



SELECTING THE BEST CHANGE PROCESS LEADER TO OVERSEE YOUR TRANSFORMATION

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Introduction

Leading transformational change is far more challenging than managing a typical large project. The process complexities, human dynamics, and need for ongoing course correction call for unique change leadership knowledge and skills. As sponsor, your choice of leader to design and implement your transformation is one of the most important decisions you will make in setting your transformation up for success. If at all possible, get this decision right from the start!

This eBook describes the role, authority, attributes and deliverables needed most in your senior change leader—the “Change Process Leader.” We explore how to select the right person for this role, how to position this role for optimal influence, and how to support this person with the right staff and resources.



The Need for a Change Process Leader

Too often, we see organizations initiating major changes without proper leadership, sometimes even without adequate sponsorship. Executives often choose the wrong type of person to orchestrate the change, someone who does not understand the unique dynamics of transformation, lacks the needed awareness and behaviors, or does not possess the tools and strategies needed to mobilize people to accomplish the change effort's results.

We frequently see a person selected as project lead because of their project management skills, but project management does not suffice for transformation even though it is often adequate for other less complex types of change. We also see people from staff positions named as the change process leader—typically from human resources—yet staff people often lack sufficient clout with line leaders to successfully lead enterprise-wide efforts. Sometimes, a leader is

selected because they simply happen to be free at the moment, and everyone else is “too busy” to fill this role. We also see the scenario of a strong line person being named, but this responsibility is added on top of her or his normal duties, and no extra time is made. Or, this person may know the business inside and out, but have inadequate people skills to succeed. Ouch! None of these approaches work. The change process leader job is too big, too important, and frankly, too unique in its requirements. It takes a special person.

Overview of This Role

The change process leader, in alignment with the sponsor, is responsible for delivering the desired business AND human results from the change. This person is in charge of building the overall change strategy, as well as designing AND implementing the change process, including scoping, planning, overseeing, and course correcting the transformation as it rolls out.

In designing the key activities of the change process, the change process leader ensures that the vision and case for change are developed and communicated, change infrastructures and resources are obtained, the executives and workforce are capable and ready to make the change, and that the best future state solution is designed and prepared for an optimal rollout. The change process leader also ensures effective communications, employee engagement, and full alignment of the change with the existing organization and its ongoing operations.

Project integration is a critical responsibility. The change process leader oversees the multiple initiatives required for the overall transformation and the mechanisms for integrating and coordinating them as they are designed and implemented.

The change process leader ensures that required human development—personal, team, and cultural—is begun and sustained





as the effort unfolds, including all necessary mindset and behavior change for the top executives and others. Change acceleration strategies, personal and organizational alignment, readiness, appropriate pacing, and creating a critical mass of support are among this role's key deliverables. Given all this, it is no wonder that this role in major transformation is a full time job!

A Focus on Process and People, not Just Content!

We call the lead role the “change process leader” for a very specific reason. An effective change strategy must address three distinct yet related areas: content, people, and process. Content refers to the business side of “what” is changing, (e.g., CRM implementation, restructuring, global re-engineering, etc.); people refers to the human and cultural

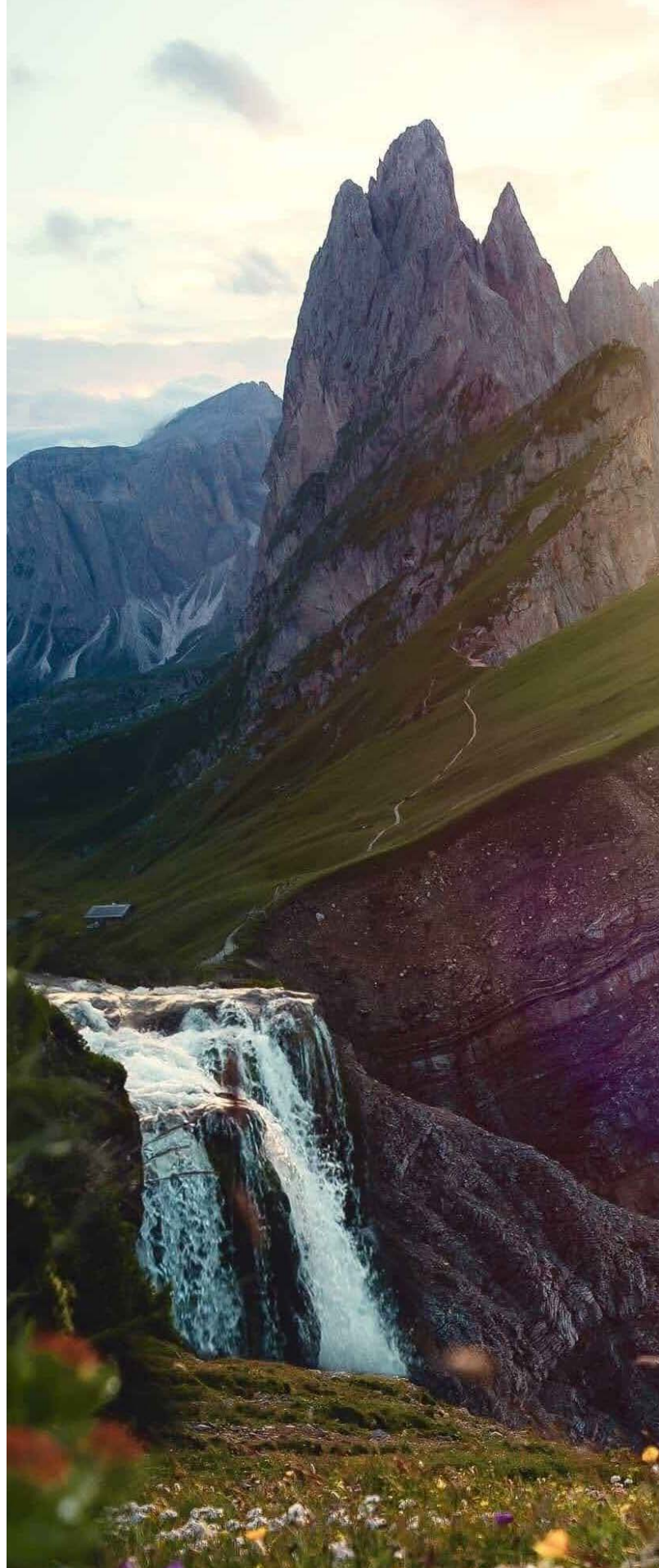
dynamics, including communications, engagement, resistance, training, culture, etc.; and process refers to the one unified and integrated plan or roadmap by which the content and people outcomes are achieved. We call this role the change process leader because this person is ultimately responsible for the overall process by which the transformation will deliver both its business and human results.

As mentioned above, this person is responsible for both the design AND the implementation of the change process. This is very different from the traditional approach where the project leader is often responsible only for the design of the business solution, not its implementation and not the employee engagement in design required to get smooth implementation!

This lack of true change process leadership is a common and very costly mistake regarding change governance. Transformation is complex and dynamic. The process is volatile and needs someone to own it, nurture it, and push it along as needed. If that person becomes embroiled in the content design, then they neglect the overall process and lose their capacity to facilitate it. For example: If the project lead gets into the content ring, takes a position, and fights for design Scenario A over Scenario B, then everyone who wanted Scenario B will now resist this person's efforts to influence the change rollout. Plus, while enmeshed in the battle, the project lead will not be thinking about how to get others engaged in discovering the best solution. He or she will no longer be seen as objective or seeking other's input.

Instead of focusing on which change solution is right, the change process leader should focus on creating a design process that will—through engagement—simultaneously deliver the best design solution AND build commitment in the workforce to implement it. The design process should attend to both the content and the people dynamics inherent in the change...people's degree of understanding, buy-in, readiness, capability to succeed, emotional reactions, workload needs, and political agendas. Any of these can block the success of the design's implementation, so the change process leader needs to attend to them early and especially during design!

Many organizations use other language to name this position, such as Change Project Manager, Transformation Officer, or Project Lead. Any of these titles are fine, as long as this person's work covers the essential bases of overseeing the change strategy and process planning that deliver both content and human results.



Positioning of the Change Process Leader

The change process leader reports directly to the sponsor of the change. If the transformation is enterprise-wide, the change process leader would likely report directly to the CEO. This person would also have a dotted line reporting relationship to the Executive Team to ensure that the change is led in alignment with the ongoing needs of the operation. If the change is large and complex enough to need a Change Leadership Team that is separate from the Executive Team, then the change process leader would chair the Change Leadership Team.

Of greatest importance is the announcement and authority of the Change Process Leader. The CEO (or sponsor of the change) must announce that this person and role has the authority to act in his or her stead on behalf of the transformation. This person needs to be able to be anywhere at any time if information about the outcomes, process, conditions, or needs of the transformation are being discussed or affected. This role has significant power, which is why the selection of the person who fills it must be made very carefully. If this person is to do what is required, the conditions for his or her success must be ensured from the outset.

Selection Criteria

The following is a list of skills, mindsets, and behavioral criteria for selecting the right person. After reading this list, people often say, “You forgot a criterion...walks on water!” Fair enough. We acknowledge that it is difficult to find a person with all of these qualities. Some of these are more important than others, depending on your situation and available candidates.

Some transformations can run effectively with a partnership—two people with different skills that share this role and work closely with each other to handle its demands for the overall system. In this scenario, clear roles, authority, and decision-making are critical. These two people must fit and work together like hand in glove.

Begin your review of the list keeping in mind that you are seeking the most senior line leader (or staff leader if your change is in a staff organization) who has credibility throughout the organization and who knows its operations and culture. But most importantly, this person must be people and process savvy. He or she does not have to have superior content expertise! It helps, of course, but is not essential. For those of you needing a handy job description of the





responsibilities of the change process leader to match with these attributes, we have attached one at the end of this eBook.

Change Process Leader attributes:

- Understands the business
- Understand the unique dynamics of transformational change
- Well respected and trusted
- Models the desired mindset and behavior
- Seen as unbiased and open-minded
- Politically astute
- Sees the whole system; understands system thinking
- A skilled planner
- Can multi-task
- Good negotiator
- Sets and communicates clear goals and tasks
- Uses resources effectively
- Simplifies complex issues
- Tolerates uncertainty
- Handles conflict well
- Open to feedback, learning, and course correction
- Action oriented AND results oriented
- Good process thinker and designer
- Good listener with concern for people
- Adaptable and flexible
- Has and uses influence effectively
- Good interpersonal skills
- Good at engaging and inspiring others to contribute their best

Staffing a Change Leadership Office

The change process leader for large scale transformation typically sets up a Change Leadership Office to provide change strategy consulting, coaching, and resources where needed throughout the change. This office is staffed by people different from those on the change leadership team or change project team. The Change Leadership Office may have seasoned organizational development consultants, change management experts, project management staff, change communications specialists, facilitators, logistics masters, and learning specialists. Since we recommend that you keep your content experts distinct from your change leadership staff, create clear working relationships between them, since some change staff may

play an important role during the design of your future state solutions. This is true if you are doing your future state design work in-house and especially true if you use external content experts.

Since so many organizations have a project management office, we feel that it is important to position project management as one of your key resources where it fits in helping plan aspects of your transformation. The Change Leadership Office needs to be positioned where it can have the level of influence over the change that it needs to have, and not be buried at lower levels, since it oversees more complexity and breadth than the typical project management charter.





In Summary

Your selection of a change process leader can be a make-or-break factor in your success. Go after the best person and do whatever it takes to reposition him or her to have the time, focus, and resources to do the job correctly. Remember, this person is responsible for both content AND people, design AND implementation; “line” carries more weight than “staff” in an enterprise-wide effort; and overt positioning and authority is everything. Because change sponsors need to keep their eye on the transformation as well as on many other organizational priorities, they need to ensure success by identifying, supporting, and depending on a masterful change process leader.

Job Description: Responsibilities of the Change Process Leader

Here is a list of typical responsibilities of this role:

- ▶ Define, with the sponsor, the scope of the change, deliverables, goals
- ▶ Lead the change leadership team and the change project teams
- ▶ Facilitate the creation of the case for change, desired outcomes, and major initiatives
- ▶ Facilitate the design and implementation of an integrated change strategy, change infrastructure, and the appropriate timeline for the overall effort
- ▶ Determine the best change process roadmap/model with which to orchestrate the transformation and each of its initiatives
- ▶ Select, with the sponsor, project leads for each major initiative and ensure their change leadership competence
- ▶ Oversee and streamline the design and execution of each phase and activity in the overall change process, and for each key initiative, and create an Implementation Master Plan for roll out
- ▶ Identify, mobilize, and engage all stakeholders to support the change
- ▶ Advocate for real conditions for success and put them in place; work closely with the sponsor to ensure their creation
- ▶ Facilitate the integration of all initiatives, including organizational/technical and cultural/human initiatives, and coordinate all project leads within the overall effort
- ▶ Determine the need for and use of adequate resources
- ▶ Build the capacity and skill of both leaders and employees to lead this and all future changes by ensuring that they engage in learning and development now
- ▶ Oversee the creation of a multi-directional change communication strategy
- ▶ Advocate for and design appropriate participation strategies
- ▶ Help design and implement an ongoing course correction process
- ▶ Engage in personal mindset and behavioral changes as needed to model the transformation in work and action, and ensure that the same work is done by the sponsor, leaders, and employees
- ▶ Monitor and address the emotional responses and readiness of the targets of the change
- ▶ Interface with and coordinate all other consultants working on the transformation





About Being First

Being First is a Breakthrough company. Founded in the 1980's by Drs. Dean Anderson and Linda Ackerman Anderson, we provide advanced expertise in personal and organizational transformation.

We open leader's minds, develop their self-mastery and equip them with the advanced Conscious Change Leadership skills to transform themselves, their organizations, communities and cultures.

For forty years, we've been pioneering a new field of study – Conscious Change Leadership – that develops “transformational superpowers:”

- ▶ **Conscious** – “Vertical” leadership development that produces greater mindfulness, and self-mastery
- ▶ **Change** – Strategies and methodologies for designing and leading organization and culture transformation
- ▶ **Leadership** – Co-creative leadership styles that unleash human and organizational performance

We are Strategic Advisors to the C-Suite, and provide an integrated System of Transformation to your executives, change leaders and internal consultants that includes strategic advising and consulting, training and development, coaching, methodology, tools and assessments.

We partner with our clients, and customize everything to their exact needs to fit the scope and scale of their required transformation to Achieve Breakthrough.

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