

Intentional Change

Facilitating team adoption of new ideas

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A little bit about me:

- 15+ years' consulting and digital experience — certified Prosci® change consultant
- Mother of two awesome kiddos
- Live in Vancouver, Canada

I'm also:

- Passionate about human-centred, purpose-driven change through:
 - ✓ Change workshops
 - ✓ Leadership / Group Coaching
 - ✓ Facilitation



When it comes to change:



Our expectations...



The reality:



A blurry, black and white photograph of a person with their arms outstretched, pressed against a translucent surface, symbolizing communication gaps. The person's face is obscured by the blur, and their hands are pressed against the surface, with fingers spread. The overall image has a soft, out-of-focus quality, emphasizing the concept of being unable to reach or connect.

We have gaps in
communication.



We have
gaps in
skills.



We have gaps
in expectations.



Is this true for you?

What if...

Just as we **adapt** digital
and customer
experiences ...

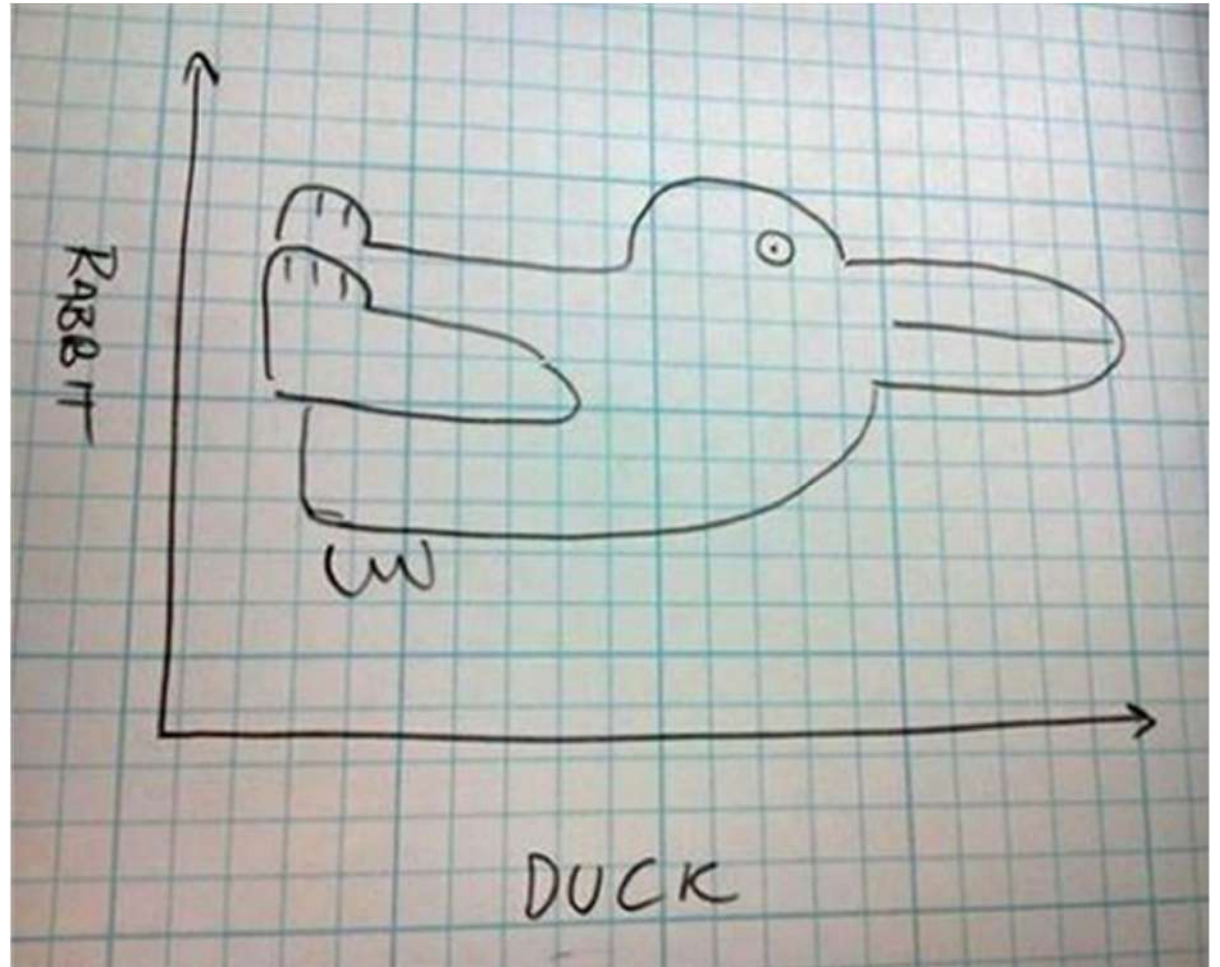


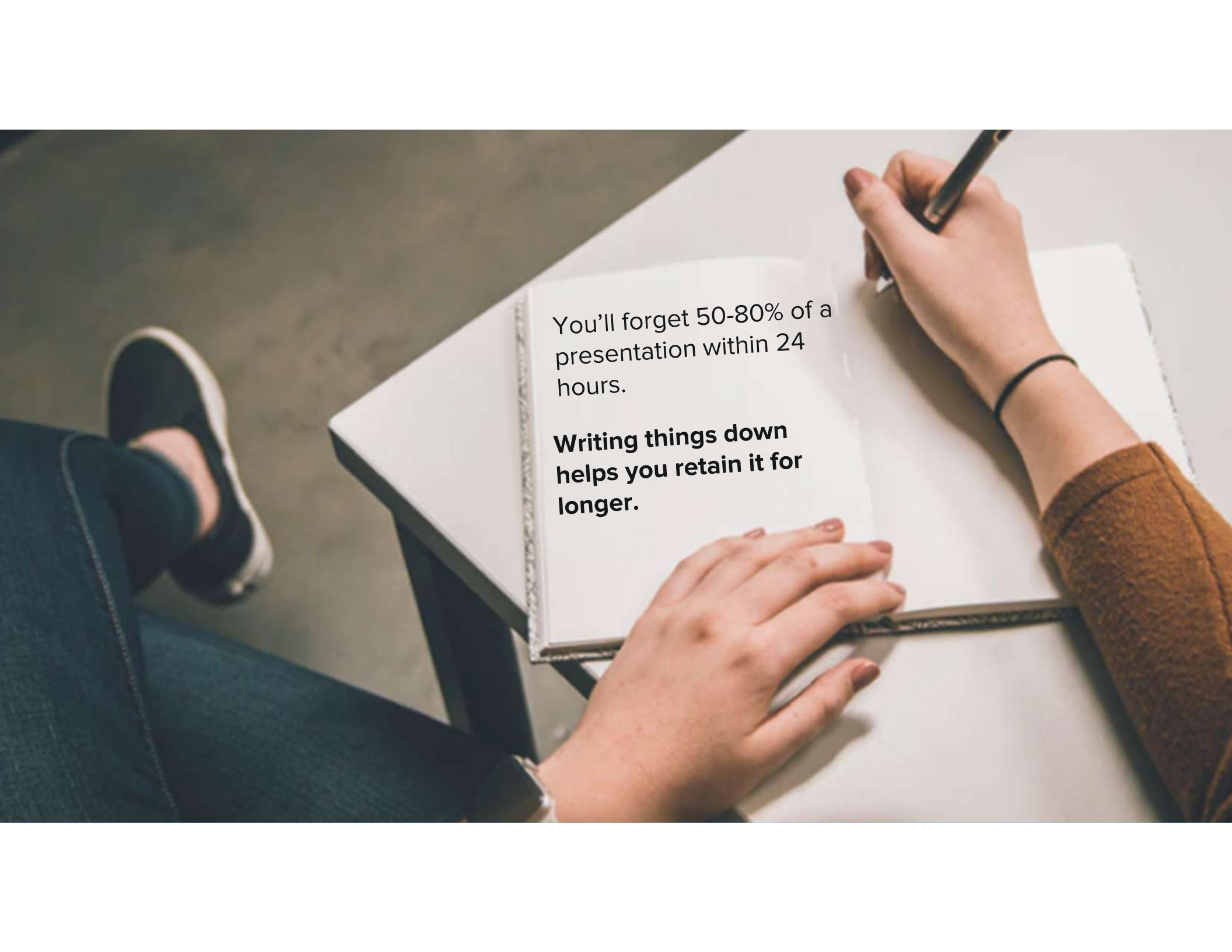


We could **adapt** the
experience of **change**?



A different perspective



A high-angle, close-up photograph of a person's hands writing in a white notebook on a white desk. The person is wearing a brown sweater and a black wristband. Their left hand rests on the notebook, and their right hand holds a black pen. The background shows a grey floor and the person's legs in blue jeans and black sneakers. Overlaid on the notebook page is text in a clean, sans-serif font.

You'll forget 50-80% of a presentation within 24 hours.

Writing things down helps you retain it for longer.



Today

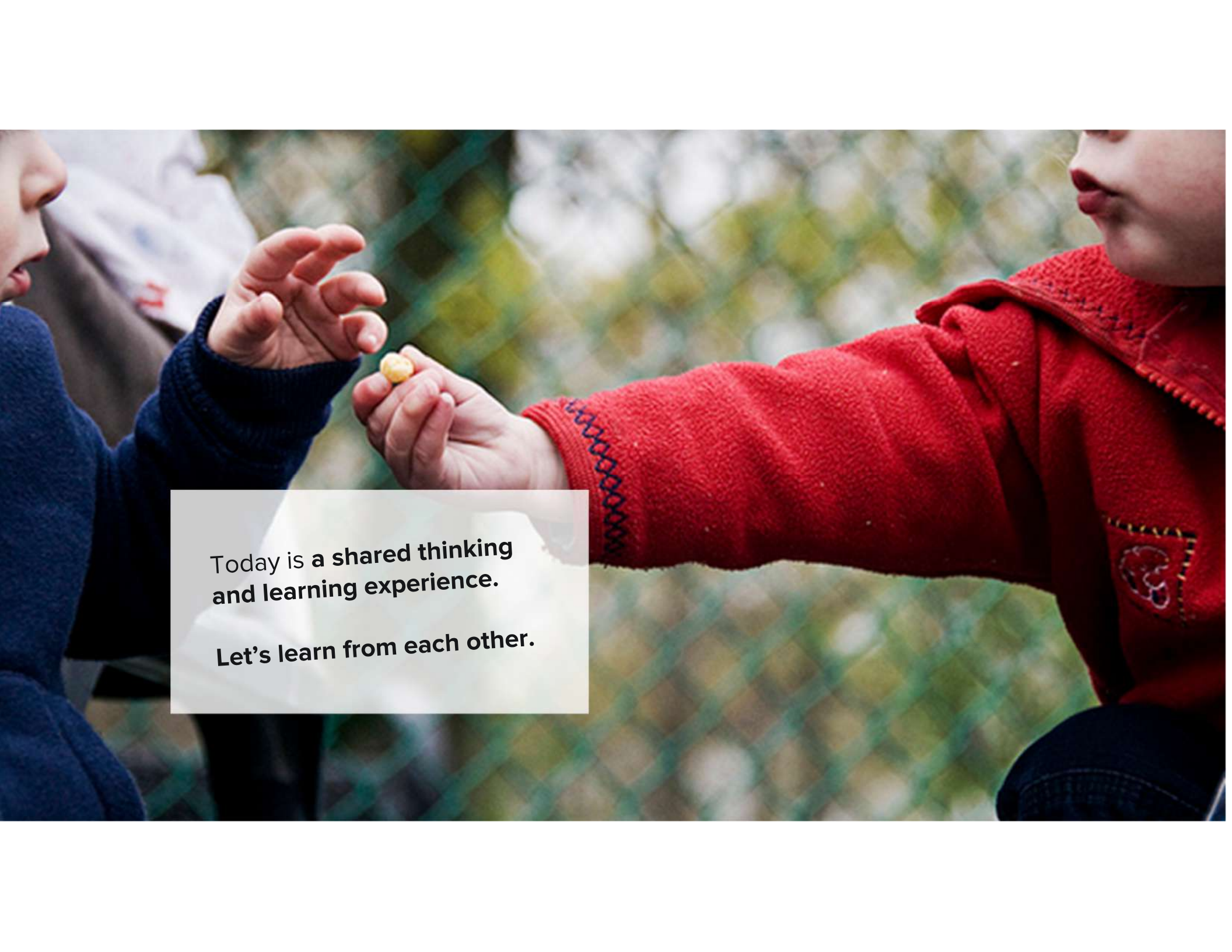
What we're talking about today

Assess:
What is
intentional
change?

Define:
Who is our
audience?

Develop:
How do we
connect?

Support:
How will we
get there?

A close-up photograph of two children's hands reaching towards each other. The child on the left is wearing a dark blue sweater, and the child on the right is wearing a red sweater. They are holding a small, round, yellow object between their fingers. The background is a blurred green chain-link fence.

Today is a **shared thinking**
and **learning experience.**

Let's learn from each other.

Let's try it

Meet someone new

1

If you could wake up tomorrow having gained any one quality or ability, what would it be?

2

Is there something you've dreamed of doing for a long time?

3

What in your life do you feel most grateful for?

**Real
communication
begins with
connection –
Oprah**





Assess

What words do you use to describe
the process of change?

Assess

Our expectations vs reality...





What is intentional change?

Assess

Intentional change

It's about:

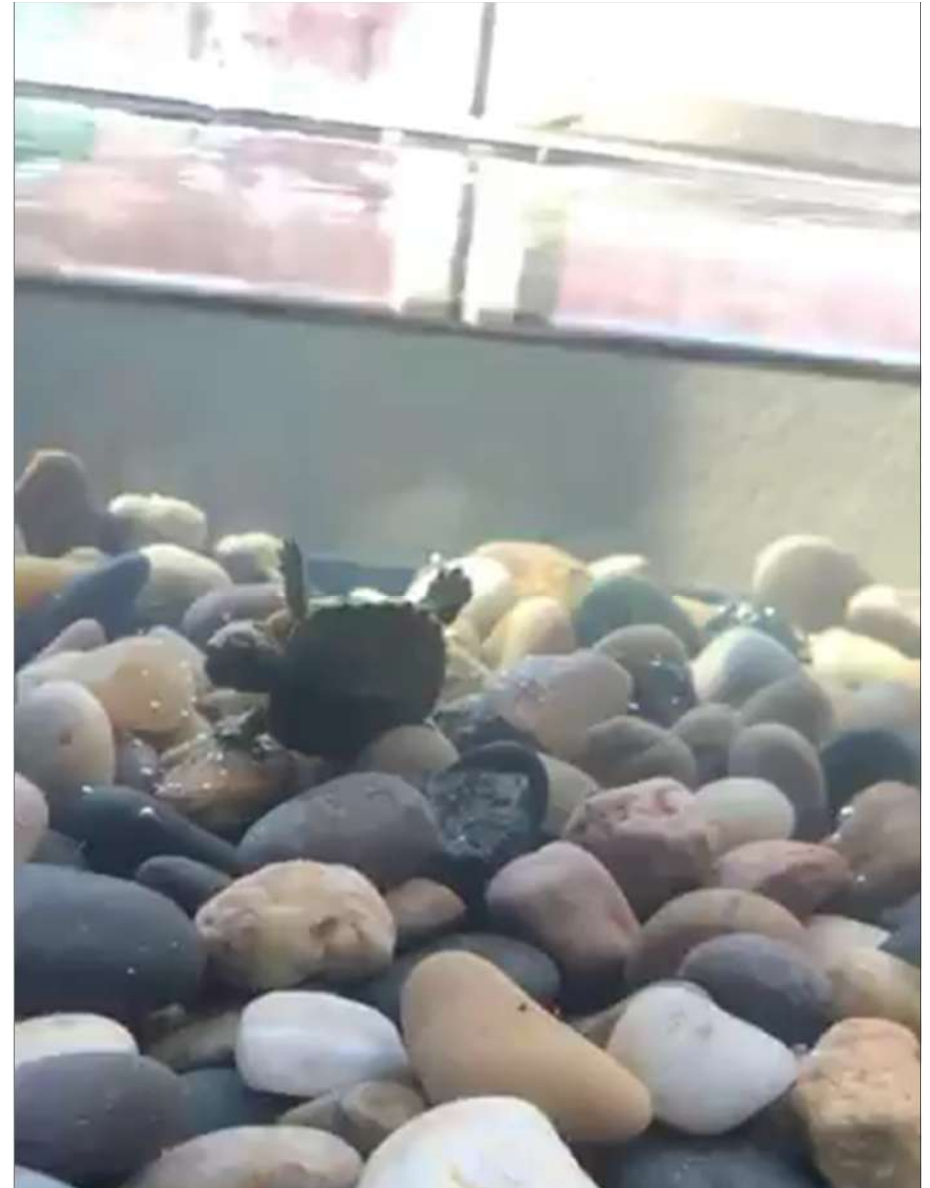
- Who you are
- What you bring
- How you can improve through learning
- How you can learn with others



Define

Change problems

- Readiness for change.
- Team culture vs process.
- Lack of vision and ownership.



Why is it important?

97%

of employees and executives believe lack of alignment within a team impacts the outcome of a task or project.

- Clear Company



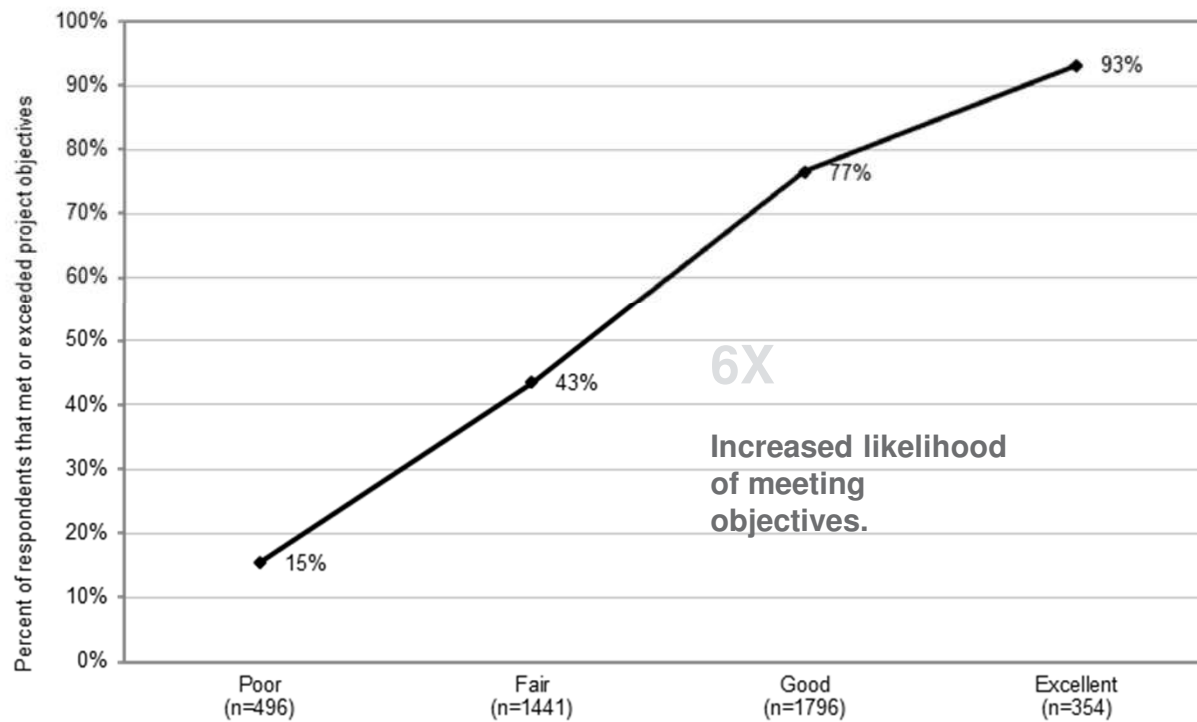
86% of employees and executives cite lack of collaboration or ineffective communication for workplace failures.

- Salesforce

Assess

Figure 5.1 – Correlation with meeting objectives

© 2018, Prosci Inc. Best Practices in Change Management – 2018 Edition



Change Management Effectiveness

Projects with good change management are 6x more likely to succeed.

Assess

Some people believe...



In reality, we need change that is:

1

Systematic
(Planned & structured)

2

Meaningful
(Results focused)

3

Purpose driven
(Human centered)

**Change doesn't
need to happen
by accident.**

Assess

Change readiness factors

Size of change

Impact of change

Priority of change

Type of change

Location

Preparedness of change

Timeframe of change

Complexity

Risks and Resistance

Change readiness factors

Size of change: how different is it from status quo? How deep is the behavioural change? How many people are impacted?

Type of change: Process, People or Technology or all?

Timeframe of change: How soon will changes need to be implemented? How much change is currently going on? Have there been recent change projects?

Impact of change: What changes to business benefits realization and what could upset the cart?

Location(s): How many locations will be impacted by change (and who currently owns the knowledge)

Complexity: How complex are the changes? What are the capabilities of the change team and sponsors?

Priority of change: How does this change fit with existing initiatives? Is it more or less important? Is it replacing something? What are the dependencies?

Preparedness of change: How ready is for change through supportive culture or leadership?

Risks and Resistance: What are the core values and background of impacted groups? What's the projected level of resistance to the change?

Assess

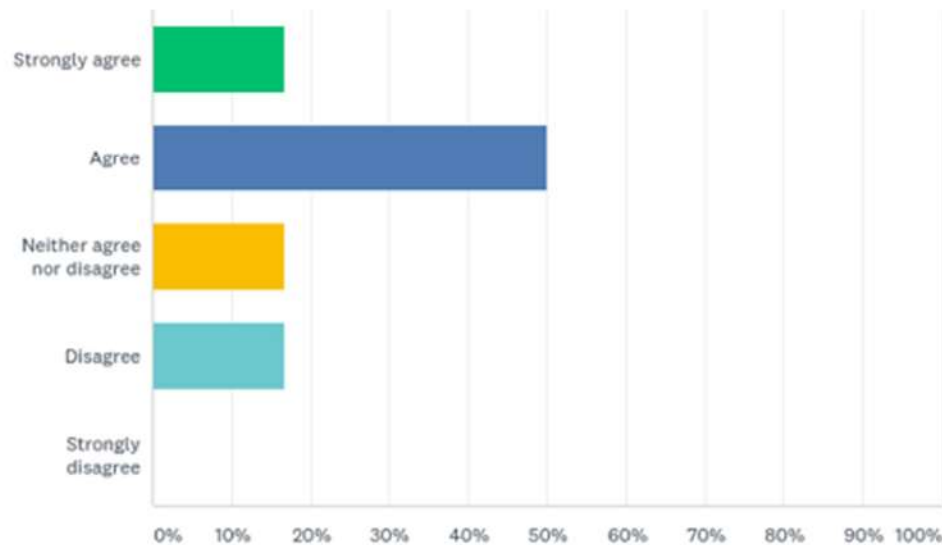
True story...



Define

Team survey

At work, I have the opportunity to do what I do best every day.



Lessons learned

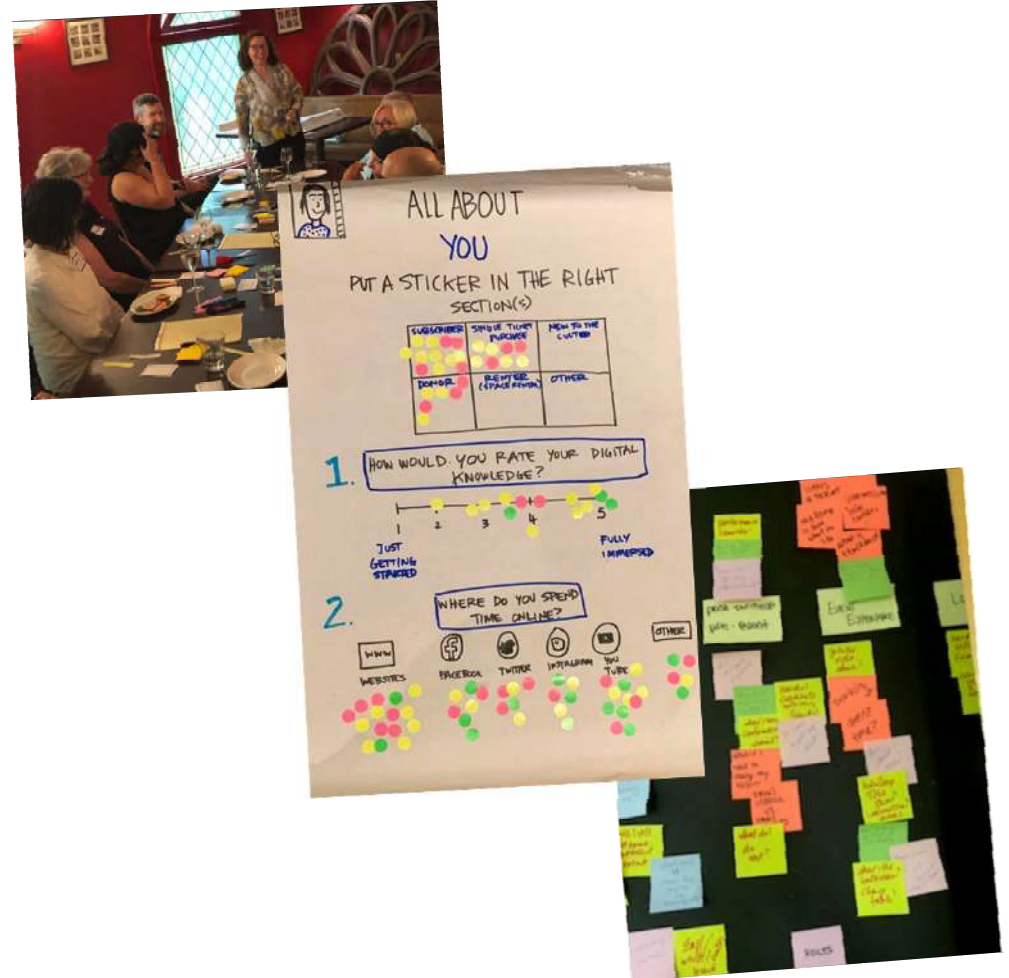
- Lack of alignment around goals and vision
- Good level of acknowledgement of work within the team

Results

- Weekly update to include a “team temperature check”

Organizational alignment through:

- Data and system governance
- Information governance
- People governance
- Technology governance





Tools



Change assessment tools

Category	Considerations	Key idea
Interviews	Which key stakeholders should be invited to participate / share insights?	Have defined questions that address the purpose of the interview
Focus Groups	How can we invite a cross-selection of folks across departments and teams?	Schedule well in advance. Watch for Group Think. Let people know about next steps and how you will close the loop
Surveys	How can we get a good response rate?	Share open and closed questions for qualitative and quantitative data.



Assess

What other tools have you used to assess readiness for change or “current state”?

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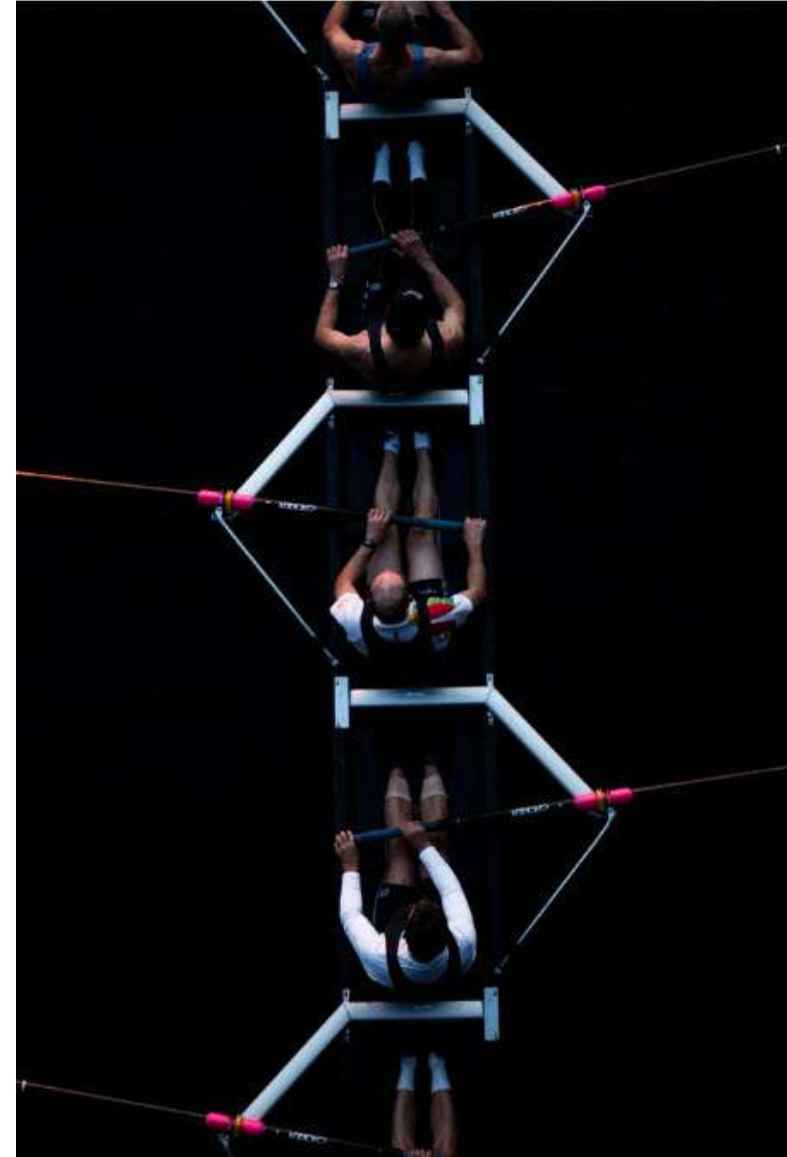
Develop:
How do we
connect?

Support:
How will we
get there?

Define

Understanding your audience

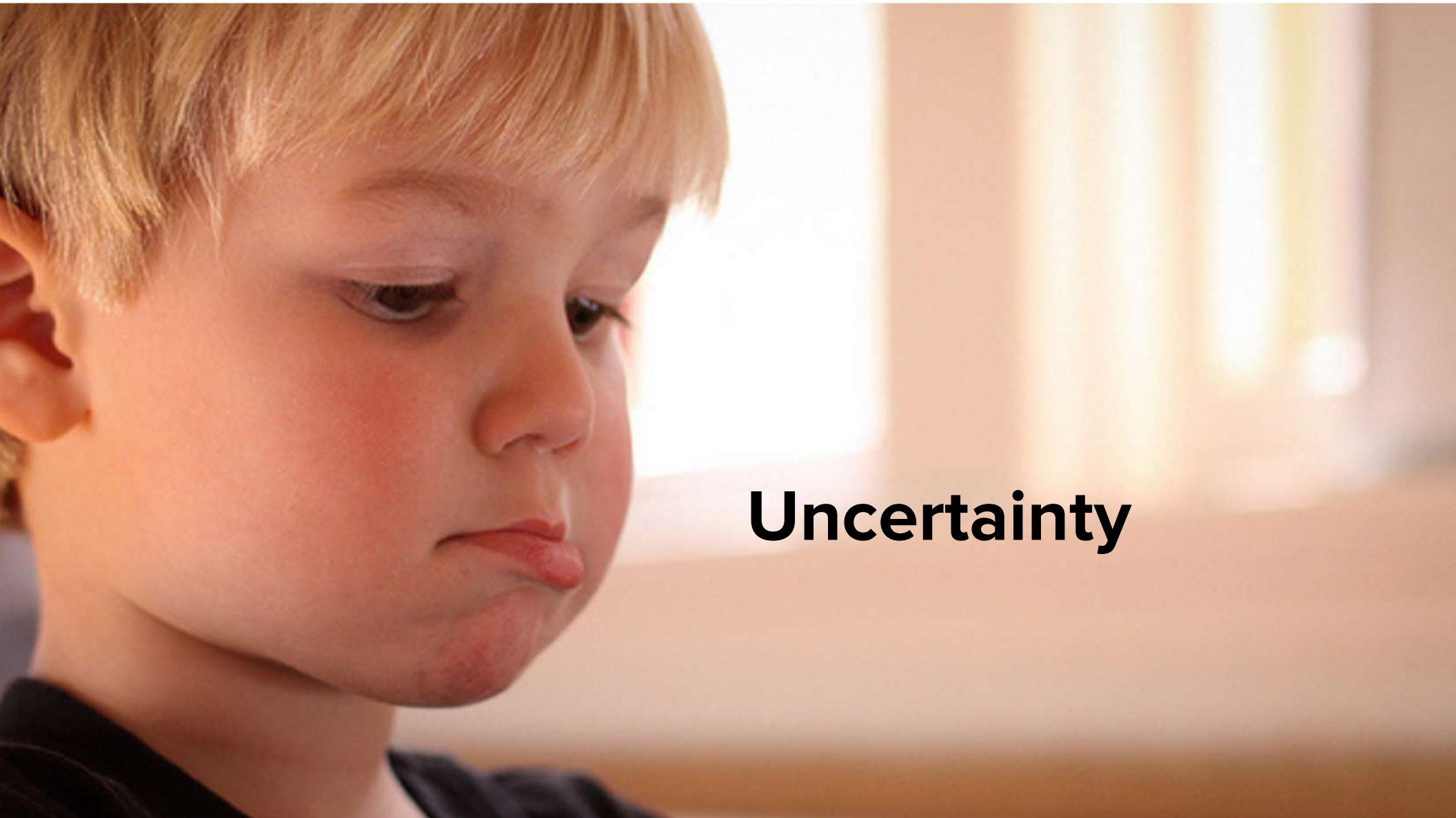
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Change problems

- Lack of awareness of the project
- Change fatigue
- Lack of leadership support





Uncertainty

The Kübler-Ross Change Curve

Emotional Response to Change



**Change
with
intention
reduces
the “dip”**

**“People don't resist
change.**

**They resist being
changed.”**

-Peter Senge



Define

Audience Ecosystem

- Realize that your change may have impacts to others outside of your immediate team.
- Consider roles and requirements and what's changing / what's staying the same.
- Set realistic expectations.



define

Key change questions

- What is the change all about?
- Why do we need the change?
- What's in it for me?
- How will you help me?



Assess

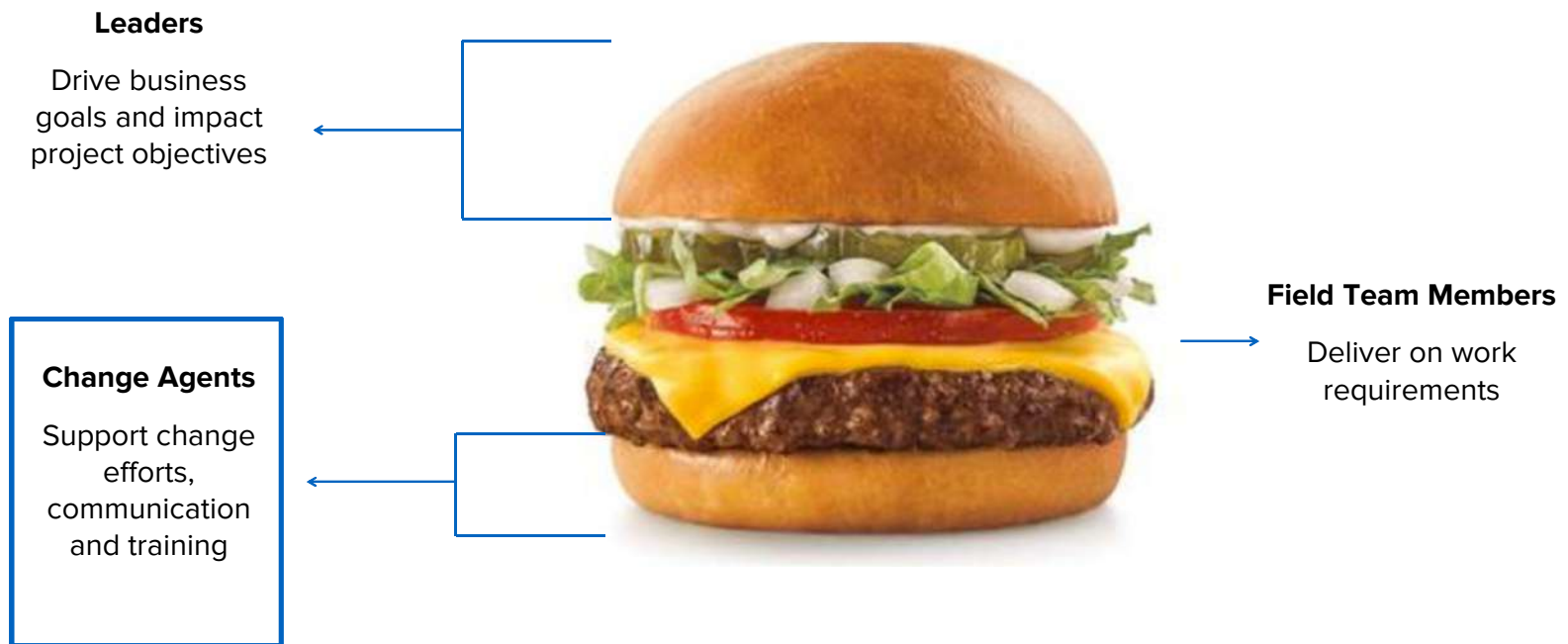
True story...



Define

Top down and bottom up

Offer support from a “top-down” and “bottom-up” perspective



Tool: Change Agent Network

Role

Activities

Leaders: Can “make or break” a project. They’re **highly influential and can be found in any level of the organization.**



Leaders: Are actively and visibly endorsing change activities, providing a communication channel, supporting transition activities, and sharing any concerns they have with the Change Agent.



Change Agents: Individuals from the project that can support Key Influencers with solution knowledge and understanding of the business group.



Change Agents: Have regular informal conversations with assigned Key Influencer(s) to develop influencers knowledge about change; address any questions, concerns and/or hesitations they may have about the initiative; raise any issues with change management team.



Field team members: Members of the field team.

Field Team Members



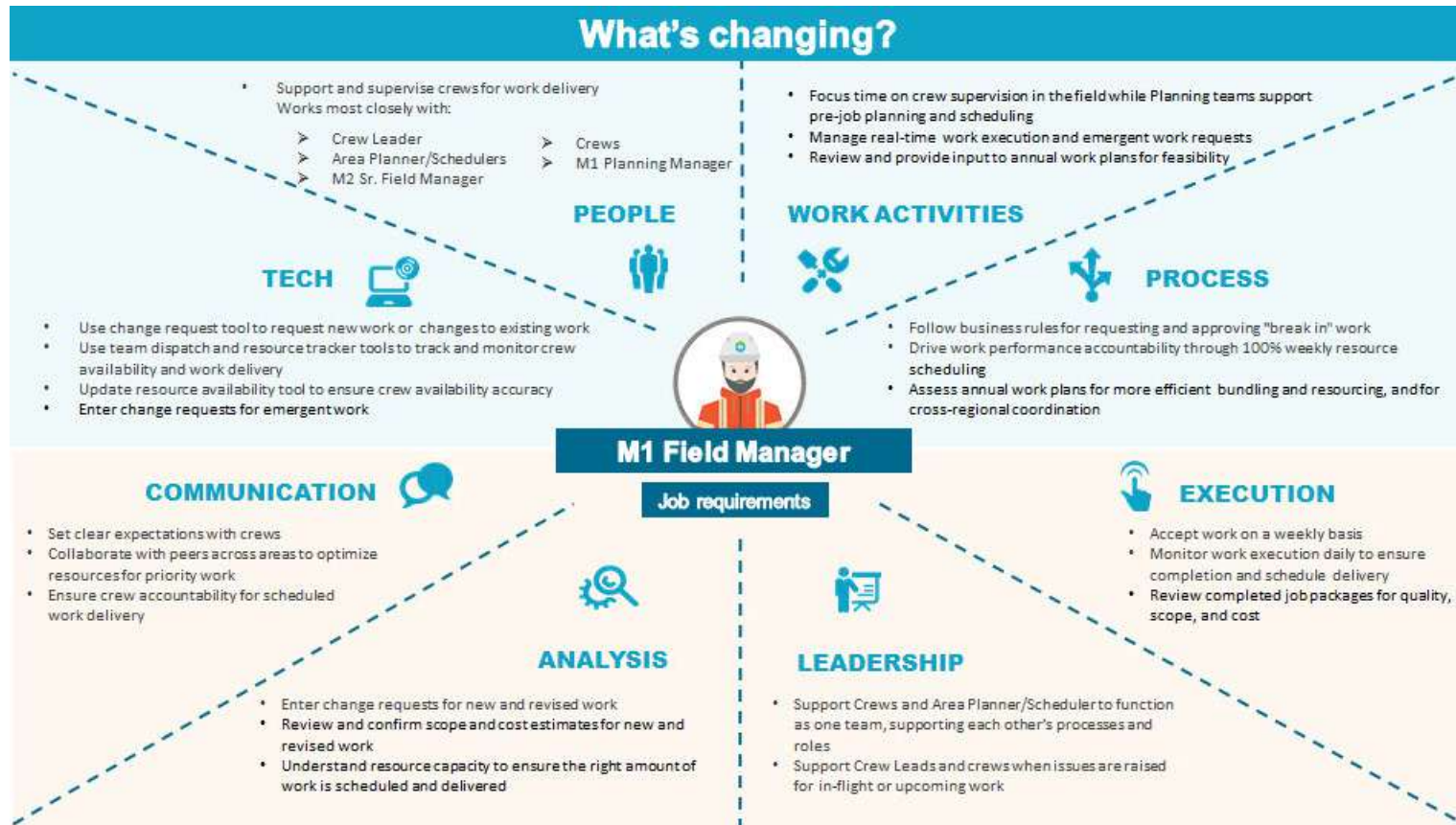
Field Team Members: Work with Change Agents to share insights about new processes and impacts.



Tools



Tool: Role changes



**Get to know your
team...**

Understand



Direction

Vision + Objectives

- Personal
- Departmental
- Organisational



Obstacles

Problems + Risks

- Conflicts
- Pressure



Drivers

Communication

- Passion
- Work style

Define

Team members

Think about someone
on your team.

Who do you need to get
to know better?



Define

“We don’t
see things as
they are, we
see them as
we are.”

Anais Nin

brekergroup.com @melissabreker





Stand up!



Define

Have you
identified
someone to
reach out to next
week?

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Develop

Making connections



Risks with change:

- Information – team members not getting the information they need
- Communication – Senior leader messages are not effectively cascaded
- Process – barriers for new process or not relevant processes
- Skills – overlooked skill or capabilities

Develop

It can feel like ...












Define

True story...



Define

Digital strategy roadmap

WHAT Here's what the Digital Strategy is and what it means for our team 	WHY The Digital Strategy is important because: 	BENEFITS The Digital Strategy will benefit us because: 	COMMITMENT Our responsibility for rolling out the Digital Strategy is: 	KEY ACTIVITIES The key methods we'll use to implement the Digital Strategy are: 
	SUCCESS We'll consider the Digital Strategy a success when: 		EXPECTATIONS For a successful Digital Strategy Plan rollout we'll need help with: 	
RISK MANAGEMENT We need to consider the following risks: 			ROLLOUT PLAN The actions we will take to prepare and rollout the Digital Strategy are: 	



Develop

Do you use tools to get team alignment around change?



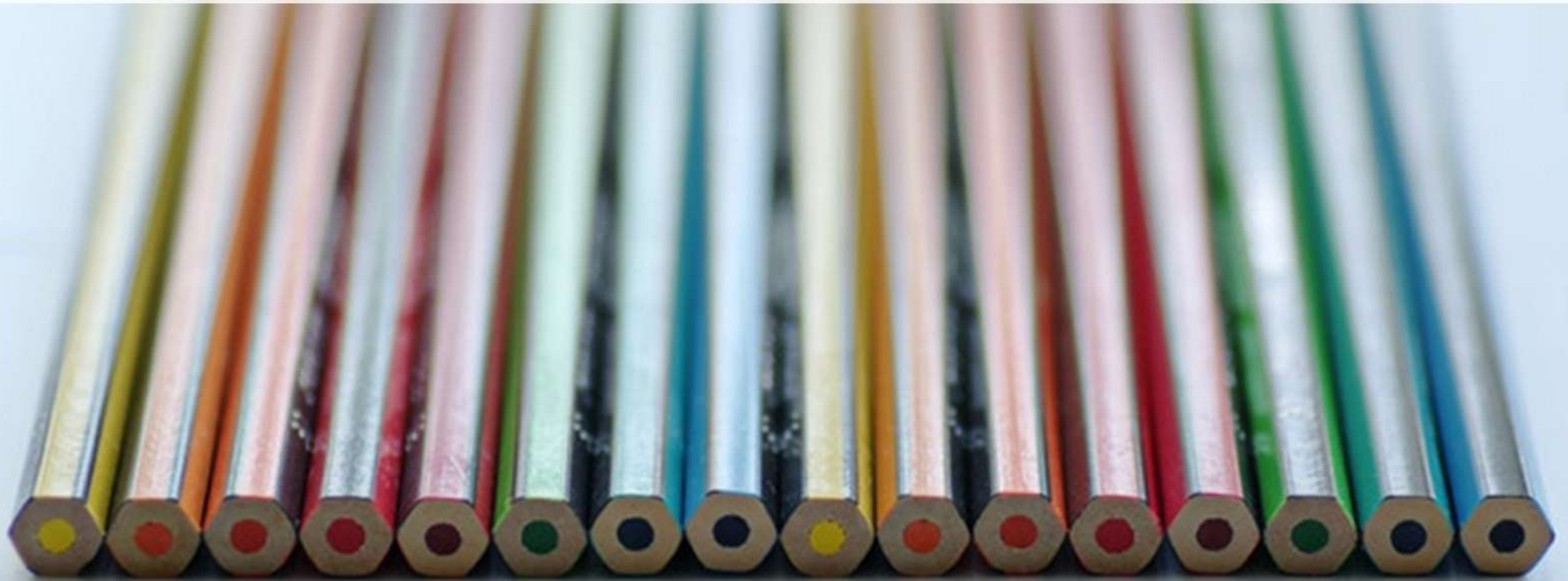
Tools



Team assessment tools

Category	Considerations	Approach Example
Team Development	What stage of development is your team?	Bruce Tuckman's model of "Forming, Norming, Storming and Performing" or Team Performance model by Drexler and Sibbet
Communication	How well do you communicate around goals and requirements?	4L Retrospectives: Liked, Learned, Lacked, Longed for, Feedback loops
Structure and Roles	How is your team structured for content?	RACI's, Governance team Models

Other tools for change buy-in

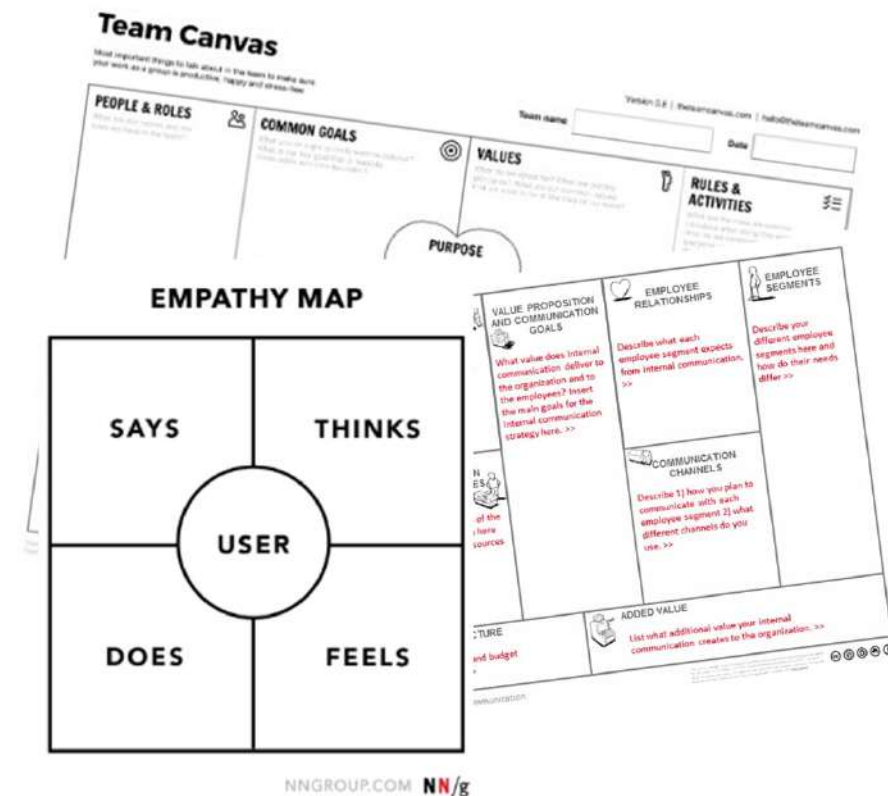


Define

Sample team workshop activities

- Team canvas
- Influencer map
- Empathy map
- Post meeting retrospectives
- RACI
- Impact prioritization grid
- Stakeholder influence map

Or other workshop activities depending on your objectives.



Sample change workshop activities



- Process mapping
- Roadshows
- Town Halls
- Story driven project updates
- Feedback role playing
- Support tool review
- Train-the-trainer
- Mind mapping
- Presentations for impacted groups



Define

Team alignment tools

Technology

- Jira
- Trello
- Mural
- Confluence
- Google docs ldrive
- Slack
- Dropbox paper
- Wiki
- Hipchat
- Ryver

Project

- Daily scrums
- Review meetings
- Design sprints
- Risk assessment matrix
- 4 L Feedback
- Retrospectives
- Toggle time management



Define

Team alignment tools

Project

- Project calendars
- Decision briefs
- Impacted groups ecosystem map
- Process maps and workflows

UX

- Mental models
- User journey mapping
- Mind mapping
- User motivation quad
- User matrix
- KJ Brainstorming

Team members

- Myers Briggs
- DISC
- Clifton Strengths Finder



Develop

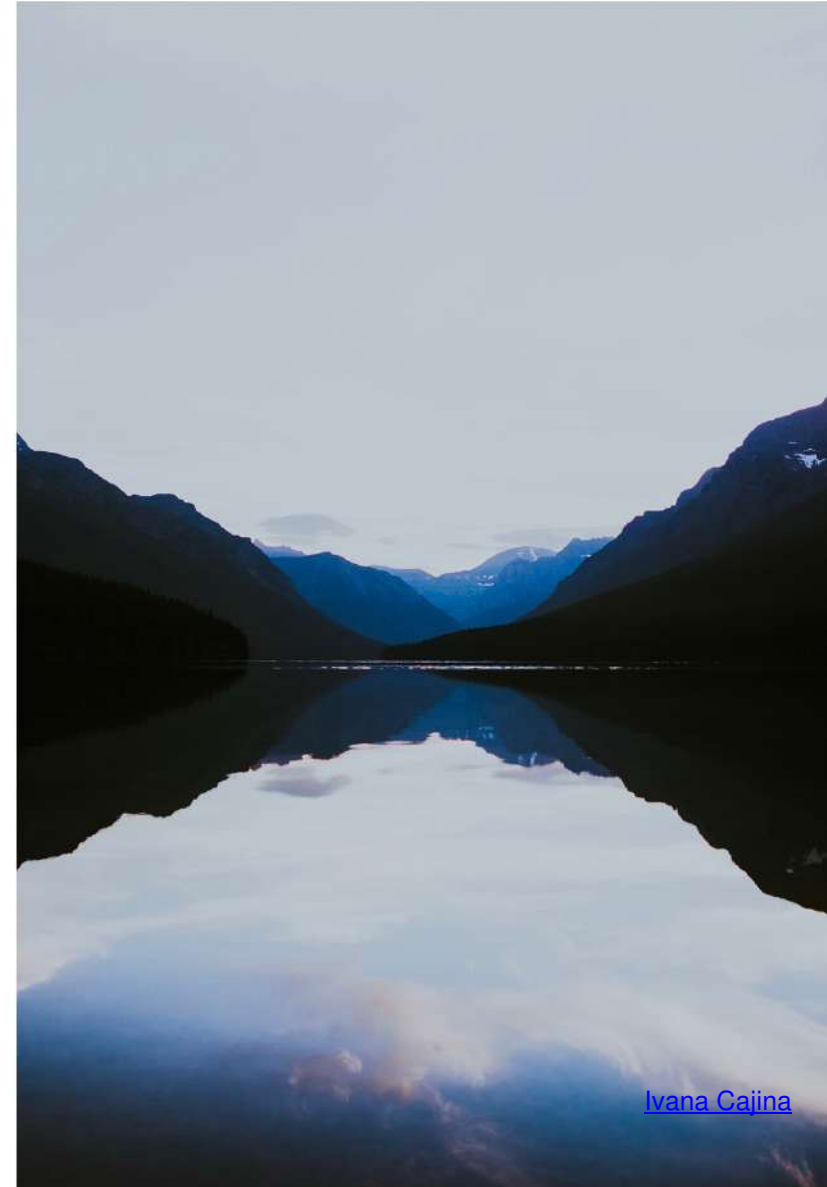
Other tools

What other tools have you used to align your team?

Develop

Let's take a moment to reflect.

Which tools do you want to
explore further to support
change?



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Transformation
and change

Define

Less than
30% of
transformation
efforts succeed.

Support

The change test

level of
dissatisfaction

X

clarity of
new vision

X

pathway to
change

<

loss making
change

Design Thinking by Jeanne Liedtka

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What motivates us?

Not about concrete rewards and punishments.

- (1) Autonomy—“the desire to direct our own lives;”
- (2) Mastery—“the urge to make progress and get better at something that matters; and”
- (3) Purpose—“the yearning to do what we do in the service of something larger than ourselves.”

Daniel Pink’s [Drive: The Surprising Truth About What Motivates Us](#).



Flexibility
Autonomy
Respect
Transparency

Steps to take



Successful Adoption Patterns

- › *Compelling need to change*
- › *Teams “opt-in”*
- › *Organization values learning*
- › *Everyone measured on value contribution*
- › *Management supports the change, clears obstacles*
- › *Continuous improvement*

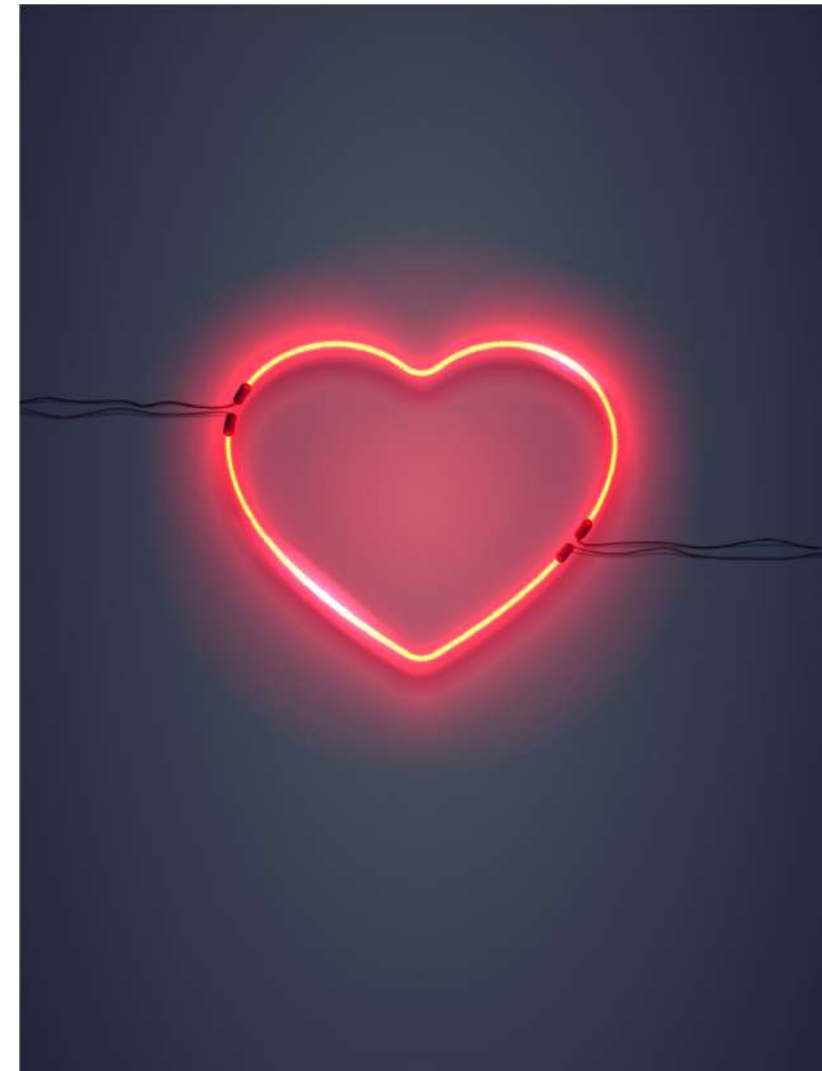
Team check list

- ☐ Do you have a clear and compelling need to change?
- ☐ Does the organization value learning?
- ☐ Are people measured on the value they create?
- ☐ Will management clear obstacles & support change?
- ☐ Are team members ready to opt-in to change?

Build skills

Create the right mindset

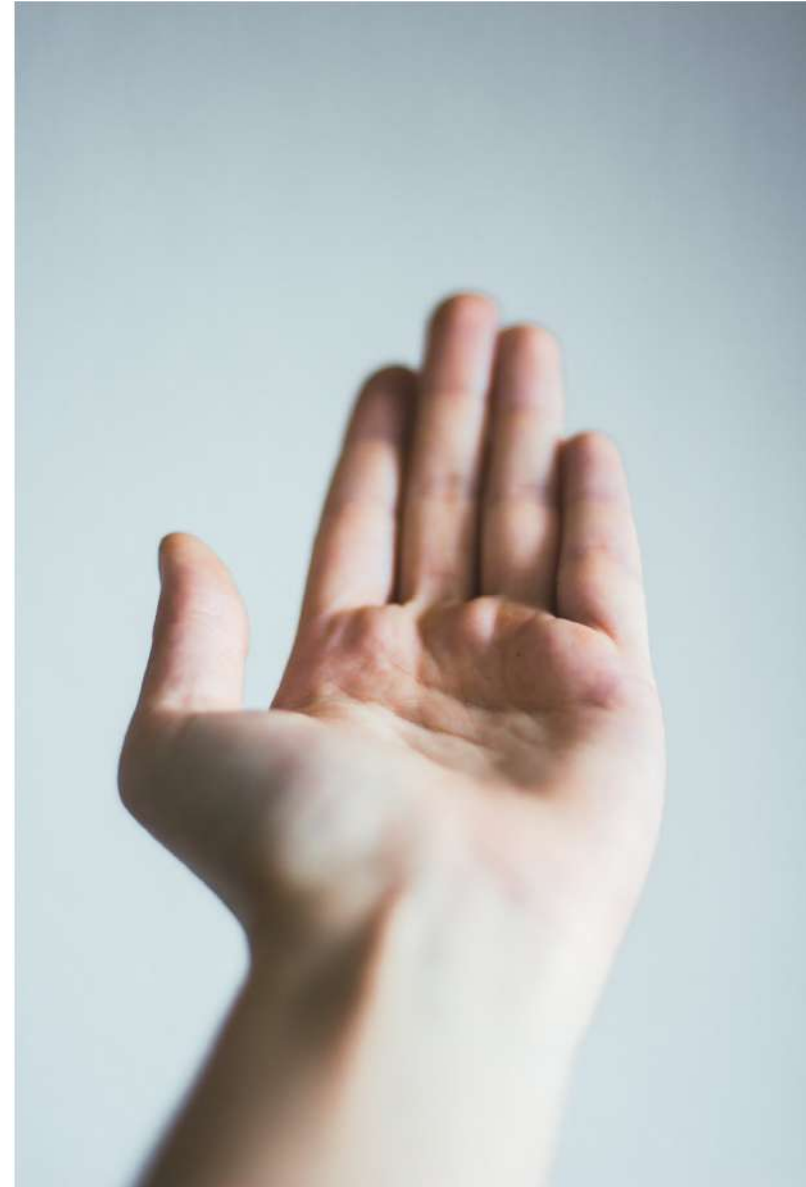
- Respect contributions
- Be open to trying other people's ideas
- Be sensitive to how your actions may affect other team members and outcomes



Build skills

How?

- Active listening
- Practice empathy
- Be comfortable giving and receiving feedback





Support

Ask better questions

How?

Think about:

- Purpose
- Format (Open and closed questions)
- Type (5 Ws + H and others)



Define

What have you tried?

- What works?
- What doesn't?



**Start with the end
in mind.**

- Stephen Covey

Think about

More

- Open sharing
- Curiosity
- Competition
- Them

Less

- Hidden information
- Fixed beliefs
- Collaboration
- You


What's one action you'll take?



What's one action you'll take?



Please email it.

A person stands in silhouette on a dark, rocky ridge, looking up at a vast, vibrant night sky. The Milky Way galaxy is visible, stretching across the sky with a mix of pink, purple, and yellow hues. The sky is filled with numerous stars, and the overall scene conveys a sense of wonder and contemplation.

“The best thing
about the future is
that it comes one
day at a time.”

Abraham Lincoln

**Change doesn't
need to happen
by accident.**



Let's connect

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- Digital Strategy Assessments
- Team Strategy Workshops
- Content Strategy Consulting



Final questions?



Thanks!