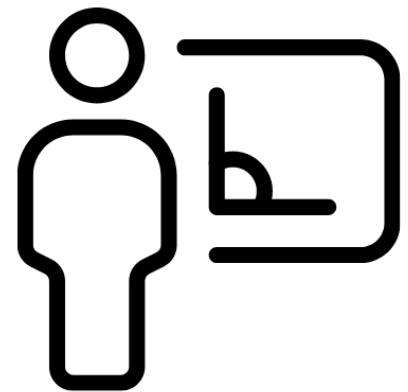# Instructors Guide

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

Module Two: Preparing for Change

A simple definition of change is "to cause to be different". The idea of change management on a personal level has been studied for more than one hundred years. But it is only since the mid- 1980's that change management has been explored within the context of business applications.

Today's change management initiatives have become a business discipline, driving bottom-line results through changes in systems and behaviors. Managing change has therefore become a critical skill, both for leadership -- and for workers in an organization.

Estimated Time	10 minutes
Topic Objective	To recall a change a participant experienced
Topic Summary	Facilitated Discussion: Reflecting on a Past Change Everyone has been through change. This individual exercise allows participants to draw upon personal experience to reflect upon a change -- its circumstances, and its outcome – as a way to set the stage for this seminar.
Materials Required	Worksheet: Reflecting on a Past Change
Planning Checklist	Write two definitions on the flip chart: Change: To cause to be different Change management: Driving results by changing behaviors
Recommended Activity	Provide the worksheet to each participant. Explain that this exercise will help set the stage for new thinking about change. Ask everyone to read and respond to the questions on the

	worksheet:
	Think back to a time when a major change effort occurred in your organization or group. What was the change? What preceded it? What happened in the change occurred? How did people react to it? Was it successful?
	• Who would like to share a change that you experienced?
	• What helped to make it successful?
	Write emerging success factors on the flipchart as they arise in the discussion. If themes emerge, point them out.

Defining Your Strategy
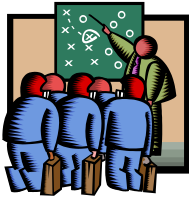
It is critical to manage change by creating and implementing a strategy that defines an approach consistent with the unique needs of the organization. The strategy serves as the guiding framework, providing direction and shaping decision making throughout the change process.

A simple way to gather data for the strategy is to set up interviews and ask questions regarding the different aspects of the change. Below are some typical questions:

Aspect	Question
The Situation	What is being changed? How much perceived need for the change exists? What groups will be impacted? How long will the change take?
People and Their Roles	Who will serve as a high-level sponsor? What functional groups should be represented to lead the effort?
Issues for Analysis	What will happen if we do/don't do this? How universal is the change? Are there exceptions or deviations to consider?

From the answers to the questions, the strategy document is created, serving as a "blueprint" for the initiative. A strategy document should discuss important components of the change. The components are listed below, accompanied by sample wording.

Strategy Component	Sample Language/Notes
Description of the proposed change vision, and its goals	Transform the business processes and the technology by which the organization manages the human resources and payroll functions
The reasons(s) why the change is necessary	These changes will allow the organization to save time and money and provide more responsive HR and payroll services to our employees
Critical success measures and key performance indicators	Risks have been proactively identified and addressed Employees are prepared to perform their new job on Go live day with a 95% success ratio
Project stakeholders and stakeholder groups and their involvement	The current Phase: Senior management The Pre-Implementation Phase: Senior management, subject matter experts, change champions
Key messages to communicate	Pre-Implementation Phase: The business requirements, business case staffing, and the projected timeline
Roles and Responsibilities	Communications Team Lead: Develop project communications and presentations Change Management Team Lead: Direct overall team activities; Provide team with change management expertise; Manage Project Team Effectiveness, Capability Transfer, & Leadership Alignment activities
Target time frame to achieve goals	(This can be a graphical time line, a paragraph, an embedded spreadsheet, etc.)
Focus Areas	Leadership Alignment: Align leaders to the project vision and enable them to champion the effort Organizational transition: Design new employee roles, jobs, and organization structures to support the new processes and technology

Estimated Time	15 minutes
Topic Objective	To use a hypothetical case study to create questions for a change strategy
Topic Summary	Contemporary Chemical This exercise provides participants with practice developing key questions that need to be answered in order to gather data necessary for developing a change management strategy
Materials Required	None
Planning Checklist	Handout: Contemporary Chemical Phase I
Recommended Activity	Divide participants into groups of 4 and distribute the handout. It contains a short case about a company about to undergo a change. Ask participants to read the case and develop questions that need to be asked in order to create a strategy. The questions should be written on flip chart paper and posted for discussion during debrief. In the debrief discussion, look for common question themes among the groups, and emphasize the importance of gathering all the needed data about the situation, the people, and the issues aspects of the organization and the potential change.
Review Questions	Why are a complete and comprehensive strategy and strategy document important to the success of a change management project?

Building the Team

To effectively implement a team positioned for success, leaders must select members who display a high degree of skill in six key elements:

1. Commitment
2. Contribution
3. Communication
4. Cooperation
5. Conflict management
6. Connection

The team must represent all of the needed functional groups and roles necessary to manage the change initiative. By formalizing the team and providing funding and other resources, it sends a message of

accountability and responsibility, and illustrates the investment the organization has made in the change.

Estimated Time	20 minutes
Topic Objective	To define six elements of a successful change management team
Topic Summary	Teams and Roles in Change Management People responsible for putting together a change management team should carefully consider the six elements when selecting individuals for the team
Materials Required	Handout: Elements of a High Performing Change Management Team Handout: Essentials Roles for a Change Management Team Worksheet: Change Management Team Job Description
Planning Checklist	None
Recommended Activity	Distribute the two handouts and the worksheet to everyone Discuss the six elements and overview the roles that should be represented Divide the group into teams of 4 Ask the groups to use the worksheet to write a short job description for a team member in the change management role In debrief, ask each group to share one or two requirements from their job description
Review Questions	What are the benefits of careful and balanced selection of change management team members? The problems of not considering the right skills and attributes? Remind participants to consider adding an item to their action plan.

Below is an optional team-building exercise you can use if time permits.

Estimated Time	10 minutes

Topic Objective	To create a group resume
Topic Summary	Creating a resume is an excellent way to help a newly formed change management team discover how rich the group is in skills and experiences
Materials Required	None
Planning Checklist	None
Recommended Activity	Divide participants into groups of 3 and provide each with flipchart paper and markers Tell the group members that they represent an incredible array of talents and experiences Suggest that one way to learn about one another is to compile a group resume Ask the groups to use flipchart paper to each write a resume that includes • Total years of professional experience • Positions held • Key accomplishments • Knowledge about the change management topic • Educational background • Hobbies In debrief, ask each group to present their resume to the large group.
Review Questions	Remind participants to consider adding an item to their action plan.

Practical Illustration

James needed to prepare for a change in management at a paper distribution company. In order to do so, he assembled a very specific team of competent employees. They were chosen based on factors such as commitment, communication, and conflict management. They were able to effectively design a strategy for the change and guide it onward to completion, which helped the company grow and evolve.

Module Two: Review Questions

1) Change management has been explored within the context of business applications:

   a) For more than hundred years
   b) For more than fifty years
   c) Since mid-1980's
   d) Since mid-1990's

   Today's change management initiatives have become a business discipline, driving bottom-line results through changes in systems and behaviors. Managing change has therefore become a critical skill, both for leadership -- and for workers in an organization.

2) A simple definition of change is:

   a) To cause to be different
   b) To prove that you are different
   c) To want to be different
   d) To try to be different

   A simple definition of change is "to cause to be different". The idea of change management on a personal level has been studied for more than one hundred years, but it is only since the mid-1980's that change management has been explored within the context of business applications.

3) What kind of questions should you ask when you are gathering data for a change strategy?

   a) General questions
   b) Questions about anything regarding the organization
   c) Any kind of questions regarding the interviewee
   d) Only the questions regarding the change

   A strategy document should discuss important components of the change.

4) When the strategy document is created, it serves as:

   a) Black print for the initiative
   b) Whiteprint for the initiative
   c) Blueprint for the initiative
   d) Red print for the initiative

   A simple way to gather data for the strategy is to set up interviews and ask questions regarding the different aspects of the change. From the answers to the questions, the strategy document is created, serving as a "blueprint" for the initiative.

5) Which of the following is not one of the key elements for the members of a team?

   a) Contribution
   b) Connection
   c) Commitment
   d) Competitiveness

   The Six Key Elements:

   - Commitment
   - Contribution
   - Communication
   - Cooperation
   - Conflict management
   - Connection

6) Which of the following statements IS NOT true?

   a) The team must represent all of the needed functional groups and roles necessary to manage the change initiative
   b) By formalizing the team and providing funding and other resources, it sends a message of accountability and responsibility
   c) Leaders must select members who display a basic degree of skill in six key elements
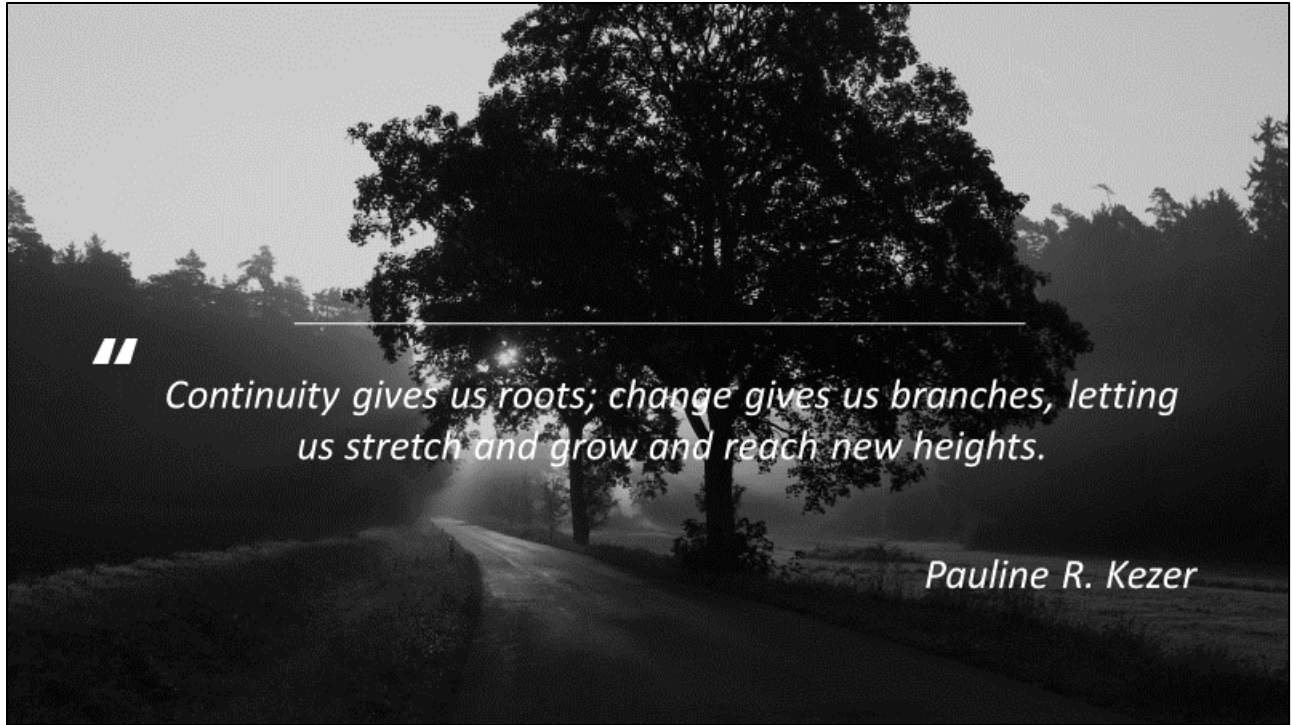
PowerPoint Slides

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.
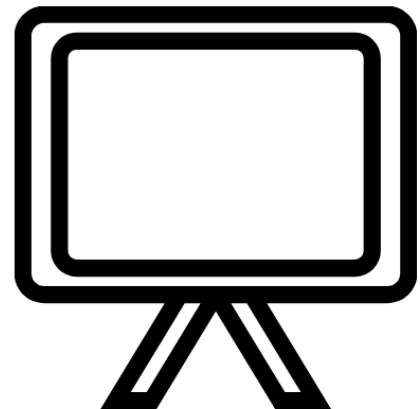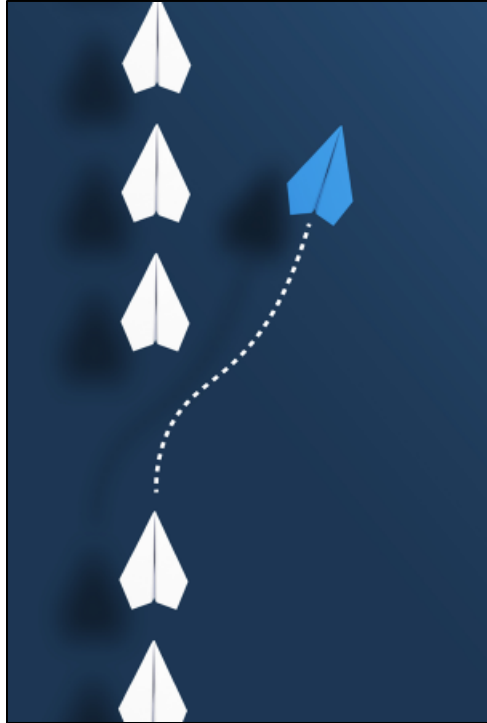
> *Continuity gives us roots; change gives us branches, letting us stretch and grow and reach new heights.*
>
> Pauline R. Kezer

Preparing For Change

Change management initiatives have become a business discipline, driving bottom-line results through changes in systems and behaviors.

Defining Your Strategy

It is critical to manage change by creating and implementing a strategy that defines an approach consistent with the unique needs of the organization.

Building the Team

To effectively implement a team positioned for success, leaders must select members who display a high degree of skill.

Practical Illustration

- Defining Your Strategy
- Building The Team

Module Two: Review Questions

1. Change management has been explored within the context of business applications:

A. For more than hundred years

B. For more than fifty years

C. Since mid-1980's

D. Since mid-1990's

Quick Reference Sheets

Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Change Management
Quick Reference Sheet

Building the Team

To effectively implement a team positioned for success, leaders must select members who display a high degree of skill in six key elements: Commitment, contribution, communication, cooperation, conflict management, and connection.

The team must represent all of the needed functional groups and roles necessary to manage the change initiative. By formalizing the team and providing funding and other resources, it sends a message of accountability and responsibility, and illustrates the investment the organization has made in the change.
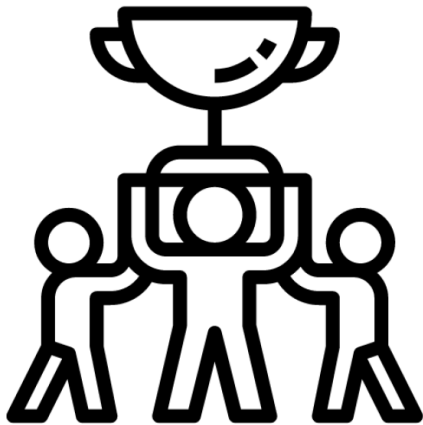
Building Support

Effective communication is essential for building support throughout the organization.
Whoever communicates with people impacted by a change must have a clear understanding of the overall nature of the change, its reasons, and how it aligns with the vision for the organization. They must understand the risks of not changing, the timing for the change, and who will be most impacted by the change.

Communication options are many, including email, presentations, postings on the organization's intranet, flyers and circulars, banners, online or phone conferences, and special social events.
Beforehand, communicators should identify and segment audience groups, craft messages appropriate for each audience, and determine the most effective packaging, timing, and methods for communicating.

- Executive sponsorship

- Coaching by managers and supervisors

- Ready access to business information
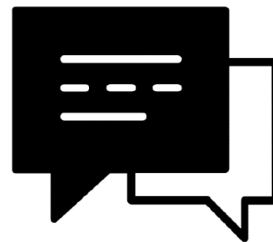
Plenty of Facts

A fact is something that is demonstrated to exist, or known to have existed. As opposed to the "people" component, emotion, facts are straightforward, and necessary to measure progress. As a change management project shifts into the launch or in-process stage, the change management team must make sure that measurement is ongoing. Two types of measurements are described below.

➢ **Audits and performance measurement systems:** Audits and measurement systems provide data to determine the adoption rate of change. They help to determine:

➢ **Accountability Systems:** Enhancements should be made to performance evaluation and compensation systems in order to maintain the accountability and credibility of the change. This is important in order to maintain ongoing reinforcement of the changed systems or processes.
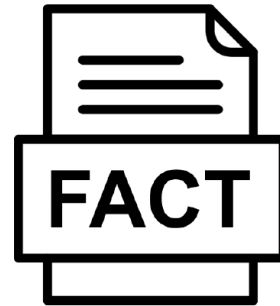
Handouts

Each course is provided with a wide range of worksheets. Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.
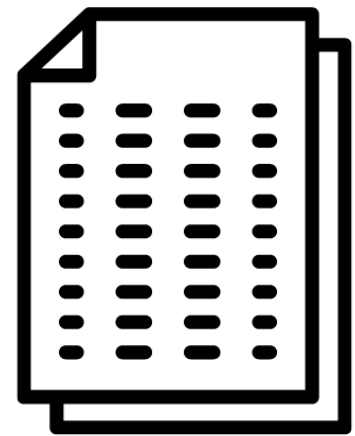
Sample Worksheet One: Reflecting on a Past Change

Think back to a time when a major change effort occurred in your organization or group. Write brief answers to the questions below.

What was the change?

What preceded it?

What happened when the change occurred?

How did people react to it?

Was it successful?

Sample Worksheet Two: Change Management Team Job Description

Position Description:

Responsibilities:

Skills and Experience:

Sample Worksheet Three: Elements of a High Performing Change Management Team

Element	Applicability
Commitment	Team members understand how their work fits into corporate objectives. They agree that their team's goals are achievable and aligned with the organization's mission and values. Members are willing to put aside personal needs for the benefit of the organization
Contribution	Members should have strong technical and interpersonal skills and have a willingness to learn Look for confident people who take responsibility for getting things done
Communication	Team members should have strong oral and written communication skills They should be comfortable saying what they think, asking for help, sharing new or unpopular ideas, and risking making mistakes
Cooperation	Look for people who excel at working in an inter-dependent environment. Traits necessary are: follow-through, accuracy, creativity, timeliness and spirit
Conflict Management	Members should be able to shift paradigms to avoid conflict. Traits of optimism, empathy, and affirmations, or positive statements help reduce the potential for team conflict
Connection	Members must be connected to the larger work organization, to team members, and to other work teams. This way the needs of the organization are considered as the team does its work. When team members have the ability to connect to one another, peer support and volunteerism increase.

Sample Worksheet Four: Essential Roles for a Change Management Team

Team Role	Core Responsibilities
Change management team member (May be part of a Change Management function, or convened specifically for this initiative)	Develop the change management strategy and plans Serve as an integral part of the project's success
Executives and senior managers	Authorize and fund changes Serve as the change sponsor, participating visibly and actively throughout the project Communicate high-level messages about the change directly with employees
Middle managers and front-line supervisors	Communicate with employees; advocate for the change Coach employees through the changes that impact their day-to-day work
Project team member	Manage the technical side of the change (design, creation) Integrate change management into project plans
Project support functions	Support different activities of the change management team and project team Provide expertise, knowledge and tools

Icebreaker: The 10 Minute Challenge

PURPOSE
It will help introduce the topic of time management in a fun, non-confrontational manner.

MATERIALS REQUIRED

1. Flip chart paper

2. Markers

3. Timer or watch

4. Craft supplies if desired (colored paper and pencils, glue, sparkles, etc.)

PREPARATION

Write out the following list on a piece of flip chart paper. Ensure that it stays covered until the end of the activity explanation.

5. Do a lap around the room (5 points)
6. Create something for the instructor to wear, such as a hat or tie (10 points; bonus 5 points if the instructor actually wears it)
7. Find out something unique about each person on the team (5 points)
8. Sing a song together (15 points)
9. Make a paper airplane and throw it from one end of the room to another (10 points)
10. Get everyone in the room to sign a single piece of paper (5 points)
11. Count the number of pets owned by your group (20 points)
12. Assign a nickname to each member of the team (5 points)
13. Create name cards for each team member (5 points; bonus 5 points if you use your team nicknames)
14. Make a tower out of the materials owned by your group (10 points)
15. Convince a member of another team to join you (20 points)
16. Name your team and come up with a slogan (5 points for the name, 5 points for the slogan)
17. Re-create the sounds of the Amazon rainforest with the sounds of your voices (10 points)
18. Make a list of what your team wants out of the workshop (15 points)
19. Form a conga line and conga from one end of the room to another (5 points; bonus 10 points if anyone joins you)

You can customize this list as you wish; just make sure there is a point value (which is completely up to you) assigned to each item.

You will also want to create a scoreboard matrix on flip chart paper that looks like this:

	TEAM 1	TEAM 2	TEAM 3
TASK 1			
TASK 2			
TASK 3			
TASK 4 (AND ON…)			
TOTAL			

This should stay hidden until the end of the activity.

EXPLANATION

Divide participants into teams of five to eight. Unveil the numbered list of tasks. Explain that they have ten minutes to collect as many points as possible. They must be safe and they only have ten minutes!

ACTIVITY

Give participants ten minutes to perform their tasks, and enjoy the show! After ten minutes, add up their points using your pre-designed matrix and announce the winner. Keep the list of tasks; you may want to tape it to the wall.

DEBRIEF

After the activity, discuss learning points. Possible discussion topics include:

20. How did teams decide what tasks they wanted to do? Most groups will analyze the time the task will take and/or the difficulty level, compare it with the value (possible number of points), and prioritize as a result. We do this when managing our time, too: we often choose the high-yield, low-effort tasks over the low-yield, high-effort tasks (and rightly so!).

21. Were any decisions based on task dependencies? For the name card task, for example, teams received bonus points if they used team nicknames. Performing these two tasks together would triple the points received. This often happens in life, too – batching tasks increases your results exponentially.

22. What group dynamics came into play? If participants knew each other before, they may feel more comfortable performing a personally risky activity, like singing a song. This comes into play when prioritizing tasks, too; we're more likely to stay within our comfort zone, especially if we're working in a team.

23. What skills came into play? For example, several tasks involved creativity and artistic skills. Did teams find out whether any members had artistic talent before deciding to do the task?

24. What additional information did you ask for? How did that affect your approach? Some groups will catch on to the fact that there is no rule that the whole group must perform every task, and will divide their resources and achieve more points as a result. The lesson to learn here is that you need all the information you can get before prioritizing tasks and making a plan. Some teams may have even realized this partway through the activity and adjusted their approach as a result. Kudos to them!

25. Did ethics come into play? Although "stealing" another team member was worth a lot of points, some teams are uncomfortable with the idea and avoid this task.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.
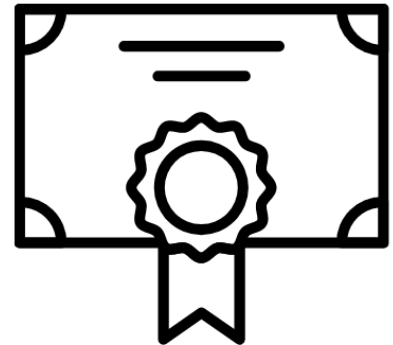
CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Change Management

Awarded this _____ day of _____ e _____, 20 _____

_____

Presenter Name and Title