

**PROPELLER**

# HOW TO AFFECT CHANGE WHEN YOU CAN'T SHARE WHAT'S COMING

[WWW.PROPELLERCONSULTING.COM](http://WWW.PROPELLERCONSULTING.COM)



# HOUSEKEEPING



## **MODERATORS**

Drew Monroe and Jenni Jayne



## **AUDIO & VIDEO DISABLED**

Audio & video will be disabled during presentation



## **POST QUESTIONS TO CHAT**

Post your questions in the chat – we will address at the end



## **WEBINAR IS RECORDED**

This webinar is being recorded and will be provided shortly afterwards via email







# RACHEL CROCKER

CHANGE MANAGEMENT PRACTICE DIRECTOR

- Native Oregonian
- Grew up on a cattle ranch
- Played tenor saxophone as a child

*“Human beings can get used to virtually anything, given plenty of time and no choice in the matter whatsoever.”*

**TOM HOLT**

# POLL #1

*What has your level of exposure  
been to personnel changes?*







HOW TO AFFECT CHANGE WHEN  
YOU CAN'T SHARE WHAT'S COMING

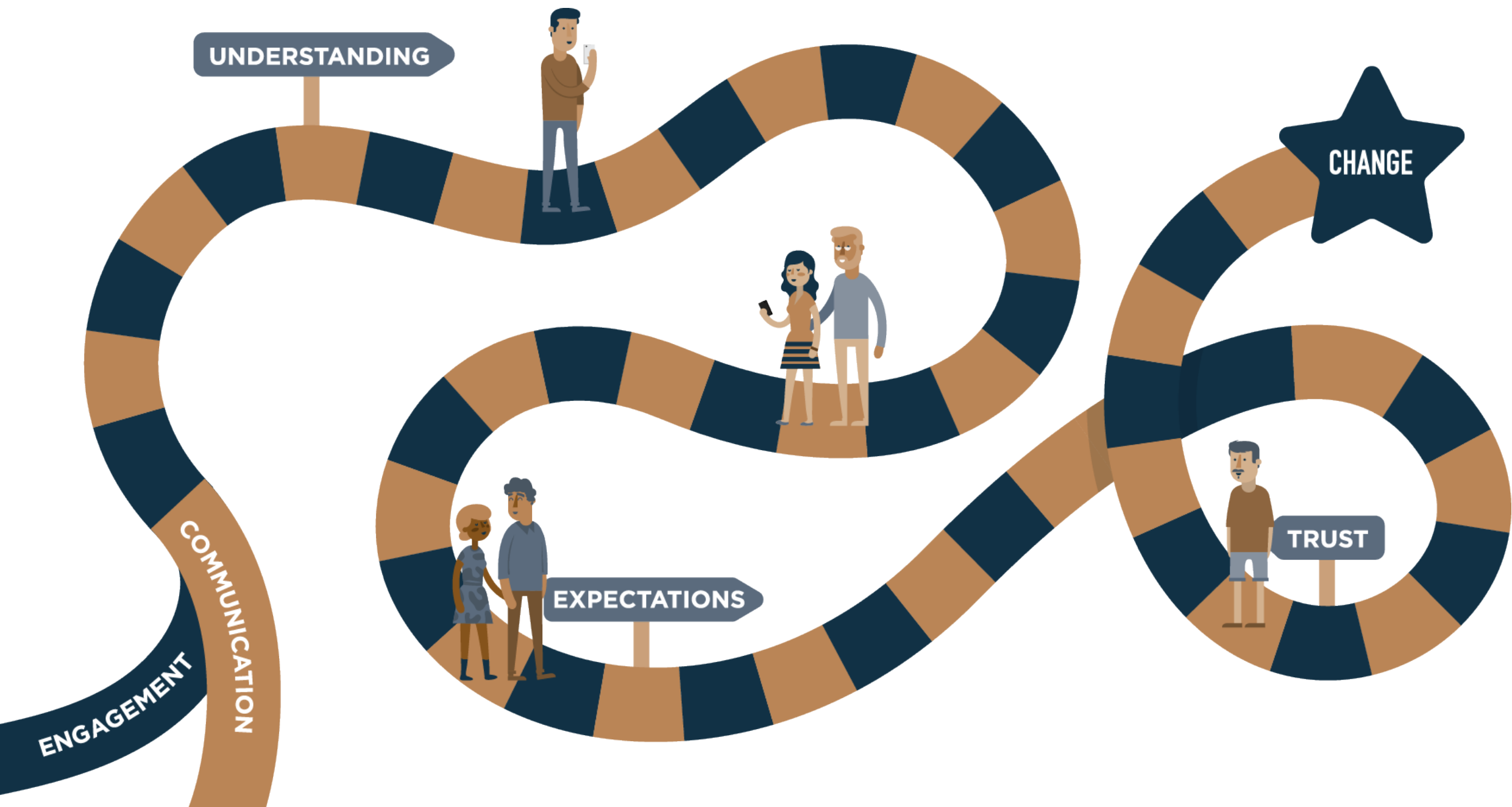
# FEATURES OF PERSONNEL CHANGES

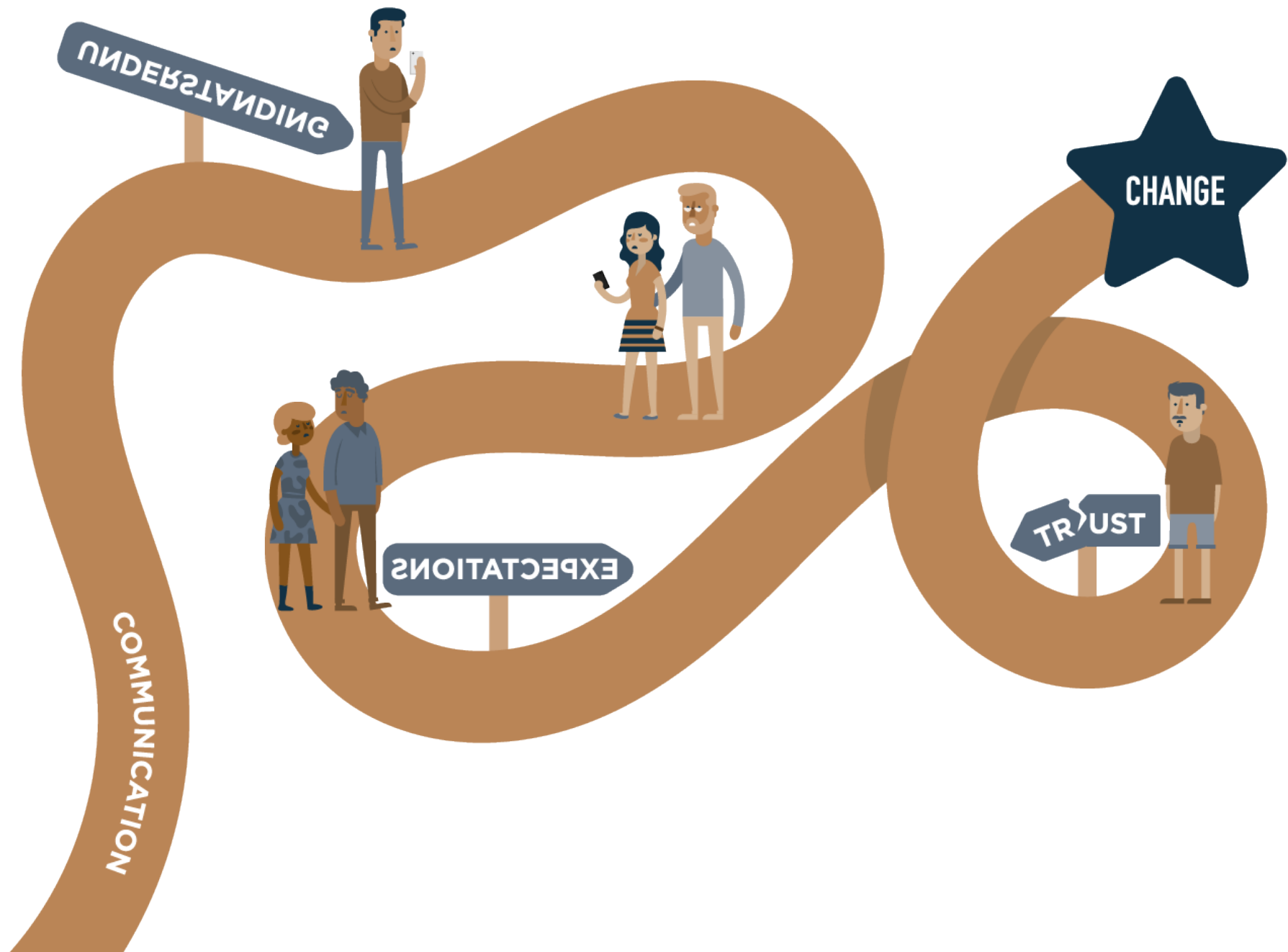
*Only Some Stakeholders  
Are Aware & Engaged*

*Transparency is Limited*

*Specific Outcomes Are Unknown*

*Large Disruption is Expected*









HOW TO AFFECT CHANGE WHEN YOU CAN'T SHARE WHAT'S COMING

# MEASURES OF SUCCESS



**DEVELOPING  
MEANINGFUL  
COMMUNICATION**



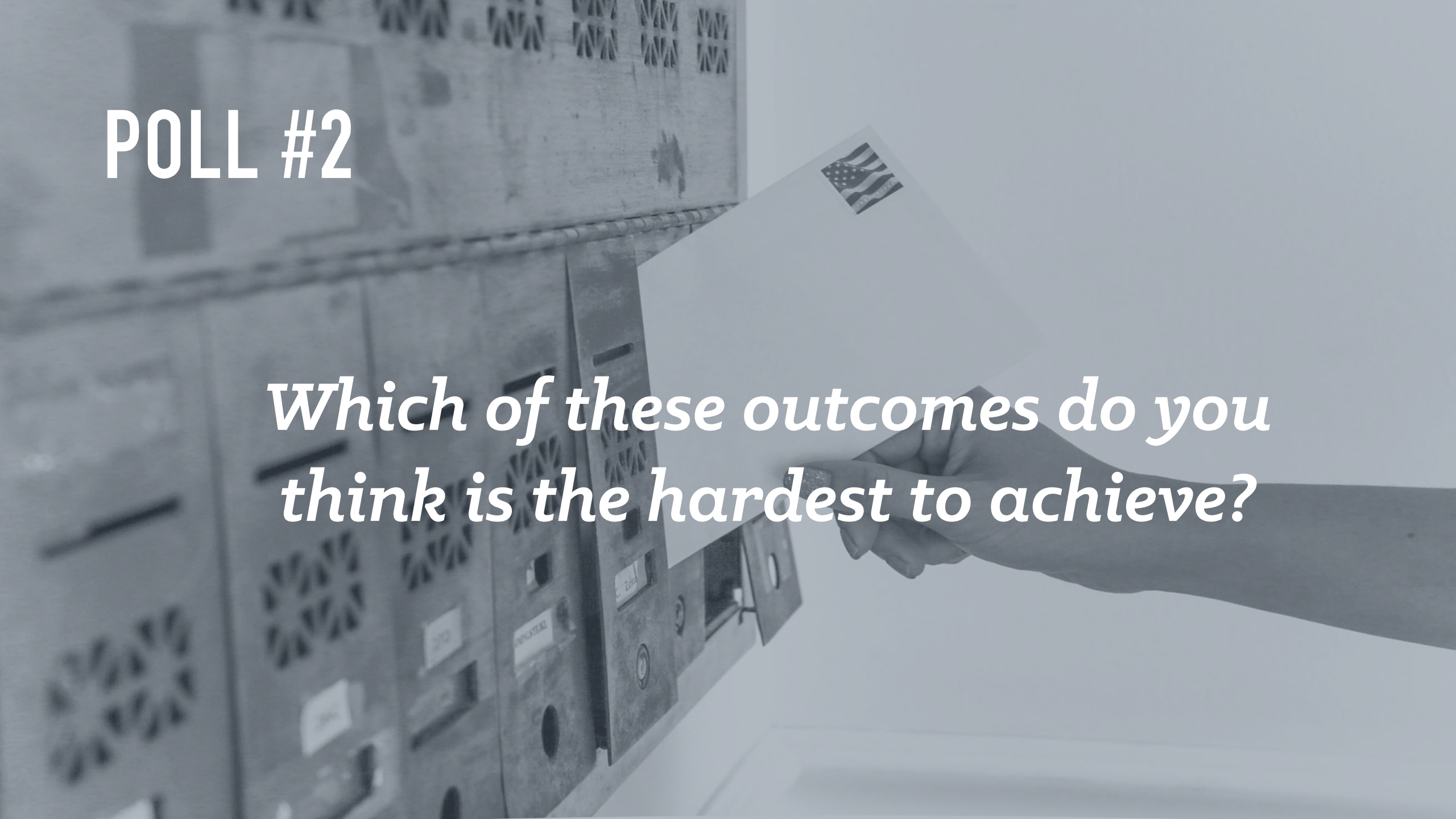
**BUILDING TRUST  
& MITIGATING  
DISRUPTION**



**ENABLING LEADERS  
FOR CHANGE**

# POLL #2

*Which of these outcomes do you think is the hardest to achieve?*





# CASE STUDY

*To better align resources and improve efficiency, a large retail clothing company decides to restructure.*



## IMPACT

A business unit of  
300 people



## RISK APPETITE

No business disruption  
can be allowed



## INTENDED OUTCOME

Redistribute human  
capital to other  
departments and groups



## MAIN CHALLENGE

No employees below a  
director level can be  
engaged with for planning





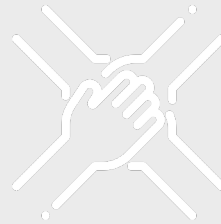


HOW TO AFFECT CHANGE WHEN YOU CAN'T SHARE WHAT'S COMING

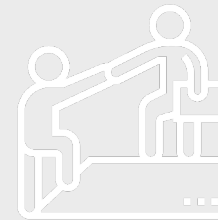
# MEASURES OF SUCCESS



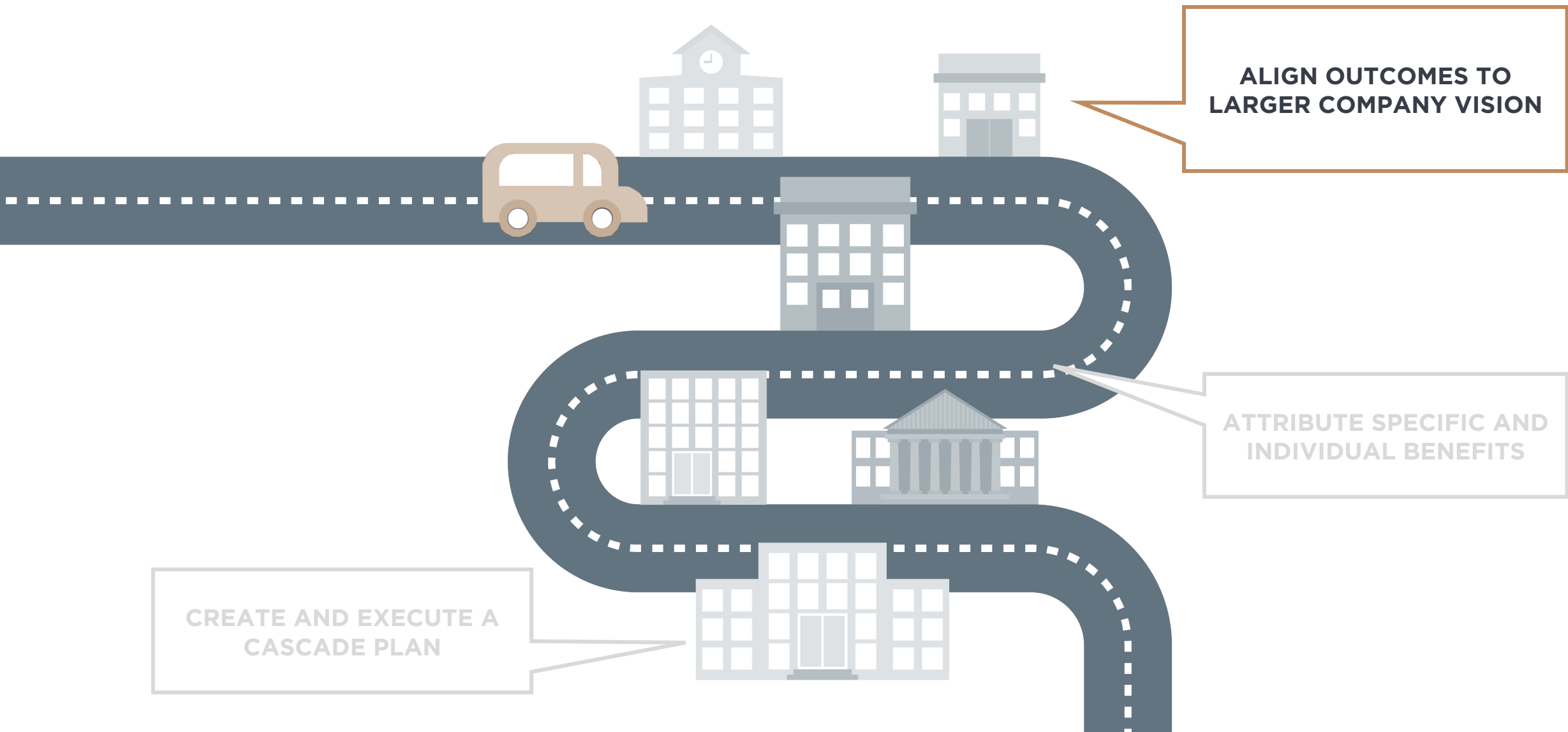
DEVELOPING  
MEANINGFUL  
COMMUNICATION

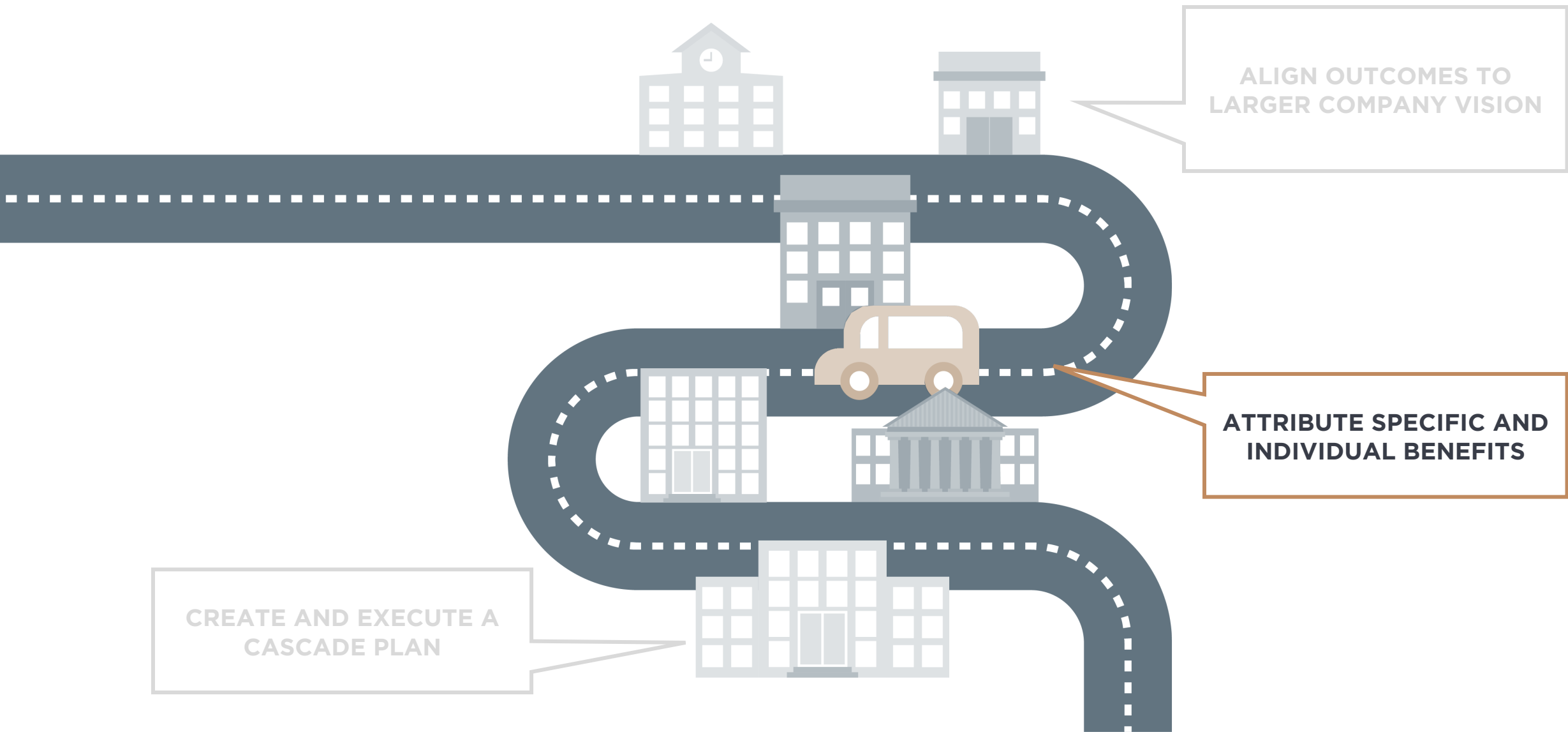


BUILDING TRUST  
& MITIGATING  
DISRUPTION

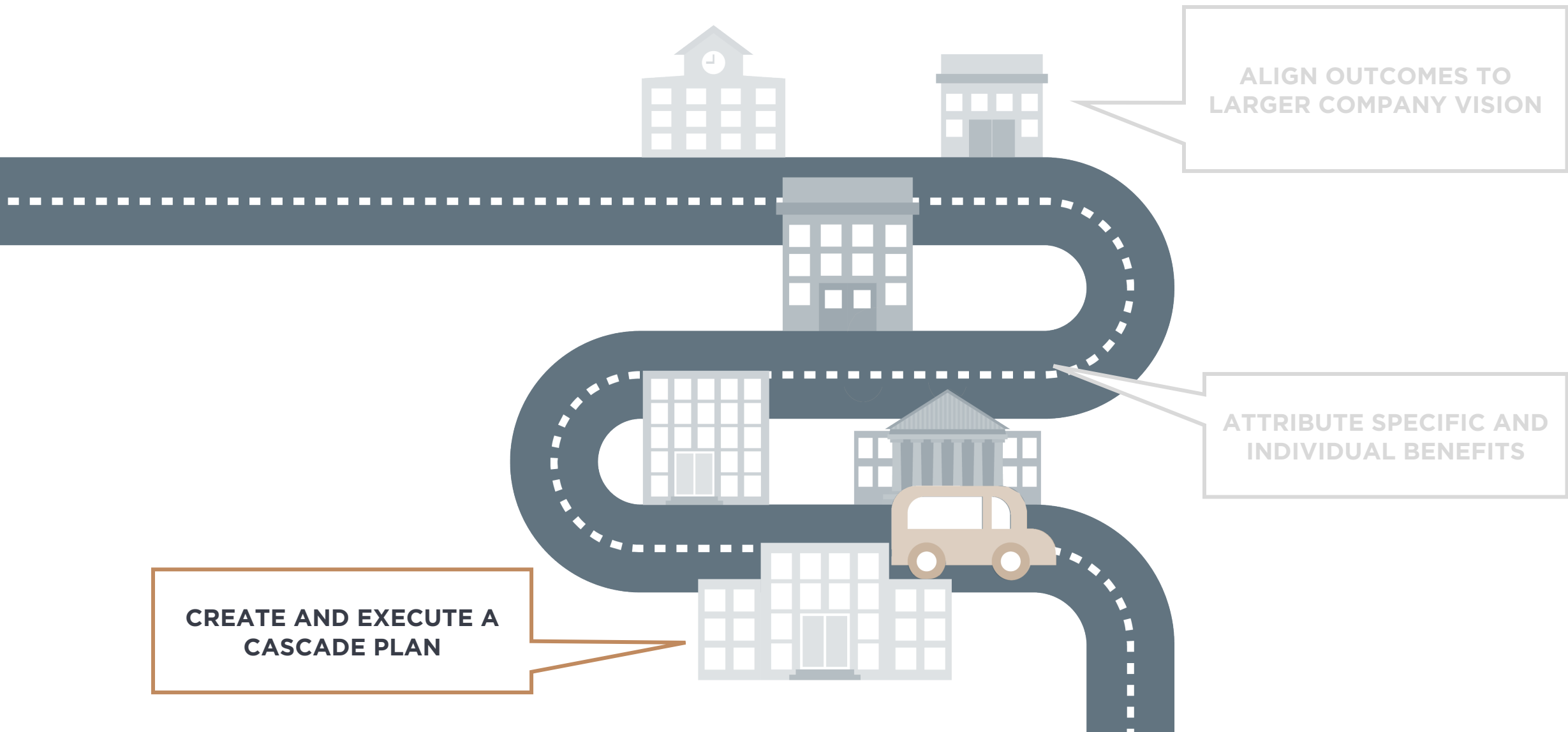


ENABLING LEADERS  
FOR CHANGE











HOW TO AFFECT CHANGE WHEN YOU CAN'T SHARE WHAT'S COMING

# MEASURES OF SUCCESS



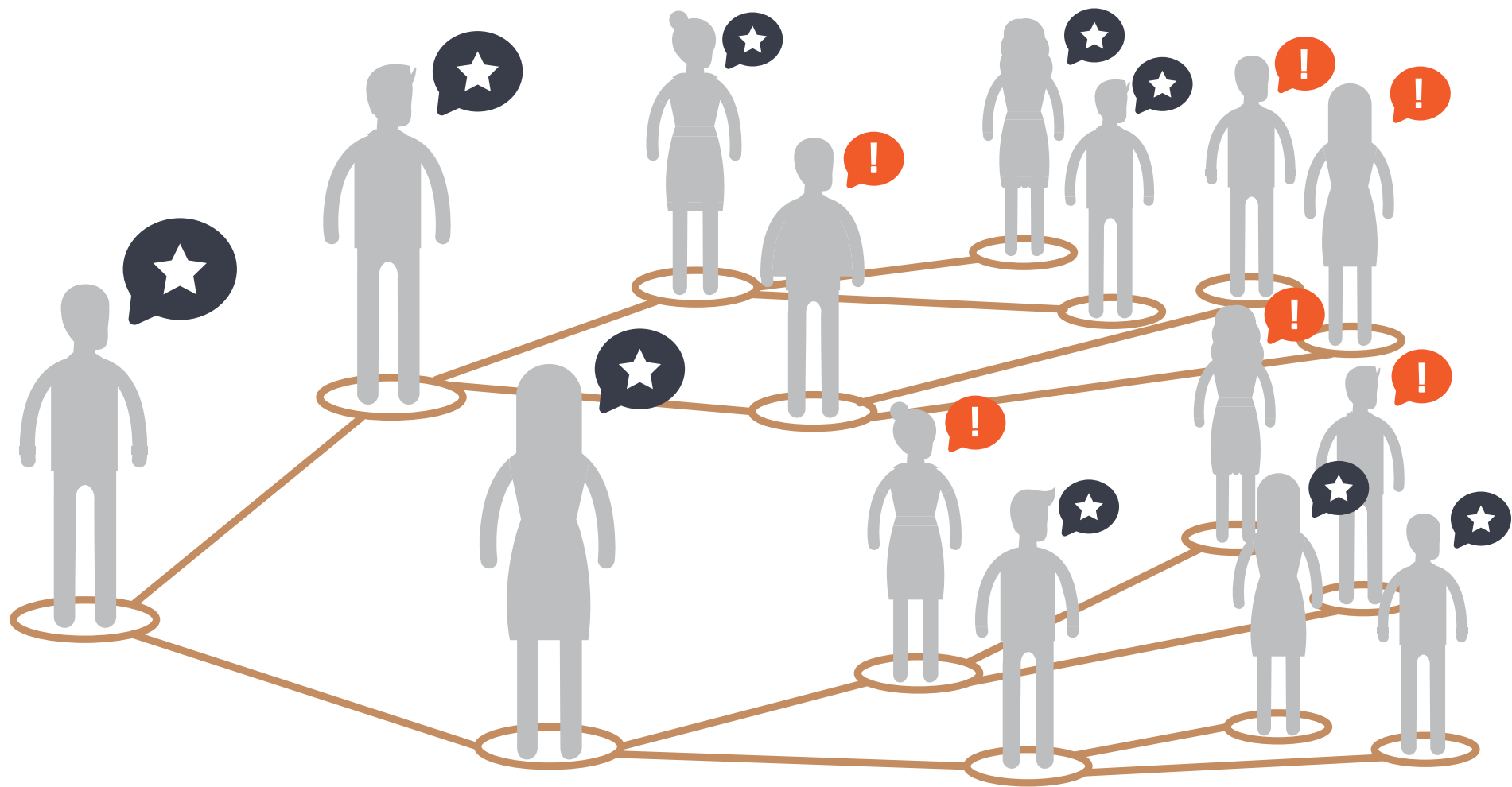
DEVELOPING  
MEANINGFUL  
COMMUNICATION

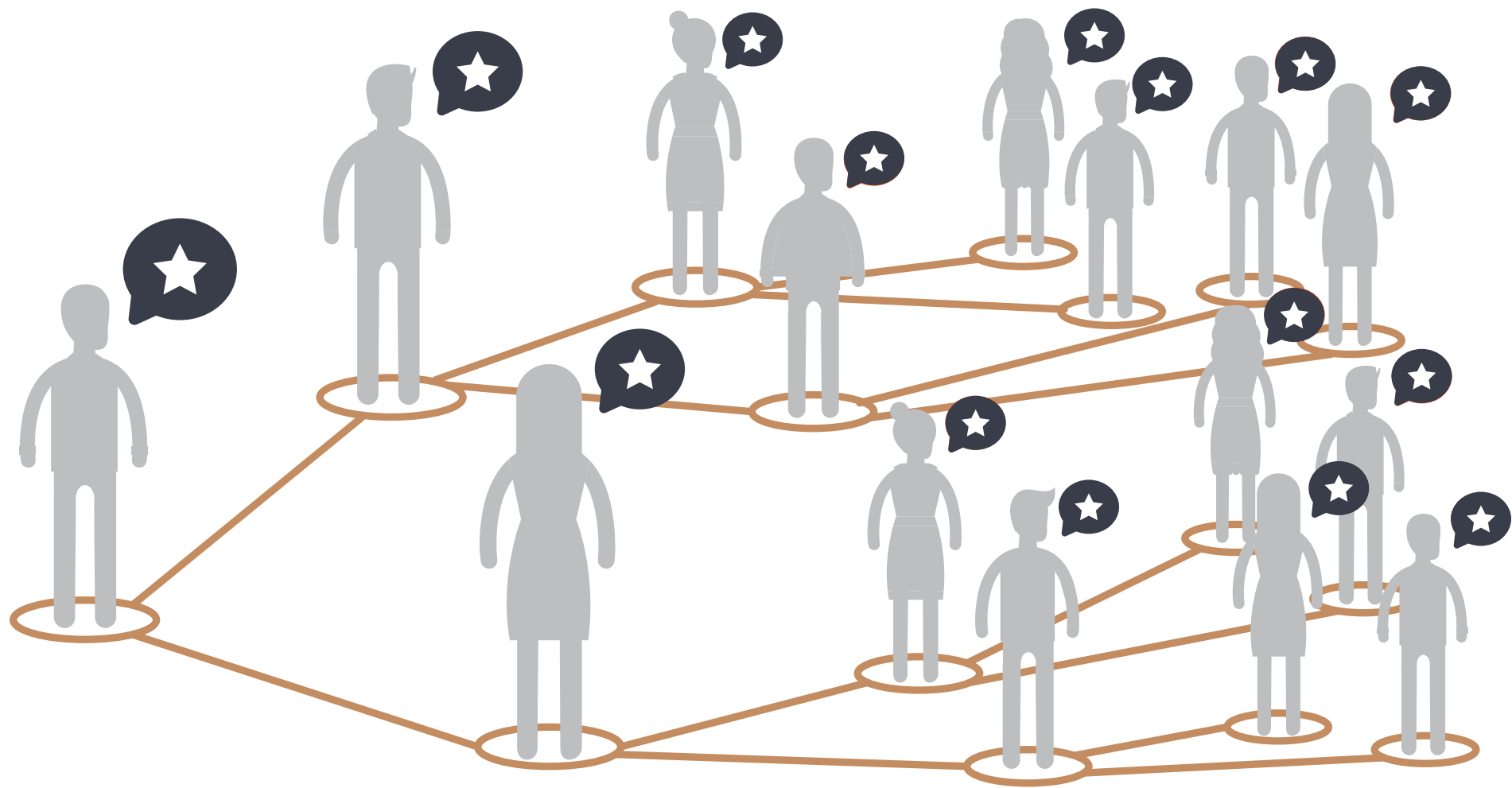


BUILDING TRUST  
& MITIGATING  
DISRUPTION



ENABLING LEADERS  
FOR CHANGE







LEVER 1:

## ROLES & RESPONSIBILITIES



LEVER 2:

## MANAGER MAPPING



LEVER 4:

## HANDOFFS



LEVER 3:

## DEADLINES & MILESTONES



# POLL #3

*What are some ways you've built trust  
when you can't share what's coming?*

**Post your answers in chat**

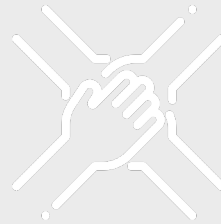


HOW TO AFFECT CHANGE WHEN YOU CAN'T SHARE WHAT'S COMING

# MEASURES OF SUCCESS



DEVELOPING  
MEANINGFUL  
COMMUNICATION



BUILDING TRUST  
& MITIGATING  
DISRUPTION



ENABLING LEADERS  
FOR CHANGE



**ASSESS LEADERSHIP  
READINESS**



**DETERMINE CRITICAL  
ASKS/INTEGRATION POINTS**

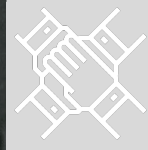


**CREATE A  
GO-LIVE TOOLKIT**





LEADER NAME	READINESS SCORE
SARAH	2
JIM	6
STEVE	7
MIKE	1
ELAINE	8
SUZANNE	9
MITCH	5
PAUL	3
AMANDA	4
LISA	2
ADAM	8
BETHANY	5
JEFF	6



ASSESS LEADERSHIP  
READINESS



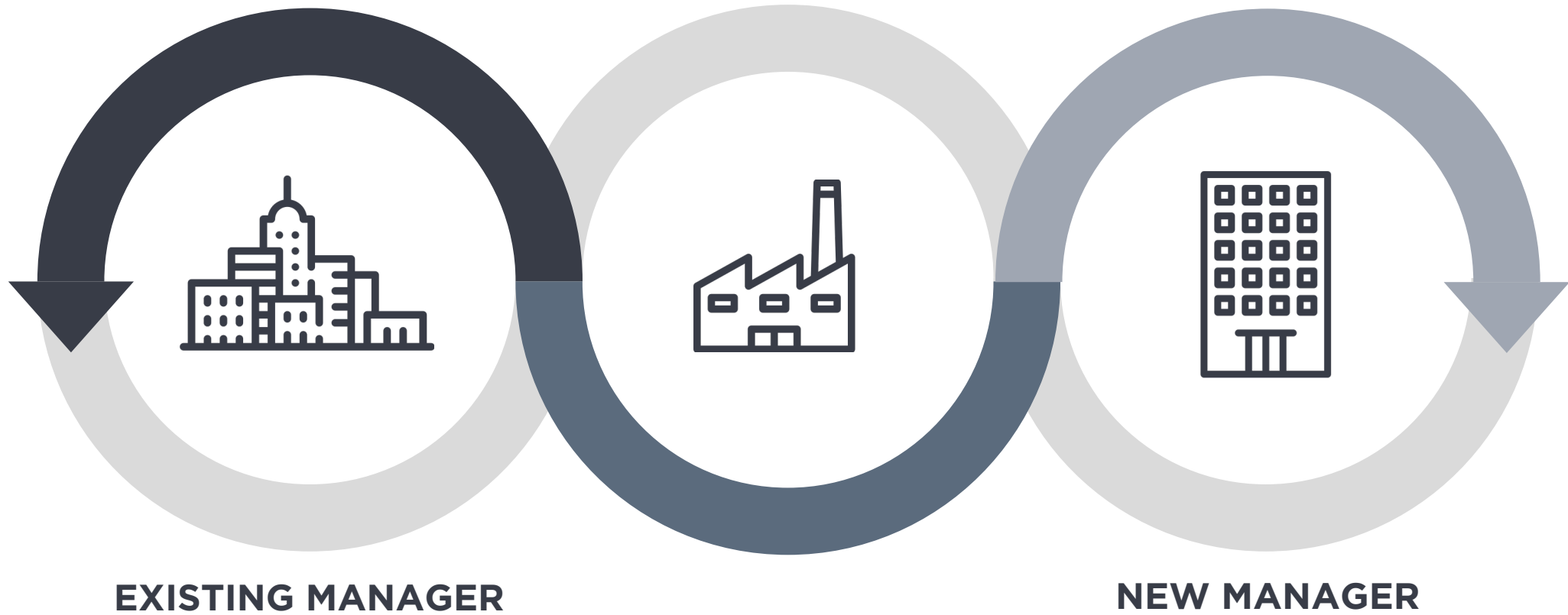
**DETERMINE CRITICAL  
ASKS/INTEGRATION POINTS**

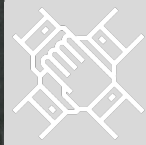


CREATE A  
GO-LIVE TOOLKIT



## TERTIARY INTERACTIONS





**ASSESS LEADERSHIP  
READINESS**



**DETERMINE CRITICAL  
ASKS/INTEGRATION POINTS**



**CREATE A  
GO-LIVE TOOLKIT**



# 1 MANAGER TRAINING DECK

## TRAINING OBJECTIVES

COMMUNICATION PLAN GUIDES FOR MEETING WITH INDIVIDUALS	
NAME:	MEETING DATE / TIME:
REASON FOR SELECTION:	CHANGES / IMPACTS TO HIGHLIGHT:
ANTICIPATED RESPONSE:	MITIGATING TACTICS:

### HOW TO USE THIS TOOLKIT

Includes an overall section on the project strategy and intended outcomes

**THIS TOOLKIT WILL PROVIDE YOU WITH THE RESOURCES TO SUPPORT THIS TRANSITION**

PURPOSE	CONTENT	NAVIGATION
This activation toolkit is designed to empower you to proactively lead and engage your employees through change. This toolkit serves as a resource for you and your team.	This toolkit is a resource for you and contains information, guidelines, timelines, scripts, and tips. Due to the sensitive nature of this content, please do not forward to anyone without discussion and consent.	Each section includes a timeline to show you where you are in the process. The bar at the bottom of each page shows you where you are in the toolkit.

### ACTIVATION TIMELINE

1. PREPARE The Process	2. ANNOUNCE Announce the Transition	3. TRANSITION Transition to the New Process
<b>PREPARE</b> What You Need to Do: <ul style="list-style-type: none"><li>Attend all prep meetings</li><li>Review all relevant scripts</li><li>Set meeting times 1 day before announcement</li></ul>	<b>ANNOUNCE</b> What You Need to Do: <ul style="list-style-type: none"><li>Conduct 1:1 conversations</li><li>Talk with your team</li><li>Support transition workshops with HR</li></ul>	<b>TRANSITION</b> What You Need to Do: <ul style="list-style-type: none"><li>Be visible for your team</li><li>Talk with your team</li><li>Support transition workshops with HR</li></ul>

### ANNOUNCE: GUIDING PRINCIPLES

- Help the organization stay focused by following key messages provided in this toolkit. Be consistent!
- If you don't know or can't answer questions, don't speculate. Let others know you'll provide more details when you are able.
- Remember you are ahead of the curve when it comes to knowledge about this topic. It's important to demonstrate patience, empathy and understanding.
- Others are following your words and actions closely. Be a visible and accessible leader. Others will follow your lead.

### HAVING CONVERSATIONS

TIPS

**WHAT TO SAY**

- I appreciate that this may be a difficult message for you.
- Please take time to reflect on what we've talked about.
- I don't know the answer, but I can find out.

**WHAT NOT TO SAY**

- I know how you feel.
- I'm sure it will work out.
- Let me see what I can do for this.

# 2 MANAGER TOOLKIT



### HOW TO USE THIS TOOLKIT

Includes an overall section on the project strategy and intended outcomes

**THIS TOOLKIT WILL PROVIDE YOU WITH THE RESOURCES TO SUPPORT THIS TRANSITION**

PURPOSE	CONTENT	NAVIGATION
This activation toolkit is designed to empower you to proactively lead and engage your employees through change. This toolkit serves as a resource for you and your team.	This toolkit is a resource for you and contains information, guidelines, timelines, scripts, and tips. Due to the sensitive nature of this content, please do not forward to anyone without discussion and consent.	Each section includes a timeline to show you where you are in the process. The bar at the bottom of each page shows you where you are in the toolkit.

### ACTIVATION TIMELINE

1. PREPARE The Process	2. ANNOUNCE Announce the Transition	3. TRANSITION Transition to the New Process
<b>PREPARE</b> What You Need to Do: <ul style="list-style-type: none"><li>Attend all prep meetings</li><li>Review all relevant scripts</li><li>Set meeting times 1 day before announcement</li></ul>	<b>ANNOUNCE</b> What You Need to Do: <ul style="list-style-type: none"><li>Conduct 1:1 conversations</li><li>Talk with your team</li><li>Support transition workshops with HR</li></ul>	<b>TRANSITION</b> What You Need to Do: <ul style="list-style-type: none"><li>Be visible for your team</li><li>Talk with your team</li><li>Support transition workshops with HR</li></ul>

### PREPARE FOR CHANGE

- LEARN ABOUT WHAT IS CHANGING
- REVIEW THE TIMELINE FOR WHEN CHANGES WILL OCCUR
- REVIEW BUSINESS CONTINUITY PLANS
- UNDERSTAND THE BEST WAYS TO COMMUNICATE WITH YOUR TEAM
- UNDERSTAND YOUR ROLES & RESPONSIBILITIES
- ASSESS YOUR READINESS FOR CHANGE

### WHAT IS CHANGING

**WHAT WILL LOOK DIFFERENT**

Includes all critical pillars of the changed model, including a description of what this will look like

**WHAT THIS WILL GET US**

Get out the benefits of the change, both on an individual level of roles, and on an organizational level

**HOW WE'RE APPROACHING THE WORK**

Get strategy pillars or approach here

### HAVING CONVERSATIONS

EMOTIONAL RESPONSES

If employees become emotional...

- Acknowledge what you see or hear
- Provide a brief response
- Focus on the future

REACTION	RESPONSE	FOCUS
TEARS	Ask if they'd like a few moments alone and let them know you'll connect shortly.	Focus on the next steps and help. "Let's look at what we've put in place to help you through this difficult time."
ANGER	Repeat the information if necessary and let them know it was a difficult decision.	Focus on what's next. "Let's focus on what we've put together to help you and what your next steps are for today."
SHOCK	Move forward gently.	Move forward. "This has been reviewed by business leadership and HR, and I believe any concerns you have can be met today."

ESTD



2012

# PROPELLER

## ACTIVATION TOOLKIT GUIDE

[WWW.PROPELLERCONSULTING.COM](http://WWW.PROPELLERCONSULTING.COM)

# ACTIVATION TIMELINE

## 1. PREPARE FOR THE CHANGE

### PREPARE

#### What You Need to Do:

- Attend all prep meetings
- Rehearse all relevant scripts
- Set meeting times 1 day before announce dates

#### What You Need to Do:

- *Make sure to be consistent with messaging*
- *Include specific diction and examples*

## 2. ANNOUNCE THE CHANGE + MANAGE THE TRANSITION

### ANNOUNCE

#### What You Need to Do:

- Conduct 1:1 conversations
- Talk with your teams
- Support transitions

#### What You Need to Do:

- *Include specifics on how the change will impact employees in 1:1s*
- *Remember to show empathy and recognize it's normal to experience a sense of loss*

## 3. TRANSITION TEAM BUILDING AND RAMP DOWN/UP

### TEAM

#### What You Need to Do:

- Be visible for your team
- Talk with your teams
- Support transition workshops with GPL

#### What You Need to Do:

- *Focus on shared goals*
- *It's a marathon, not a sprint!*
- *Focus on the purpose of the team*
- *Highlight brand and/or company strategy*

INTRO

PREPARE

ANNOUNCE

TRANSITION

RESOURCES

# PREPARE FOR CHANGE

- ☐ LEARN ABOUT **WHAT** IS CHANGING
- ☐ REVIEW THE TIMELINE FOR **WHEN** CHANGES WILL OCCUR
- ☐ REVIEW **BUSINESS CONTINUITY PLANS**
- ☐ UNDERSTAND THE **BEST WAYS TO COMMUNICATE** WITH YOUR TEAM
- ☐ UNDERSTAND **YOUR ROLES & RESPONSIBILITIES**
- ☐ ASSESS YOUR **READINESS FOR CHANGE**

INTRO

PREPARE

ANNOUNCE

TRANSITION

RESOURCES



# WHAT IS CHANGING

## WHAT WILL LOOK DIFFERENT

*Include all critical pillars of the change and tangible examples of what this will look like*



## WHAT THIS WILL GET US

*List out the benefits of the change, both on an individual level (if scalable), and on an organizational level*

## HOW WE'RE APPROACHING THE WORK

*List strategy pillars or approach here*

INTRO

PREPARE

ANNOUNCE

TRANSITION

RESOURCES

# HAVING CONVERSATIONS

## EMOTIONAL RESPONSES

*If employees become emotional...*

1. Acknowledge what you see or hear
2. Provide a brief response
3. Focus on the future

REACTION	RESPONSE	FOCUS
TEARS	Ask if they'd like a few moments alone and let them know you'll return shortly.	Focus on the next steps and help: <i>"Let's look at what we've put in place to help you through this difficult time."</i>
ANGER	Repeat the information if necessary and let them know it was a difficult decision.	Focus on what's next: <i>"Let's focus on what we've put together to help you and what your next steps are for today."</i>
SHOCK	Move forward gently.	Move forward: <i>"This has been reviewed by business leadership and HR, and is final. Are you ready to focus on next steps?"</i>

INTRO

PREPARE

ANNOUNCE

TRANSITION

RESOURCES

# HAVING CONVERSATIONS

## TIPS

### WHAT TO SAY

*I appreciate that this may be a difficult message for you.*

*Please take time to reflect on what we've talked about.*

*I don't know the answer, but I can find out.*

### WHAT NOT TO SAY

*I know how you feel.*

*I'm sure it will work out.*

*Let me see what I can do to fix this.*

INTRO

PREPARE

ANNOUNCE

TRANSITION

RESOURCES



HOW TO AFFECT CHANGE WHEN YOU CAN'T SHARE WHAT'S COMING

# ACTIVATION TOOLKIT GUIDE — DOWNLOAD LINK IN CHAT





HOW TO AFFECT CHANGE WHEN YOU CAN'T SHARE WHAT'S COMING

# MEASURES OF SUCCESS



**DEVELOPING  
MEANINGFUL  
COMMUNICATION**



**BUILDING TRUST  
& MITIGATING  
DISRUPTION**



**ENABLING LEADERS  
FOR CHANGE**



HOW TO AFFECT CHANGE WHEN  
YOU CAN'T SHARE WHAT'S COMING



# QUESTIONS?





# PROPELLER

*Consultants, Fixers, Change Makers*



**RCROCKER@PROPELLERPDX.COM**

## **PORTLAND**

**info@propellerpdx.com**

**503.946.1505**

## **SAN FRANCISCO + SILICON VALLEY**

**info@propellersfo.com**

**415.268.0356**

## **DENVER**

**info@propellerden.com**

**303.306.8116**

**WWW.PROPELLERCONSULTING.COM**