

Sustainable Enterprise Learning Guide

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Instructor Materials

Chapter 4

Managing the change to a sustainable enterprise: Assessing change leadership skills

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Editors' Notes:

These materials are intended for use by academics and practitioners. In order to simplify the language, editors have determined to use the terms instructors, learners or participants rather than facilitators, professors or students.

ACTIVITY INTRODUCTION AND OVERVIEW

Objectives

Upon completion of this activity, the learner will/will be able to:

1. Describe their existing strengths as change leaders
2. List areas (skills and abilities) that they need to develop if they are to be successful change leaders
3. Conduct a focused discussion with peers or supervisors about their capabilities and needs for development

Activity Length

50 minutes

Audience Description

Undergraduate student, graduate level, practitioner level

ACTIVITY PREPARATION

Activity Name	Change leadership self-assessment	
Preparation Checklist	<p>One Week in Advance</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assign pre-reading (see list below) – make and distribute copies of assigned pre-reading <input type="checkbox"/> Make one copy of the self-assessment for each student (see pages 6 - 9 for the master copy) <input type="checkbox"/> (Optional) Make a “take-home” copy, one for each students, so they can use the assessment at work <p>Session Day</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensure there are pens or pencils for participants who may come to the session without any. 	
Timing Flow	Step 1 – Activity set-up	5 minutes
	Step 2 – Assessment of skills and abilities	20 minutes
	Step 3 – Rating the Importance	10 minutes
	Step 4 – Activity debrief and description of follow-on (optional activities)	10 minutes
Total Time	50 minutes	
Prereading	<p>Adams, J: Creating Critical Mass, OD Practitioner ????? (1988)</p> <p>Adams, J: Successful Change: Paying Attention to the Intangibles, OD Practitioner VOL. 35 NO. 4 2003</p> <p>Andriate, G., Fink A.: The Sustainable Enterprise Fieldbook, Chapter 4, pp 118 - 139</p>	
Prerequisite(s):	None	

ACTIVITY: ASSESSING CHANGE LEADERSHIP CAPABILITIES

This activity helps learners view their own capabilities for change leadership.

Instructor Notes	Activity Description
<p>Step 1 – Activity Set-up</p>	<p>Say: Skilled leadership is required to alter the governance processes of a social system. Effective leadership is necessary during transformational change in a social system to keep the organization focused on achieving its new mission while simultaneously carrying out the requirements of the existing operating system. Leadership catalyzes the creation of a compelling vision, identifies targets for change, guides the development of a plan for becoming a fundamentally different social system, builds an aligned sense of urgency for action, and ensures that the governance system and the “parts” of the organization are arranged in a way that supports the change.</p> <p>Let’s assume you are working in a corporation and have been selected to lead a major organizational (and sustainable) change. It might be useful for you to know whether or not you are ready for such an assignment.</p> <p>You are going to conduct an activity that is an individual activity. There are no right or wrong answers but to be meaningful, you need to be honest with yourself about your capabilities. It is unlikely that you have all the qualities and characteristics of a successful change leader. However, if you know your strengths and areas that could stand some improvement or development you can either work on developing them, or, if time is short, make sure you have people on your change team who have strengths where you do not.</p> <p>Do: Handout Self Assessment forms, one to each student.</p>
<p>Step 2 – Assessment of skills and abilities</p>	<p>Say: You will have 20 minutes to conduct this part of the activity. This should give you enough time to really think through your capabilities and to provide real examples from work or your personal life. Here is how I want you to conduct this self-assessment.</p> <ol style="list-style-type: none"> 1. Read ALL the skills in the list. (See column 1.) Complete tasks 2, 3 and 4 completely before continuing to use Column 4. 2. Add any skills or abilities for change leadership that you have that are not on the list (use the spaces after #30). 3. In column 2 (Rate Your Ability) circle the number that corresponds with your rating for each skill using the scale provided above. 4. In column 3, indicate at least one example that is evidence that you have that skill/ability. <p>When you have completed steps 1 – 4, STOP. Only when instructed to do so, go to step 5 (below the skills list).</p> <p>This part should take you 20 minutes. When you go to step 5, the rest of the activity</p>

	<p>should take you another 10 minutes. Please put your pens and pencils down when you are finished so I can gauge how everyone is progressing. If you have any questions, please raise your hands and I will come to you individually.</p>
<p>Step 3 – Rating the Importance</p>	<p>Say:</p> <ol style="list-style-type: none"> 5. Go to column 4 and Rate the Importance (to effective change leadership) for each of the skills/abilities. This should take you about 5 minutes. 6. When you have finished with the rating, now I want you to look at the ratings in the last column – IMPORTANCE and compare them to your level of skill rating. <ul style="list-style-type: none"> • For every activity that you marked with a 1 (high importance) check your ability rating and evidence. Do you see any areas that indicate a need for improvement/focus? • Then comparing the importance and the ability ratings. If the ABILITY rating is 2 or more points higher or lower than the IMPORANCE rating, you need to look closer at these activities and find ways to get support for those skills that are important.
<p>Step 4 – Activity debrief and description of follow-on (optional activities)</p>	<p>Ask: What did you find out about yourself?</p> <p>Expected answers:</p> <ul style="list-style-type: none"> • I had more/less ability that I thought • I found areas of strengths • I found areas that needed development • When I compared what I can do with what is most important, I have some work to do <p>Say: The self- assessment is only your perspective on your capabilities and what is important. Here are some other ways you can use this assessment:</p> <ol style="list-style-type: none"> 1. You can ask your supervisor to fill out the importance section, then compare his or her areas of importance to your skills 2. You can use the skill examples to share your capabilities with your supervisor when you ask for a change assignment to demonstrate your readiness 3. You can share your perspective with your supervisor or mentor, your peers or your direct reports to get their perspective on your capabilities. They could do an assessment using the same form which you could compare to your perspective on your capabilities. <p>(Optional) Do (Optional): Hand out another copy (blank) for each of them to take with them.)</p>

ACTIVITY MEASUREMENT

This is a self-assessment,, so there will be no external measurement except involvement in the discussion and demonstration of self-learning.

HANDOUT: SELF-ASSESSMENT

RATE YOUR ABILITY	EVIDENCE OR EXAMPLES	RATE THE IMPORTANCE
1. Superior level 2. Good/competent level 3. Moderate Level 4. Low level 5. Not much or no experience	You fill in this column with your experiences – choose one that best represents your capability level.	(for EFFECTIVE CHANGE LEADERSHIP): 1. Extremely important 2. Important 3. Of moderate importance 4. Not very important N/A

ACTIVITY DIRECTIONS:

- Read ALL the skills in the list. (See column 1.) Complete tasks 2, 3 and 4 completely before continuing to use Column 4.
- Add any skills or abilities for change leadership that you have that are not on the list (use the spaces after #30).
- In column 2 (Rate Your Ability) circle the number that corresponds with your rating for each skill using the scale provided above.
- In column 3, indicate at least one example that is evidence that you have that skill/ability.
- When you have completed steps 1 – 4, go to step 5 (below the skills list).

SKILLS LIST	RATE YOUR ABILITY	YOUR PERSONAL EVIDENCE / EXAMPLES	IMPORTANCE FOR EFFECTIVE CHANGE LEADERSHIP
A. GENERAL QUALITIES			
1. Able to engage in productive conflict conversations about ideas without attacking people or ideas	1 2 3 4 5		1 2 3 4 5
2. Works constantly to improve relationships	1 2 3 4 5		1 2 3 4 5
3. Has a systematic and comprehensive strategy for implementing the changes	1 2 3 4 5		1 2 3 4 5
4. Continues to learn on the go	1 2 3 4 5		1 2 3 4 5
5. Invites others to learn; creates opportunities for learning	1 2 3 4 5		1 2 3 4 5
B. INITIATION OF CHANGE			
6. Exhibits the courage to question present conditions, the willingness to generate uncertainty, and the willingness to search without knowing	1 2 3 4 5		1 2 3 4 5
7. Generates an understanding, acceptance, and sense of urgency in relation to the need for	1 2 3 4 5		1 2 3 4 5

SKILLS LIST	RATE YOUR ABILITY	YOUR PERSONAL EVIDENCE / EXAMPLES	IMPORTANCE FOR EFFECTIVE CHANGE LEADERSHIP
change			
8. Builds the belief that the change is both desirable and possible	1 2 3 4 5		1 2 3 4 5
9. Establishes new mindsets that hold the desired state as essential and the status quo as unacceptable	1 2 3 4 5		1 2 3 4 5
C. DIFFUSION OF CHANGE			
10. Always tells the truth and forms “until further notice” expectations	1 2 3 4 5		1 2 3 4 5
11. Naturally generates a passionate commitment to the desired outcomes (perhaps through metaphor rich stories)	1 2 3 4 5		1 2 3 4 5
12. Articulates specific deliverables and ensures that all key people know what to do next	1 2 3 4 5		1 2 3 4 5
13. Deliberately uses new governance processes and parts arrangements to ensure that the desired state is top priority in people’s minds, and that action is taken	1 2 3 4 5		1 2 3 4 5
14. Works with intervention processes that bring the whole system into the room	1 2 3 4 5		1 2 3 4 5
15. Ensures that the governance process rewards movement towards the desired state and removes rewards from maintenance of the status quo	1 2 3 4 5		1 2 3 4 5
16. Remembers to constantly scan the “boundaries of the change” for potential problems, resources and new agreements	1 2 3 4 5		1 2 3 4 5
17. Builds critical masses of alignment (Getting early adopters into alignment and giving them things to do) around each essential component of the change	1 2 3 4 5		1 2 3 4 5

SKILLS LIST	RATE YOUR ABILITY	YOUR PERSONAL EVIDENCE / EXAMPLES	IMPORTANCE FOR EFFECTIVE CHANGE LEADERSHIP
vision through engaging and mobilizing agreement			
D. INTEGRATION OF NEW STATE			
18. Maintains an appreciative stance of encouraging and rewarding what is already working in the newly emerging change process	1 2 3 4 5		1 2 3 4 5
19. Demonstrates patience and perseverance in supporting all in moving forward	1 2 3 4 5		1 2 3 4 5
20. Acts in ways that are visible, vocal, consistent, and persistent with the “story” of the change	1 2 3 4 5		1 2 3 4 5
E. SPECIFICS			
21. Demonstrates understanding/ acceptance of the need for change	1 2 3 4 5		1 2 3 4 5
22. Exhibits the belief that the change is both desirable and possible	1 2 3 4 5		1 2 3 4 5
23. Shows sufficient passionate commitment	1 2 3 4 5		1 2 3 4 5
24. Defines specific deliverable /goal and a few first steps	1 2 3 4 5		1 2 3 4 5
25. Creates and communicates structures or mechanisms that require repetitions of the new pattern	1 2 3 4 5		1 2 3 4 5
26. Helps others feel supported and safe during the change	1 2 3 4 5		1 2 3 4 5
27. Accepts versatility of mental models	1 2 3 4 5		1 2 3 4 5
28. Demonstrates patience and perseverance	1 2 3 4 5		1 2 3 4 5
29. Exhibits clear accountability: (visible, vocal, consistent, persistent) with sponsors and stakeholders	1 2 3 4 5		1 2 3 4 5
30. Defines and clearly communicates explicit “boundary management” – the role of other people	1 2 3 4 5		1 2 3 4 5
Other:			
31.	1 2 3 4 5		1 2 3 4 5
32.	1 2 3 4 5		1 2 3 4 5

SKILLS LIST	RATE YOUR ABILITY	YOUR PERSONAL EVIDENCE / EXAMPLES	IMPORTANCE FOR EFFECTIVE CHANGE LEADERSHIP
33.	1 2 3 4 5		1 2 3 4 5
34.	1 2 3 4 5		1 2 3 4 5
35.	1 2 3 4 5		1 2 3 4 5
36.	1 2 3 4 5		1 2 3 4 5
37.	1 2 3 4 5		1 2 3 4 5
38.	1 2 3 4 5		1 2 3 4 5

ACTIVITY DIRECTIONS - continued:

7. Go to column 5 and Rate the Importance (to effective change leadership) for each of the skills/abilities.
8. Look at the ratings in the last column - IMPORTANCE. For every activity that you marked with a 1 (high importance) check your ability rating and evidence. Do you see any areas that indicate a need for improvement/focus?
9. When comparing the importance and the ability ratings, if the ABILITY rating is 2 or more points higher or lower than the IMPORANCE rating, you need to look closer at these activities and find ways to get support for those that are important.

OPTIONAL:

When you return to your job, you may want to have a conversation with your supervisor or mentor, your peers or your direct reports to get their perspective on your capabilities and what is important. They could do an assessment using the same form which you could compare to your perspective on your capabilities.

HANDOUT: SYSTEM CHANGE LEVERS