WHAT MAKES LEADING CHANGE DIFFICULT?

Think about a time when you were leading change or experienced a change initiative.

*What were the challenges you experienced or observed?*

*What were the behaviors and attitudes of the leader and team that contributed to that experience?*

*“People are mobilized to tackle tough challenges and thrive.”* Ronald Heifetz and Marty Linsky

How would you define thriving through change?

Your thoughts:

Sarah’s definition:
**EXPLORE**—Exploring a situation from all angles so we can more deeply diagnose the challenges we are truly facing. This requires us to:

- Identify Technical Problems vs. Adaptive Challenges
- Conduct Fearless Audits
- Define who needs to do the work

**EXPERIMENT**—Testing assumptions and running experiments to learn so that we can progress, not just solve. This requires us to:

- Meet people where they are to understand their loss
- Identify and test multiple hypotheses
- Regulate the heat

**EVOLVE**—Pausing and reflecting to cultivate powerful learnings so that we can move forward more intentionally. This requires us to:

- Share lessons learned
- Identify next steps
- Reflect on personal growth
### Understanding Technical Problems vs. Adaptive Challenges

(Adapted from “Your Leadership Edge: Lead Anytime, Anywhere” by Ed O’Malley and Amanda Cebula 2015)

**Identify Technical Problems vs. Adaptive Challenges**

<table>
<thead>
<tr>
<th>TECHNICAL PROBLEMS</th>
<th>ADAPTIVE CHALLENGES</th>
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<tbody>
<tr>
<td>The SOLUTION</td>
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<tr>
<td>The PROBLEM</td>
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<tr>
<td>WHOSE work is it?</td>
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<tr>
<td>Type of WORK</td>
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<td>TIMELINE</td>
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<tr>
<td>EXPECTATIONS</td>
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<td>ATTITUDE</td>
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(Adapted from “Your Leadership Edge: Lead Anytime, Anywhere” by Ed O’Malley and Amanda Cebula 2015)
Once we have identified an Adaptive Challenge to focus on, we need to explore MULTIPLE possible interpretations for why this challenge exists.

**Common traps when exploring interpretations:**

1. Seeking quick or technical explanations
2. Avoiding uncomfortable or conflictual interpretations
3. Focusing on an individual and not examining the system

**EXAMPLE**

**Comfortable Interpretation:** Manager has high turnover because he micromanages and doesn’t build trust.

**Courageous Interpretation:** Turnover is also high because we haven’t set clear expectations for our managers and there isn’t a structure of accountability for behavior that conflicts with our culture. We tend avoid direct conversations and, as a result, we have tolerated toxic behavior.

**Time to Practice!**

Using the Adaptive Challenge identified in the previous exercise, explore possible comfortable interpretations. Then work together to conduct a Fearless Audit to identify Courageous Interpretations.

**Comfortable Interpretation:**

**Courageous Interpretation:**
EXPLORE

“There is no such thing as a dysfunctional organization, because every organization is perfectly aligned to achieve the results it gets.” Ronald Heifetz

Our goal with Fearless Audits is not to find the "true" reason, because there are likely many reasons to explain an Adaptive Challenge. Rather, our goal is to explore possibilities to help us see the situation through many lenses instead of just one.

**Best Practices when exploring interpretations:**

1. Consider multiple perspectives from people involved
2. Adopt the mindset of “Renting” an idea vs. owning it
3. Accept that there may be truths in both the Comfortable and the Courageous Interpretations

**Reflection**

*What makes Courageous Interpretations difficult?*

*What would be possible if you and your colleagues could explore both Comfortable and Courageous Interpretations?*
Who Needs to Do the Work

Adaptive Challenges cannot be solved with expertise and authority alone, but require those impacted and part of the system to be involved in the conversations, experimentations, and evolution. In order to mobilize the system for change we need to understand who is in the system.

Why engage others? Adaptive Challenges require changes in beliefs, habits, loyalties and behaviors of those most impacted.

**TECHNICAL EXAMPLE**

A customer comes into a branch and is interested in setting up a Home Equity Loan.

Who needs to do the work?

**ADAPTIVE EXAMPLE**

A company wants to become more inclusive and build a culture that honors and advocates Diversity, Equity, and Inclusion.

Who needs to do the work?

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**Time to Practice!**

Using the Adaptive Challenge identified in the previous exercise, make a list of those who have formal and informal influence on the situation. Then identify who are the people impacted by this change.

<table>
<thead>
<tr>
<th>Who has influence?</th>
<th>Who is impacted?</th>
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</table>
EXPLORE

Things to consider when identifying who needs to do the work:

1. Seek dissenters; identify factions, as well as allies
2. People are more likely to commit to that which they help create
3. Our questions are fateful, and people begin to change the moment of inquiry

Reflection

*Who is usually included or involved in decisions that impact the system?*

Knowing there are times when you cannot include everyone at every point of conversation, what are different ways you can engage people in tackling the Adaptive Challenge?
EXPERIMENT

Meet Them Where They Are

“Pain will push you until the vision pulls you.” Sharna Fey

Once we have identified those who need to do the work, we need to work to meet them where they are related to the change. If we are in a position of formal authority we have to remember that we’ve had more time to become comfortable with a change and more power to make impact. One way we can meet them where they are is to identify and honor their loss.

When people are resistant to change, it isn’t the change that is causing the pushback, it’s the loss.

PEOPLE DON’T FEAR CHANGE, THEY FEAR LOSS.

EXAMPLE

Situation: Restructuring the roles and responsibilities of a team. Some team members will report to a new supervisor, while others will be asked to take on new tasks.

What losses (real or imagined) might people experience?

Situation: Due to the requirements of social distancing while at work, desks are moved around and there are restrictions on how and where people can gather.

What losses (real or imagined) might people experience?

Time to Practice!

Using the Adaptive Challenge identified, and reflecting on the list of people you identified would be impacted, what might be possible losses they are experiencing?

<table>
<thead>
<tr>
<th>Who is impacted?</th>
<th>What are possible losses?</th>
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EXPERIMENT

Things to consider when identifying losses:

1. Just because it isn’t a loss for you doesn’t mean it isn’t for them

2. You don’t have to agree with the loss or make changes, just honor the loss

3. Our brains react the same if the loss is real or imagined

Reflection

Think about a time when you struggled with a change. Knowing what you know now, what was the loss you were experiencing (again, real or imagined)?

What cultural values are being amplified when you practice understanding and honoring the loss someone is experiencing?
Identify and Test Multiple Hypotheses

“Experimentation is the least arrogant method of gaining knowledge. The experimenter humbly asks a question of nature.” Isaac Asimov

Since Adaptive Challenges won’t have clear solutions, they require us to try something intentionally, fail, learn, and experiment again. When navigating Adaptive Challenges, our goal isn’t a solution, but progress.

How to Embrace an Experimenter’s Mindset?

1. Test assumptions
2. Get on the balcony
3. Start small
4. Be willing to be wrong
5. Celebrate learning

Time to Practice!

One of the challenges to experimenting is testing our assumptions. We need to try to identify what are true “rules” and what are just possibilities in our processes and procedures. Here are two exercises we can use to help us push past these deeply held beliefs to consider new paths forward:

Questions Only—The goal in this activity is to force ourselves to go below the surface of what we know and get curious about what we don’t. The total exercise can take as little as 15 minutes.

1) All people reflect individually for 5 minutes, coming up with as many questions as they can about the challenge before them.

2) As a team, set a timer for 10 minutes. Everyone asks their questions about the situation they prepared and adds new ones as they hear from others.

3) You may consider having someone recording OR have the team make notes of questions that are provocative.

4) Only after the time is up and everyone has shared can you identify questions that you will explore further as a team.
EXPERIMENT

Shoot for 50—The goal in this activity is to force ourselves to brainstorm ideas beyond the obvious ideas. We accomplish this by focusing on quantity, not quality. The total exercise can take as little as 15 minutes.

1) Working in pairs or small groups, each group will have 10 minutes to come up with a minimum of 50 experiment ideas.

2) After the time is up, have each group go back and circle the ideas they were most excited about, as well as their most creative.

3) Have each group share their ideas out loud and invite people to share additional ideas that may emerge during the sharing.

4) Wrap up by identifying the experiments you will move forward with.

Time to Experiment!

Now it’s time to identify what experiments you will run. Think about different types of experiments from small effort, like conversations or data gathering, to medium effort, like pulling a group together, to large effort, which will take multiple parties to test.

Don’t forget to think like a scientist by being clear about what you are testing, how you will run the experiment, and most importantly, when you will debrief results.

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<thead>
<tr>
<th>Small Effort</th>
<th>Medium Effort</th>
<th>Large Effort</th>
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Reflection

*When you think about this idea of Embracing an Experimenter’s Mindset, what excites you? What makes you nervous?*
EXPERIMENT

Regulate the Heat

“Your ability is always far more than your level of comfort.” Anne Tomkinson

Working on complicated and uncomfortable challenges will mean that we may need to raise the heat to create pressure to act, or we may need to lower the heat because the discomfort will become too much for those involved.

Ed O’Malley and Amanda Cebula captured the idea of raising the heat powerfully in their book, “Your Leadership Edge”:

“Raising the heat means doing something big or small to compel people to act—to make it more uncomfortable not to address the issue than to live with the issue.”

Leading changes requires us to always have our hand on the thermostat and intentionally raising or lowering the temperature to help everyone work their edge without getting complacent or burned in the process.

<table>
<thead>
<tr>
<th>How to Increase the Heat</th>
<th>How to Decrease the Heat</th>
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<tbody>
<tr>
<td>1 Name the elephant in the room</td>
<td>1 Shift focus to technical solutions</td>
</tr>
<tr>
<td>2 Give more responsibility</td>
<td>2 Break down project into smaller tasks</td>
</tr>
<tr>
<td>3 Ask and invite provocative questions</td>
<td>3 Temporarily take ownership for tasks</td>
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<tr>
<td>4 Be direct about the cost of inaction</td>
<td>4 Take a break</td>
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<tr>
<td>5 Identify work avoidance</td>
<td>5 Slow down the rate of change</td>
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Reflection

Think back to a time when someone raised the heat on you that pushed you to take productive action. What did they do, and how did that impact how you responded?

Think back to a time when someone raised the heat on you that paralyzed or was too much. What did they do, and how did that impact how you responded?
EVOLVE

Cultivate Learning

“We do not learn from experience...we learn from reflecting on our experience.” John Dewey

At any point in the journey of change, we can and must pause to gather what we have learned. We do this by reflecting as individuals, as a team, and as an organization. Our goal is to share success, identify next steps, and reflect on personal growth.

Here are questions to get you started on your journey to evolve. Please note that the goal is not to ask all of these, but use them as a guide.

1) What did we learn?
2) What surprised us?
3) What was challenging?
4) What was easy?
5) What do we let go of?
6) What do we hold on to?
7) What do we create new?
8) How are we different now than when we started?
9) Knowing what we know now, what should we explore?
10) What do we want to celebrate?

Reflection

When was a time your growth was accelerated as a result of intentional reflection? What role did others play in that practice? What role did you play?
FINAL REFLECTION

What are three new things you learned today?

What are two ideas you want to remember?

What is one thing you will commit to doing differently?