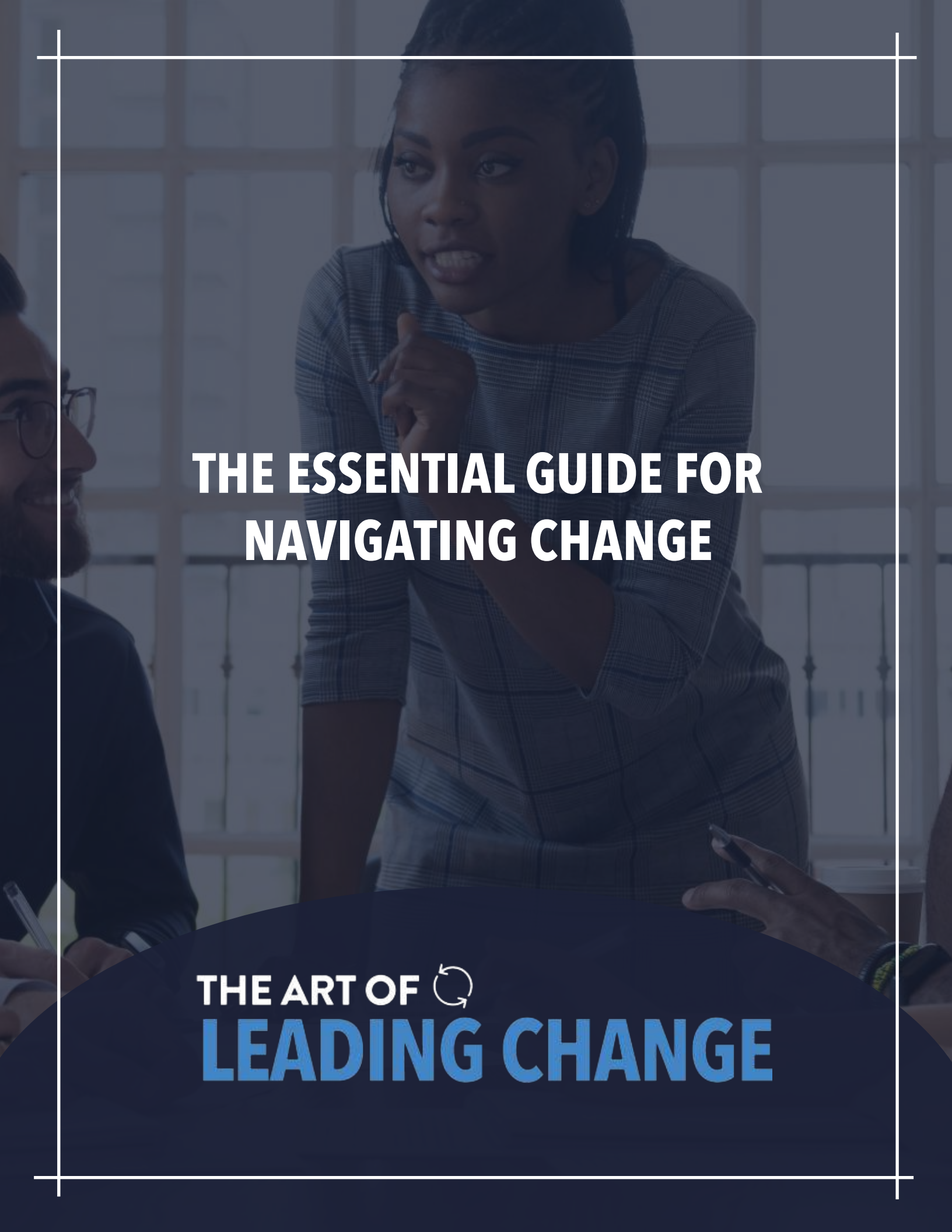


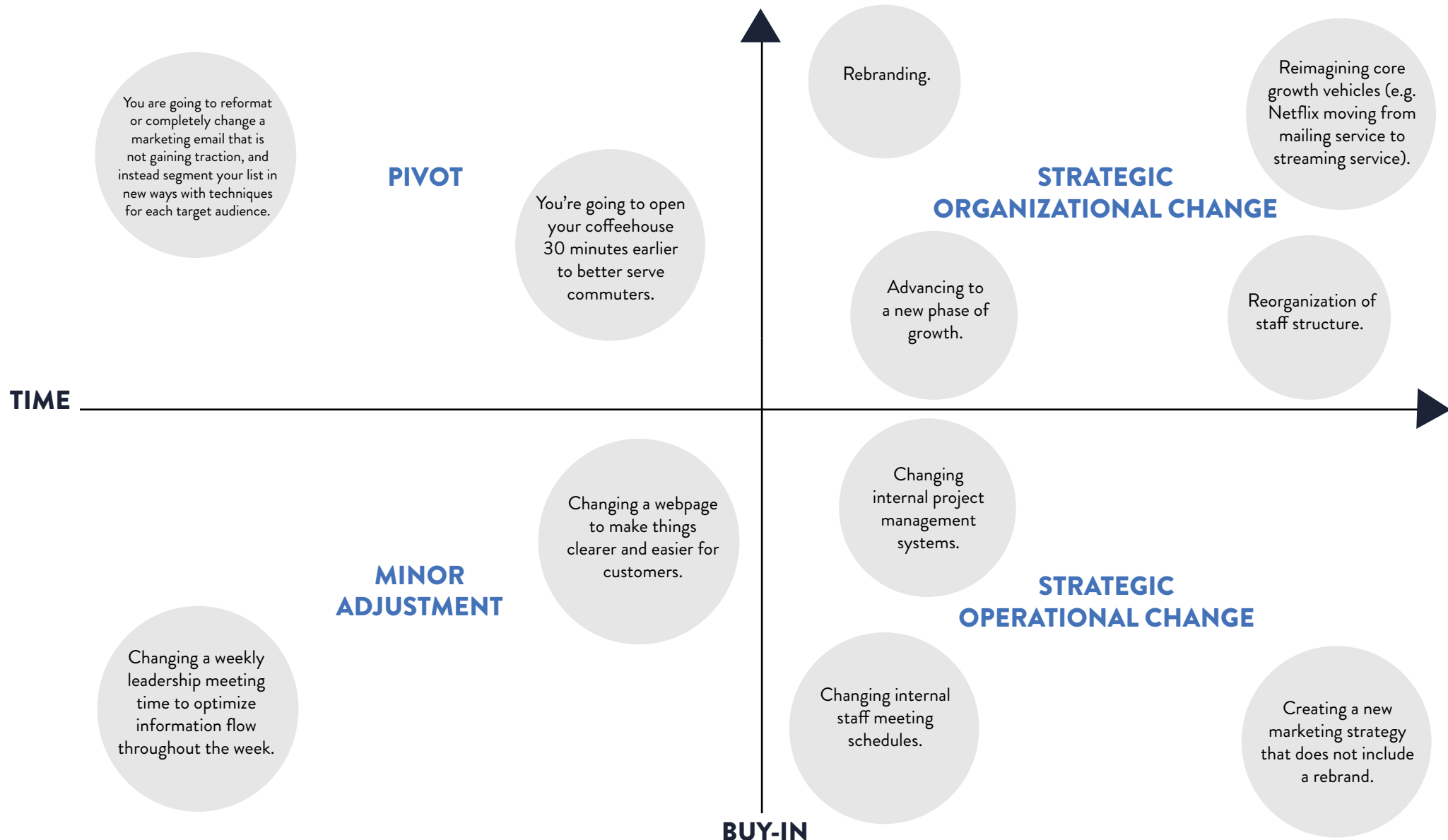


THE ESSENTIAL GUIDE FOR NAVIGATING CHANGE

THE ART OF 
LEADING CHANGE

The Essential Guide for Navigating Change

Use this matrix and the following checklists to help determine time and resources required when navigating change - from quick adjustments to large organizational changes.



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The Minor Adjustment Checklist

WHAT: A minor change that requires very little time and does not require widespread buy-in

TEAM BUY-IN: The senior leader, and potentially their immediate team.

☐ Determine who needs to be involved in making this decision. Gather that team.

Session 2 talks about who a leader needs beside them to lead change effectively).

☐ Evaluate by asking:

- What things are we currently doing that are working?
- What things are we currently doing that are not working?
- Why are those things working or not working?

☐ Identify measurable metrics to gauge effectiveness.

☐ Ideate possible solutions and make a decision.

☐ Implement the new change.

☐ Evaluate the change and adjust if necessary.

Session 3 of The Art of Leading Change walks through the details of the 30-day pivot which outlines ways to implement simple adjustments.

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The Pivot Checklist

WHAT: A quick change that requires additional buy-in from specific groups such as a department head who will implement the agreed upon change, or other key stakeholders like customers, key volunteers, or donors.

TEAM BUY-IN: The senior leader with their immediate team as well as key stakeholders on staff. Depending on the change, you may also consider inviting the input of your core.

☐ Determine who needs to be involved in the decision making process. For a quick pivot this will likely be the senior leader and their immediate team or department heads involved in carrying out the change. For help, sessions 2 and 5 discuss your teams and concentric circles of engagement.

Session 5 of The Art of Leading Change discusses the concentric circles that exist in any organization. The core is not a decision-making group, but the small group of people who will be implementing and carrying out the change.

☐ Gather the decision making group and begin evaluating by asking:

- What things are we currently doing that are working?
- What things are we currently doing that are not working?
- Why are those things working or not working?

Session 3 of The Art of Leading Change walks through the details of the 30-day pivot which outlines ways to implement simple adjustments.

☐ Identify measurable metrics of effectiveness.

☐ Ideate possible solutions and make a decision.

☐ Determine system and timeline for evaluation of the pivot.

☐ Implement the change.

☐ Re-gather decision makers and stakeholders to evaluate effectiveness of the pivot made and determine if further adjustments are needed.

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The Strategic Operational Change Checklist

WHAT: A larger change that requires lots of time but little buy-in. This type of change tends to be a change surrounding internal operations that in turn will passively influence external impact.

TEAM BUY-IN: Senior leader and their immediate team as well as impacted staff and stakeholders.

- ☐ Determine your decision making team.
- ☐ Gather your team. Consider if an off-site retreat is the best option to cover all of the ground needed.
- ☐ Refresh your team on your mission, vision, and values.
- ☐ Ideate and dream about what could be possible. Blue sky.
- ☐ Conduct a SWOT Analysis.
- ☐ Brainstorm solutions.
- ☐ Determine specific change and measurement of success with check-in and evaluation systems.
- ☐ Map out timeline and communication roll-out plan considering your 5 concentric circles of stakeholders and appropriate levels of communication for each.
- ☐ As part of your communication plan, create an FAQ and equip your team with answers they will be asked as well as sample responses. Remember attack problems not people!
- ☐ Implement the change.

Session 4 of The Art of Leading Change walks through a strategic off-site structure for leading large-scale change.

Strategic Operational Changes likely only directly impact your staff. There is no need to communicate large internal changes publicly, though you may need to consider stakeholders such as board members, key volunteers, etc. Session 5 covers each group in depth and the degree to which they should be invited to provide feedback.

For help navigating opposition to change, check out Session 6 of The Art of Leading Change.

The Essential Guide for Navigating Change

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The Strategic Operational Change Checklist (cont'd)

☐ Evaluate effectiveness on a regular basis and determine what adjustments and pivots should be made along the way.

- What things are we currently doing that are working?
- What things are we currently doing that are not working?
- Why are those things working or not working?
- Identify measurable metrics

☐ Offer updates to key stakeholders on results of the implemented changes at appropriate dates post-implementation.

The 30-day pivot from Session 3 is a great ongoing resource for adjusting large-scale change as needed.

The Essential Guide for Navigating Change

Use this matrix and the following checklists to help determine time and resources required when navigating change - from quick adjustments to large organizational changes.

The Strategic Organizational Change Checklist

WHAT: A large change that requires lots of time and lots of buy-in.

TEAM BUY-IN: Senior leader and their immediate team as well as impacted staff and stakeholders.

- ☐ Determine your decision making team.
- ☐ Gather your team. Consider if an off-site retreat is the best option to cover all of the ground needed.
- ☐ Refresh your team on your mission, vision, and values.
- ☐ Ideate and dream about what could be possible. Blue sky.
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- What things are we currently doing that are not working?
- Why are those things working or not working?
- Identify measurable metrics

The 30-day pivot from Session 3 is a great ongoing resource for adjusting large-scale change as needed.

☐ Offer updates to key stakeholders on results of the implemented changes at appropriate dates post-implementation.

☐ Celebrate great success stories as a result of changes made with your public.