

Blank sheet exercises

Starting the "why change management" discussion

How do you introduce change management to a project team you are supporting? You could begin with an accurate and precise definition of change management and a sampling of the tools you will be using. But that is not going to achieve the **fundamental shift in mindset** you need. Instead, start with a blank sheet of paper and see if you can **lead your team to the realization** that individual change is necessary and critical for delivering results and outcomes.

This tutorial presents two "blank sheet" exercises - activities you can complete **anytime, anywhere** to jumpstart the change management discussion. All you need is a blank sheet of paper and a project that your audience cares about. Rather than starting with "here is change management", start with a simple analysis about the nature of change and of their project to demonstrate why change management is a critical success factor and should have a seat at the table.

Connecting project, purpose and people - the P-P-P-P exercise

The first "blank sheet" exercise is an approach for connecting the project with the people who have to do their jobs differently. The foundation of change, and the reason we need change management, is that projects and initiatives **ultimately require individuals to do their jobs differently**. Whether the initiative is focused on processes, systems, tools or job roles, it will result in individual impacts. Whether the scope is a single workgroup, a department or the entire enterprise, in the end the change will only occur when individuals **embrace, adopt and utilize** the solution that is being introduced. Helping a project team identify and inventory which employees have to do their jobs differently is an important anchor and starting point for effectively positioning change management.

The goal of this exercise is to show the connection between the project, the intended outcomes and the employee groups who will be impacted by the effort by slowly and purposefully identifying four key elements of the change.

Steps for completing the P-P-P-P blank sheet exercise:

1. Start with a blank sheet of paper.
2. Divide the paper into four columns.
3. Label the first column "Project name" and answer the question: **What is the project?**
4. Label the second column "Purpose" and answer the question: **Why are we changing?**
5. Label the third column "Particulars" and answer the question: **What are we changing?**
6. Label the fourth column "People" and answer the question: **Who will be changing?**
7. Finally, pose the question: **How much of the "Purpose" can be achieved if the "People" do not adopt the change to their day-to-day work? Or, said another way, what percentage of the "Purpose" of this project is dependent upon the "People" doing their jobs differently?**

<i>Project name</i>	<i>Purpose</i>	<i>Particulars</i>	<i>People</i>

Change management connection:

The connection to change management is how dependent the "Purpose" is on the "People" changing their behaviors. For every project or initiative, success is determined by how effectively those individuals in the final column adopt and embrace the change to how they do their jobs. When you use the exercise with a project team, you are forcing them to think about the individual impacts of their project or initiative. The transition for positioning change management sounds something like this: ***"Thank you for helping me better understand the initiative and the impacted groups for this effort. Now that we have an inventory of who has to adopt the change for the project to succeed, I can begin creating change management plans and activities to actively engage these groups."***

On a single sheet of paper, this exercise allows you to make the **connection** between the project, the intended outcomes, the specific technical changes and the individuals and groups who must adopt the change.

Two levels of change - future states exercise

The second "blank sheet" exercise is based on the **three states of change** - the Current State, the Transition State and the Future State. The idea of change occurring in three distinct phases is found in most change management literature from Kurt Lewin to William Bridges, Richard Beckhard to Daryl Conner, Jeanenne LaMarsh to Prosci - the explanation of change as a movement (Transition) from how we had done things (Current) to a new way of doing things (Future) is prominent. Even many systems used to develop technical solutions are based on the delta between an "as is" (the Current State) and a "to be" (the Future State).

The goal of this "blank sheet" exercise is to extend the thinking one more level by adding the perspective of **Individual Future States**. Most project teams and business leaders think about the Future State from an organizational perspective - documented and managed processes, a production process with fewer errors or variations, an integrated data system instead of disparate legacy systems, etc. While this is certainly a necessary perspective, all of these projects and initiatives ultimately impact individuals and **how they do their jobs**. Said another way, as the project or initiative is implemented, individual employees have to move from their own Current State, through their own Transition State to their own Future State.

Steps for completing the future states blank sheet exercise:

1. Start with a blank sheet of paper.
2. Draw a line down the middle to separate the page into two sides.
3. On the left hand side, describe the Future State from the organization's perspective that the project or initiative is trying to achieve (this is usually an easy task for a project team or leader).
4. On the right hand side, describe the Future State for five individuals impacted by the change - how their own job will be different after the project is implemented.

<i>Future State from the organization's perspective</i>	<i>Future State for 5 individuals impacted by the change</i>
	<i>1.</i>
	<i>2.</i>
	<i>3.</i>
	<i>4.</i>
	<i>5.</i>

Change management connection:

The change management connection for this exercise is the perspective of change on **two levels** - the organizational level and the individual level. In the exercise, you use a fairly simple and accessible model (the three states of change) as the foundation for examining the Future State at the organizational and the individual levels.

You may find that your project team can instantly define the Future State from the organization's perspective, but struggle to even begin defining individual Future States. The positioning of change management might sound something like: **"Thank you for helping me start to look at the numerous Future States that this project is going to create. Change management is about enabling and encouraging impacted individuals to reach their own Future States. By working together on the project, we can achieve the organizational and individual Future States that will result in the improved performance we are trying to achieve."**

This exercise can be eye opening for many who have always thought about change strictly in terms of the organizational perspective. On a single sheet of paper you are able to introduce the individual level of change and start the discussion about how to best facilitate these changes.

Conclusion

The case for change management can certainly be made more analytical, more data-driven and more rigorous. However, the first step in building buy-in and commitment to change management is helping your project teams **redefine how they view change** - away from a strictly technical view of the project or initiative and toward a more complete view that includes the individuals who have to ultimately embrace and adopt the change.

The two exercises presented in this tutorial are designed to help you position and anchor change management for a project team with a simple analysis that starts with nothing more than a blank sheet of paper and a project to consider.