

# FORWARD Leading Your Team Through Change

## By Elizabeth Moran

### Chapter 10: Forward Change Leadership Tool

Sometimes what you need most at the start of a big change is a consolidated, action-focused checklist of the things you need to do, in the order you need to do them. That's what this tool is—an overview of the action steps that you've read about in the past nine chapters, without the explanations, scripts, and stories to distract you. This tool gives you a simpler way to run through the steps to help you get each change off to a good start.

You can refer to previous chapters if you need more information about anything here.

#### Chapter 4: Start with Yourself

Before you talk to your team, spend a few minutes understanding your own feelings and reactions to the upcoming change.

Am I currently on board, uncertain, or resistant to the change that's coming? Pause to name your feelings, treating them as important data that will either help or hinder you as you make the change.

- If I'm uncertain or resistant, why do I feel the way I do? What are your feelings trying to tell you? What's the wisdom in your feelings?
- Can I reframe my negative thoughts to create a more empowered perspective to help me lead through this change?
- What are the facts versus my assumptions in this situation?
- Is my perspective the only possibility?
- Is a more optimistic outcome possible?
- What strengths can I bring to manage this situation?
- When I've experienced something like this before, what did I learn that I could apply here to help me or my team?



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- What have I learned from other leaders who have moved through difficulties with both realism and grace that could help me in this situation?
- What aspects of this change can I control?

### Forward Change Leadership Playbook

#### Step 1: Understand the Impact of the Change

Take a few moments and think about your path forward. Write down your answers.

- One thing that will be challenging for me in leading through this change is:
- Another challenge for me or my team will be:
- What activities or tasks will my team need to start, stop, or continue in order to implement this change?
- Do any aspects of how we work together or communicate need to change, even if only in the short term?
- What processes, workflows, or technologies must be reconfigured as a result of the change?
- Will my team need to learn any new skills to be successful in the future?
- How does this change intersect with, or influence, existing changes underway?

#### Step 2: Identify Strengths



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Use the question prompts below to identify and list experiences, skills, characteristics, or abilities that you and members of your team bring to support this change effort.

- One strength I/we bring to this change situation is:
- Another strength I or my team brings to this situation is:
- A past situation where we used our strengths to move through a change was:
- Strengths that we used then that really helped were:

#### **Step 3: Prepare for Tough Questions and Reactions**

Think about the change from your team's perspective, including processes they might need to do differently, and use the tools below to help you identify activities they like that they might not get to do anymore, skills they'll need to learn, increases in their current workload, and the like.

O.U.R. (on board, uncertain, resistant) Team Assessment

Directions:

- Write the names of each team member in the first column.
- Consider the approaching change from each person's perspective. What could be the consequences, or the perceived consequences, for this specific person? Write that in the second column.
- In the third column, write down how that person might initially feel about the change.
- In the fourth column, consider what they might need from you to get on board with the change. This could be one of the 3 Priorities or something practical like skill development or training.
- Lastly, given what you know right now, would you consider them to be on board, uncertain, or resistant to this change?



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Team member Name/initials	What might happen to this person as a result of this change?	How might they feel?	What will they need to make the change?	Initial reaction: on board, uncertain, or resistant?

Next, write down questions or concerns you expect to hear from your team:

- 1.
- 2.
- 3.
- 4.

Take a few moments to draft some things you could say in response to the questions above. If you are pretty sure there will be resistance, you can use the guidance on tough questions in Chapter 5 to help you formulate your responses.

- 1.



# FORWARD Leading Your Team Through Change

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## Chapter 10: Forward Change Leadership Tool

2.

3.

4.

### Step 4: Envision Success

Imagine you have been successful in leading your team through this change. Practice seeing and feeling success as clearly and fully as you can and responding to the questions below.

- What has been accomplished?
- What or who are you particularly proud of? (Imagine the person who might have the most resistance at the start becoming one of the most valuable contributors to success.)
- What obstacles have you overcome?
- What does your team say you did that helped them be successful? (See their smiling faces; imagine the meetings and conversations where you all are reflecting on your success together, sharing stories, laughing, and talking about all obstacles you overcame.)
- What benefits have you achieved for the team, the organization, the clients, and other stakeholders? What are they feeling, expressing, or experiencing?
- What are you feeling as you imagine your success? Relief? Happiness? Gratitude? Satisfaction? (Physically feel these in your body and heart area as fully as you can. Let the thought create the experience, which is what primes your brain for this possibility to become



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a reality.)

Now, come up with a one-to-three-sentence statement that captures a positive future vision of this change for your team. If you need more information about how to do this, refer to Chapter 5.

My positive future vision is:

#### Step 5: Create Your Message

Write your answers to the following questions on a single page, forcing yourself to stick to higher-level answers. This will be the vision statement you can share with your team. (Make sure this aligns with any broader organizational messaging, and share with your manager prior to sharing with your team, if appropriate.)

***The name of this change is:***

- What's changing?
- Why is it changing now, and what happens if it doesn't change?
- What will the change mean to me/us, and what needs to be done differently?
- What will be gained?
- What will be lost?
- What new actions, behaviors, and results are we looking for (what needs to be done differently)?
- What benefits will we get from supporting this change? (For example, there may be benefits



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for clients and the organization as a whole in the short or longer term, but also consider whether there are specific benefits for your team and their professional and personal development.)

#### Step 6: Have a Team Conversation

The actual team conversation is outlined in detail, including text to include in a slide deck, in Chapter 5. Below is a checklist of questions to consider before having the team conversation:

- Have you completed steps 1 through 5? (The exception is if you and your team find out about a change at the same time, then go to Chapter 7 for the guidance on the quick team check-in.)
- Have you blocked out enough time for the first conversation, including having time available after the meeting in case some team members need to talk further with you?
- Have you considered any logistical challenges for your unique situation? (Will everyone be at the meeting, or will you need to connect individually with anyone?) This is especially important to consider if this change involves job losses. Refer to Chapter 6 for more information on dealing with staff reductions.
- Lastly, what would a positive conversation or outcome be or look like? (For example, see people being curious, listening and asking questions, even if they disagree. See yourself being able to handle any tough question, even if it means following up later. If you don't know how to respond, say that.)

#### Step 7: Follow Up

Your role as a change leader doesn't end when the change is announced and launched. As time passes, here are a few tools to continue to check in and support your team. Additional helpful information about gathering team input and feedback using an after-action review and the 3 Priorities Mini Survey, identifying and utilizing strengths, measuring progress, and celebrating success can be found in Chapters 8 and 9.

Considering this change, what type of follow-up actions or conversations do you anticipate needing to do or have in the next 2 months?



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- 1.
- 2.
- 3.
- 4.

### Want More?

This book and my company, Elizabeth Moran Transformation, emerged from my belief that leading through change doesn't have to be complicated. I am passionate about helping leaders, teams, and organizations navigate and evolve through constant change in the simplest way possible, leveraging their strengths and aligning their energy to realize their vision.

If you'd like access to additional articles, resources including leadership development solutions or to connect with me visit [elizabethmorantransformation.com](http://elizabethmorantransformation.com) or follow me on [LinkedIn](#). EMT leadership development solutions, include:

- A scalable, technology-enabled learning simulation for team leaders based on FORWARD.
- An interactive in-person or virtual leadership development experience that gives leaders proven actions and practical tools to more confidently lead their team through existing or upcoming changes.
- Change Leadership Coaching that takes the guesswork out of "Change Management," focusing on your specific goals and challenges, and supporting you to take the best targeted actions, reducing stress and maximizing impact.

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