



Facilitation Guide: Destination CRM

Short Version

Key Learning Points in Destination CRM

In the case scenario Destination CRM you have the possibility to train a team in managing, leading and handling the implementation process of a new CRM-system in a sales company with proud traditions and independent employees.

The participants must as middle-level managers make sure that the new CRM-system works, is implemented and anchored in the company. The facilitator has the possibility to train the participants' ability to motivate and lead experienced employees, who are independent and used to structuring their own work. Some of the employees have developed the existing CRM-system and have a great deal of professional pride invested in the existing system.

At the same time, the participants learn to drive a change and implementation process through a series of leadership and management choices, as well as handling the frustrations, which are bound to arise when the system unexpectedly breaks down.



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WELCOME TO THE FACILITATION GUIDE

- A Presentation

Introduction

ActeeChange is a concept developed for understanding and managing change. The ActeeChange simulation cases are especially designed to increase awareness about the change process and the organisational dynamics that follows any change a team, a company or an institution goes through.

Choices and Results in the Simulation

Generally it is important to state what kind of simulation ActeeChange is and is not. Our goal with creating ActeeChange has first of all been to create a learning opportunity. Our approach to learning is that creating reflection is more powerful than just downloading information. Creating reflection can lead to the construction of a personal sense or personal opinion.

What It's Not

Our goal has not been to make a one-to-one map of what happens and what you should do in a change process. We don't believe such a thing exists and to truly play such a simulation would take as much time as it would take to make the change in real life. Thus effects of the choices you find in ActeeChange have NOT been statistically validated. Such a validation is not possible to make, as too many contextual and situational factors would influence on the results.

Sense Making

The effects of each choice have been carefully constructed to follow the thinking of the theory or category of the choice as well as following the storyline and the experiences concerning the change theme. This means that each choice has a 'likely' result, which can be validated in the sense making process of those playing the simulation.

It Depends

You will find that there is no 'one-good' approach in ActeeChange. It all depends... Whether a choice has a positive effect or not always depends on where stakeholders are standing on the Change Board. If you choose an action aiming at giving more information e.g., and you have no one in resistance level 1, the choice might not benefit your play, even though it was a very efficient choice when it comes to information.

Balance

We have also chosen to let each choice have a more or less balanced effect – this means that there will almost always be an unintended side-effect of the choices.

STRUCTURE BEHIND THE CHAPTERS

The Entire Case in Overview

Case Introduction

When entering the game, you can click on your stakeholders to get more information on their wants and needs.

Here you will find the structure of the game with a description of each chapter.

Chapter 1

Management or Leadership?

Change Situation

The participant will encounter three Chapter Challenges when going through the entire ActeeChange case.

In each Chapter Challenge, the participant must choose how to manage the change and lead the transition.

There are a range of timeframed options in all Chapter Challenges, but only a total of 100 hours available.

Based on the participant's choices here, the result (movement of the boat) and the following Change Situation will vary.

Chapter 2

Management or Leadership?

Change Situation

In this Chapter Challenge the participant gets some management and leadership choices he/she has seen in the previous Chapter Challenge.

This time choosing these options will have a different effect, because the team has reacted to the choices made in the previous chapter.

Again, 100 hours is available to manage and lead the change process. Based on the choices here, the result (the boat's movement) and the following Change Situation will vary.

Chapter 3

Management or Leadership?

Change Situation

In the last Chapter Challenge, the participant must choose how he/she will manage the anchoring part of the change process.

Again, the starting point of the boat and each team member's resistance level are both based on the previous choices (unless default setting is chosen, because you only go through this chapter).

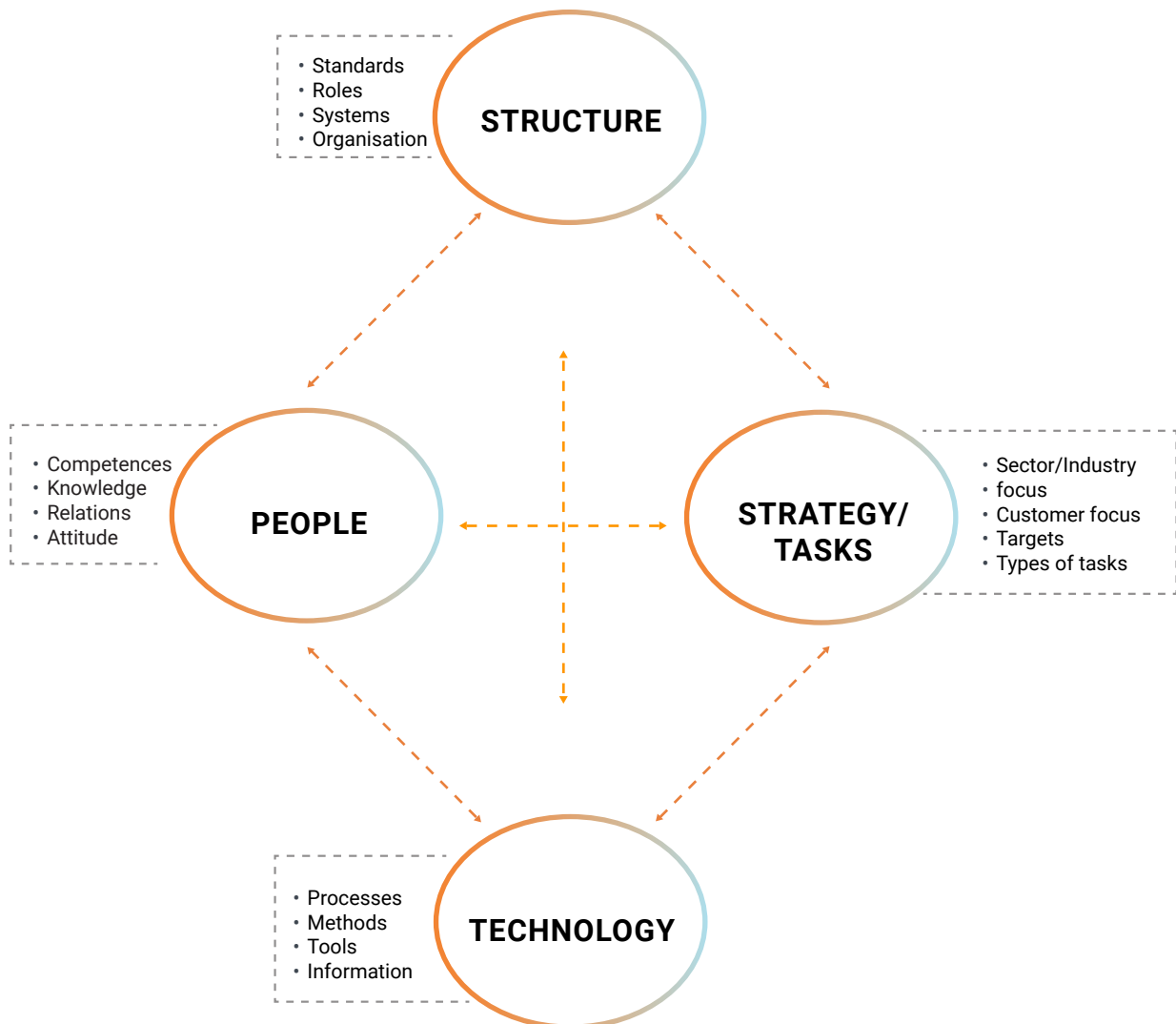
Again, 100 hours is available to manage and lead the change process and the final result (the boat's last movement) will vary.

MANAGEMENT MODEL

- Built into the Simulation

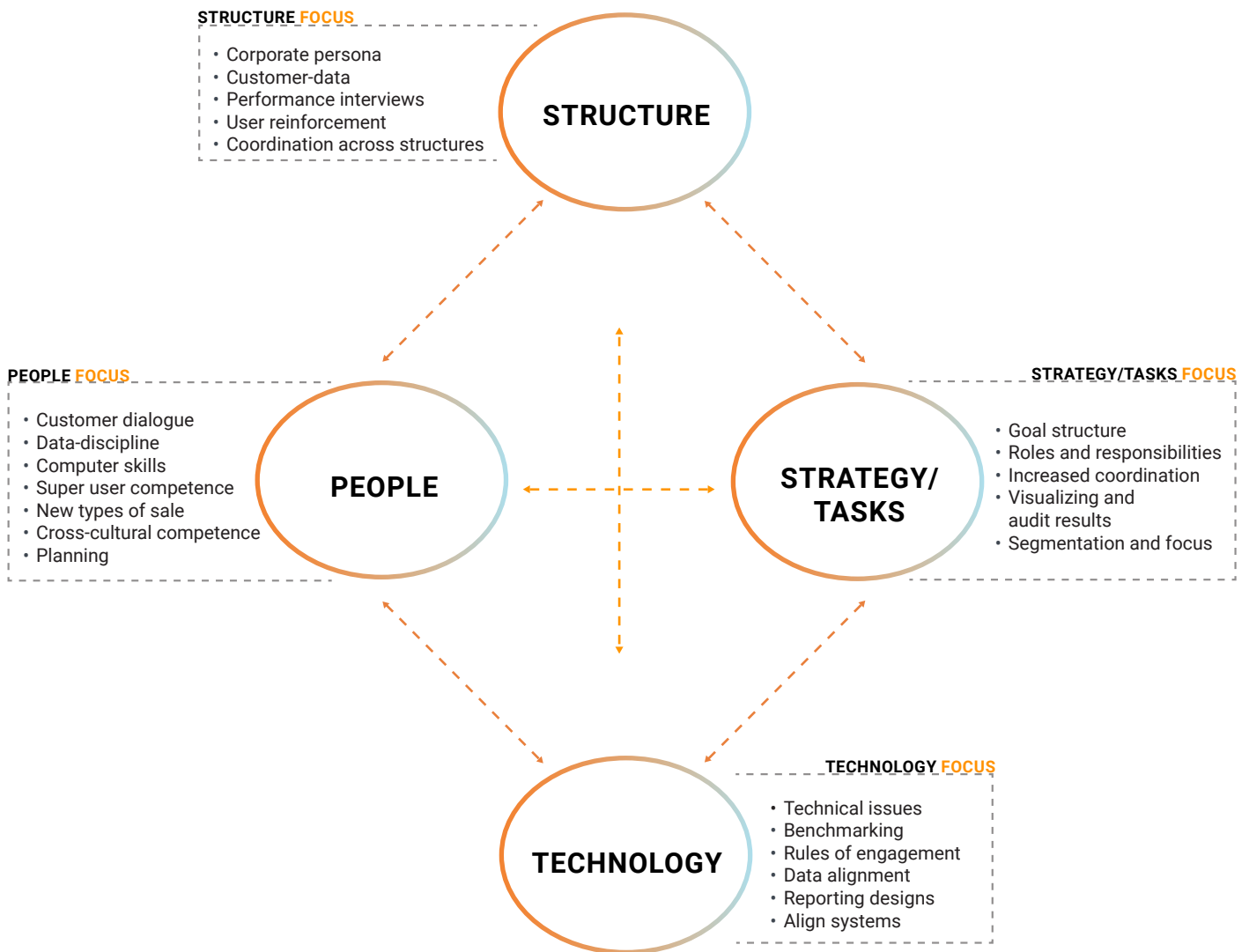
The Management Model

The management choices in the case are constructed according to a systematic approach - visualised in the model below. The origins of the model is mainly Leavitt's Diamond. Leavitt served as a professor at Claremont University and Stanford University. Leavitt's diamond proposes that every organizational system is made up of four main components: People, Tasks, Structure and Technology - and that any change in one of these elements will have a direct effect on all the other elements, and thus also need to be tweaked to accommodate the change. Here, we have used this model to guide the capturing of the management options and to support the participants, when playing the simulation to identify aspects of the alignment needs in a system.



MANAGEMENT MODEL

- Built into the Simulation



LEADERSHIP MODEL

- Built into the Simulation

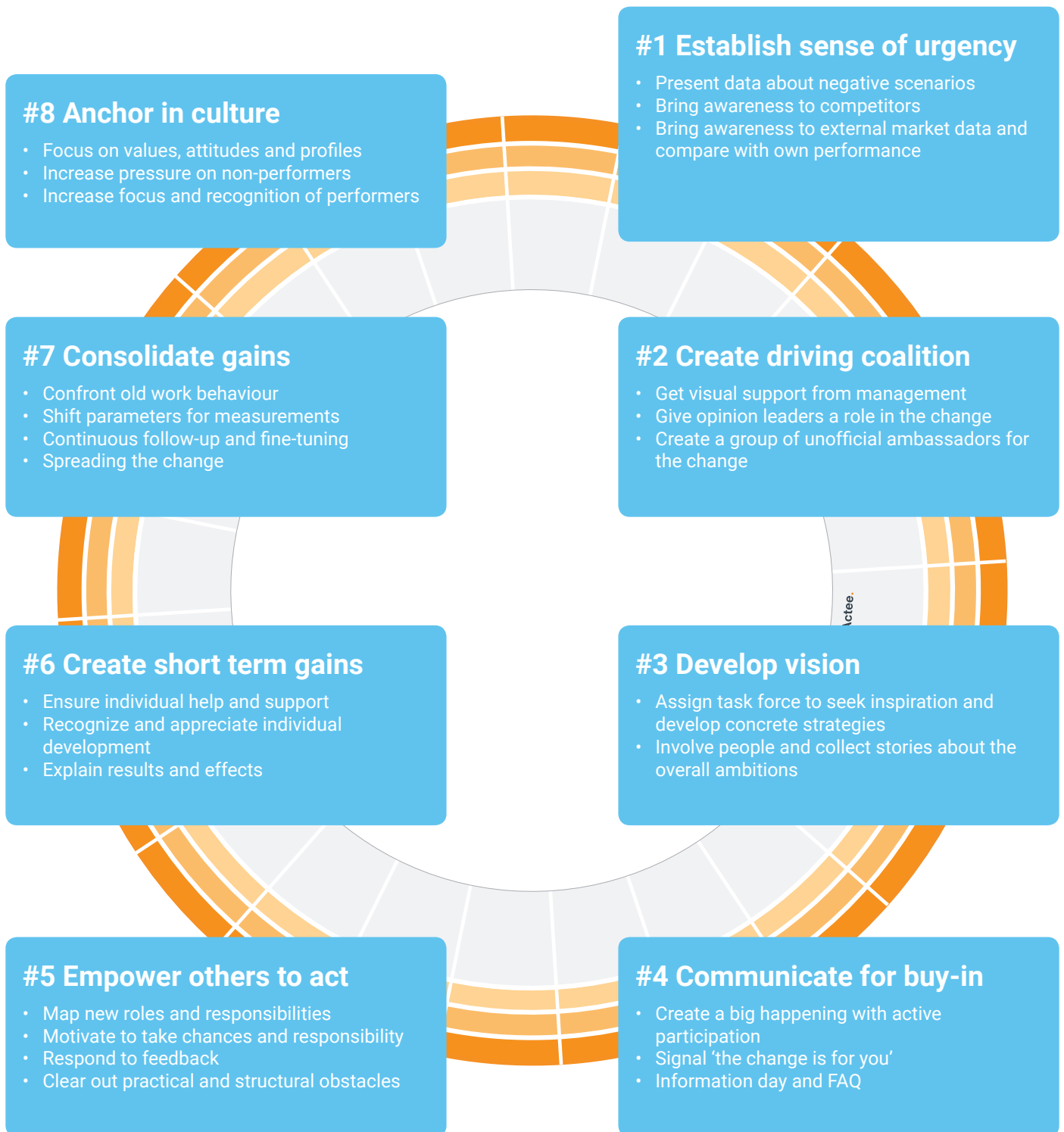
The Leadership Model

John Paul Kotter is Professor at Harvard Business School and the author of many important contributions to the management and leadership literature. In his book 'Leading Change', Kotter describes an 8 step process for implementing a successful transformation, which has become the 'recipe for change' to many leaders around the world. In ActeeChange the steps represent the change manager's leadership 'tools' on the way through the cycle of change. The steps on one hand represent a checklist for the manager planning his/her change. On the other hand, they represent sources of inspiration and intervention, when the change 'stalls', or when different stakeholders move at different speed or simply move in different time zones in the change cycle.



LEADERSHIP MODEL

- Built into the Simulation



THE CYCLE OF CHANGE

- Built into the Simulation

The Cycle of Change and Resistance to Change

'The Cycle of Change' is a model developed by the American author, Rick Maurer. The model describes and simplifies the understanding of change processes, and has been recognized all over the world for its perspective on change. The 'Cycle of Change' is a tool to heighten our insight into and reflections about how we participate in changes. Rick Maurer has described the close coupling between resistance to change and the cyclic nature of changes. According to Maurer's studies, resistance is a reactive defensive action (passive or active) towards a change that appears threatening. Rick Maurer's levels of resistance offer a way of making the understanding and handling of resistance more operational.

#6 Time to Move On

- Stakeholders can have a tendency to get stuck in the old change too long.
- Evaluation is essential.
- It is time to let go of the change in favour of new incidents, signs and impacts that are calling for new changes.

#5 Results

- The change has become part of the way the participants in the change do their work.
- The change is no longer a 'special event'.

#4 Roll Out

- The change ideas are rolled out into the organization.
- Stakeholders need to match expectations to plans, criteria of success, resources etc.

#1 In the Dark

- Stakeholders pay very little attention to the need for change. They do not see the urgency.
- Stakeholders might experience the incidents, but they reject their importance.

#2 See the Challenge

- Stakeholders recognize that there is a problem or an opportunity.
- Recognition is the most critical stage in the change process. If everybody begins to see the same image, it's possible to align stakeholder movement throughout the change.

#3 Get Started

- The energy to do something about the change potentially builds.
- It is crucial to use this energy constructively through involvement and engagement in the decision making process.

RESISTANCE TO CHANGE

- Built into the Simulation

Resistance Level 1 "I don't get it!"

Lack of understanding (facts, data, the idea):

- Lack of information
- Disagreement about the reasons for change
- The foundation of the change is not communicated
- Overload of information or unfiltered information
- Disagreement about the interpretation of data
- Lacking access / confrontation with critical information

This is a type of resistance which belongs in a world of thinking, rational actions, presentations, diagrams and logical argumentation.

Resistance Level 2 "I don't like it!"

Emotional reaction to the change:

- Loss of power, control or status
- Loss of 'face' or respect
- The idea seems incompetent or useless
- Fear of isolation or abandonment
- Too much change (the stakeholder cannot be bothered)
- Previous bad experiences with changes similar to the change in question.

This is a type of resistance which is often directly connected with a physiological reaction, where blood pressure, adrenalin and pulse are affected.

Resistance Level 3 "I don't trust you!"

Lack of trust in the leader:

- What the leader represents (culturally, ethnically, gender or power differences)
- The personal story between stakeholder and leader
- Significant disagreement about values
- Experience of the change or the leadership of the change not being credible

This is a type of resistance which is connected to the relationship between the participants of the change and its leaders. The resistance is seldom focused on the change itself, but on those who represent it.

GENERAL STRUCTURE AND FACILITATION

- How to interpret and explain the game process

Entering the Chapters – the Boat

When entering Chapter 1 the boat will be positioned in step 8. Afterwards, the placing of the boat will vary according to individual choice.

Interpretation of the Starting Position:

The project has been officially decided to be rolled out, but there will be a time period before the roll out and implementation actually begins.

In the following chapters, the change situation and the stakeholders' resistance levels will vary according to the underlying theories presented here on page 7-10.

Entering the Chapter – the Stakeholders

When entering Chapter 1 the stakeholders will be spread out behind the boat and in different resistance levels.

Interpretation:

People behind the recognition point have not yet realized that this project is something which will have a deep impact on their work. Even though they have not realized the impact they can still have a reaction to the existence of the project.

Change Situations and Chapter Challenges

Chapter 1 starts with the task of creating key messages. The focus of this task is to reflect on the initial communication of the transformation process ahead. The challenge is staged as an information meeting where the manager presents the change to the stakeholders.

Interpretation: The challenging element is that the participants have to choose what the key messages have to be. Participants can only choose two messages. The analogy is that when people receive messages in a meeting like this, there is a big risk that people will not be able to remember all of the information given. Therefore, the real assignment for them is to decide: What is most important for my stakeholders to remember?

Attention:

1. The first task often acts as the first 'try-out' of the simulation interface for your participants - they might need help.
2. Some groups spend a lot of time on key messages and may not be aware that they have to secure time for the next challenge.
3. Some groups have to be guided to read carefully what people are saying on the screen. Their discussion often focus more on what is the right thing to say. Guide them to take the situation and reactions into consideration.

Management and Leadership

The Chapter Challenge in all chapters is to move the change project forward with a balance of management and leadership choices (the management/ leadership balance, originally captured by Kotter).

Before Entering the Next Chapter: Debriefing.

Repetitions in Management – Kotter

Repetitions in Leadership – Maurer

Attention: Sometimes people get confused about having two available choices in the first challenges - and in the management/leadership part, they have to make a range of choices one-by-one in the round. Here focus is on spending the 100-hours available to obtain the best result in the chapter.

Storyline: What is going on in the story?

>Questions

The Board: What is the situation on the change board?

> Questions (where are the stakeholders placed, and what are their comments about the situation from their point of view?)

Key Messages:

>Questions

Management or Leadership:

>Questions

The Board: What is the situation on the change board?

>Questions (where are the stakeholders placed, and what are their comments about the situation from their point of view?)

The Reactions: What are the themes?

>Questions (How does the stakeholders react as a consequence to your choices of actions?)

NOTES

A series of horizontal dotted lines for writing notes.

Facilitating Chapter 1

Chapter Challenge - Management or Leadership?

Facilitation Questions

(when your participants have made their choices)

In this part of the process it is relevant to focus on Person M, who is programmed not to move throughout the entire first chapter. Do not reveal the programming to your participants, as it might create a feeling of manipulation, which will not support the learning.

Facilitation questions for Chapter 1

- How do we handle Person M?
- Do you know Person M? Do you have one in your organization?
- How much time do you spend on Person M?
- In how many choices do you focus on Person M?
- Did you change your strategy in the process? And if yes, why?
- How do you experience resistance?
- Sum up the learning from this chapter.

Interesting Choices to Reflect on

(when your participants have made their choices)

Choice 24 (I want to understand)

– did anyone try this?

Choice 24 has the intention to reduce resistance level 3... (Mark in focus)

- What happened?

- Why do you think this happened?

Choice 13 (Now or never, Kotter 1)

– did anyone try this?

We tend to get started too late/slowly in a change – it is important to establish «a sense of urgency» from the very start!

OBS: **Choice 22 (I Coach)** is no use in Chapter 1 (however wait to go into this discussion until Chapter 3, where the choice most likely will have an effect – then take the discussion about why now and not in Chapter 1)

Change Situation Result:

(on-screen for your participants)

The result of your participants choice and focus when creating key messages as their initial actions has created a new change situation. Now, they have to decide what to focus on in the Chapter Challenge.

On the next two pages, you see the possible outcomes of the choice of focus in the Chapter Challenge of Management and Leadership.

The theory behind the results are represented in the blue/red boxes on the two following pages.


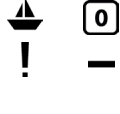



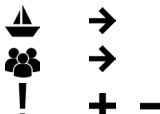



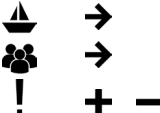


Management/Leadership results:

(on-screen for your participants)

Based on how your participants choose their focus when handling the management/leadership challenge, their results will vary and once again, the Change Situation changes.













MANAGEMENT FOCUS

Manage the Change - Options

LEAVITT STRATEGY/TASK	LEAVITT TOOL/TECHNOLOGY	LEAVITT PEOPLE/COMPETENCE	LEAVITT STRUCTURE/CULTURE
<p>#1 Goal Structure</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – framing the transformation process ahead and setting expectations. Stakeholders forward – clearer that goals will influence their work. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of what is going to happen with the goals. 	<p>#2 The Technical Side</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholder resistance decrease (minimal) – expected increased stability of solution (but not everybody sees this). <p>Negative results:</p> <ul style="list-style-type: none"> No movement of boat – no significant influence on scope of change. 	<p>#3 Customer Dialogue</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – focus on competency and knowledge actively sets a framework. Stakeholders forward – stakeholders as they can see that something new is happening. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of the new challenges. 	<p>#4 Corporate Persona</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the 'usual way of doing things' is being challenged. Stakeholders forward – clearer that the project will influence the demands. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not understand the impact or do not approve of the new salesperson profile. 
<p>#5 This is NOT an IT-Project</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – this makes it clearer that this will influence their service performance level. <p>Negative results:</p> <ul style="list-style-type: none"> Boat backwards – raises more question and slows the process down. Stakeholder resistance increase (minimal) - do not approve of what is going to happen. 	<p>#6 Benchmark</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – significant consequences for a number of other aspects. Stakeholders forward – enables them to see that the change has wide-ranging consequences Stakeholder resistance decrease - understand how the project will succeed. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - uncertain of what is coming. 	<p>#7 Data-Discipline</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – framing the change through focus on behavior needs. Stakeholders forward – they see the have to learn something new. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of the change they have to make concerning documentation and discipline. 	<p>#8 Know Thy Customer</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the 'usual way of doing things' is being challenged. Stakeholders forward – clearer that the project will influence their own focus. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not understand the impact or do not approve. 
<p>#9 Together We are Stronger</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the choice gives the change a strategic character. Stakeholders forward – it becomes clearer that the project will have significant impact. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - find it difficult to foresee the consequences. 	<p>#10 Rules of Engagement</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the design can have significant consequences. Stakeholders forward – the project will have impact on priorities. Stakeholder resistance decrease – explains how it will succeed in practice. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – do not approve. 	<p>#11 PhD. Computer?</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – focus on competency influences direction. Stakeholders forward – focus on knowledge and skills impacts stakeholders. Stakeholder resistance decrease – they will receive help in acquiring the skills. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of this challenge. 	<p>#12 Performance Interview</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat significantly forward – Movement has been created towards the 'new way of doing things'. Stakeholders forward – the project will continue to challenge them from now on. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance strong increase - do not like or do not feel they are yet able to accomplish the required goals. 

LEADERSHIP FOCUS

Lead the Transformation - Options

<p>KOTTER #1</p> <p>#13 Now or Never</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – creates awareness of the need for the change and the alternative to the change. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - some conclude that they should just do 'more of the usual'; while some may react with increased fear or mistrust. 	<p>KOTTER #2</p> <p>#14 The Dirty Dozen</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – gives a feeling that the organization has truly invested in making the transformation process. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – results in a 'defiance reaction' among some people that can act to bolster their resistance. 	<p>KOTTER #3</p> <p>#15 Where Are We Going?</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – gives a feeling of being part of defining the meaning and purpose of the change. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – few feel that it is frustrating that the meaning and purpose have not already been defined. 	<p>KOTTER #4</p> <p>#16 A Big Splash</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people temporarily become very enthusiastic about the change. Many people experience the communication as uplifting. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – some people will find the new changes stupid and overblown. 
<p>KOTTER #5</p> <p>#17 The Breakaways</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people improve their ability to take initiative and drive the change process. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - people may feel sidetracked because previous core competencies have been officially 'retired'. 	<p>KOTTER #6</p> <p>#18 Step by Step</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – feeling empowered and inspired by the short-term wins and feeling that all of their hard work has been worth the effort. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - among the skeptics, who want more proof before surrendering their skepticism. 	<p>KOTTER #7</p> <p>#19 Not as We Used To Do...</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – creates commitment to the change and people respect the concept of seeing the system through and ensuring its success. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - feeling of being 'bound' is very uncomfortable. 	<p>KOTTER #8</p> <p>#20 We Build a New World</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people will feel that the change has manifested itself as 'the new reality'. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - clear that the value set is different to their own values. Stakeholder resistance increase – some will think this is too early. 
<p>MAURER DEFAULT</p> <p>#21 Stop It!</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders resistance decrease (limited) – among those who are irritated that others aren't moving as quickly. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - contains a risk of making everyone insecure about when your 'anger' will target them. 	<p>MAURER L1</p> <p>#22 I Coach</p> <p>No results:</p> <ul style="list-style-type: none"> The overall framework for the transformation process is not sufficiently developed for the stakeholders to see how their workday will look after the transition and hence, coaching has limited effect. 	<p>MAURER L2</p> <p>#23 Something Will Be Lost</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders resistance decrease - feel legitimate about their experience of personal consequences, and perhaps re-evaluate their image of you. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - some will miss the sense of initiative and energy on your part. 	<p>MAURER L3</p> <p>#24 I Want to Understand</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders resistance decrease – those experiencing a high level of resistance may find it liberating. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - contains a risk that the individual may feel his/her boundaries are being pushed. 

NOTES

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Facilitating Chapter 2

Chapter Challenge - Management or Leadership?

Facilitation Questions

(when your participants have made their choices)

In this part of the change it is a good idea to focus on the 'I Coach' choice. In Chapter 1 of the simulation this choice doesn't impact anything - not the boat, nor the stakeholders. But in Chapter 2 during the implementation it does affect the resistance levels. Discuss with your participants, why this could be.

Facilitation Questions to Chapter 2, Management or Leadership:

- Why does the choice 'I Coach' have an effect in this chapter, but not in Chapter 1?
- What surprised you in this chapter?
- What would you do if you had 20 hours more?
- If you were the superior manager for this organization - what would you think at this stage?
- What would you do on a short-term basis and on a long-term basis?
- Did you focus on Management or Leadership?

Implementation Situation Result

(on-screen for your participants)

The result of your participants focus in initial actions has created a new change situation.

Now, they have to decide what to focus on in the Chapter Challenge.

On the next two pages, you see the possible outcomes of the choice of focus in the Chapter Challenge of Management and Leadership.

The theory behind the results are represented in the blue/red boxes.





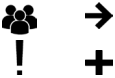
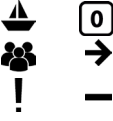

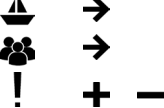


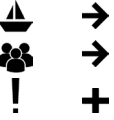

Management/Leadership Results

(on-screen for your participants)

Based on how your participants choose their focus when handling the Management/Leadership challenge, their results will vary and once again, the Change Situation changes.




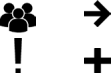








MANAGEMENT FOCUS

Manage the Change - Options

LEAVITT STRATEGY/TASK	LEAVITT TOOL/TECHNOLOGY	LEAVITT PEOPLE/COMPETENCE	LEAVITT STRUCTURE/CULTURE
<p>#1 Goal Structure</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – framing the change and setting expectations. Stakeholders forward – clearer that goals will influence their work. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of what is going to happen with the goals. 	<p>#2 The Devil is in the Detail</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholder resistance decrease - because it implies increased stability. <p>Neutral results:</p> <ul style="list-style-type: none"> The choice does not move the boat as it does not really move the implementation forward, but minimizes the risk of one of the largest obstacles. 	<p>#3 Super Users in Play</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – because they understand that they must learn something new. <p>Neutral results:</p> <ul style="list-style-type: none"> The choice does not move the boat. There is a risk for too little transfer. Stakeholder resistance increase - because they are uncertain and do not feel that they have received sufficient help. 	<p>#4 Corporate Persona</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the 'usual way of doing things' is being challenged. Stakeholders forward – clearer that the project will influence the demands. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not understand the impact or do not approve of what is going to happen. 
<p>#5 What Does it Look Like?</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – helps clarify how the project is already bringing a drastic change. Stakeholders forward – customer segmentation makes people notice the consequences. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - uncertain about what it will mean for their competencies and performance. 	<p>#6 It Has to be Easier</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – they can see that they can 'own' the change. Stakeholder resistance decrease – as above. <p>Neutral results:</p> <ul style="list-style-type: none"> The choice does not move the boat as it potentially slows down the implementation process.. 	<p>#7 Data-Discipline</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – framing the change through focus on behavior needs. Stakeholders forward – they see they have to learn something new. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of the change they have to make concerning documentation and discipline. 	<p>#8 Out to Get Them</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – more focus and goal-orientation. Stakeholders forward – clear signals that not all paths to the goal are equal. Stakeholder resistance decrease - manager's visibility may reduce Level 3 resistance. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – some are uncertain about the consequences. 
<p>#9 Together We Are Stronger</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – choice gives the change a strategic character which can be very opinion-forming. Stakeholders forward – it becomes clearer that the project will have significant impact on their work and priorities. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - find it difficult to foresee the consequences. 	<p>#10 Benchmark</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – changes to the work processes are a very visible implementation. Stakeholders forward – enables them to see that the change has wide-ranging consequences. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – because it is a frustrating process. 	<p>#11 New Types of Sale</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – challenges a distinct mindset shift. Stakeholders forward – it becomes clearer that the project will influence their own approach – and perhaps even their own identity. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - because they do not understand the final goals, or they do not approve. 	<p>#12 Performance Interviews</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat significantly forward – movement has been created towards the 'new way of doing things'. Stakeholders forward – it's clearer that the project will continue to challenge them. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance strong increase - do not like it or do not feel they are yet able to accomplish it. 

LEADERSHIP FOCUS

Lead the Transformation - Options

KOTTER #1	KOTTER #2	KOTTER #3	KOTTER #4
<p>#13 Now or Never</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – creates awareness of the need for the change and the alternative to the change. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - some conclude that they should just do 'more of the usual'; while some may react with increased fear or mistrust. <p></p>	<p>#14 The Incredibles</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people may develop the desire to 'invest in' the change. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – people may see it as a provocation, leading to a 'don't think you can lead me down the garden path'-reaction. <p></p>	<p>#15 Command and Conquer</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – gives a better feeling for the overall meaning of the change. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – can seem as a signal to stand back and wait, and some will consider this a waste of time. <p></p>	<p>#16 Information Day</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people are reminded of the process and get answers to their questions. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – far from all of the information 'sticks'. <p></p>
KOTTER #5	KOTTER #6	KOTTER #7	KOTTER #8
<p>#17 The Breakaways</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people improve their ability to take initiative and drive the change process. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - people may feel sidetracked because previous core competencies have been officially 'retired'. <p></p>	<p>#18 Sisyphus</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people feel recognized, supported and empowered to stretch themselves to meet the more difficult challenges. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - among the skeptics, who want more proof before surrendering their skepticism. <p></p>	<p>#19 Not as We Used To...</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – creates commitment to the new system and people respect the concept of seeing the system through and ensuring its success. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - feeling of being 'bound' is very uncomfortable. <p></p>	<p>#20 Super Performer</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholder resistance decrease - those who have gained control over work processes and competencies, feel almost buoyant. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - those who still haven't managed to anchor the new approaches feel pressured and sidelined. <p></p>
MAURER DEFAULT	MAURER L1	MAURER L2	MAURER L3
<p>#21 A Deal</p> <p>Neutral results:</p> <ul style="list-style-type: none"> The choice has no real effect on the resistance, as it is rare for this kind of compensation to eliminate the reasons behind the reactions. <p></p>	<p>#22 I Coach</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholder resistance decrease - As new structures and new tasks are starting to emerge investing in building competences is big leap towards feeling more 'on-top' of and secure with the change. <p></p>	<p>#23 Gut Feelings</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders resistance decrease – people feel more legitimate about their experience of personal consequences, and perhaps re-evaluate their image of you. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - the choice takes time and it might create reactions from some of the more committed people. <p></p>	<p>#24 What's the Noise?</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders resistance decrease – affects those who are so pressured by the change that they feel under siege and emotionally impacted who will find this liberating. <p></p>

Facilitation Chapter 3

Chapter Challenge - Management or Leadership?

Reflection about the end Phase

The theory is recognisably “thin” in the last part of a change. No one wants to spend their time in this phase – neither theoreticians nor companies – however this phase is truly important if the long-term effects should be gained and be worth the investment of time and money spend on the change!

Interesting Choices to Reflect on (when your participants have made their choices)

Choice 10 (Closed) (technology choice) (“Context model) – did anyone try this?
Discuss how the choice relates back to Mark – we are afraid to evoke resistance – therefore we should be ready to make the choice early in the chapter in order to handle potential resistance

Choice 12 (Performance Interviews) (structure/culture choice)
Wait until chapter 3 to investigate the “intrinsic” of the process– wait until the results start to show sense of urgency» from the very start!

Choice 20 (We Build a New World) (Kotter step 8) The aim is to incorporate changes into the new culture and “make it stick”.

Change Situation: Anchoring

(on-screen for your participants)

The result of your participants focus in initial actions has created a new change situation. Now, they have to decide what to focus on in the Chapter Challenge.

On the next two pages, you see the possible outcomes of the choice of focus in the Chapter Challenge of Management and Leadership. The theory behind the results are represented in the blue/red boxes.

Pay attention to the choice ‘Closed’

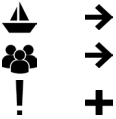
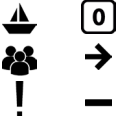





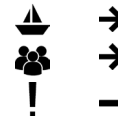




If the boat is full, several stakeholders will immediately leave the boat, once this option is chosen. This is due to the fact that the stakeholders will realize that the change, at this point, is definitive, which inevitably will cause some degree of frustration and concern.

It is necessary to limit the stakeholders access to the old system in order to anchor the change. But if the decision is taken too late, the player will not have a chance to get the stakeholders back on board. If the choice is taken in somewhat good time (in the beginning of phase 3), it will allow the player to bring the stakeholders back in the boat, before the process has ended completely.

This choice naturally calls for discussion since the player will have to consider the current situation before making the choice; when is the right time to close down the old system and how should we deal with stakeholder reactions?

MANAGEMENT FOCUS

Manage the Change - Options

LEAVITT STRATEGY/TASK	LEAVITT TOOL/TECHNOLOGY	LEAVITT PEOPLE/COMPETENCE	LEAVITT STRUCTURE/CULTURE
<p>#1 Goal Structure</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – framing the change and setting expectations. Stakeholders forward – clearer that goals will influence their work. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of the long term perspectives in the goals. 	<p>#2 Systems, Systems</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people can see that their perspective and role in the organization has been taken seriously. Stakeholder resistance decrease - as above. <p>Neutral results:</p> <ul style="list-style-type: none"> The choice does not move the boat because it is a process which moves too slow. 	<p>#3 Cross-Cultural Competences</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the timing is good for focusing on the overarching purpose obtaining a uniform IT-system. Stakeholders forward (few) – those who see that the global focus can be used. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - they cannot grasp the complexity or find it alienating. 	<p>#4 Corporate Persona</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the 'usual way of doing things' is challenged. Stakeholders forward – clearer that the project will continue to influence the demands for their own approach. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not understand the impact or do not approve of what this means in the long run. 
<p>#5 The No-Go's</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – tests the strategy and clarifies how the project is bringing a significant change. Stakeholders forward – it becomes clearer how seriously management is treating the strategy. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - challenges the service staff. 	<p>#6 Benchmark</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – experience an improved version of the change has been achieved. Stakeholders forward - clearer to them that the project will enhance their own performance. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – they cannot grasp what the new changes will mean to them personally. 	<p>#7 Data-Discipline</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – framing the change through focus on behavior needs. Stakeholders forward – they see they have to learn something new. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - do not approve of the change concerning documentation and discipline. 	<p>#8 Help From the Others</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – focus on exploiting and challenging the organizational context moves slow but creates internal respect. Stakeholders forward – they can see that the change positions them more centrally. Stakeholder resistance decrease – new position awareness is beneficial for both recognition and self-esteem. 
<p>#9 Together We Are Stronger</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward significantly – keeps global alignment perspective alive. Stakeholders forward – it becomes clearer that the transformation project will have significant impact. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - find it difficult to foresee the consequences. 	<p>#10 Closed</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – The usual approach is completely gone. Stakeholders forward – clearer to them that the project is not up for discussion. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase (strongly) – because they do not approve of what is going to happen and they may not appreciate the way it is done. 	<p>#11 Revitalization</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat forward – the choice is a powerful method of anchoring the change. Stakeholders forward – because they understand that they must learn something new. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - they do not approve of the fact that the new expectations appear to be permanent. 	<p>#12 Performance Interviews</p> <p>Positive results:</p> <ul style="list-style-type: none"> Boat significantly forward – Movement towards the 'new way of doing things'. Stakeholders forward – clearer to them that the project will continue to challenge them. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance strong increase - do not like what is happening or do not feel they are yet able to accomplish it. 

LEADERSHIP FOCUS

Lead the Transformation - Options

KOTTER #1	KOTTER #2	KOTTER #3	KOTTER #4
<p>#13 Bring the Outside In</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people may see that working differently can open up vast unexploited opportunities. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - can result in an 'it's not for us' type of reaction. <p></p>	<p>#14 The Dirty Dozen</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people feel that the organization has truly invested in the change, which increases motivation. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – can result in a 'defiance reaction' among some people. <p></p>	<p>#15 Command and Conquer</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – gives a better feeling for the overall meaning of the change. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – can seem as a signal to stand back and wait, when they see that a team is expected to come up with "more fluffy ideas of what to do next", and some will consider this a waste of time. <p></p>	<p>#16 Information Day</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people are reminded of the process they are undergoing, in which most will be very focused on getting an answer to their own questions. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase – far from all of the information 'sticks'. People are occupied by a number of issues and have completely forgotten the message just an hour later. <p></p>
KOTTER #5	KOTTER #6	KOTTER #7	KOTTER #8
<p>#17 I Got It...</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people feel they are being guided and assisted through the change. Stakeholder resistance decrease - even for the toughest resistors, it is hard not to acknowledge the will demonstrated by the leader. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - may feel pressured due to the disappearance of many of the old excuses, making it more difficult to dodge the issue. <p></p>	<p>#18 Sisyphus</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – people feel recognized and supported and empowered to stretch themselves even further to meet the more difficult challenges of the change process. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - among the skeptics, who want more proof before surrendering their skepticism. Some may even feel that you are trying to manipulate them. <p></p>	<p>#19 Small Circles</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward – creates commitment to the new system and people respect the concept of seeing the system through and ensuring its success. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - among those who were looking forward to a 'break' after the change process. <p></p>	<p>#20 We Build a New World</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders forward - people will feel that the change has manifested itself as 'the new reality' – which is gratifying for most. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - for those who realize that the value set created by the change is so different from their own values that it affects their basic satisfaction of being in the organization. <p></p>
MAURER DEFAULT	MAURER L1	MAURER L2	MAURER L3
<p>#21 Stop It!</p> <p>Neutral results:</p> <ul style="list-style-type: none"> Stakeholders forward - amongst those who are irritated about the fact that others aren't moving as quickly as they are. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - because it contains a risk of alienating some people and making everyone insecure about when your 'anger' will target them. <p></p>	<p>#22 Your Contribution</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholder resistance decrease – people feel better equipped to create their own way through the transformation process. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - because it makes some of the consequences more obvious and confronting. <p></p>	<p>#23 Gut Feelings</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders resistance decrease – people can feel more legitimate about their experience of personal consequences of the change. <p>Negative results:</p> <ul style="list-style-type: none"> Stakeholder resistance increase - the choice takes time and it might create reactions from some of the more committed people that you spend so much energy on those who are against the change. <p></p>	<p>#24 Agree to Disagree</p> <p>Positive results:</p> <ul style="list-style-type: none"> Stakeholders resistance decrease – for those who are truly caught up in their resistance against you. Stakeholders forward - To some the choice does not reduce their resistance, but does give them a signal that they need to move on! <p></p>

THE CASE HAS ENDED

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ACTEECHANGE: REFLECTION QUESTIONS

Result Q's

- Who have won?
- Why is it hard to say?
- What do you need to know to decide whether the result is good or bad?
- If it had been your company – who would have won?

Hypothesis Q's:

- Which choices did you make, where the results surprised you?
- What where your hypothesis? What did the simulation say?
- What kind of experiences do you have with your own hypothesis?
- Which choices where an 'easy pick'?
- Where did you disagree the most?
- Which of the choices did you agree, not to take?

Result Q's

- What was different to work with in this phase compared to the previous?
- How do you explain this difference?
- Which of the phases do you find it most easy to lead?
- Position yourself on the floorboard, in the place where you yourself like to be, the most, in a change process. The place where you thrive the best.
- What does the picture that reveals itself, tell you?
- What are the consequences of this picture? What does it take to make this picture work as an organisation culture?

ACTEECHANGE: REFLECTION QUESTIONS

Decision Q's:

- How did you make your decisions?
- Who had to let go of a personal conviction in this process? Why? What happened?
- What was your learning from this decision making process?
- What were the most influential values or arguments that guided your decisions?
- Were there cultural differences in your input to the decisions? What kind of differences? Who represented these differences and what did the differences result in?

Experience Q's:

- How does this situation/ this visualization match situations you know from your own organization?
- Which of these characters have you tried to be? What happened in that case?
- Which of these characters are you normally?

Perspective Q's:

- How do you think the manager would feel at this point in time?
- If you were the employees/ stakeholders in the boat, what would you think of this process?
- If you were the employees in resistance level 3, what would we see you do?
- If you were the customer, what would you probably experience? How would you respond to that?
- If you were coaching the manager leading [this] department, how would you help this person? What would be of special concern to you?
- How would a manager for [this] department typically feel about a situation like this?

ACTEECHANGE: REFLECTION QUESTIONS

Organisation Q's:

- **Managing managers:** If you were the superior boss for these departments – would you think at this stage? What would you do?
- What would you do on a short term basis and what would you do on a long term basis?
- **Focus across:** If there was a demand for all departments to be 'aligned' or coordinated, what kind of consequences would that have?
- What would it take to align the boats? What would be challenging?

Next step Q's:

- What would you do if you had 20 more hours?
- What would you do, if you could come up with a choice of your own?
- What would happen if you fires the worst opponents?
- What would happen to the others?
- What would happen to the boat?

Communication Plan Q's

- **In this round you must make your choices in a sequence, that you cannot change. You are tied to your plan.**
- What consequences did that have?
- Why were you successful, why were you not?



Check out our website for more information about our concepts, products and possible cooperation.

We are looking forward to hearing from you.

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