

# Leading Organizational Change: Seven Steps to Success

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SEPTEMBER 19, 2011

CompassPoint nonprofit  
day



# PRIMARY REFERENCE

## *“Managing Transitions: Making the Most of Change”*

**by William Bridges**

**De Capo Lifelong Books, 2009**

## *Small group discussion*

# What change are you facing?

- Break into groups of four
- Name a change facing your organization
- Share one thing that might be particularly tough or challenging about managing that change
- Ten minutes



## *Transition*

*Experience*

*Psychological*

*Process based*

*Gradual and slow*

## **Change**

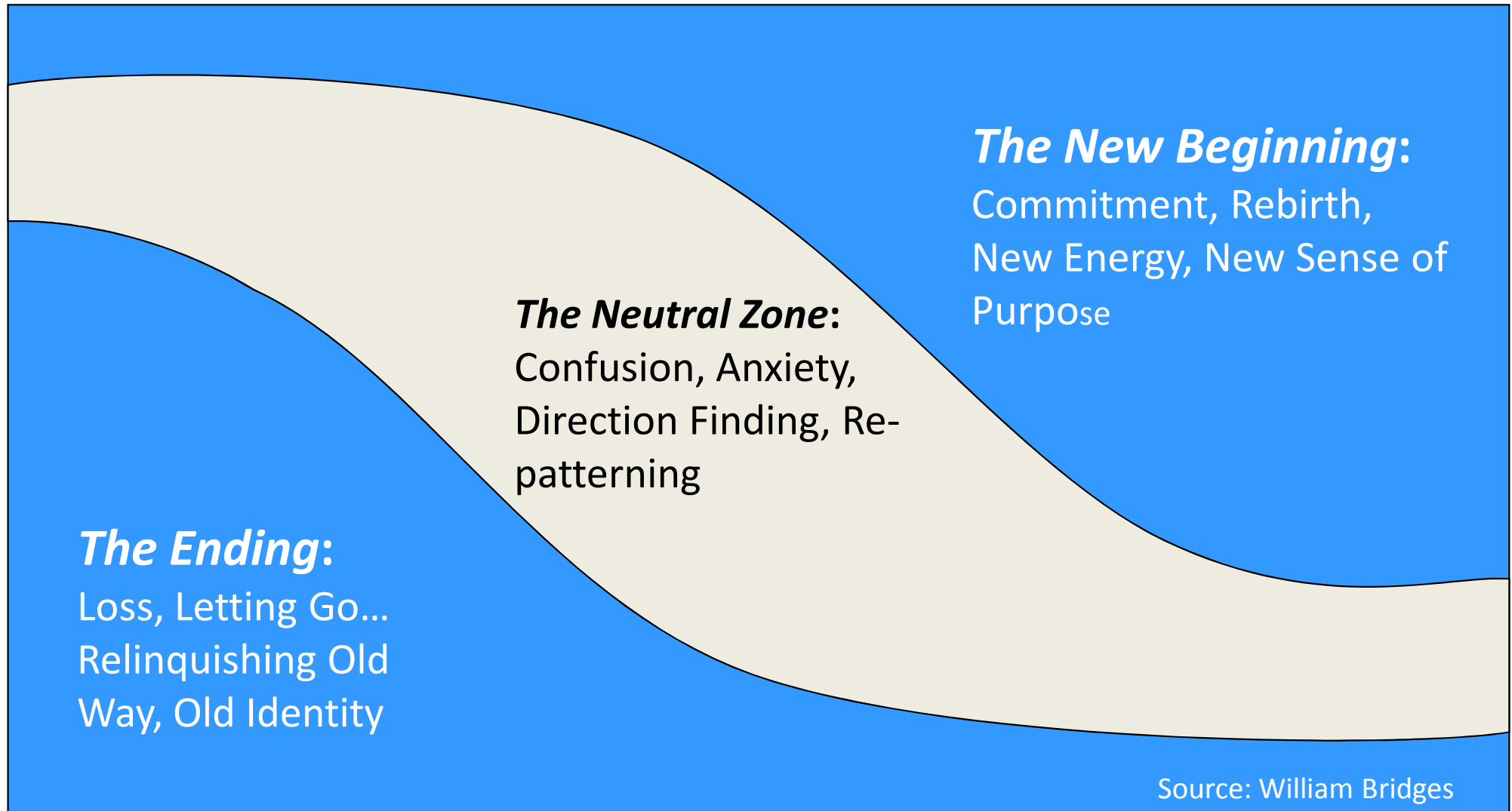
Events

Situational

Outcome - focused

Relatively quick

# Transition – Coming to Terms with Change



# SEVEN STEPS TO SUCCESS

# *One*: Connect the change to the bigger picture

- Your strategic vision
  - ✓ *Major changes are best be done in the context of strategic planning*
- A problem to be solved, e.g., overcoming a barrier to client satisfaction or staff efficiency

## *Two:* Create a detailed change plan

- ❑ Assign the “change team” leader & the team members
- ❑ Create the workplan – the specific steps to designing the change & the timeline
- ❑ Allocate resources – staff time, funding, outside expertise, if needed



# Three: Get input on the planned change from affected parties

## Sources of input:

- ✓ Staff, clients, volunteers, board, funders

## Venues for input:

- ✓ Online survey—maybe anonymous
- ✓ Group interviews
- ✓ One-on-one interviews with a sample

## When

- ✓ At critical points in the development of the change

## *Four:* Get endorsements from leadership

- Board, when appropriate
- Executive Director
- Department Head
- Other?

# *Five: Communicate, Communicate, Communicate*

- ❑ At the roll out of the planning process provide information to affected parties on:
  - ✓ leader & team members
  - ✓ workplan & timeline
  - ✓ who will have input & how
  - ✓ what's changing & what's not changing
- ❑ Provide regular progress reports

## *Six: Facilitate the staff “transition”*

- Provide a forum(s) for staff to process their reactions to the change
- Be empathic with and “normalize” their reactions
- Help them move from letting go of the old to excitement for the “new beginning”
- Understand that staff move through the transition phases at different speeds

## *Seven:* Be the “container”

- Exude confidence, calm, empathy
- Present a clear vision of the “new beginning”
- Give space to staff reactions
- Process your own anxieties within your personal support network

# *Small group discussion*

## **Creating your change plan**

- Fill out your “Change Management Plan”
- Share your plan in your group of four
- Note themes and questions that emerge in your group
- Be prepared to share a theme or question with the full group
- **20 minutes**

# Please Fill Out Your Evaluations

## Session Objectives

- Learn basic techniques for successfully moving your organization through a significant change
- Understand the importance of addressing the transition side of change, i.e., staff reactions to change
- Outline a partial plan for managing a change

Session Materials and Additional Resources available at:

[www.compasspoint.org/nonprofitday](http://www.compasspoint.org/nonprofitday)