



Taking Charge of Change

Revised Edition

Preview Guide



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Program Information

CRM Learning's *Taking Charge of Change* teaches individual employees the skills necessary to understand and support change initiatives. By learning to manage their internal response to change, employees are better able to guide themselves productively through organizational change.



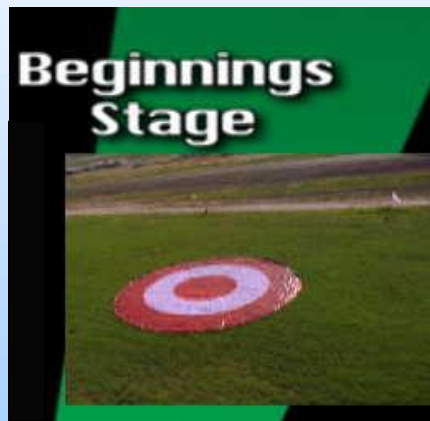
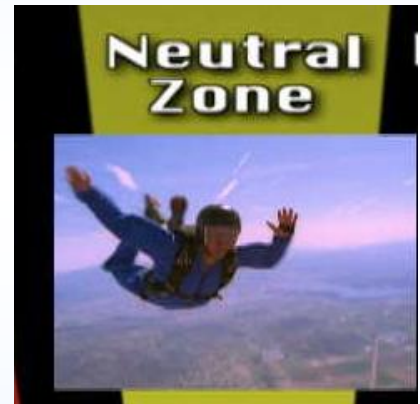
This updated version features vignettes in a variety of industries - manufacturing, white-collar business, healthcare, government and education, and contains many more "how-to" applications than the original.

Stunning visual images feature a rookie skydiver making his first solo jump... a powerful metaphor for the leap we take into the unknown each time we experience a change in our own work lives.

LEARNING POINTS:

Employees will develop useful strategies for moving through the three stages of transition (*Endings, the Neutral Zone and Beginnings*). They will be able to:

- ❑ Differentiate between "change" and "transition."
- ❑ Name and describe the three stages of change transition.
- ❑ Describe how and why each person in a workgroup may experience change differently.



- ❑ List the likely challenges and opportunities that characterize each stage.
- ❑ Identify and describe the types of information and support most people need as they move through the change process.
- ❑ Propose specific actions team members and leaders can take to successfully move themselves and others through each stage of transition.

BACKGROUND

INTRODUCTION

As people's lives react to constant organizational restructuring and new workplace realities, the need to focus attention on the underlying psychological effects of change becomes increasingly important.

Hardly a day goes by without a major magazine or nightly news story on the social, political, and environmental ramifications of continuous and significant change. We see less information about the psychological effects this change has on us as individuals and as members of organizations.

In the workplace, change often involves a fundamental alteration of methods and procedures that have become familiar and comfortable. Our reactions are as intensely personal and individual as we ourselves are, and often include displacement, disruption, and resistance. We often become disoriented and find it hard to fully absorb the new world that surrounds us.

Taking Charge of Change, Revised Edition, explores the reasons why we find workplace change so threatening and, in a straightforward manner that every employee can relate to, the workshop provides an effective structure to help us accept and manage change.

The guiding premise? Unless we can formulate an approach to take charge of change, it will take charge of us!

MYTHS ABOUT CHANGE

Organizations often try to combat some of the negative effects of change by attempting to "sell" the change and sweep employees' unresolved feelings under the carpet. Ironically, this typically just makes things worse. Efforts to spur employees to simply "get on" with the new order do not account for the very real issues that employees must confront when change is imposed on them.

It is certainly tempting to search for "quick-fix" solutions, but the fact is, there aren't any. There are only people and their attitudes. There are ways we can mitigate the devastating effects of continual change upon us and our organizations, and to harness the forces surrounding change for our benefit. This effort starts with the basics — redefining how we look at change and our place within the change process.

STAGES OF TRANSITION

Organizations can develop specific strategies to mitigate our reactions to change. One way to do this is to examine change using the model developed by William Bridges.

Workshop Designs

This Leader's Guide presents two workshop designs.

- The Main Workshop design (see page 23 for Presentation Script) is intended for a half-day session. See the Agenda for this design below.
- The Awareness design (see page 63 for Presentation Script) is centered around the video, a brief exercise, and a discussion, and is intended as an introduction and sensitization to the concepts surrounding workplace change and the Bridges model. It is designed for use in brown bag or other shorter sessions, and should require no more than an hour to complete. See the Agenda for this design on page 9.

TRAINING AGENDA-MAIN WORKSHOP DESIGN

The full workshop agenda runs about 4 hours.

Training Agenda: Main Workshop Design

Workshop Segment	Workbook	Duration (minutes)
Workshop Introduction <ul style="list-style-type: none"> • Welcome • Purpose and Benefits of Workshop • Needs met by the Workshop 		3
JUMP! Meeting Opener		3
<ul style="list-style-type: none"> • Ground Rules 		3
Workshop Objectives and Agenda	Page 1	3

Workshop Segment	Workbook	Duration (minutes)
Part One: Exploring Change Objective met in Part One: <ul style="list-style-type: none"> Describe how and why each person in a workgroup may experience change differently. 		
Exercise 1: Pulse Check on Change	Page 2	5
Debrief Exercise 1	Page 2	5
Activity: Participant Introductions		10
Exercise 2: Recall a Change Experience <ul style="list-style-type: none"> Examining attitudes and feelings around a recent change experience from their own workplace. Includes Changing Hands Activity 	Page 3	10
Exercise 2 Debrief <ul style="list-style-type: none"> Debrief Changing Hands. Debrief content on Past Experience 		10
Part Two: Taking Charge of Change Video Presentation Objectives met in Part Two: <ul style="list-style-type: none"> Differentiate between change and transition. Name and describe the three stages of transition. Explain why the names of the stages are appropriate. List the challenges and opportunities that usually characterize each stage. 		
Taking Charge of Change Video	Page 4, 5	25
Video Debrief <ul style="list-style-type: none"> General comments Differentiating Change & Transition (slides) Revisit Exercise 2: Apply stages to the recent change experience. 	Page 3	10

Training Agenda-Awareness Design

Workshop Segment	Workbook	Duration (minutes)
Workshop Introduction <ul style="list-style-type: none"> Welcome Purpose and Benefits of Workshop Needs met by the Workshop 		5
Taking Charge of Change Video	Copy pages 4 and 5 if desired	20
Exercise: Agree/Disagree	Agree/Disagree (Guide page 65)	10
Exercise Debrief and Discussion		10
Workshop Summary and Close		5
Total Instructional Time		50 minutes

Introduce Activity/Give Instructions

SAY:



REFER to the list of words on **Workbook page 3**. To the right of each word are two columns:

- + **Positive**
- **Negative**

For each of the words or phrases in the list, check the box that best reflects your initial reaction to the word: **positive** or **negative**.

You might actually feel neutral on a word, but do your best to decide if your reaction is closer to the positive or to the negative side of the range.

NOTE: Go with your initial, “gut response”—don’t over-think it!

		Positive (+)	Negative (-)
1	Uncertain		
2	Postpone		
3	Impose		
4	Adapt		
5	Reorganize		
6	Opportunity		
7	Retrain		
8	Cancel		
9	Plan		
10	Shift		
11	Re-deploy		
12	Transition		
13	Ambiguous		
14	Let's try something different!		
15	Starting from Scratch		
Totals:			

Run Activity

ALLOW participants about 1 minute to complete the list.

Debrief Exercise I

INSTRUCT participants to count the number of positive and negative responses and note them in the **Totals** row.

Comment on the proportion of negative and positive responses.

- We tend to view change as a challenge or opportunity.
- Most of us do have concerns and some anxiety about parts of change.

SAY:

There is nothing scientific or psychological about this short exercise.

The point is, each of us has a different reaction to change. Even the words we associate with change can trigger a range of responses.

- **For some people, the images these words bring to our minds tend to be uncomfortable, disruptive, or even stressful to a degree.**
- **Others view the same words in a more positive light.**

PARTICIPANT INTRODUCTIONS (10 MINUTES)



Note: To maintain the workshop schedule, avoid engaging in extended discussions on these initial participant statements.

If a comment is particularly insightful or unusual, make a note on the white board to return to it for further discussion later.

ASK:

What do you need to “take charge of change?” What do you need in each stage of transition in terms of:

- **Information**
- **Support**
- **Resources**
- **Time**
- **Other things?**

SAY:

In Exercise 4, you’ll be working with a partner to list needs you can recall from the past experience you described in Exercise 2, as well as other change processes you’ve been through.

Return to Exercise 2 (Workbook page 4) for a minute to review your notes.

- **Write down the needs you had at that time in the space at the bottom of the page.**

With your partner, generate a list of change-related needs for information, support, resources, and time based on your past experiences.

Write these on Workbook page 8.

- **As you record each need in the first column, think of and write down a method you have learned or seen to meet that need in the *How We Get It* column.**
- **Take about 5 –6 minutes for this discussion.**



DEBRIEF EXERCISE 4 (10 MINUTES)

Ask the participants for their **needs** and **ways to meet them**.

Record their responses on a flip chart or white board.

Suggest that participants record the group's lists on Workbook Page 8 as they develop.

ALLOW about 5 minutes for this discussion.

What We Need	How We Get It

Possible responses for **Typical Needs** include the following. These needs usually surface during the Endings or Neutral Zone stages.

- I need to know what's going on.
 - Why is the change happening?
 - A sense of timing — when are things going to happen?
 - Is there going to be more change after this change?
- I need assurance that I'm not alone in this.
 - Who else is experiencing the change (solo or larger group)?
- What's in it for me? (I need to know the benefits)
- I need direction.
 - What are things going to look like on the other end?
- I need to participate and be included.

- What is my role in the change?
- Will I be left behind?
- I need support.
- What help is available if I need it?

Possible responses for **Typical Ways to Meet Them** include the following. These ideas usually surface during the Neutral Zone stage.

- Asking questions of management (face-to-face, emails, etc.)
- Having a forum to share feelings of concern and frustration
- Forming an employee committee to meet with management to ask question
- Move into research mode. Learn as much as possible about the likely new situation: skills, background information, etc.

Review the two lists.

- Point out the needs and methods that are communication-related: Asking for and sharing information; clarifying questions, etc.
- Many items on the list will be related to the need for open and frequent communication.

Key Points

- Our initial reactions to change are often triggered when we feel threatened with the loss of things we need.
- Change brings new needs and requirements —both for us and the organization.
- Our ability to cope with and thrive on change depends on meeting our own needs while adjusting to new workplace conditions.
 - For example, when someone is dealing with changes they had no role in planning, they may experience a strong need to build or regain a sense of control in the process of handling the change.

EXERCISE 7: PREPARE A PERSONAL MISSION STATEMENT

(10 MINUTES)

INTRODUCE THE EXERCISE

ASK for comment from the group that developed guidelines on Beginnings. What do they consider key elements of a personal mission statement?

REFER participants to Workbook page 13.

REVIEW instructions, and check for understanding.

SAY:

Given the change circumstance we just worked with:

- **How will you respond?**
- **What will your contribution be?**
- **How will you take charge of your experience of the change?**
- **How will you support others?**

DEBRIEF EXERCISE 7 (8 MINUTES)

Conduct a round robin sharing of key points discovered and likely to be applied.

AWARENESS WORKSHOP DESIGN

The full version of the **Taking Charge of Change** workshop may not be practical for some learner groups in your organization. One way to introduce the workshop concepts and give learners an opportunity to discuss them is to use this Awareness Design in a “brown bag” or staff meeting format. The following outline and exercise are intended to serve that purpose.

INTRODUCE THE PROGRAM (5 MINUTES)

SAY:

Taking Charge of Change presents a model of change as a three-stage process. The model helps explain our reactions to change and offers clues to useful ways to manage it.

The three-stage transition model presented in the video was developed by William Bridges, author of Transitions, Transition Management, and other writings on change and change management.

Most people experience the same stages while going through change, although the stages look and feel different for everyone.

NOTE: Explain to the group members that they will enjoy the video more if they do not try to take extensive notes. If you choose, distribute copies of Workbook pages 5 and 6.

These pages summarize key points from the video and will assist the post-exercise discussion. These note pages will also provide a useful takeaway for the participants.

EXERCISE 4: WHAT WE NEED AND WAYS TO GET IT

1. What kinds of things do you need as you work through transitions? List them in the left column.
2. How can you get the information, resources, and support that you need? List your ideas in the right column.

What We Need	How We Get It

EXERCISE 5: TAKING CHARGE, SPECIFICALLY, CONT.

Group 2: Neutral Zone

<p>Neutral Zone</p> <p>Where you find yourself adrift, without solid orientation. This can be a time of great ambiguity and frustration, but also a stage where you have freedom to try new things.</p>
<p>Action Points</p> <ol style="list-style-type: none"> 1 Accept ambiguity as an essential element, without becoming paralyzed by uncertainty. 2 Keep channels open and communicate. Share and listen. 3 Be willing to experiment. 4 Acknowledge the help and progress of others.

Working with your group, discuss this stage in depth, taking into account previous workshop discussions, the needs identified in Exercise 4, and the experience of your group's members.

Develop six –eight detailed guidelines for action during this stage. Use the video action points as starting points, but you are not limited to these ideas.

Guidelines

EXERCISE 7 PERSONAL MISSION STATEMENT

Respond briefly to the following prompts to develop a one or two sentence Mission Statement related to the current change case discussed in Exercise 6.

1. How will you take charge of your experience of the change?

2. Given your skills and your personal strengths, what will **your** contribution be to the process?

3. Are there specific goals you could set that would become a part of your response?

4. How will you support others?

Summarize your personal mission statement here:

Pricing Information

Purchase Price: \$995.00

Rental Price: \$275.00 (5 days, does not include participant materials)

Preview Price: Free

Running Time: 18 minutes

Materials Included with this program purchase:

- ✦ Chaptered DVD with:
 - ☆ **JUMP!** Meeting Opener
 - ☆ **Taking Charge of Change, Revised Edition**
 - ☆ 5 Follow-Up Booster Shots
- ✦ Leader's Guide
- ✦ PowerPoint CD-ROM
- ✦ 10 Participant Workbooks
- ✦ 10 Reminder Cards

Quantity Pricing Discounts

Taking Charge Of Change Program

2 copies	10% off
3-5 copies	15% off
6-10 copies	20% off
11-15 copies	25 % off
16+ copies	(call for quote)

Industry discounts may apply; call your Sales Consultant for more information.

Additional Participant Workbooks

1-50	\$14.95 each
51-250	\$13.46 each (10% off)
251-500	\$12.71 each (15% off)
501+	\$11.96 each (20% off)

Additional Reminder Cards (sold in packs of 10)

1-50 packs	\$5.00 each
51-250 packs	\$4.50 each (10% off)
251-500 packs	\$4.25 each (15% off)
501+ packs	\$4.00 each (20% off)

(contents, pricing & discounts subject to change without notice)

