

Leading Through Change Worksheet

Leading a group through change on pursuit to a goal is challenging, but you have the skills, wit and ability to lead with grace, accountability and candor.

Use this worksheet to intentionally create a shared vision, anticipate challenges, regulate and pace distress, and support leadership in others.

WHY AND WHY NOW?

Why are we changing?

Why are we changing *now*?

VISION

People need to know where they are going, especially during times of change. Successful change demands a clear vision that you can articulate *often*. Make it real, visible, compelling, and repeat it every time you describe or discuss the change.

A strong vision blends these key elements:

- **Description:** vivid, clear, audacious permanent solutions to a problem or an equally vivid, clear, audacious description of the ideal scenario for the topic at hand
- **Values:** desired values embedded in the description of the permanent solution or ideal scenario
- **Emotions:** positive feelings (yours and others) about the permanent solution or ideal scenario
- **Context:** How it supports or strengthens a larger purpose

A strong vision is built in a manner that honors and takes advantage of the appropriate power and prerogative of executive leadership. Yet you also want to involve everyone in meaningful, appropriate ways as quickly as possible in the process, so a strong vision is key.

What is the vision for your change?

GET ON THE BALCONY

Leaders need to know how and when to step back and take a broader view that looks to the future. You want to see the bigger picture in two ways: (1) rising above the immediate details (or chaos) to remember where you are heading overall, and (2) noticing the nuances, alliances, trouble-spots, and dynamics that are best observed from a birds-eye view. Rather than standing in the middle of the action, the balcony view allows you to see a fuller picture of what is going on.

When considering your change, what might you observe from a broader “balcony” view, such as the bigger picture, subtle cross-functional nuances, emerging patterns, trouble spots, system-wide opportunities, etc?:

KNOW THE ADAPTIVE CHALLENGE ¹

Ronald Heifetz and Marty Linsky offer a useful distinction between technical change and adaptive challenge. Technical change is relatively straightforward and noncontroversial. It involves things like implementing a new form or policy, changing a concrete process or retraining a group. Technical work has a clear problem, a clear solution, and the boss/leader can usually just make a decision.

Adaptive work is far more complex and nuanced. There are many different, equally legitimate perspectives; neither the problem nor its solution is clear; there may be many different ways to implement or interpret the change; and it may require deep shifts in philosophy, power, responsibilities, and behavior. An adaptive leader cannot merely make the decision. Instead, the adaptive leader must help the group unite on a shared vision and then encourage deep understandings and collaborative resolutions of the adaptive challenges embedded in the change.

When considering your chosen change, begin to define the adaptive challenge as distinct from the technical work. Adaptive challenges are those with unclear problems & solutions, with equally legitimate, compelling yet competing interests, that will require leadership at all levels.

ADAPTIVE QUESTIONS TO ASK	IS THIS CONVERSATION IN MY SWEET SPOT?
Who's values, beliefs, and attitudes may need to change in order to move forward successfully with this adaptive challenge?	<input type="checkbox"/> I love talking, learning, and engaging about this; I could do it all day long. <input type="checkbox"/> I know these conversations and skills are necessary and I can have or develop them. <input type="checkbox"/> I'm not sure why this conversation or task is important but I'll try it. <input type="checkbox"/> I'd rather get back to what I consider real work. <input type="checkbox"/> I need to find someone else better suited to engage in this conversation or action.
What shifts in priorities, resources, and power might be necessary?	<input type="checkbox"/> I love talking, learning, and engaging about this; I could do it all day long. <input type="checkbox"/> I know these conversations and skills are necessary and I can have or develop them. <input type="checkbox"/> I'm not sure why this conversation or task is important but I'll try it. <input type="checkbox"/> I'd rather get back to what I consider real work. <input type="checkbox"/> I need to find someone else better suited to engage in this conversation or action.
What sacrifices might have to be made and by whom? How might you address and resolve tensions or barriers related to the things you identified above?	<input type="checkbox"/> I love talking, learning, and engaging about this; I could do it all day long. <input type="checkbox"/> I know these conversations and skills are necessary and I can have or develop them. <input type="checkbox"/> I'm not sure why this conversation or task is important but I'll try it. <input type="checkbox"/> I'd rather get back to what I consider real work. <input type="checkbox"/> I need to find someone else better suited to engage in this conversation or action.

¹ Heifetz, R. A., Grashow, A., & Linsky, M. (2009). *The practice of adaptive leadership: Tools and tactics for changing your organization and the world*. Harvard Business Press.

How would you define the adaptive challenge in a few concise sentences?

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REGULATE AND PACE DISTRESS

Deep, meaningful, adaptive change may be chaotic, stressful, and challenging at times. Any large-scale change that requires people to rethink themselves and their work will spark strong reactions and emotions. An adaptive leader acknowledges and allows for these very natural reactions in ways that spark healthy change. The adaptive leader finds the right balance between allowing the heightened stress to serve as a healthy container for deep conversations and inspired motivation while preventing exhaustion, burnout, destructive conflict, or hopelessness.

ADAPTIVE QUESTIONS TO ASK

What might be the thorniest conflicts (overt or unspoken) that, if left unresolved, could jeopardize the success of the change?

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What are the potential unhelpful management behaviors that could hinder successfully revealing and resolving the conflict?

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What might you do individually and collectively with other leaders to help shed light upon and resolve these challenges and conflicts?

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EMPOWER ALL VOICES

During or After Implementation, Don't Assume Concerns Equal Resistance

The best leaders listen when they are serious about continuous improvement. They listen to their middle managers. They listen to those with varying perspectives. They listen to employees or group members with different views. And they listen to the courageous individuals who may blow a whistle or warn that actions are not necessarily aligned with stated intents.

ADAPTIVE QUESTIONS TO ASK	IS THIS CONVERSATION IN MY SWEET SPOT?
<p>Who are your organization's or group's most trustworthy voices, creative mavericks and emerging or buried leaders? How might you support and engage them in positive, proactive ways to help evaluate and improve the change?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> I love talking, learning, and engaging about this; I could do it all day long. <input type="checkbox"/> I know these conversations and skills are necessary and I can have or develop them. <input type="checkbox"/> I'm not sure why this conversation or task is important but I'll try it. <input type="checkbox"/> I'd rather get back to what I consider real work. <input type="checkbox"/> I need to find someone else better suited to engage in this conversation or action.
<p>How well might you handle bad news, especially warnings that the change is not going well, the results are not aligning with desired goals, or problems at the top are interfering with successful implementation?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> I love talking, learning, and engaging about this; I could do it all day long. <input type="checkbox"/> I know these conversations and skills are necessary and I can have or develop them. <input type="checkbox"/> I'm not sure why this conversation or task is important but I'll try it. <input type="checkbox"/> I'd rather get back to what I consider real work. <input type="checkbox"/> I need to find someone else better suited to engage in this conversation or action.

