

The 7 Skills of Successful Change Agents



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1. Goal: want the attendees to understand the skills that successful change agents possess
2. Approach: review each skill, explain the pitfalls if one lacks the skill, then get a chance develop personal strategies for how they will practice the 7 skills, going forward



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Definition of change: people moving from what they know how to do today, to what you want them to do in the future.

Change, and projects, don't happen with just one person. It takes a **team**.

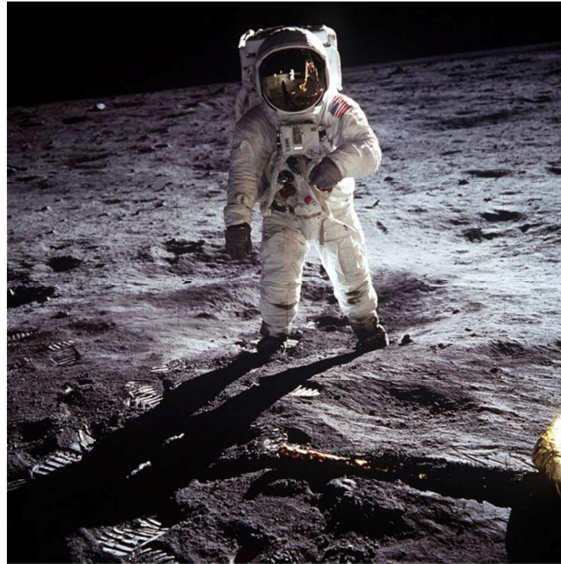
Your project team will need people who have demonstrated the ability to lead and drive organizational change – change agents. The goal is to create a self-sustaining change that will last after the project team disbands, which will happen once the change is operational.

As project management professionals, you need to understand the 7 skills that all successful change agents possess and the pitfalls you will encounter if your project team lacks those skills.

Without people with the capabilities and attitudes to ensure a successful outcome, your project will fail!

This is why we are talking about change agent skills.

Let's look at an example.



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During a visit to the NASA space center in 1962, President John F. Kennedy noticed a janitor carrying a broom. He interrupted his tour, walked over to the man and said, "Hi, I'm Jack Kennedy. What are you doing?"

"Well, Mr. President," the janitor responded, "I'm helping put a man on the moon."

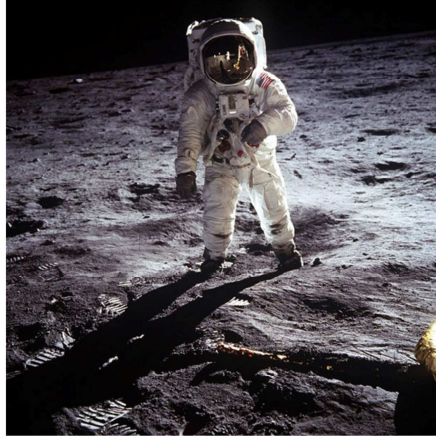
To most people, this janitor was just cleaning the building.

That man saw himself, not just as a janitor, but as a member of the NASA team and he was right, he was helping to put a man on the moon.

No matter how large or small your role, you are contributing to the larger change happening within your business and your organization.

That janitor knew that he was contributing to NASA's overall mission.

Do People Feel Valued?



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Why did I bring up this example?

If you don't understand how people feel about their job, you may direct your energy and resources inappropriately.

What makes people happy at work? What influences them?

Change agents need to be able to motivate others to get on board with a change, and to persist despite the resistance that will naturally arise when you ask people to do something different.

When people feel valued, respected, and important, they are motivated to participate. You can create the best plan for change, yet for it to work, you must be able to motivate people to join in.

Who is a Change Agent?



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Change agent, a person in the trenches who has the passion to make change work and to maintain it long term.

As change management professionals, you need to be able to identify the contributions that each individual in your organization makes and to use their natural enthusiasm and sense of ownership to drive change. You are the coaches and cheerleaders to guide your team through the steps they need to take to adopt the change.

Let's discuss the 7 most critical aspects of successful change agents...

#1 Envision What is Possible



- Think differently
- Challenge assumptions
- Brainstorm new ideas

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It will be critical that the people who participate on the change team do not limit themselves to what exists today or to how the company “has always done things.” The change team is required to think differently than how your company previously approached problems. The change team must challenge assumptions that will get people out of their comfort zones and therefore thinking about ways to tackle the business situation they now find themselves in.

Thinking about what is possible is a fabulous way to get your change agents energized about the fun and creative ways they will deliver change in your organization!

#1 Envision What is Possible



- Think differently
- Challenge assumptions
- Brainstorm new ideas

Limited to today's constraints

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Without this skill:

Your company's future state is limited to what constrains the organization today.

#1 Envision What is Possible

Apple "Think different"



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From the Apple watch I am wearing to the smartphone in front of me, I can't think of a better example of envisioning what is possible than Apple.

<<Read text from the 1997 Think different ad>>

#1 Envision What is Possible



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Exercise: Your turn

- Think differently
- Challenge assumptions
- Brainstorm new ideas

Exercise: how will you develop this change agent skill? How will you get people out of their comfort zones and open to taking risks beyond what they know today (or has worked in the past)?

What can you say? What actions will you take?

#2 Ask Powerful Questions



OK questions:

- Closed-ended: "Is the project plan OK?"
- Rarely yield any insight

Powerful questions:

- Open-ended: "Tell me about the most successful project you worked on. What was different about that project?"
- Invite reflection and start a discussion

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OK questions invite a "yes or "no" response.

A powerful question is an open-ended one. When subject matter experts and other employees provide feedback and express challenges with adopting the change, the change team needs to delve to make sure they truly understand the heart of the problem—not just the symptoms.

Powerful questions:

- Tell me about your challenges in the past with adopting a change and how you or your team handled them.
- Tell me about the people in your organization who are successful at adopting change.

By asking powerful questions you may unearth things that people don't want to talk about, but that you will need to know in order to make sure your project is successful.

#2 Ask Powerful Questions



Powerful questions:

- Open-ended: "Tell me about the most successful project you worked on. What was different about that project?"
- Invite reflection and start a discussion

**React to symptoms,
not the root cause**

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Without this skill:

Change team will react to symptoms, not the root cause. The change you create may not solve the real problem that your company faces.

#2 Ask Powerful Questions

Consulting clients' business needs



Stated problems: poor documentation or poor performers

Root causes: unclear roles and responsibilities, lack of training, culture of fear...

Address the root cause, not the stated problem

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In 100% of my consulting engagements, the business problem I was hired to address was not the business problem we ended up tackling. Once I am at the client site and start engaging employees, that is when I find out that the stated business problem is just the tip of the iceberg.

Have anyone else here encountered the same thing?

Often when I am tasked with developing a consistent business requirements practice, or improve the performance of an underperforming project management office, the real problem is addressing the end to end software development life cycle, clarifying roles and responsibilities, providing consistent feedback and training to the staff, and addressing a culture so that people feel comfortable speaking up if they don't know how to do something.

In order to achieve the goal (better documentation, more

engaged and better performing staff), we need to address the root cause.

#2 Ask Powerful Questions



Exercise: Your turn

Powerful questions:

- Open-ended: "Tell me about the most successful project you worked on. What was different about that project?"
- Invite reflection and start a discussion

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Exercise: how will you develop this change agent skill? What can you say? What actions will you take?

#3 Listen Actively



- Restate what you heard
- Clarify
- Show empathy

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The change team must demonstrate that they are interested in feedback from subject matter experts and other employees. Active listening lets people know that the change team is seeking to truly understand others' perspectives.

The steps for active listening are:

1. Restate what you heard: Am I correct that the main challenge with the change is ...?
2. Clarify: What is the biggest concern or issue that you feel we need to address immediately?
3. Show empathy: It sounds like this has been a very frustrating experience. I know that change can be hard. Without naming names, have you ever worked on a project where you didn't trust that the leaders really heard your concerns? Even with active listening, if **you do not take action it will lead the distrust.**

#3 Listen Actively



- Restate what you heard
- Clarify
- Show empathy

**Mistrust of the
change team**

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It is not the responsibility of the impacted employees to reach out to the change team and say why employees don't want to change. It is up to the **change team** to actively seek feedback and to consciously listen so you can hear what's really going on. This way you can determine what must happen in order for people to become willing to adopt the change.

Without this skill:

Mistrust of the change team and the change by owners, subject matter experts, and other impacted employees
If people don't believe that you have heard them and understand what THEY need in order to be successful, they will not be eager to jump on board the change!

#3 Listen Actively

Command & Control vs. Collaborative Culture

Command & Control	
1	I'm the boss so I make the rules
2	Your job is to do what I say
3	You'd better be careful not to make a mistake, or cross me!
4	It's my way or the highway
5	Management knows best; makes decisions behind closed doors

Adapted from Liz Ryan for Forbes, "Command-and-Control Management is for Dinosaurs" © 2016

Up until now I have not spoken about culture and its affect on change. Your company's culture affects whether people's are willing to action or not as it relates to a change.

Do people feel that they will be rewarded for speaking up, or participating in change efforts? Are people rewarded for taking calculated risks? What about failure, is it OK to try something and not succeed?

If your organization is stuck in an old, command and control model, active listening is one way to start to break those habits.

But it will take strong sponsorship to make sure the culture change takes hold and sticks!

#3 Listen Actively



Exercise: Your turn

- Restate what you heard
- Clarify
- Show empathy

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Exercise: how will you develop this change agent skill? What can you say? What actions will you take?

#4 Welcome Other's Ideas



- Consider suggestions
- Say “yes” to beneficial ideas: creates more change agents
- Say “no thank you” to harmful ideas; explain why
- Treat everyone professionally and with respect

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As part of a change team you will be presented with other people's ideas and opinions on how to do things “better.”

Why would you pause and consider making a change based on somebody's suggestion? Well, because it might actually be a great idea—and the right answer will be to say “yes!”

Take a breath, think it through, and see if you can incorporate the suggestion into what you're doing. If you adopt and integrate, you've just created another change agent who is going to help you to drive the change.

If you conclude that the suggestion isn't beneficial and might harm what you're trying to accomplish, then it's time to stand your ground and say “No, thank you, but no.”

Whenever you say no, there is a very real possibility of alienating the person who made the suggestion. It will be important to say no in such a way that she understands the perspective of the change team and that she comes to understand the vision. It may come to the point where she could be a champion or a change agent, even after you've just shot down her idea.

Sometimes people can't be persuaded and you may have to agree to disagree. Just be sure you've made an effort to understand their perspective.

You cannot always act on people's suggestions. Explain why. They may not like the decision but if they respect you it will affect the outcome. In any case, treat people professionally and with respect.

#4 Welcome Other's Ideas



- Consider suggestions
- Say "yes" to beneficial ideas: creates more change agents
- Say "no thank you" to harmful ideas; explain why

Alienated employees

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Without this skill:

Impacted employees become alienated because they don't believe the change team understands the impact to their business unit (stakeholder). This can delay or even prevent the change from taking hold.

#4 Welcome Other's Ideas

Early Adopters vs. the Experts



"Assumptions section" compromise

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I was assigned to launch a standard business requirements process. These are the documents used in software development that state what the business needs a solution to do.

The challenge I had was there was a team who was willing to try the new approach, and to even test out our first templates. The methodology we were deploying said there should not be any assumptions in the document.

Assumptions, according to the experts, were really business requirements: staffing needs, training needs... according to the experts, anything normally put in the assumptions section of a business requirements document should really be in the requirements section, as we need to make sure the project's solution addresses those needs.

The early adopters, though, were not comfortable using a document that did not have an assumptions section.

Because the goal was to have a real team use the new approach and help us make sure the training and materials would work within the organization, I reached a compromise with the experts: we would leave the assumptions section in, and during the mentoring of the business analysts we would discuss anything written into the assumptions section to help the learners understand how these were really business requirements that should be in the main part of the document.

We ended up being able to get great feedback and some quick wins by welcoming the people who volunteered and by not dying on the sword for 1 section of a document.

#4 Welcome Other's Ideas



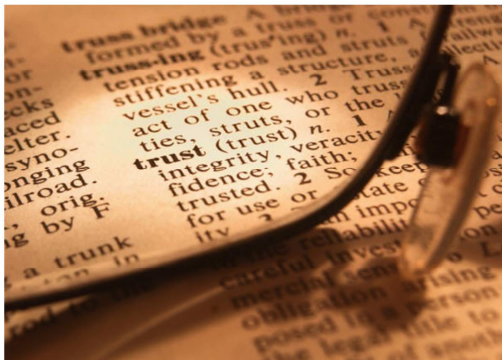
Exercise: Your turn

- Consider suggestions
- Say "yes" to beneficial ideas: creates more change agents
- Say "no thank you" to harmful ideas; explain why
- Treat everyone professionally and with respect

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Exercise: how will you develop this change agent skill? What can you say? What actions will you take?

#5 Develop Trust



- Show humility
- Listen actively
- Be open to new ideas
- Build professional, healthy relationships

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By encouraging the open, honest exchange of ideas while designing the change, you will engender goodwill among the people whose support you need to actively implement the change at the ground level.

In fact, the people impacted by the change may come up with better ways to effect a change that is faster and more efficient than what the change team has designed.

The only way to know if they have better ideas is to build professional, healthy relationships with people across your organization.

Talk about people assigned who can be “spared”

If people trust you, they will suspend disbelief. The change you are trying to make is not about you and your ego! It is about the change you want to see in your organization.

#5 Develop Trust



- Show humility
- Listen actively
- Be open to new ideas
- Build professional, healthy relationships

**Solution limited to
change team's knowledge**

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Without this skill:

Future state is limited to what the members of the change team know about how the organization works. If the team only knows about specific business units and how they function, the change might not work enterprise-wide.

#5 Develop Trust

Banking Software Vendor Change



"What was the most painful part of the last vendor change project?"

Planned & performed 3 rounds of data conversion

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I was tasked with changing a bank's software from one vendor provider to another. I was new to banking, and knew that this project HAD to hit it's date as the existing software contract would end and could not be extended.

I approached the Director of Operations and explained that I wanted to make sure this project was a success. Once she understood that I genuinely wanted to learn (humility), and was not asking difficult questions to point fingers or to make anyone feel that they had managed a previous project badly, I asked the question: What was the most painful part of the last vendor change project?

She told me that the biggest challenge was data conversion. To change software, the bank needed to map all of the types of checking accounts to new checking account types... same with savings accounts and other types of accounts. The last time the bank changed vendors, they found that the data was not clean, and spent months fixing bad data.

As a result of what we learned, we built 3 rounds of data conversion into our plan: 1 we expected to be poor and to find the majority of the data to be cleaned. A 2nd round found where there might be issues with the mapping of types of accounts to others, and a 3rd round that we expected to be clean.

The result? We converted vendors on time and balanced the multiple millions of dollars to the penny on the date of conversion.

Without this critical information from the Director of Operations, I would never have written this into my plan!

#5 Develop Trust



Exercise: Your turn

- Show humility
- Listen actively
- Be open to new ideas
- Build professional, healthy relationships

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Exercise: how will you develop trusted relationships? Think about the people you trust – what characteristics do they have that lead you to trust them? Example: do what they say...

How can you demonstrate that you are trustworthy and build strong, trusted relationships?

#6 Influence without Authority



- Explain the business problem
- Adapt based on the audience
- Be authentic
- Share stories
- Persist

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The majority of the change team will be composed of middle management or front-line employees, they will need to be able to persuade people at or above their hierarchical level in the organization to give change a try. The change teams' titles will not convince anyone that they have to listen to you. Therefore, change agents will have to use other ways to encourage, cajole, and otherwise win over people who will already have their own priorities and goals.

Nothing is above your pay grade when you are put on a change team! You are being asked to make change happen, and will need to be flexible to make it stick.

Back to the 1962 NASA visit by President Kennedy, the janitor knew he was playing a role in the change: "I'm helping put a man on the moon."

To most people, this janitor was just cleaning the building. That man saw himself, not just as a janitor, but as a member of the NASA team and he was right, he was helping to put a man on the moon.

No matter how large or small your role, you are contributing to the larger story unfolding within your organization.

And when your entire team embraces that type of attitude and belief system, incredible things happen.

#6 Influence without Authority



- Explain the business problem
- Adapt based on the audience
- Be authentic
- Share stories

Inability to persuade people to join the change

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Without this skill:

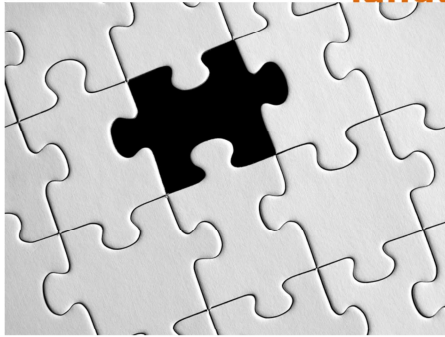
Change team is unable to persuade impacted employees to participate in the change.

Talk about CBA – benefits expected after the change!

If people do not participate in the change, you will not be able to achieve the benefits that were the reason your organization decided to make a change in the first place!

#6 Influence without Authority

8 most powerful words in the English language



I have a problem.

I need your help.

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My stepfather once told me that the 8 most powerful words in the English language are “I have a problem. I need your help.”

Starting a conversation with these 8 words spurs the person who hears them to take action because of the meaning inherent in the 2 sentences:

1. I have a problem. Something is not right. I am not blaming you for the problem nor trying to cause you to become defensive. The fact is, from my perspective, things are not going the way I had hoped or expected them to go.
2. I need your help. You are a capable person

who is in a position of power. I am coming to you because I know that you will have ideas to help me solve my problem. (Shows humility)

The best way to engender trusted relationships is to humbly acknowledge what is going on and to ask for the assistance you need to make things better.

Regardless of why or how the problem came about, the 8 words demonstrate that I am confident you, my fellow human being, have ideas or resources that will improve my situation.

After I have shared my perspective, we can work together to figure out the best way to point me in the right direction so we can all start feeling better very soon. And by working together, we are sure we will deliver the best possible solution.

#6 Influence without Authority



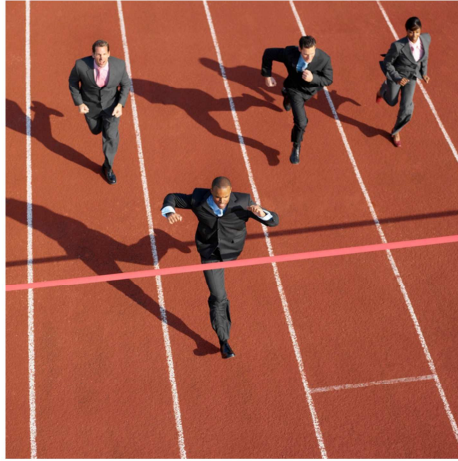
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Exercise: Your turn

- Explain the business problem
- Adapt based on the audience
- Be authentic
- Share stories
- Persist

Exercise: how will you develop this change agent skill? What can you say? What actions will you take?

#7 Focus on the Goal



- Recognition is not the goal
- Personal glory is not the goal
- Change **is** the goal

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You will always need charismatic change agents who can persuade and engage people, as well as get them on board with the change. Change agents put their reputations on the line every time they advocate for the change and persuade their peers to pay attention and give it a try.

A change agent needs to be able to recognize the whole of the group. She needs to understand when her individual contribution to the change needs to slip into the background so that the group can drive the change forward. A leader is absolutely needed to get things off the ground and moving, yet once there is forward momentum, leading from behind is a crucial and effective strategy.

Especially when there is resistance to change, it will be critical for the change agents to be able to take a step back and recognize the value the change will bring to the organization. Feedback from even close friends might become negative when issues arise or unforeseen challenges cause a plan to have to be reworked.

Throughout it all, a change agent needs to have the self-awareness to be able to take a breath and realize that what matters is the goal, not personal glory.

#7 Focus on the Goal



- Recognition is not the goal
- Personal glory is not the goal
- Change **is** the goal

**Isolation and distrust
of the change team**

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Have any of you ever worked for someone who was only in it for themselves? How did it make you feel?

We all love to be recognized. But that is not the goal. We want to hear that the change was successful and made such a difference. As change agents, we were a part of that change and did the right thing for our organization.

Without this skill:

Isolation and distrust of everybody on the change team. People catch on to this quickly.

#7 Focus on the Goal

Karen Pryor, "On Being a Changemaker"

People's Response to Change

Changemaker Response

© 2010, Karen Pryor Clicker Training, clickertraining.com

Karen Pryor is a behavioral biologist who is the author of more than a dozen books on modifying behavior.

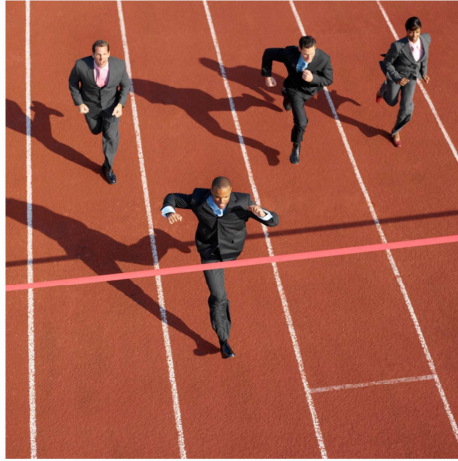
She is the creator of Clicker Training, a training system that isolates wanted behaviors and ignores the unwanted.

Though she specializes in animals, Karen also understands the human reaction to change.

Karen's blog post "On Being a Changemaker" is excellent because the 8 responses to change are the exact reactions we at wHolistic Change have experienced when driving change. I have a feeling these will be familiar to everyone in the room.

Highlight #7 – when people want to take credit (it was their idea to change...), let them!

#7 Focus on the Goal



Exercise: Your turn

- Recognition is not the goal
- Personal glory is not the goal
- Change **is** the goal

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Exercise: how will you develop this change agent skill? What can you say? What actions will you take?

7 Change Agent Skills

Skill	Worst Case Scenario
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True behavioral change happens because people recognize the value of making the change and then purposely decide to act. In order to convince people outside of your sphere of influence to change their behavior, you need to master the 7 change agent skills.

Questions?



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Now that I have shared the 7 skills of successful change agents with you, do you have any questions for me?

Thank You

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