

# Workbook for Preparing to Lead Change Effectively



## Purpose

This job aid serves as a workbook to generate and capture personal insights, and to bring focus and clarity to the action planning process when preparing to lead a change initiative. It helps you build a change plan that considers each element of successful change leadership: context, communication, commitment, collaboration, and compassion.

You can record your notes and responses electronically or print out a paper copy to do so. Research supports the benefits of putting pen to paper.

## Focus Questions

1. What is the change I am leading?
2. What is my role?
3. What is the impact I want to have on this change?

## Reflection Questions

Reflect on and answer the following questions for each element of successful change leadership.

### Context

Context refers to the organizational culture and the broader environment that we live and work in. The shared values, goals, beliefs, and perceptions within a team can result in a culture that is change friendly or change resistant. The nature of the environment, including the economic and social landscape and what the team has already experienced will greatly impact change readiness. The context sets the stage for change and understanding and articulating this helps the team to appreciate why change is needed.

Consider the cultural and environmental context in which the change you are leading will be occurring. Keep in mind the assumptions you are making and how you might validate their accuracy.

1. What are the key features of my work environment and culture, and how do they impact change efforts?
2. What makes my team culture change friendly or change resistant? How do I know?
3. What is the level of psychological safety on my team, and how does it impact my willingness to take risks?



## Communication

Communication refers not just to what we say and how we say it but also to how we seek out and listen to team members. Communicating the imperative of a shared need and connecting the change to the values of the organization is critical to achieving greater commitment and building collaboration within the team.

According to Simon Sinek, inspiring leaders engage people in the ‘why’ of change. By using an effective, inclusive communication style, change leaders ensure that all team members can access relevant and accurate information in a timely manner and that they can be safely heard.

Providing teams with an opportunity to share constructive feedback and solutions contributes to overcoming resistance within the team, promoting confidence and productivity (Cran, 2016).

1. What are my communication strengths and what gaps exist in my communication style that detract from my impact?
2. How can I be a more effective listener?
3. How can I ask more powerful, curious questions?
4. How can I be more inclusive in my communication style, using multiple channels, to meet the communication preferences of all team members?

## Commitment

Commitment refers to aligning your actions with your words and exhibiting a growth mindset to serve both your team and the goal. Leaders who demonstrate commitment are consistent and act with integrity even in small matters. Demonstrating commitment helps to establish and maintain the trust of your team during change. Gaining a team's commitment to a new direction is not an easy task and leaders model the way.

1. How committed am I to supporting this change, and how does this affect the impact I want to have?
2. How committed am I to supporting my team, and how does my team recognize my commitment?
3. Which of my assumptions, approaches and behaviours am I willing to challenge in service of the larger change goal?
4. Where are my actions aligned with my words and how can I increase my commitment to foster more trust and resilience on my team?



## Collaboration

Collaboration is bringing the team together to plan and implement the change. It is both a mindset and a skill that can be continuously improved. Successful collaboration depends on effective communication and clarity regarding the vision and the shared need. It is an inclusive approach that shares risk and reward. Collaboration is most successful when there is a foundation of trust and appreciation within the team and when the change leader has a high degree of emotional intelligence.

1. How can I bring people together to create shared ownership for the vision and encourage more teamwork?
2. How can I break down silos and invite diverse perspectives regardless of level and seniority, while respecting protocols?
3. How can I challenge myself to share more of the risks and rewards of collaborating?
4. What are my own strengths and weaknesses with respect to collaboration?

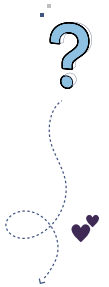
## Compassion

Compassion is empathy in action. Leaders who demonstrate compassion have an opportunity to lessen the potential negative emotional impacts of change on those affected while also helping them transition through it more quickly.

Being a compassionate leader is not about sacrificing standards. It is about caring for people while achieving the task. Compassionate leaders create psychologically safe environments which, according to Google's Project Aristotle research, is the single most valuable characteristic contributing to team performance.

According to business expert Peter Drucker, leaders who practice compassion have been found to possess higher levels of emotional intelligence, are better able to stay calm under pressure, and can remain resilient in the face of deep change.

1. How can I develop more empathy and deepen my connection to the people on my team?
2. What am I letting prevent me from being a more courageous leader?
3. How can I bring more mindfulness to the people side of this change?
4. How can I recognize and celebrate more wins during the change journey?



## Action Planning Questions

Considering the impact you want to have on the change you are participating in and using each element of successful change leadership to help you be more effective, ask yourself:

1. What does success look like?
2. What do I need to do to have this impact?
3. How do I need to be to have this impact?
4. What supports do I need to make this happen?
5. Whose support do I need to make this happen?

