

# LEADING ORGANIZATIONAL CHANGE





# WORD FROM RANDY

# CHECK IN

**In Chat:** If you could get yourself to make one small change (personal or professional), what would it be?

# OUR CREW

Ann Moenke

Ryan Soisson

Nikki Stephens

Melanie

Marina

Holly

Jason

Maureen

Amy

JT

Jen

Debbie

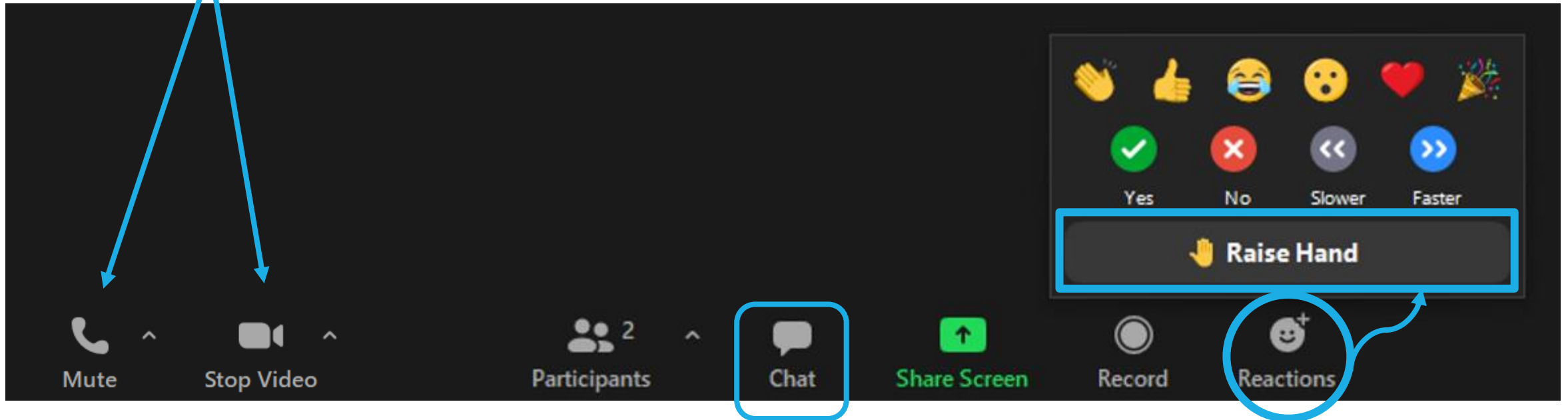
Lindi

Kayce

Laura

# ZOOM REMINDERS

## Audio/Video Controls



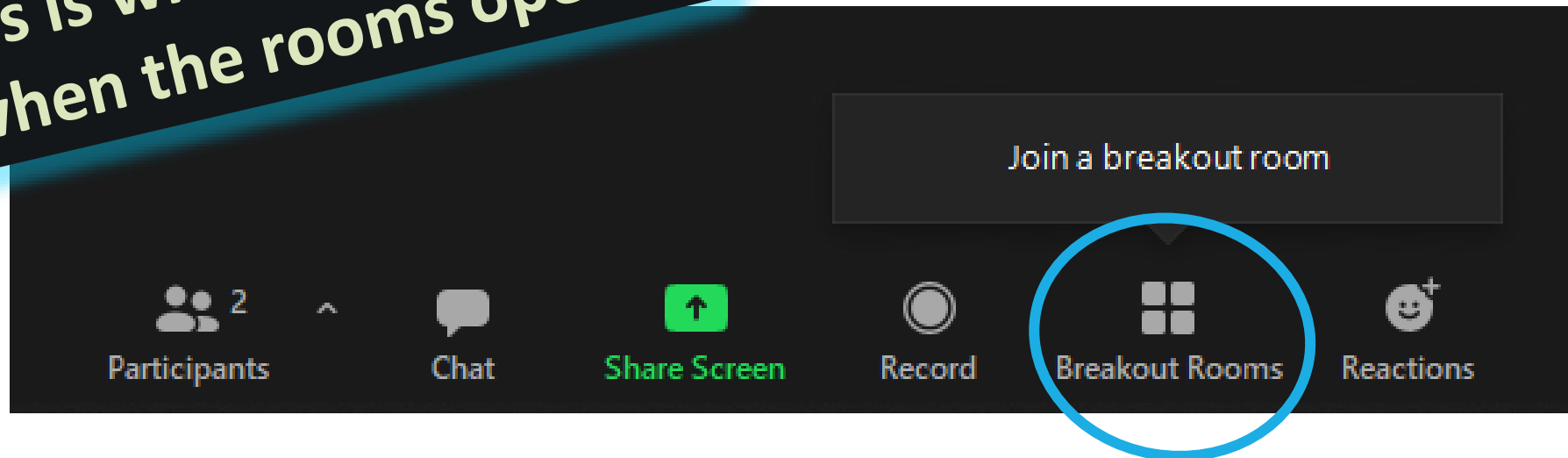
## Want to ask a question live?

- Please use the “Raise Hand” button and we’ll ask you to come off mute

**Use Chat to ask us questions and interact with everyone in the workshop.**

# ZOOM BREAKOUTS

This is what you will see  
when the rooms open



# INFLUENCING *STAKEHOLDERS* TO DO *SOMETHING*

## Org Stakeholders

- Board
- Donors
- Clients
- Management
- Staff
- Volunteers

## But Also

- Spouses
- Parents
- Kids
- Neighbors
- Friends
- Self



# AGENDA

- Introduction
- Influence Challenge
- Action + Stakeholders
- Action + Stakeholders Breakout
- Action + Stakeholders Debrief
- Break
- Influence Tactics
- Influence Tactics Breakout
- Influence Tactics Debrief
- Close



# CASE STUDY

Stakeholder Group

Specific Action

**Participant Pre-Work & Worksheet**

**Pre-Workshop Influence Challenge**

In the *Leading Organization Change* workshop, we will focus on how to influence a stakeholder group to take a specific action. In preparation for this workshop, please identify a *case study* of a real, specific change you would like to lead in your organization. While it is tempting to think about big, broad programmatic changes "increase funding" or "improve management practices," for this case study we will ask you to **focus on a specific stakeholder group and a specific action**. We will ask you to share your case study in breakout session with a small group of peers.

In the table below please identify:

1. The **stakeholder group** you wish to influence.
2. The **specific action** you would like them to take.

What stakeholder group are you trying to influence? The **stakeholders** you are trying to influence likely come from one of the following generic stakeholder groups:

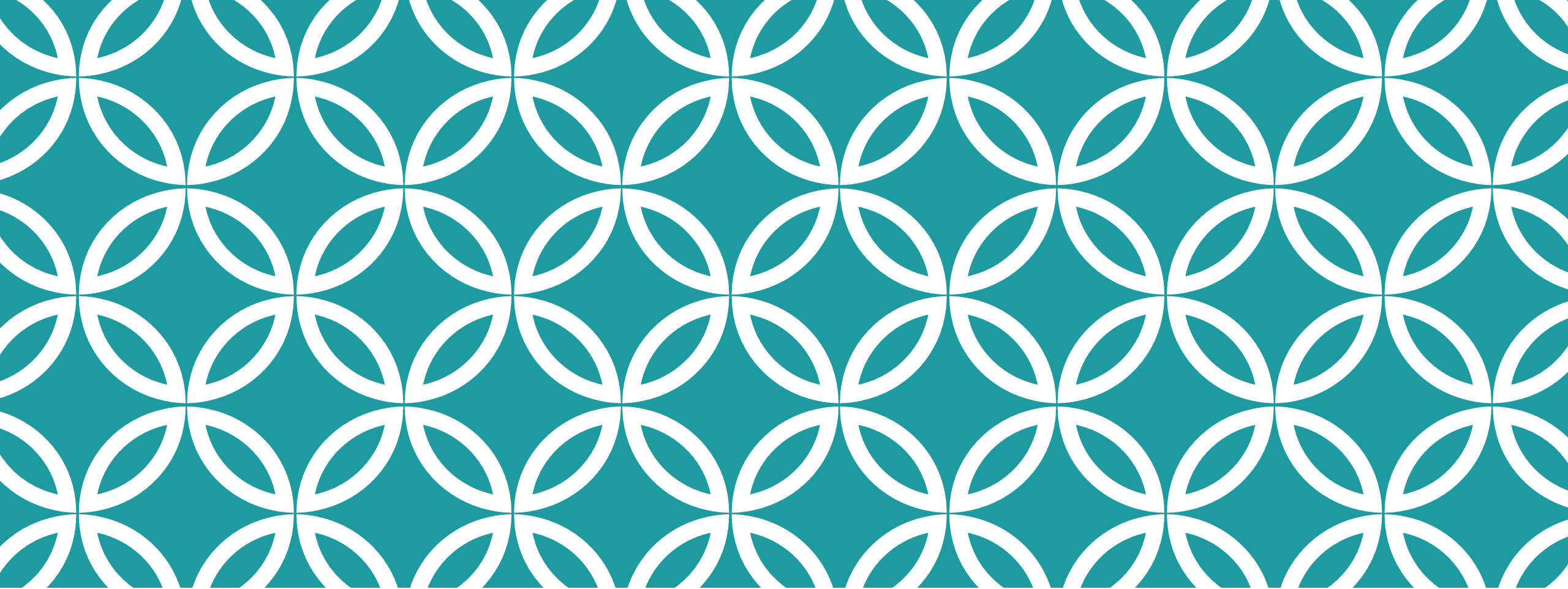
- Board
- Staff
- Donors
- Volunteers
- Constituents

Consider selecting a sub-set of one of these generic groups, e.g., instead of "donors" you might choose high-income, long-term donors. Instead of staff, you might focus on supervisors on the operations team.

Which **specific action** are you trying to get the stakeholders above to take? Try to avoid broad descriptions (e.g., financially support our organization, hold staff accountable). For now, try to identify one specific, action you would like your stakeholders to take (e.g., make a \$200 donation using our new online fundraising portal, hold regular one-on-one coaching sessions with all direct reports.)

Please type or write your case study **stakeholder group** and **specific actions** in the table below. Once completed you are finished with the pre-work!

<b>Stakeholder group</b>	
<b>Specific action</b>	



# INFLUENCE CHALLENGE



# BREAKOUT 1: INFLUENCE CHALLENGE

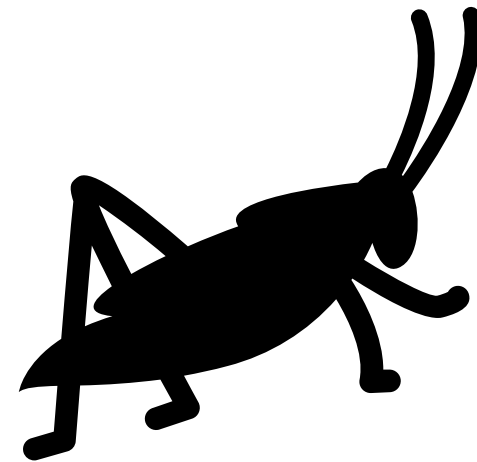
**Get Started:** Move to breakout. Introduce selves: name + org.

**Objective:** Your group will try to get Randy and Christy to **eat crickets**.

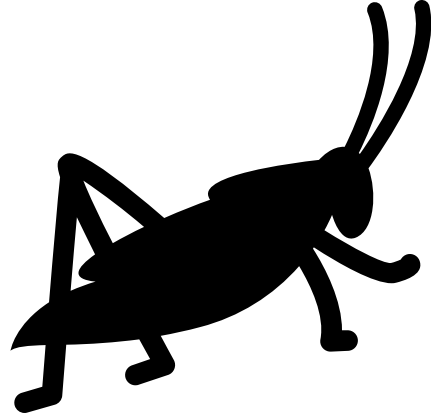
**Process:** Quickly discuss and list on worksheet what is your approach. Be specific.

- What would you **say**?
- What would you **do**?

**Time:** 8 minutes



# DEBRIEF



# POLLS





# ACTION + STAKEHOLDERS



# ACTION + STAKEHOLDER ASSESSMENT

1. **Actions:** Identify a clear, specific, and achievable action for stakeholders.
2. **Drivers and Barriers:** Understand our stakeholder's drivers and barriers.
3. **Influencers:** Leverage influencers within the stakeholder's group.

# ACTION

## **What**

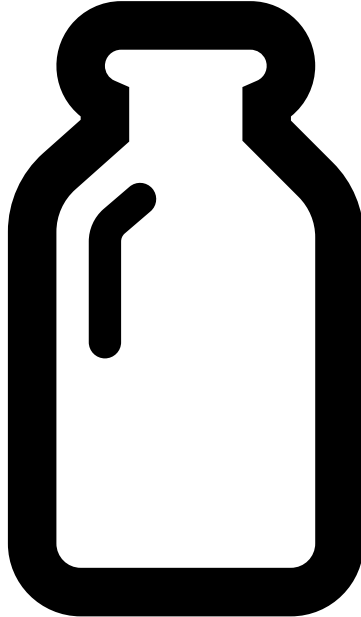
During change, clearly identify what (specifically) you want stakeholders to do.

## **How**

Identify high leverage, specific and achievable actions.



# ACTION



Specific (not general)

Action (not an outcome)

Eliminates ambiguity which can paralyze people during change.

Leads to the outcomes you want

# ACTION

Not Good	Much Better
Eat healthy!	Purchase 1% Milk.
Eat crickets.	Eat one cricket in next 3 minutes.
Managers empower your staff.	Work one-on-one with each staff member to identify particular work projects or tasks where they can make decisions without consulting you.
Board members learn about our programs.	Over the next year, hold two 30-minute interviews with constituents from each of our 6 signature programs.

# STAKEHOLDERS DRIVERS AND BARRIERS

## **What**

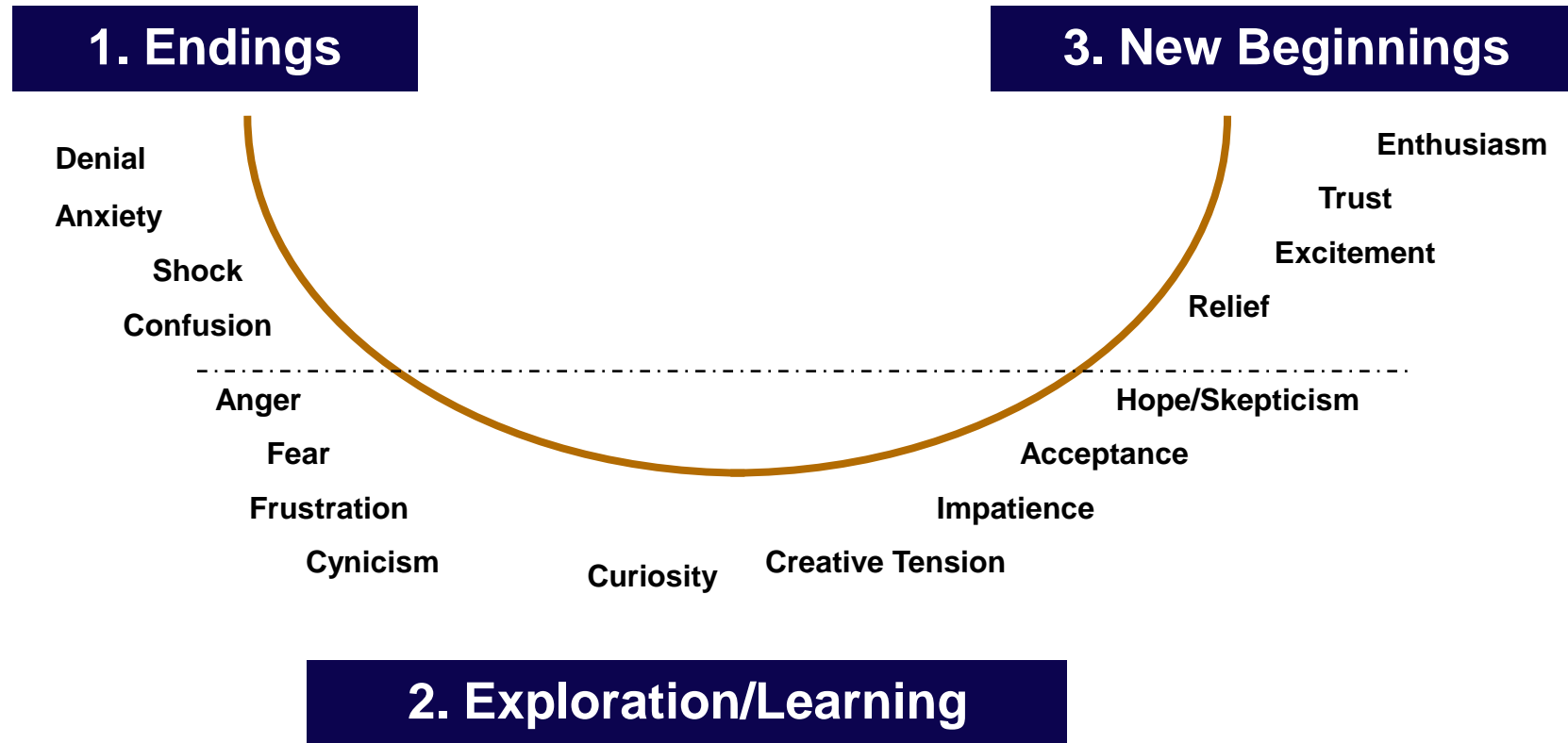
It is important to understand their drivers (motivations to change) and barriers (resistance to change).

## **How**

Ask them!

Surveys are helpful but individual or group conversations where you listen (not sell) are preferable.

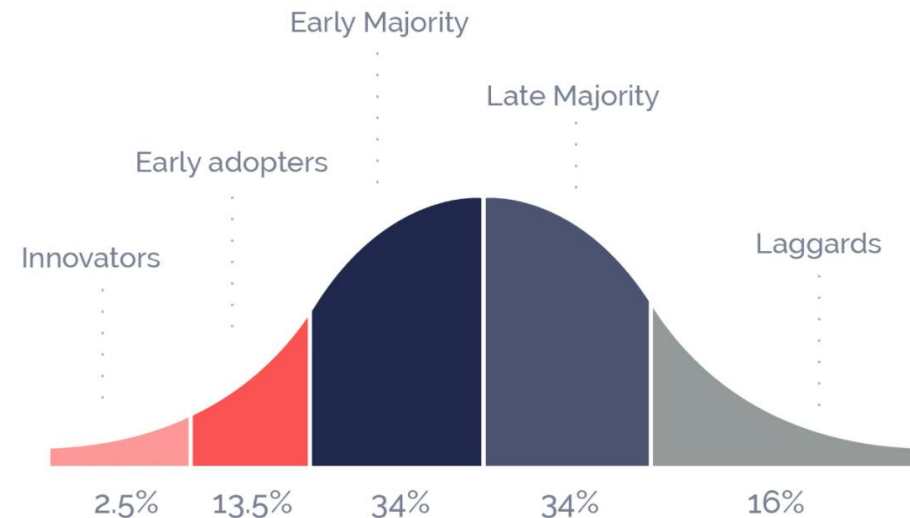
# TRANSITION CURVE



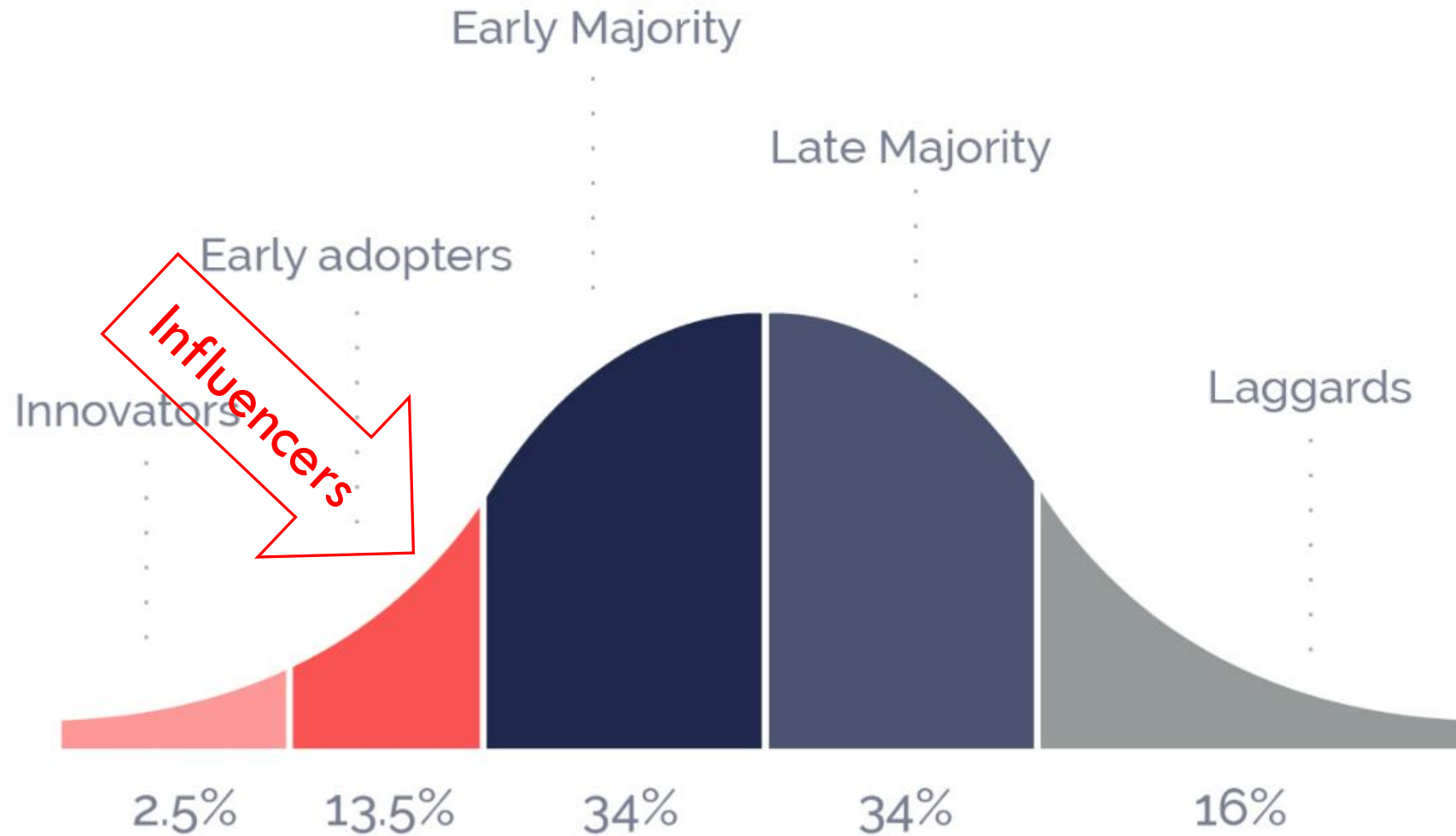
# LEVERAGING STAKEHOLDERS!

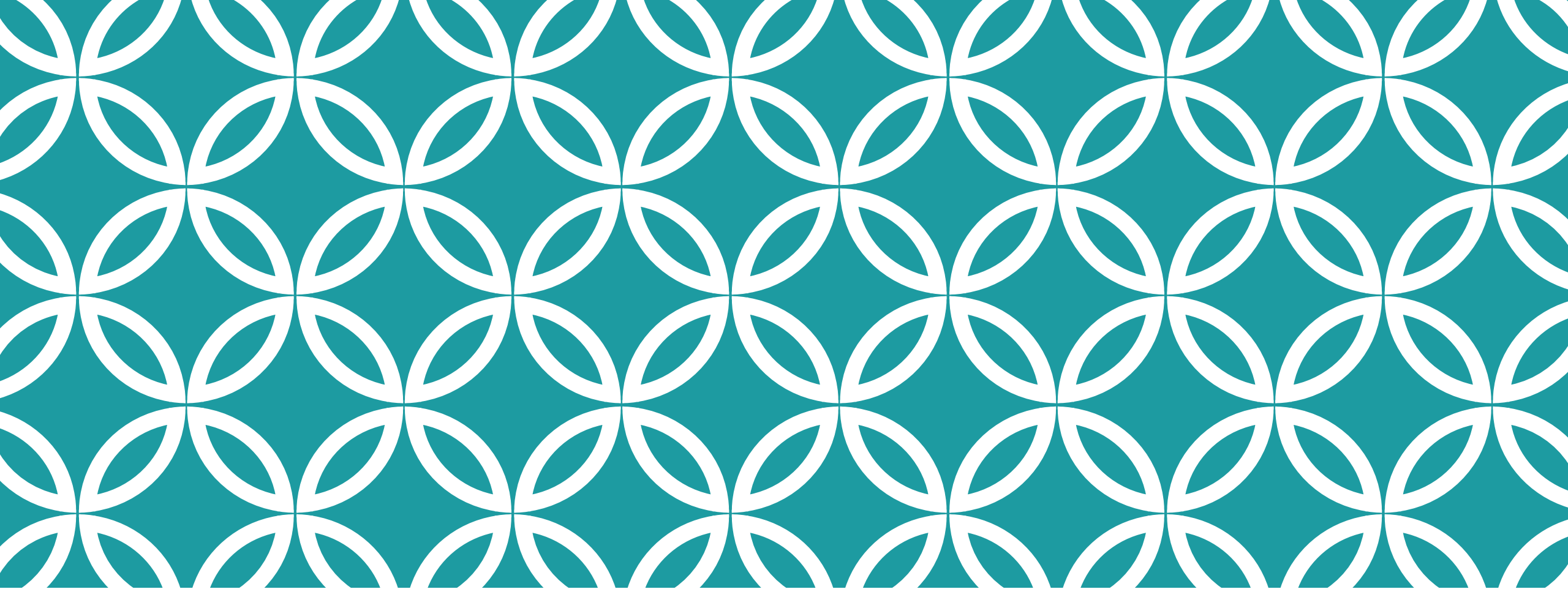
## What

It is important to understand that your stakeholder group is not homogenous. They are a set of individuals that will react to the change in different but somewhat predictable ways.



# ADOPTION CURVE





# ACTION + STAKEHOLDER REFLECTION










# REFLECTION

What insights do you draw from your case study about:

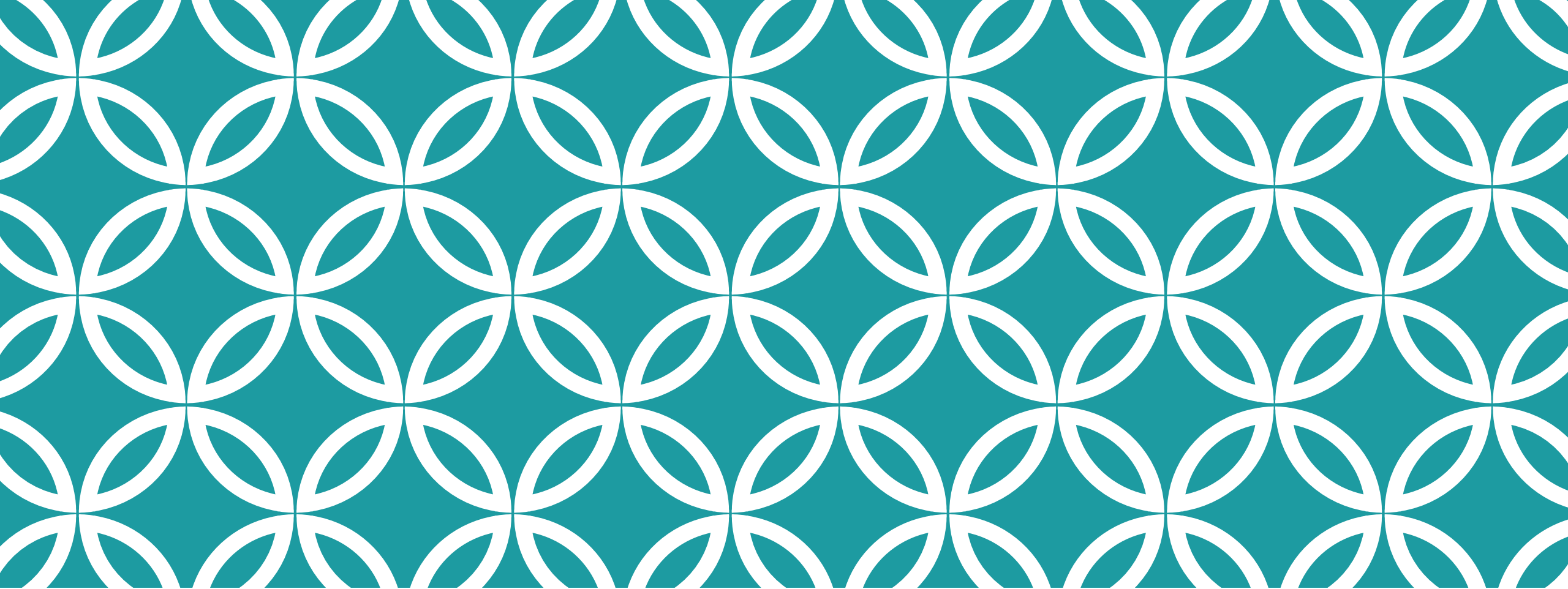
1. Stakeholder group
2. Specific action
3. Stakeholder assessments
4. Drivers
5. Barriers
6. Influencers

Classroom Worksheet

	Stakeholder Group	Who is your stakeholder group?
	Specific action	What specific action do you want your stakeholders to take?
	Stakeholder Assessment	How will you learn more about your stakeholder's drivers and barriers?
	Drivers	What might drive your stakeholders to take the action?
	Barriers	What might restrain your stakeholders from taking the action?
	Influencers	How can you use influencers within your stakeholder group to get other stakeholders to act?
	Influence Tactics	What influence tactics can you deploy to move your stakeholders to action?

Coming Later





# ACTION + STAKEHOLDER BREAKOUT ACTIVITY



# BREAKOUT 2 INSTRUCTIONS

**Get Started:** Move to breakout. Share Twitter-length report on your case study.

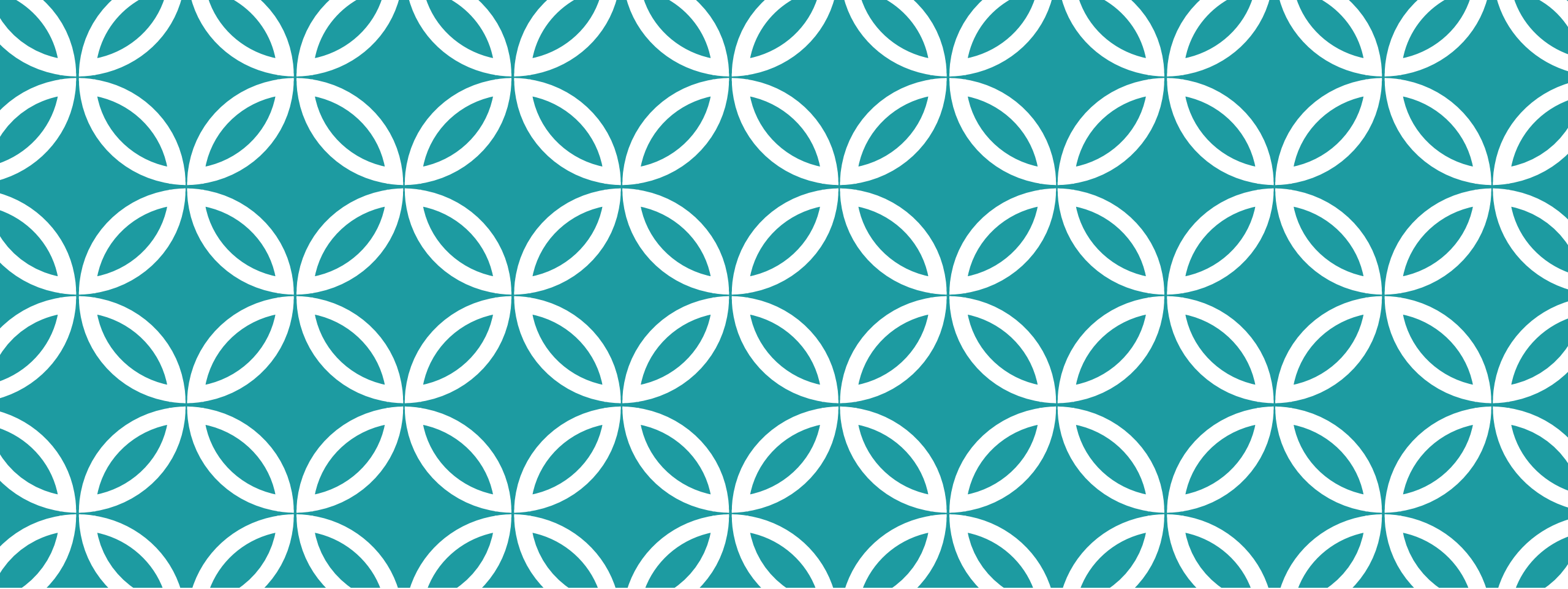
**Objective:** Hear from other group members re: what they learned and how it applies to their case studies.

**Process:** Facilitator will pose questions and create dialogue in group

**Time:** 20 minutes

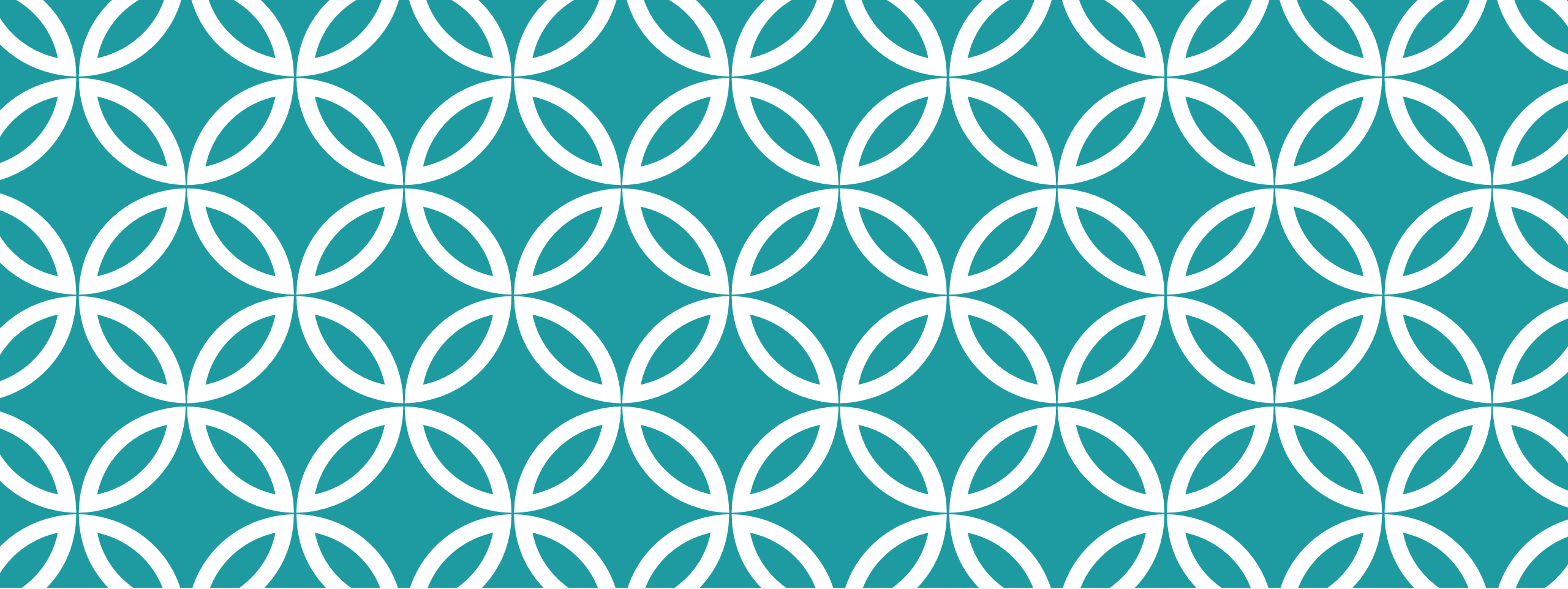
## Facilitator Questions

1. What are your biggest “Ahas” from the presentation or reflection questions? How do those “Ahas” apply to your case study?
2. Where is anyone stuck? How could this be addressed?



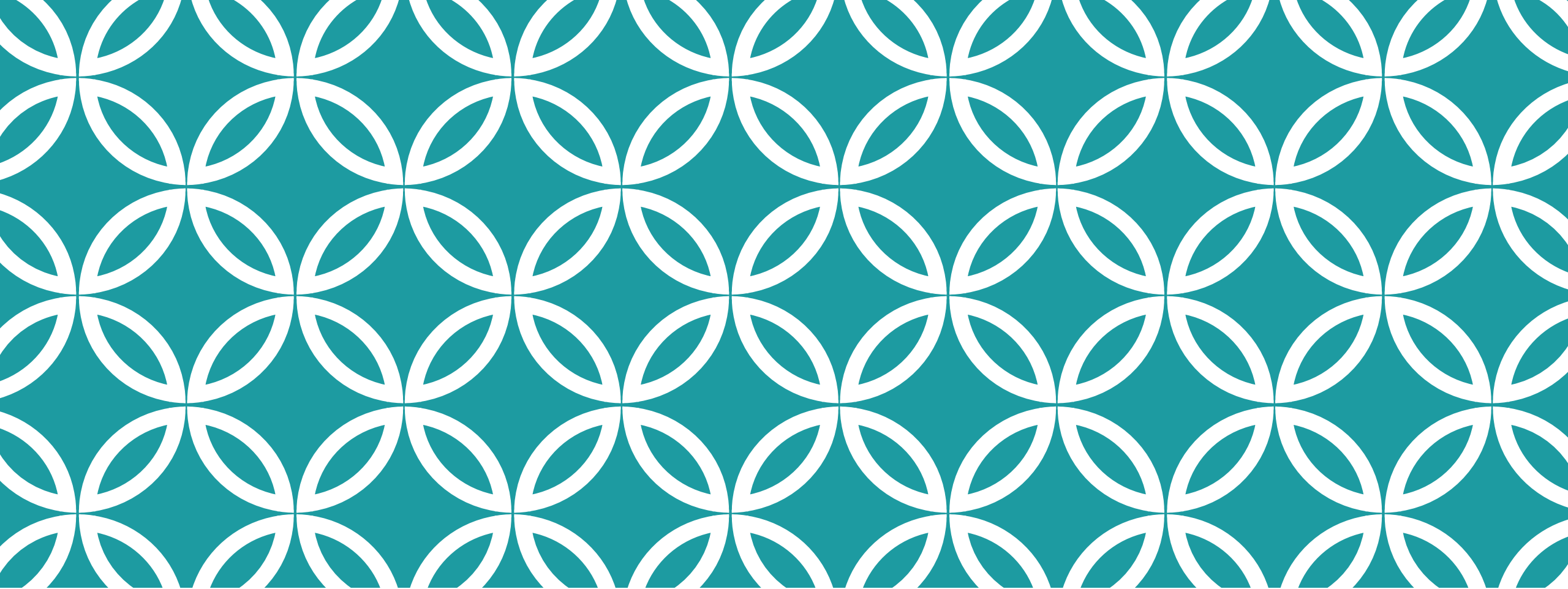
# ACTION + STAKEHOLDER DEBRIEF





**BRAIN BREAK**





# INFLUENCE TACTICS



# 2 GOALS FOR THIS SECTION

1. Offer you a way to think about influencing others
2. Trigger 2-3 ideas about how you can influence your stakeholders in your case study



## POLL 3



# INFLUENCE STRATEGIES

What drives people's actions?

1. **Intrinsic Motivation** - am I internally motivated to do X?
2. **Personal Abilities** - do I have the knowledge and skills to do X?
3. **Social Influence** - do the others around me do X?
4. **Extrinsic Motivation** - is there a payoff for doing X?
5. **Environmental Influence** - is the world arranged to make doing X easy?



# INTRINSIC MOTIVATION

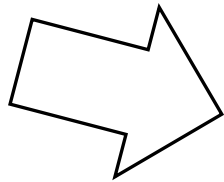
Record ideas that may help in your case study



**Expectations:** How can you clearly articulate the expectations for performance of the action?



**Involvement:** How can you involve people in creating their own influence tactics or plans?



**Baby Steps:** How can you get people to take partial actions or preparatory actions? Or simply try to take actions?



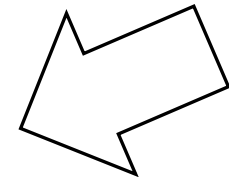
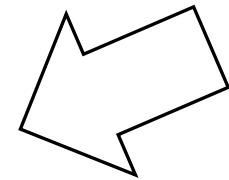
**Barriers:** How can you help people identify their barriers and devise solutions to overcoming the barriers?



**Jump-starting:** How can you demonstrate that people are already performing the action?

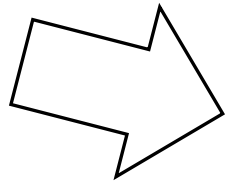


**Framing:** How can you connect this action to something the other person already values?



# PERSONAL ABILITY

Record ideas that may help in your case study



**Knowledge & Skills:** How can you provide opportunities for people to acquire the knowledge and skills needed to perform this action well?



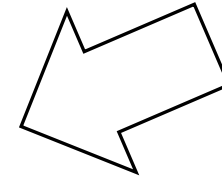
**Confidence:** How can you increase people's confidence that they can perform the action?



**Short-Cuts:** What short-cuts can you devise to make performing the action easier?

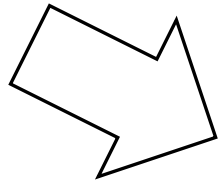


**Outcome Expectations:** How can you increase people's expectation that good outcomes will result from acting?



# SOCIAL INFLUENCE

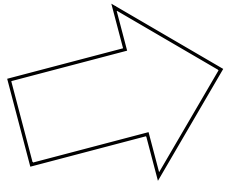
Record ideas that may help in your case study



**Modeling:** How can you model this action for others to see?



**Influencers:** How can you get influential people to become early adopters or champions of the action?



**Spotlighting:** How can you “spotlight” other people who are performing the action or performing the action well?



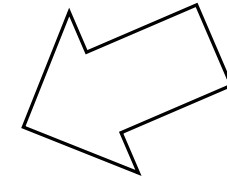
**Competition:** How can you turn performing the action into a friendly individual or team competition?



**Learning:** how can you get people to share experiences with performing the action?

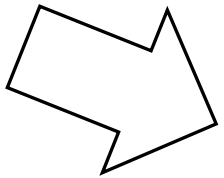


**Coaching:** How can you use coaching or mentoring or peer support groups to drive performance of the action?



# INCENTIVES

Record ideas that may help in your case study



**Incentives:** How can you incentivize performing this action?



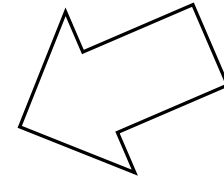
**Performance Management:** How can you connect performance of the action to the organization performance management process?



**Dis-incentives:** How can you (carefully) use dis-incentives for failing to perform the action?

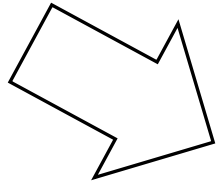


**Recognition:** How can you recognize or acknowledge people who perform the action?



# ENVIRONMENTAL INFLUENCE

Record ideas that may help in your case study



Space/Time: How can you change spatial or temporal arrangements to make the action easier to perform?



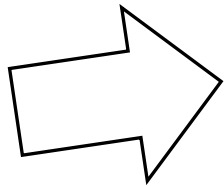
Checklists: How can you use checklists to aid performance?



Tools: How can physical tools help make performance easier.



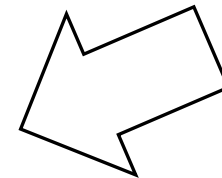
Applications: How can you use apps or software to make the action easier to perform, trigger performance or track performance?

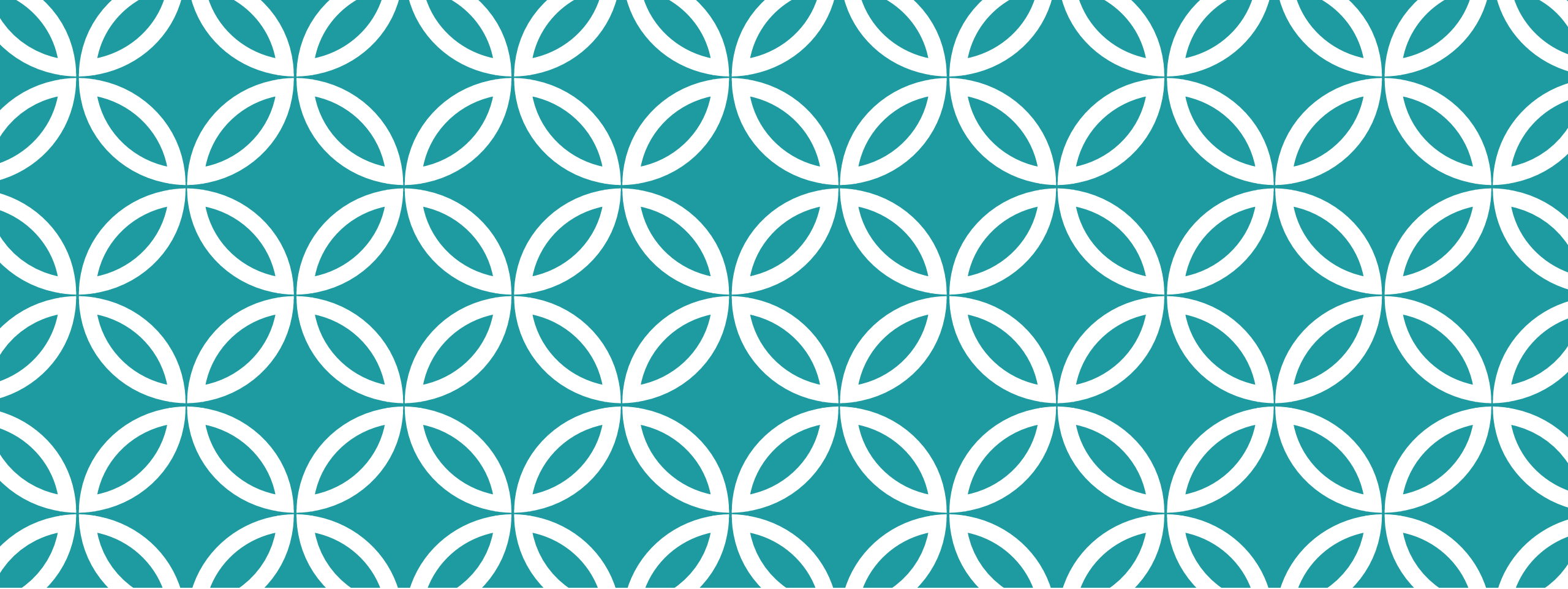


Triggers & Reminders: How can you use triggers, prompts or reminders to occasion performing the action?



Visibility: how can you make the results of the action visible?





# INFLUENCE TACTICS REFLECTION










# REFLECTION

Which tactics might you try to influence your stakeholders?

How would you implement each of those tactics?

Classroom Worksheet

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# INFLUENCE TACTICS BREAKOUT





# BREAKOUT 3: INSTRUCTIONS

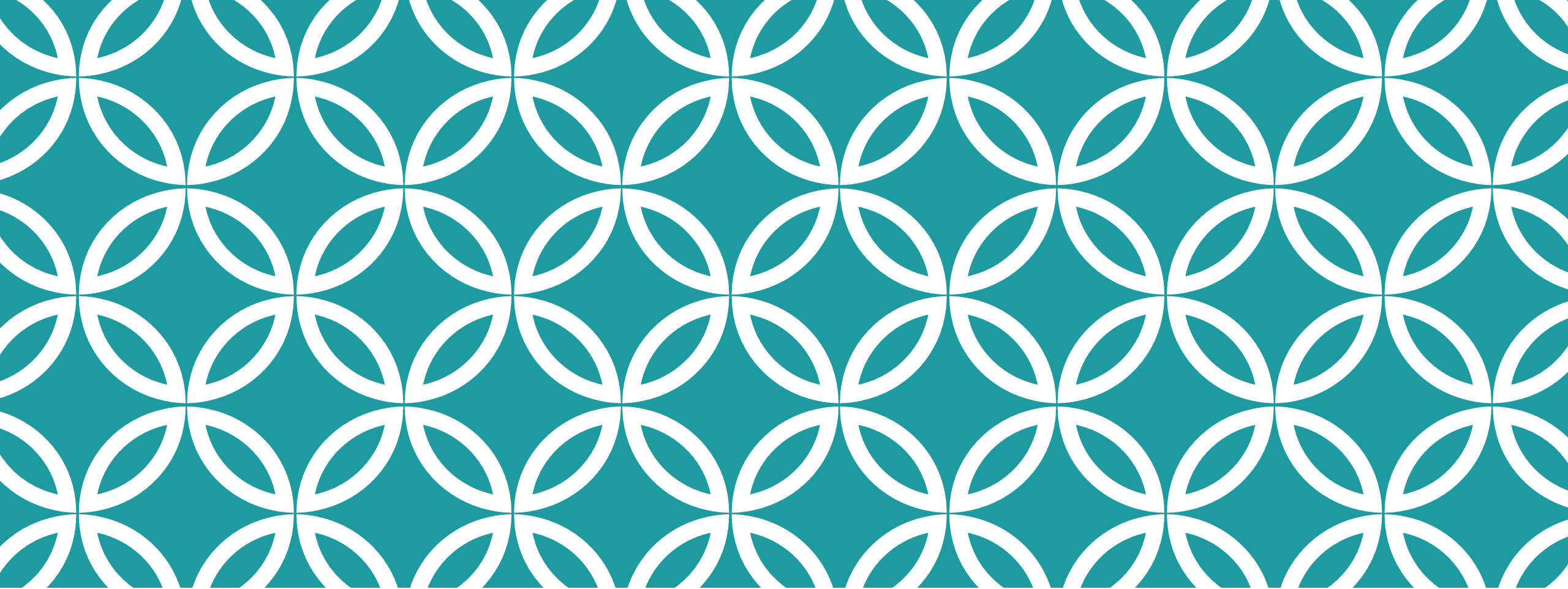
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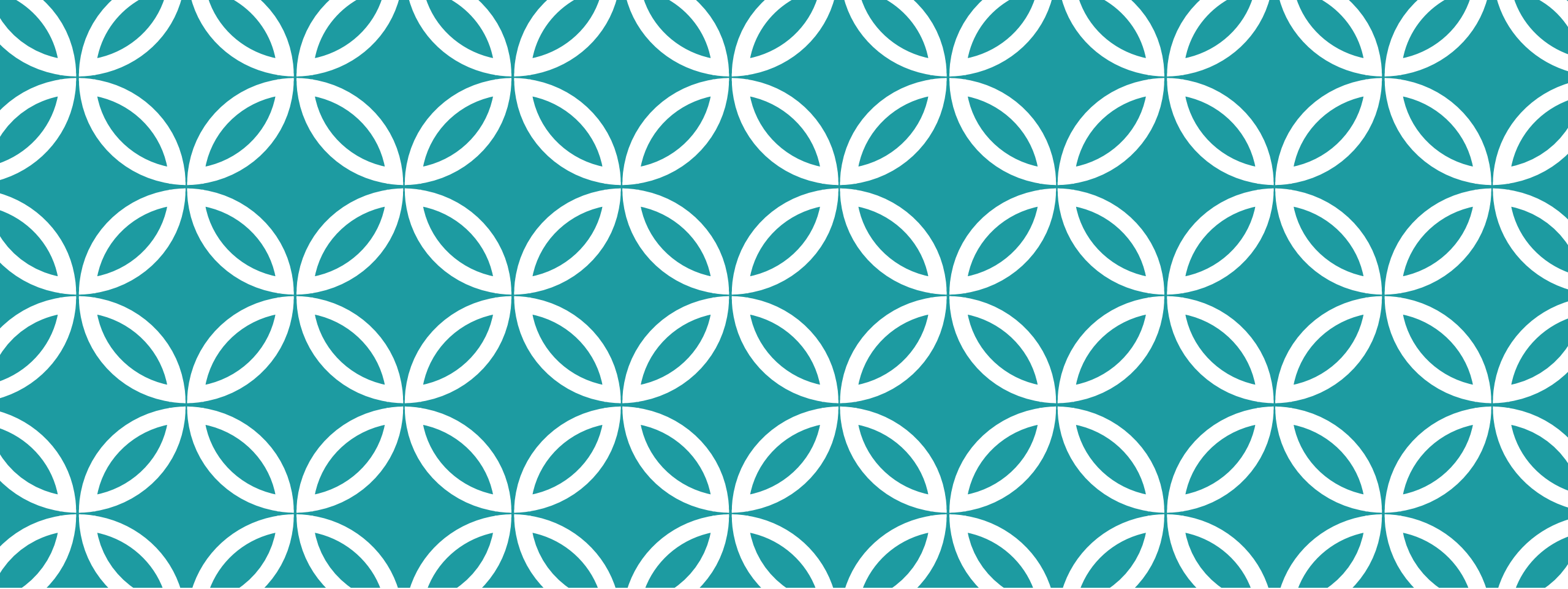
## Facilitator Questions

1. Who is your stakeholder group and what action are you trying to drive? (as a reminder)
2. What influence tactics can you deploy to move your stakeholders to action?
3. How would you implement (each of) those tactics?



# INFLUENCE TACTICS DEBRIEF





CLOSE



# I WANT MORE?

