

Lesson Overview:

During the second stage of the Change Management program, participants will engage in a three-day, in-person workshop.

Throughout these sessions, learners will participate in a variety of collaborative and individual exercises designed to reinforce the principles introduced in the initial e-learning segment. Each day will consist of four hours of focused training.

On the final day, attendees will showcase their understanding of change management by presenting their own change scenarios, applying a recognized change management framework. This experience will also allow them to strengthen essential interpersonal skills such as effective communication, teamwork, and active listening. The overarching aim is for participants to apply the insights and tools gained from the training to their everyday work environment.

The last phase of the change management program, as outlined in this guide, brings participants back together with their facilitator and original group four weeks after the second session. This follow-up meeting is dedicated to reflecting on their real-world experiences with change since the training.

Target Audience:

This training is intended for senior leaders, including Senior Managers, Directors, and Sr. Directors, and executive leaders.

Lesson Objectives:

By the end of this training, participants will be able to:

- Explain how shifts in social and environmental factors influence their industry.
- Identify the risks associated with resisting industry changes and their impact on the organization.
- Demonstrate initiative as a leader in driving change.
- Exhibit the traits of an effective change leader to guide initiatives successfully.
- Apply the five core skills essential for leading change.
- Recognize the key elements of change and respond to related challenges.
- Utilize the four stages of change management in practice.
- Employ strategies to become more adaptable in dynamic environments.
- Select and implement appropriate change management models for specific initiatives.
- Reinforce all previous learning objectives through a final group reflection activity.

Materials:

- Training room equipped with projector and speakers, and WIFI
- Flexible seating arrangements (movable desks/chairs preferred)

- PowerPoint presentation deck
- Email access
- Printed or digital participant handouts/activity workbooks
- Seven flipcharts
- Sticky notes
- Markers
- Pens
- Padlet (online collaboration tool)
- Access to YouTube
- Microsoft Forms
- Participant laptops
- Timer (such as a cell phone)

Pre-Class Activities/Pre-Session Preparation Checklist:

For Facilitators:

- Complete the Change Management e-learning module.
- Review all training materials, including the slide deck, participant workbook, and facilitator guide.
- *(Optional)* Consult Learning & Development’s resources for facilitation tips.
- Send a reminder email to participants 2-3 days before the session.
- Distribute activity links via email at the start of the training.
- Set up the training space and test all equipment.
- Print copies of the Learner Activity Workbook.
- Confirm that each session will have between 6 and 10 participants.

For Participants:

- Finish the Change Management e-learning module before attending.
- Read the pre-session email sent by the facilitator.

Timeline:

Day	Session	Total Time
1	1	4 hours, in the morning, for each day. 10-minute breaks will occur roughly every 45 minutes or every hour. On the third day, if the session ends early, participants may leave.
2	1-2	
3	2	

Module Instructions/Script:

Slide #		Action	Facilitator Notes	Resources
<p>1</p> 	<p>5 minutes</p>		<p>FACILITATOR ACTION:</p> <ul style="list-style-type: none"> • Greet participants as they arrive. • Share your name and invite everyone to enjoy drinks/snacks, if available. • Ask attendees to sign in. • Invite each person to introduce themselves. <ul style="list-style-type: none"> ○ Optional: Have them share their role, location, or tenure with the company. 	<ul style="list-style-type: none"> • Projector and room setup • Slide deck • Participant handouts (printed or digital)
<p>2</p> 	<p>1-2 minutes</p>		<p>FACILITATOR SCRIPT:</p> <p>SAY: Before we begin, let's go over some ground rules and expectations for today.</p> <p>Key Points:</p> <ul style="list-style-type: none"> • Everyone has completed the Change Management eLearning. • This session is designed to reinforce what you learned online. • The format is interactive, not a lecture. • Activities will be the main focus. • Full participation is expected, including: <ul style="list-style-type: none"> ○ Answering questions ○ Moving around the room ○ Sharing experiences ○ Working in pairs/groups 	<ul style="list-style-type: none"> • Countdown timer (phone)

			<ul style="list-style-type: none"> o Providing and receiving feedback 	
<p>3</p> 	<p>15 minutes</p>		<p>ACTIVITY: “Quick Change Activity” Icebreaker</p> <p>DIRECTIONS:</p> <ol style="list-style-type: none"> 1. <i>Ask participants to pair-up with a partner and stand back-to-back.</i> 2. Say: In the next 60 seconds, please change 5 things about your appearance. Keep your back to your partner until I call time. 3. <i>When time is up, instruct partners to face each other.</i> 4. Say: In the next 60 seconds, see if you can identify the 5 things that your partner changed. 5. <i>Announce when time is up, congratulate the participants and instruct the partners to return to the back-to-back position.</i> 6. Say: In the next 60 seconds, change 5 more things about yourself. 7. <i>When time is up, instruct partners to face each other again.</i> 8. Say: In the next 60 seconds, see if you can detect the 5 additional changes made by your partner. 9. <i>Announce when time is up, congratulate the participants, then instruct the partners to return to the back-to-back position.</i> 10. Say: Please change 5 additional things about yourselves. 	

11. *By this time, the participants usually start to groan and indicate that they do not want to participate any longer. Calm the participants, then ask them to quickly return to their seats and jump right into the debrief. **Don't give them time to straighten up or say anything that could be interpreted as instruction to return to normal.***

12. **Say:** Ok, please quickly take your seats, I have some questions for you.

13. *People will likely be trying to get their appearance back to normal, **don't comment or dissuade them, just start the debrief.***

DEBRIEF

To prevent participants from treating this activity as a mindless ice-breaker, conduct a debriefing discussion by using the following sets of questions in the specific sequence.

*Notice that **each set of questions emphasizes an important learning point** by looking back on the activity, relating it to the workplace, and brainstorming appropriate change-management strategies.*

Change as removal

- When asked to make changes, how many people removed items (such as belt or tie)?
- Why did most of you choose to remove things rather than add things?

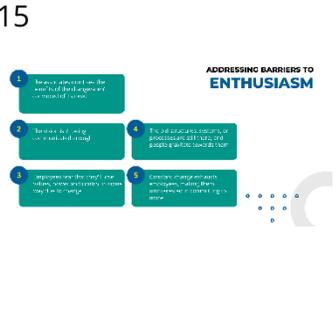
			<ul style="list-style-type: none"> • Is this how we often look at change? Do we assume that change means things are going to be taken away? What can we do to help emphasize the benefits of the change? <p>Too many, too fast</p> <ul style="list-style-type: none"> • How did you feel when I asked you to make changes the third time? I heard a lot of groaning. You weren't as enthusiastic as you were the first time. • How does this relate to the workplace when we ask our employees to make too many changes too quickly? <p>Return to status quo</p> <ul style="list-style-type: none"> • Right now, how many people have already changed back to how they were originally? This is interesting, because I didn't tell you to change back yet. • Is that what happens in the workplace? Without continued support and direction from upper management, do employees tend to go back to doing things the same old way? • How can we lead by example to prevent this from happening? 	
<p>4</p> <p>OBJECTIVES</p> <ol style="list-style-type: none"> 1. Recognize the importance of change. 2. Embed the quality of change leadership into the culture. 3. Apply the five core competencies of change leadership. 4. Lead the enterprise through change, success or challenge. 5. Apply the five essential skills for change leaders. 	<p>1 minute</p>	 	<p>SAY: This next section is about reinforcing concepts we've learned about motivating others to follow you. These include:</p> <p>FACILITATOR ACTION: Read the objectives from the slide:</p> <ul style="list-style-type: none"> • Learn how to take initiative as a leader. • Demonstrate qualities of a change leader. • Practice five core competencies. 	

			<ul style="list-style-type: none"> • Identify key components of change. • Apply the four phases of change management. 	
5	1 minute		<p>SAY: Let's shift our focus from understanding what change is to exploring who we need to be as leaders of change. This section is a review and a chance to apply what you learned online. As we go through each quality, think about how you've already used these in your role and how you can continue building them in real workplace situations.</p>	
6	5-7 minutes		<p>FACILITATOR ACTION:</p> <ul style="list-style-type: none"> • Ask the group to define each strategy before revealing the definition. • Discuss each strategy as it appears. 	
7	15-20 minutes		<p>ACTIVITY: "Both Sides of the Issue"</p> <p>DIRECTIONS:</p> <ol style="list-style-type: none"> 1. Before the session begins, place seven flipcharts around the room, each labeled with a strategy. <ul style="list-style-type: none"> • Take ownership • Find the answers • Be proactive • Be an active contributor • Overcoming inaction • It's too hard • I shouldn't have to do it 	<ul style="list-style-type: none"> • Flipcharts • Sticky notes • Pens/markers

			<ol style="list-style-type: none"> On each flipchart, draw a big T. The strategy will be written above the T. On one side of the T will be the question: "What's preventing you from applying this strategy?" On the other side of the T, the second question will be: "What can be done to address these barriers?" Everyone will go up and answer the first question, and then circle back and answer the second question. After everyone has sat down, you will lead the discussion with the group. 	
<p>8</p> 	<p>3-5 minutes</p>	 	<p>SAY: Change leaders embody five key qualities. Can you name them?</p> <p>FACILITATOR ACTION:</p> <ul style="list-style-type: none"> Ask participants to define each quality before revealing the content. Reveal definitions and discuss. 	
<p>9</p> 	<p>5-10 minutes</p>		<p>ACTIVITY: "Evaluating the 5 C's Flipchart"</p> <p>DIRECTIONS:</p>	<ul style="list-style-type: none"> Flipcharts Sticky notes Pens/markers

			<ol style="list-style-type: none"> 1. Have each quality written on a separate flipchart sheet. (These should have already been created before training began.) 2. On a worksheet, have learners categorize their 5 C's into strengths and areas of improvement. 3. Hand out several sticky notes and ask each learner to write down how they are able to apply their strong qualities/what their mindset is/what they do to embody those qualities. 4. Learners will place the sticky note on the corresponding flip chart. 5. Discuss as a group. 6. Then have all the learners go around and write down/take a picture of the strategy to put in their "areas of improvement quality" to help them come up with a plan to improve. 7. Have them choose at least one strategy to copy onto their worksheet for future use. 	
<p>10</p> 	<p>1 minute</p>		<p>SAY: This section is a review and an opportunity to apply what you learned online. As we walk through it, think about how you influence others in your day-to-day role and what leadership behaviors help people choose to follow you during times of change.</p>	

<p>11</p>  <p>The 4 Phases of Leading Change</p> <p>1. Conduct a Change Readiness Assessment 2. Gain a Shared Vision 3. Enlist a Coalition of Change 4. Activate and Enable the Organization</p>	<p>1-2 minutes</p>	 	<p>SAY: Let's look at the four phases involved in leading change.</p> <p>FACILITATOR ACTION:</p> <ul style="list-style-type: none"> Read each phase aloud. 	
<p>12</p>  <p>CHANGE READINESS ASSESSMENT: 6 QUESTIONS TO ASK</p> <p>Question 1: How do you know you're ready for change? Question 2: Are you getting the right support? Question 3: How do you know you're ready to change? Question 4: How do you know you're ready to change? Question 5: How do you know you're ready to change? Question 6: How do you know you're ready to change?</p>	<p>5-7 minutes</p>		<p>FACILITATOR ACTION:</p> <ul style="list-style-type: none"> Walk participants through the six key questions that help determine whether a change is ready to move forward. After reviewing the questions, invite participants to share thoughts or examples from their own experience where skipping this step caused challenges. 	
<p>13</p>  <p>ACTIVITY: SWH ASSESSMENT</p> <p>1. Take out your change situation. 2. Pull out the Skill, Will, Hill Assessment worksheet. 3. Complete pages 1-2. 4. Use your change situation to guide your responses. 5. Once you finish, find a partner. 6. Switch worksheets. 7. Leave comments on their worksheet. 8. Discuss your feedback with each other.</p>	<p>15-25 minutes</p>	 	<p>ACTIVITY: "SWH Assessment"</p> <p>SAY:</p> <ul style="list-style-type: none"> Take out your change situation. Pull out the Skill, Will, Hill Assessment worksheet. Complete pages 1-2. Use your change situation to guide your responses. Once you finish, find a partner. Switch worksheets. Leave comments on their worksheet. Discuss your feedback with each other. <p><i>Encourage participants to use the digital version to type their answers for more space and to easily save the document.</i></p>	<ul style="list-style-type: none"> Participant laptops Skill, Will, Hill Assessment worksheet (printed/emailed)
<p>14</p>	<p>3-5 minutes</p>		<p>FACILITATOR ACTION:</p>	

 <p>Evoking Enthusiasm for Change</p> <ul style="list-style-type: none"> Corporate Success: Discuss where the organization is today, why and how we measure success, and how we measure it. Personal Impact: Clearly articulate what the organization is doing to improve the lives of its employees and the community. Excited Response: The final step is to get participants to share what resonates with them. 			<ul style="list-style-type: none"> • Before revealing the strategies, ask participants to if they can recall the strategies from their online training. • Invite participants to share what resonates with them. • They may want to reflect on what feels challenging, how they've seen these ideas applied, or where they anticipate barriers. The goal is simply to open up discussion and reflection. 	
<p>15</p>  <p>ADDRESSING BARRIERS TO ENTHUSIASM</p> <ol style="list-style-type: none"> 1. Identify barriers to the organization's success. 2. Identify why you are not doing it. 3. Explain why the work is important, how it connects to the organization's mission. 4. Explain how you are addressing the barriers. 	<p>3-5 minutes</p>		<p>FACILITATOR ACTION:</p> <ul style="list-style-type: none"> • Before revealing the barriers, ask participants to if they can recall the barriers from their online training. • Invite participants to recall barriers and share real-life examples of overcoming them. 	
<p>16</p>  <p>PHASE 3: MOVING TO EMPLOYEE COMMITMENT</p> <p>The BEST Guide</p> <ul style="list-style-type: none"> • A document that spells out the behaviors required, overall expectations, skills to be developed, and the training and support that will be provided. <p>What to Expect</p> <ul style="list-style-type: none"> • Employees will expect you to be clear and consistent in your communication. • Employees will expect you to be available to answer their questions. • Employees will expect you to be consistent in your communication. • Employees will expect you to be available to answer their questions. • Employees will expect you to be consistent in your communication. • Employees will expect you to be available to answer their questions. 	<p>3-5 minutes</p>	 	<p>SAY: In this third phase, employees understand the need for change and are even enthused by it. They'll still want to know specifically how to change and they'll expect change leaders to demonstrate specifically how they'll be providing assistance along the way. This is where the BEST Guide comes in. It's a document that <i>that spells out the behaviors required, overall expectations, skills to be developed, and the training and support that will be provided.</i></p> <p>FACILITATOR ACTION:</p> <ul style="list-style-type: none"> • Ask participants to provide examples of what they are already doing that aligns with the BEST Guide, and which areas they need to attempt more. 	
<p>17</p>	<p>3-5 minutes</p>		<p>SAY: After showing employees your commitment by presenting the BEST plan that supports them, the next step in phase 3 is to get employees personally invested in the change. Most employees react to</p>	

<p>19</p> 	<p>5-7 minutes</p>	 	<p>ACTIVITY: “Asking the Right Questions”</p> <p>FACILITATOR ACTION: Ask a participant to read the scenario aloud to the group. Then, ask the group the following questions (available in their Learner Handout):</p> <ol style="list-style-type: none"> 1. Would you say that Alex is being a supportive change manager? Why or why not? 2. What specifically is he doing to support that opinion? 3. What are the impacts of his approach regarding the successful implementation of the new system? 4. Now, if you were Alex what would you do differently? 5. Using the “one-on-one change conversation guide,” what, if any, questions would you ask Jordan? <p><i>Acceptable answers:</i></p> <ul style="list-style-type: none"> • Alex has been dismissive of Jordan’s concerns. • Alex is ignoring the issue. • Alex is not empathetic to Jordan’s perspective. • He is providing a solution (training) without exploring the cause. Training will not fix the issue of a negative perception. • He’s not having a one-one-one conversation to address their concerns. • Instead of doing what Alex has done, it would be better to: <ul style="list-style-type: none"> o Ask questions. o Identify and help Jordan overcome their individual barriers to change. o Discuss how this change effort will be different or how it can be tailored to avoid any negative history from repeating itself. 	
<p>20</p>	<p>5-7 minutes</p>		<p>SAY: The final phase involves helping associates create new habits.</p> <p>FACILITATOR ACTION: Drive the discussion further by asking the group their thoughts on habit change, struggles they have as individuals,</p>	

			<p>struggles they have influencing others, strategies to address both, questions they might have, etc.</p>	
<p>21</p> 	<p>15-25 minutes</p>		<p>ACTIVITY: “Change Action Plan (CAP)”</p> <p>SAY:</p> <ul style="list-style-type: none"> • Take out your change situation. • Pull out the CAP worksheet. • Complete pages 2-3. • Use your change situation to guide your CAP responses. • Once you finish, find a partner. • Switch worksheets. • Leave comments on their worksheet. <p><i>Encourage participants to use the digital version to type their answers for more space and to easily save the document.</i></p>	<ul style="list-style-type: none"> • Participant laptops <p>Skill, Will, Hill Assessment worksheet (printed/emailed)</p>