The ‘Vital ***Upgraded*** Implementation Checklist’ for Successful Organisational Change

Module 1, Session 1 Business Evolution Matrix

As you know, at the end of each Session, I, Dr. Ted, propose a number of challenge questions. It is my desire, and indeed that of the Global Risk Academy, that you apply these challenge questions to your organisation to improve its performance and take you to a higher level strategic leader – one which is also more creative.

So, thinking of yourself as an ‘agent of change’ in your organisation and being held accountable for applying the challenge questions to your organisation, check the ***two areas*** for each ‘challenge’ where you believe you will have the greatest difficulty effecting change in your organisation.

It would then be up to you what steps you take to execute the changes effectively and efficiently and to develop yourself in the process. Coaching is available to help you should you decide to take the implementation further in your organization. But for now, we would like you to think about ***where you will encounter the greatest challenges***.

A list of possible and often typical implementation challenges will be given to you**. *Again,******check the 2 of which you believe are most relevant to your organisation and will represent the biggest potential barriers to change.***

Completing these for each of the remaining Sessions including this one and returning it to either to Boris at the Global Risk Academy or Dr. Ted at doctorted47@gmail.com will ensure your receipt of a certificate of completion of this programme.

**Challenge question #1 Module 1 Session 1:**

You were managing a booth for your organization at a recent high-level conference. A visitor to your booth came by and during the conversation they challenged you to share with them what you thought was really unique about your organization – distinguishes it apart from other competitors or providers of similar products and/or services. It caught you by surprise and you found yourself struggling to come up with all the standard stuff – good service, high quality products and so on but it didn’t sound very persuasive. Somehow the visitor did not seem impressed and you did not feel comfortable about what you said. The experience compelled you to start engaging people around the organization. It didn’t go as easy as you thought as you tried to gather a cross-functional and multi-level opinion (up to the leadership team a few of whom you know well having worked directly for them in the past). You decided to take a break and make a list of the difficulties you were having and others that might arise as well as thinking about how you might best deal with them. Your list included many of those identified below:

* Difficulty in getting the rest of the leadership team to agree or commit to change – or the importance of the need to change (e.g., the leadership team may be risk averse or complacent – wanting to maintain the status quo)
* Difficulty in making sure the change is in alignment with the vision and consistent with the organisation’s purpose – there may be pressure to move into unchartered waters rather than play to your strengths
* Difficulty in finding the right and sufficient human resources to implement the change – especially qualified talented or human resources with the right expertise
* Difficulty in setting priorities – what comes first and why? What is second and why? There may be confusion or discord among decision-makers bringing the effort to a halt because of controversy or at least slowing any meaningful progress down
* Unwillingness to invest time (e.g., lack of patience on the part of the leadership team) or invest money to fund the effort in total (e.g., only partial funding which you know will not produce desirable results)
* Difficulty in identifying the dependencies/interdependencies upon which the success of the change will depend or who the key stakeholders are that would not only receive value from the change but would contribute to the success of the execution of the change
* No agreement on the critical success factors for the change
* No identification of potential barriers to the change and how to overcome them
* The culture of the organisation makes people resistant – not comfortable with change and afraid to take risks or step/think outside the box – more of a wait and see attitude
* The leadership team seems unable to align the organization behind the needed change – everyone wants to go their own way, pulling resources into often non-productive activities
* Difficulty in establishing or agreeing to the measures of success which will tell you and the organisation that the change has been successful, the extent of the change and the speed of the change
* Difficulty in getting people to work together – lack of teamwork or collaboration – it is uncomfortable for people as they are not used to it – they have so many targets they won’t take time to work with others for the benefit of the organization as a whole – their reward is based solely on their individual performance
* Failure to effectively and continuously communicate about what is happening, why it is happening, how it is happening and who is involved
* Failure to listen and learn from the workforce as well as other stakeholders and then act on the information gained
* Difficulty or complete lack of getting key stakeholders such as the supply chain on board and supportive of the change if relevant – inhibiting the route to market and speed of product/service development (e.g. late launches of new products or services)
* Failure of leadership to be patient to see the change effort through to its conclusion. Instead they get anxious and want to change course and try something else – find a ‘silver bullet’ – the workforce loses motivation as their organization joins the ‘program of the month’ club
* The decision-making process is very slow and unless we act quickly the opportunity brought about by the change will be lost
* Lack of the needed core or organisational competencies to successfully implement the change
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**Challenge question #2 Module 1 Session 1: *OPTIONAL***

You are concerned that your organization I too short-term operational in its thinking and needs to become more long-term strategic in its thinking and acting – more in line with what Strategic Leadership is all about. You ask a few selected colleagues to work with you and develop an action plan. As a small team you decide to use a 5-point scale on which to rate the organization cross-functionally as well as by level. Any area where the organization is rated below a ‘5’ you want to discuss with the interviewee and your team what might be needed to bring your organization up to a ‘5’ (1=short-term operational; 5=long-term strategic). Clearly one of many challenges will be getting open and honest answers and access to and participation of the leadership team even though you are well respected by them for the high level and valuable projects you have managed on their behalf in the recent past. Your hope is that the results will be revealing and that you will have the chance to present to the leadership team and they will feel compelled to make some positive changes – not shoot the messenger! There may be some additional challenges which you and your small team believe are important to list as well as think about how you might overcome each one:

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**Challenge question #3 Module 1 Session 1 (including all OPTIONAL elements)**

You believe that your organization needs to be more innovative – listen to their customers more because the current product, service and support portfolio seems a little tired. You are seeing more customers defecting to competition and you are worried. Senior management seems blind to it. They are happy because money is coming in the door. But to you, it’s just a matter of time. You think your organization is vulnerable to competition. You want to undertake a study where you speak with key stakeholders including accounts, partners, suppliers and employees in your product and service development functions. You know you cannot go to senior management with your story unless you have some solid suggestions for improvement of your portfolio as well as estimates of time and cost associated with these improvements. You are fortunate to have a mentor who is on the leadership team who is willing to listen and would bring you in to present to the full management committee. You see some difficulties in completing your task and list them as well as how to overcome them:

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* Difficulty in making sure the change is in alignment with the vision and consistent with the organisation’s purpose – there may be pressure to move into unchartered waters rather than play to your strengths
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**Challenge question #4 Module 1 Session 1 (including OPTIONAL components)**

You just finished reviewing the initial discussion and Business Evolution Matrix and feel energized. You would like to draw the red and blue areas for your organization but need some additional input. You put together a small team of experts in the organization to provide input and check your conclusions. They too see the merit in doing this – seeing where the organisation is today based on the factors listed and where it needs to be in the future relative to these same factors. You will want to make your case to the leadership team and even the Board if necessary for foresee You know that you will need to identify what you and your team of experts think will be the other factors which will be important to success, where success means moving from where you are today to where you think you need to be in the future. All of this, you and the team believe, need to be shared with the leadership team. Of course, associated with any major change – even evolutionary, there are barriers that must be overcome. You and the team try to list these as well as ways to overcome them:

* Difficulty in getting the rest of the leadership team to agree or commit to change – or the importance of the need to change (e.g., the leadership team may be risk averse or complacent – wanting to maintain the status quo)
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**Challenge question #5 Module 1 Session 1**

Based on some discussions you have had with customers recently, you are getting the distinct feeling that your organization is not thought of as being innovative, but rather just like everyone else – ordinary. That worries you. You discuss the issue with a colleague on the leadership team and decide that possibly it would be a good idea to do a broader study – either qualitative or quantitative or some of both to really get to the truth as the customer sees it. You want to use a 5-point scale where 1=poor and 5=excellent. Any scores below ‘5’ are a concern and you will want to find out from your customers what they think needs to be done to rectify the situation. In the meantime, you speak with a select group of experts in the organization to see what they would consider to be the most innovative product or service introduced in the past 2-3 years and what process was used to do it. Your concern is that the issue may run deeper in the organization, namely that not enough attention is being given to releasing people’s creativity in any systematic way. Even when people come up with a good idea, it never seems to move forward as it should – there is not a formal mechanism in place to move it along to an action stage. As you try to map out an action plan to execute all these activities and report the results in a comprehensive way, your head also fills up with the difficulties you might encounter in undertaking such a daunting task as well as how to overcome them:

* Difficulty in getting the rest of the leadership team to agree or commit to change – or the importance of the need to change (e.g., the leadership team may be risk averse or complacent – wanting to maintain the status quo)
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**Challenge question #6 Module 1 Session 1**

You have bought into the research that shows that providing customers as well as other key stakeholders ‘value’ which they recognize and appreciate that you can strengthen your organization’s relationships with these key stakeholder groups. This vitally important because the research also has clearly stated that exceptional relationships with key stakeholders will help your organization be more successful and also more stable in times of change or turbulence. But you want to make a broad assessment as to whether your stakeholders believe they are getting the value they want and expect from your organization and how that is being delivered – as they see it. You want to make sure you understand the specific sources of value they perceive. Finally, you want to bundle the report and share it with the rest of the leadership team in the hope that some actions will be taken which will make your organization more competitive, enjoy greater profitable growth and have a strengthened reputation. One of the issues you want to confront up front is what difficulties you may encounter in getting clear insight on this issue so recommendations can be made confidently to the leadership team. Included on that list are the following and, of course, a need to discuss how you would be able to overcome these difficulties and get to the heart of the matter:

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**Optional**

***Any other comments regarding the programme so far you would like to share:***

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