This involves understanding their specific challenges and offering the necessary resources, training, and encouragement. Your role is to ensure that each team member feels equipped and confident, fostering a culture of support and psychological safety that sustains the team through the transition.

Discussion Questions

1. What specific support do you feel you need to navigate this change effectively?
2. Are there any tools or resources that would help you adapt to the new strategic plan more comfortably?
3. How can I, as a leader, be more supportive during this transition?
4. What kind of training or professional development would help you?
5. Do you have any suggestions for smoothing this transition for the entire team?
6. In what ways can we facilitate better collaboration and support?
7. Are there any aspects of the change process where you feel additional guidance is needed?
8. How frequently would you like to have check-ins or updates about our contributions to the plan?
9. What can we do to maintain morale and motivation during this time of change?
10. How can we ensure that communication remains clear and effective throughout this process?
11. What forms of recognition or encouragement would be most meaningful to you during this transition?

Facilitation Tips

Resource Awareness: Be prepared with information about available resources and support systems.

Follow-up Plans: Develop follow-up plans to ensure ongoing support.

Open-door Policy: Encourage an open-door policy for team members to seek support as needed but be proactive about checking in.

Activity Guide



Welcome to the Activity Section of this workbook, a hands-on and interactive component designed to bring the concepts of change management to life within your team. Here, you'll find a variety of engaging activities tailored to complement the five steps of leading through change in student affairs. These exercises are not just about understanding the change process but about experiencing and practicing it together with your team.

In this section, each activity is crafted to align with the specific goals of the steps outlined earlier - from clarifying the strategic plan to offering support. These activities are more than just tasks; they are opportunities for your team to collaborate, communicate, and connect more deeply with the change process. They offer practical ways to apply the principles of change management in real-time, allowing your team to explore, reflect, and grow together. By participating in these exercises, your team will not only gain a clearer understanding of the change process but also develop the skills and confidence needed to navigate it effectively.

TEMP CHECK

Take Your Temperature for Leading People Through Change

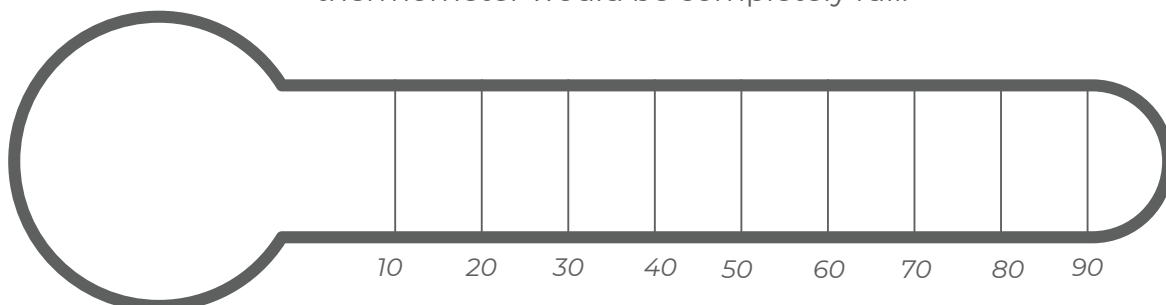
SELF-ASSESSMENT WORKSHEET

With yourself and your organization in mind, read each statement carefully. Next to each statement, write the number (from 1 to 10) that indicates your level of agreement with the statement.

- _____ I know how to create a climate supportive of ongoing change.
- _____ I generally view challenges as opportunities rather than problems.
- _____ I realize what it takes to guide a change effort successfully.
- _____ I know how to effectively communicate upcoming changes.
- _____ I always try to develop shared ownership by involving others in the change process.
- _____ I can accurately appraise changes faced by work units and organizations.
- _____ I understand why organizational members sometimes resist change.
- _____ I understand the role resilience plays in organizational change.
- _____ I am aware of how people respond when change demands exceed their resilience.
- _____ I understand my role in connecting positive change to desired outcomes.
- _____ **Total**

VISUALIZING YOUR SCORE

Start by coloring in the full circle, then utilize your total score to fill in the thermometer from left to right. Each line is 10 points. For example, if you answered 10 on each item, your total points would be 100 and your thermometer would be completely full.



Departmental Mapping Exercise

This activity focuses on aligning your departmental goals with the strategic plan. You'll create a visual representation showing this alignment, which will help in understanding and communicating how each department contributes to the broader vision.

Materials Needed

- Posterboard (or a dry-erase board) - you can also use a digital whiteboard like Miro if you are doing this exercise remotely
- Markers (if applicable)

Instructions

1. Using the template for part A on the following page, first write down your mission/vision statement for your functional area in the appropriate section.
2. Then identify a sampling of your areas programs, services, policies, resources, etc.
3. Within your mission statement, work with your team to circle the key concepts and terms.
4. Draw a line from each of those circled concepts to one or two (no more than two) of the strategic priorities/goals from the strategic plan. For each line you draw, you should be able to articulate the connection.
5. Next, do the same thing for your sample of programs and services.
6. Then utilize Part B for **each** of the priority areas and goals that you mapped to. On the left side identify the circled terms and connected programs. On the right side list out the objectives for that strategic priority or goal.
7. Now, draw a line from each item on the left to the specific objective you're mapping to on the right.

Discussion Tips

- Encourage the program or process leaders to take the first attempt at mapping. Make sure you encourage them to think critically about the **outcomes** of what they're mapping - not just the terms.
- Be critical in your mapping - it should be intentional.



Part A

Departmental Mapping

Department Name

Dept Mission

Strategic Plan Goals

Major Initiatives



Part B

Departmental Mapping

Department Name

Strategic Plan Goal

Major Initiatives

Objectives



Individual Mapping Exercise



This activity focuses on helping individuals understand their contributions to the goals and objectives of the strategic plan - especially when it may seem like there's not a clear connection. The key to this activity is not necessarily that they can find a specific project that is explicitly mentioned in the plan, but how their work will contribute to the success of the division as it relates to those objectives.

Materials Needed

- Template on the following page **OR**
- Posterboard (or a dry-erase board) - you can also use a jamboard if you are doing this exercise remotely
- Markers (if applicable)

Instructions

1. Using the template on the following page, first write down the job summary for your employee. Make sure this accurately represents the scope of their work.
2. Have them list out their regular projects and tasks associated with their day-to-day activities and expectations.
3. Within their job description, circle the key concepts and terms.
4. Draw a line from each of those circled concepts to one or two (no more than two) of the strategic priorities/goals from the strategic plan. For each line you draw, you should be able to articulate the connection.
5. Next, do the same thing for your sample of responsibilities and tasks.
6. Then utilize Part B for **each** of the priority areas and goals that you mapped to. On the left side identify the circled terms and connected tasks. On the right side list out the objectives for that strategic priority or goal.
7. Now, draw a line from each item on the left to the specific objective you're mapping to on the right.

Discussion Tips

- While this activity can be done in a group, sometimes it is best to also process it individually with your team members.
- You may need to provide additional guidance to non-student-facing roles. For instance, help articulate how a facilities operation staff helps support the success of programming mentioned in specific objectives or how a budget analyst supports the financial health of a program or the division.



Part A

Individual Mapping

Employee Name & Title

Job Overview

Strategic Priority Areas

Major Duties



Part B

Individual Mapping

Employee Name

Strategic Priority Area

Major Duties

Objectives



ChangeStory



Uncovering Our Transformative Journeys

The "Change Story" activity is designed to foster a deeper understanding and appreciation of change within your team. By sharing personal anecdotes about specific moments when they experienced or recognized the need for change, team members can connect on a human level, see change from diverse perspectives, and build empathy. This exercise aims to create a supportive environment where learning from each other's experiences becomes a foundation for embracing future changes.

This exercise offers a profound insight into how individual team members perceive and react to change, shaped significantly by their past experiences. It's important to recognize that change is not just a conceptual or operational shift but also an emotional journey. For many, their stories may reveal deep-seated emotional connections or even traumas associated with change. These revelations are invaluable as they provide a clearer understanding of the varied emotional landscapes within your team. As a leader, being cognizant of these personal histories and emotional ties to change is crucial. It enables you to tailor your approach to support and lead your team more effectively. Understanding each team member's unique relationship with change allows you to address their specific needs, fears, and motivations, fostering a more supportive and empathetic environment that is conducive to positive and successful transitions.

Tips for Facilitating the "Change Story" Activity

- **Create a Safe Space:** Reiterate the importance of a non-judgmental, respectful listening environment. Make it clear that every story is valuable and there are no right or wrong experiences.
- **Encourage Vulnerability:** Lead by example. Share your own story of a significant change to set the tone for openness and vulnerability.
- **Facilitate Thoughtfully:** Be mindful of the emotions that these stories might evoke. Be prepared to offer support or steer the conversation if it becomes too negative.
- **Draw Out Learnings:** As a facilitator, help the team draw out learnings from each story. Ask probing questions that encourage deeper reflection and connection to broader themes of change.
- **Respect Privacy:** Ensure that the team understands the importance of confidentiality and respects the privacy of the stories shared.

ChangeStory



Instructions for the Activity

1. Setting the Stage

Begin by explaining the purpose of the activity: to share specific, memorable instances that highlight personal experiences with change. Emphasize that these stories can be either positive or negative but should be specific and insightful.

2. Preparation Time

Give your team members some time to reflect and jot down their stories. Encourage them to think of a particular moment that signifies change, like a conversation with a new boss who had different expectations, or the first day of implementing a new system.

3. Sharing in a Circle

Arrange the team in a circle to create an inclusive atmosphere. Invite volunteers to start sharing their stories. Ensure each story is listened to without interruptions or immediate responses.

4. Reflect and Discuss

After each story, allow a moment for reflection. Then, open the floor for the team to discuss what they learned from that story about change, its impacts, and how people react to it. Conclude the activity by summarizing key insights and takeaways about change based on the stories shared. Highlight the commonalities and differences in experiences and reactions to change.

As you conclude this activity, reflect on the richness of the experiences shared and the insights gained. Recognize the courage it takes to share personal stories and the trust your team has placed in you and each other. This exercise is not just about understanding change; it's about building a team culture grounded in empathy, respect, and collective learning.

Moving forward, carry these stories with you. Let them inform your leadership style and your approach to implementing change. Remember that each team member's experience with change is a vital piece of the puzzle in creating a cohesive and resilient team.

Change Soundtracks

Unveiling the Rhythms of Change

In the dynamic world of change, music serves as a powerful medium to express and understand our diverse feelings and experiences. This innovative activity is designed to explore the multifaceted nature of change through the universal language of music. This activity invites team members to select songs that resonate with their personal experiences of change, both positive and challenging. By sharing these musical reflections, the team embarks on a melodious journey to deepen their understanding of each other's perspectives on change, fostering empathy and unity.

Instructions for the Activity

Selection of Songs

Each team member is asked to choose three songs that represent their positive experiences with change and three songs that reflect their challenges with change. These songs can be from any genre that speaks to you.

Compilation of Songs

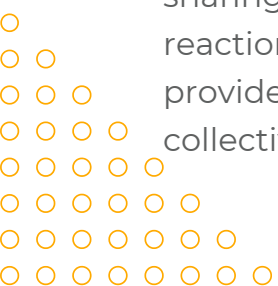
Submit your chosen songs to your team leader via email or a designated online platform. Include the song title, artist, and a brief note on why each song represents your view of change.

Creation of Playlist

The team leader will compile all the submitted songs into a Spotify playlist, ensuring a diverse mix that represents the entire team's sentiments.

Ongoing Discussion

Prior to each staff meeting, select one song from the compiled playlist. Ensure the chosen song is one that has not been discussed in previous meetings. Inform the team member who submitted the song about its selection, so they can prepare to share their perspective. Play the song for the entire team. Invite the team member who selected the song to share their reasons for choosing it. After the initial sharing, open the floor for discussion. Encourage team members to share their reactions to the song and its connection to change. Use the question guide provided earlier to steer the conversation and delve deeper into the team's collective experiences and perspectives on change.



Change Soundtracks

Unveiling the Rhythms of Change

Discussion Guide

Make sure to create an inclusive environment where every team member feels comfortable sharing their thoughts. Respect different interpretations and viewpoints, as the goal is to understand the varied ways in which people experience and perceive change.

Discussion Questions

Initial Reactions: What feelings or thoughts does this song evoke in you regarding change?

Personal Connection: How does the theme or message of the song relate to your experiences with change?

Song Interpretation: What aspects of the song (lyrics, rhythm, melody) contribute to its representation of change?

Shared Experiences: Can you identify with the perspective shared by the team member who selected this song? Why or why not?

Broader Insights: What does this song teach us about the nature of change in our team or organization?

Actionable Takeaways: How can we apply the insights gained from this discussion to better manage and embrace change in our work environment?

Facilitation Tips

Documentation and Reflection: It can be beneficial to document the main points of the discussion for future reference. This will help in tracking the evolution of the team's thoughts and feelings about change over time.

Regular Rotation: Ensure that a different staff member's song is selected for each staff meeting to give every team member a chance to share their selections and perspectives.



Force Field Analysis

Mastering Overcoming Obstacles

Change is a constant in higher education, and understanding how to effectively navigate it is crucial for success. The Force Field Analysis, a strategic tool developed by Kurt Lewin, offers a comprehensive method for assessing the various forces that impact organizational change. This technique aids in identifying both the driving and restraining forces that influence any change initiative, allowing leaders to strategize effectively. By utilizing this analysis, decision-makers can gain a clear perspective on how to balance these forces, thereby facilitating smoother transitions and more successful implementations of change.

Instructions for the Activity

Define the Change Objective: Clearly state the goal or outcome of the proposed change. This could range from implementing new technologies to restructuring teams.

Identify Driving Forces: List factors that positively support the change on the left. Consider internal elements like team morale or external factors like market trends.

Identify Restraining Forces: Document factors that resist or hinder the change. These could include internal resistance or external regulatory challenges.

Assign Impact Scores: Rate each identified force on its strength and impact on the change, using a scale from 1 (weakest) to 4 (strongest).

Develop Strategies: Based on the analysis, devise strategies to strengthen driving forces and mitigate restraining forces.

Create a Change Management Plan: Formulate a detailed plan outlining actions, responsibilities, timelines, and necessary resources.

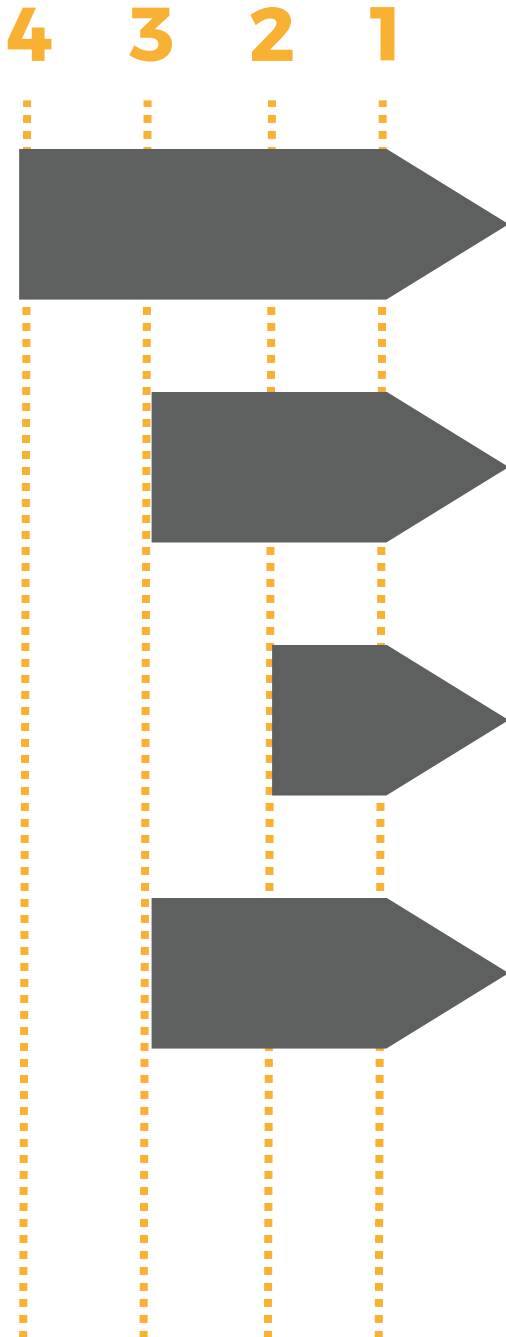


Force Field Analysis

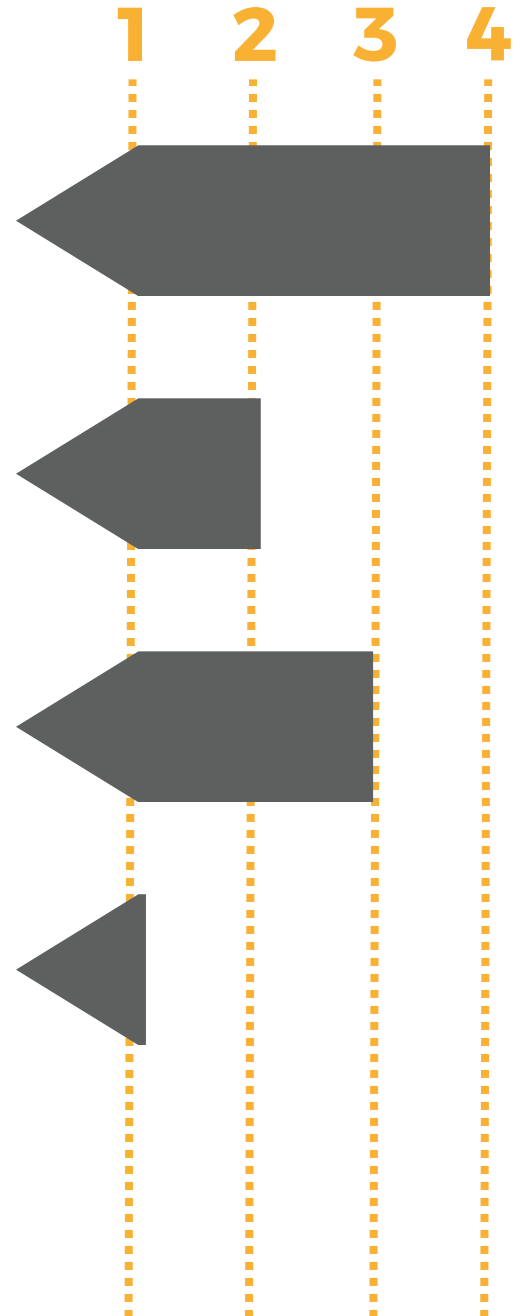
Representative Graphic for Activity

Forces For Change

Forces Against Change



**Expected
outcome(s) or
change
initiative**



Total: 12

Positive

Total: 10

Negative

Total



Force Field Analysis

Forces For Change

4 3 2 1

Four vertical dashed lines for scoring, corresponding to the numbers 4, 3, 2, and 1.

Total:

Positive

Forces Against Change

1 2 3 4

Four vertical dashed lines for scoring, corresponding to the numbers 1, 2, 3, and 4.

Total:

Negative

**Expected
outcome(s) or
change
initiative**

Total



Force Field Analysis

Discussion Guide

Questions to Facilitate

Objective Clarification: What exactly do we want to achieve with this change?

Driving Force Exploration: What factors can positively influence this change? How can we enhance these?

Restraining Force Identification: What are the potential obstacles to this change? How can we address or minimize these?

Impact Assessment: How significant is each identified force in terms of facilitating or hindering the change?

Strategic Planning: What specific actions can we take to balance these forces effectively?

Feedback and Adaptation: How can we incorporate feedback from all stakeholders to refine our approach?

Example

In the context of higher education student affairs, suppose the objective is to implement a new digital platform for student engagement. The force field analysis might reveal driving forces such as the need for improved student communication and technological advancements. Restraining forces could include budget constraints and resistance to change from staff. By assigning impact scores and developing strategies like training programs for staff and seeking collaborative funding from other areas, the campus life department can effectively manage the change.



FishboneDiagram

Unraveling the Knots of Change

The Fishbone Diagram, also known as the Ishikawa or Cause and Effect Diagram, is a powerful tool for identifying and visualizing the root causes of issues in change management. This technique enables teams to systematically explore the various factors contributing to a particular problem, especially in complex change scenarios. By dissecting these causes into categories such as People, Process, Policy, Equipment, and Environment, teams can gain a deeper understanding of the challenges and devise more effective solutions for managing change.

Instructions for the Activity

Identify the Problem: Clearly define the specific problem or issue related to change management that needs addressing.

Set Up the Fishbone Diagram: Draw a diagram with the problem statement at the "head" and create branches for each category of potential causes (People, Process, Policy, Equipment, Environment).

Brainstorm Causes: For each category, brainstorm possible causes contributing to the problem. Involve team members from various departments to ensure a comprehensive perspective.

Organize and Prioritize Causes: Group similar causes and identify the most significant ones that require immediate attention.

Develop Action Plans: For each major cause, develop an action plan detailing how to address or mitigate these issues.

Review and Update: Regularly review the fishbone diagram to update it with new findings or to reassess the effectiveness of implemented solutions.



FishboneDiagram

Visual Activity Guide

People

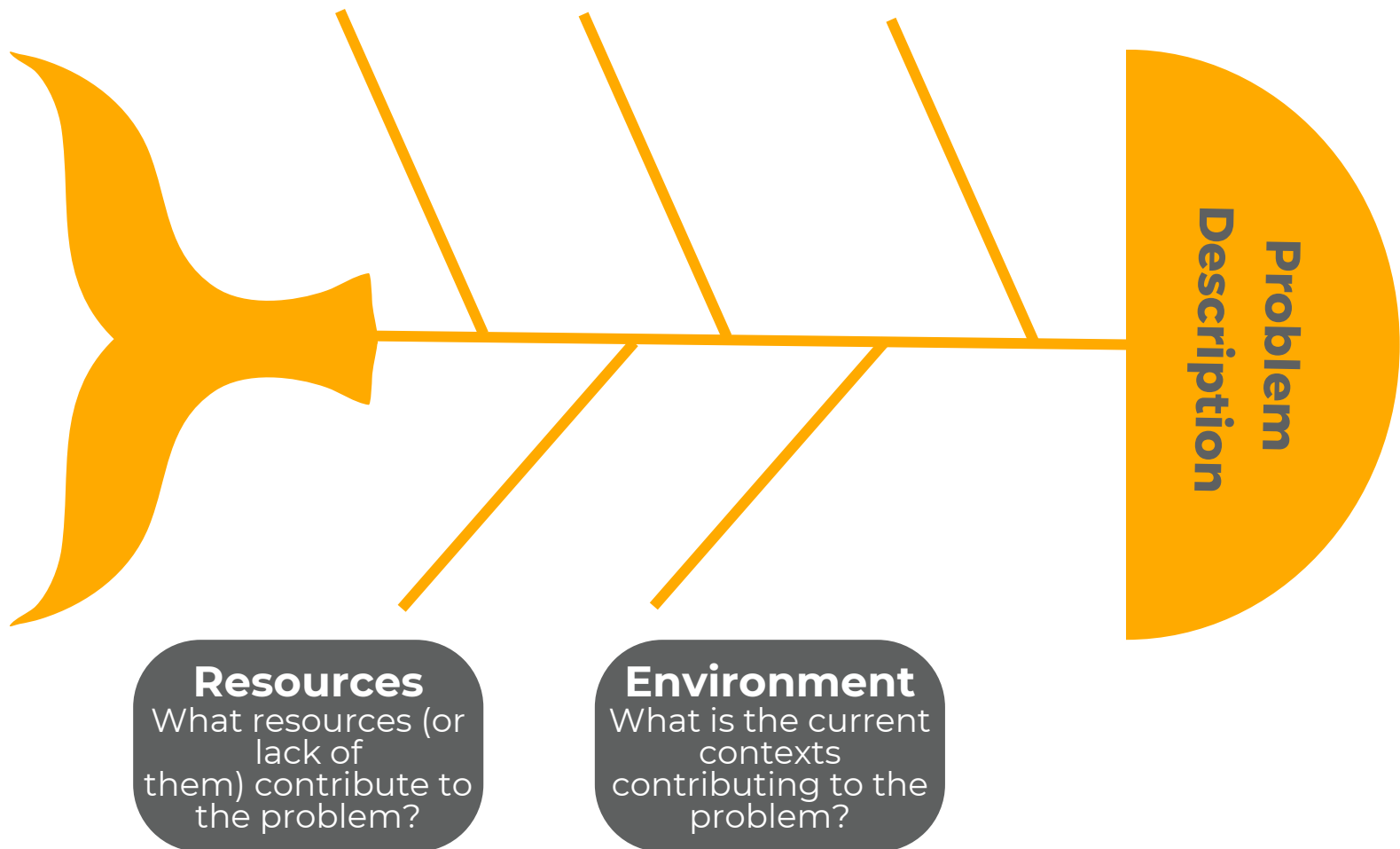
Who is contributing to the problem?

Process

What process issues contribute to his problem?

Policy

What policies are barriers to success?



Questions to Consider

Problem Exploration: What is the core issue we are facing in this change process?

Category Investigation: Under which category does this cause fall? How does it contribute to the problem?

Cause Analysis: What are the underlying reasons for this cause? Are there any deeper issues we need to address?

Impact Assessment: How significantly does this cause impact the change process?

Solution Formulation: What are potential solutions to address this cause? How can we implement these solutions effectively?

CHANGE LEADER'S CHECKLIST

Structure Your Approach. Strengthen Your Impact.

Effective change doesn't happen by chance—it happens by choice, planning, and leadership. This checklist is designed to help you turn a change opportunity into a clear, actionable strategy. By walking through these steps, you will define your vision, assess challenges, and identify practical actions to guide your team from the current state to the future state. Use this worksheet to sharpen your approach, clarify your role, and lead change with confidence.

DEFINING THE CHANGE OPPORTUNITY

Change Initiative Name

Briefly describe the initiative.

Change Type

Add Decouple
Integrate Subtract

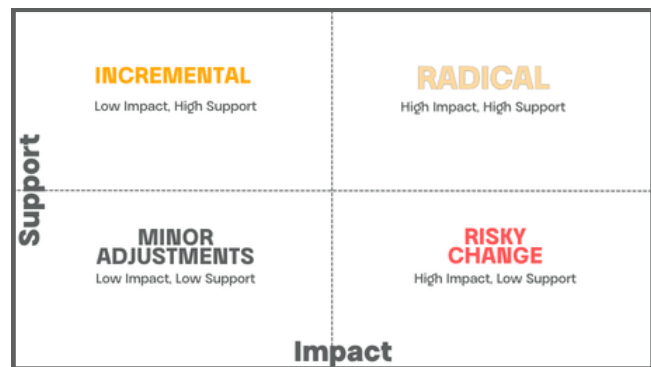
Impact Level

Low Medium High

Support Level

Low Medium High

Plot Your Change



Current State

Briefly describe the current state.

Future State

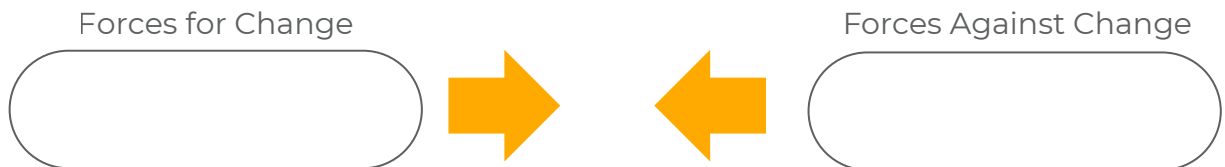
Briefly describe the future state.

STRATEGY AND PLANNING

Stakeholders & Resistance

Stakeholder(s)	Potential Resistance Points

Force Field Analysis Score



Communication Plan

How will you communicate the change? (e.g., meetings, emails, 1-on-1s)

Success Measures

How will you know the change is working?

Follow-Up Plan

What will you do after implementation to check progress and address challenges?



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About Us

At **transform.forward**, we believe change isn't just inevitable—it's an opportunity. In a world where complexity, competition, and disruption are constant, transformational change is what sets thriving organizations apart. We help people and organizations harness that change to drive innovation, sharpen their competitive edge, and shape a more intentional future. Our mission is to empower leaders and teams to realize their full potential through expert strategy consulting and human-centered change management. Whether adopting new technologies, evolving business models, or reimagining the way work gets done, we partner with clients to turn bold ideas into sustainable action. With the right support, insight, and strategy, anyone can lead meaningful transformation. That's why we meet our clients where they are and help them move forward with confidence. Let's navigate what's next, together.

