IMPLEMENTATION RESOURCE

The Manager's Guide to Leading Disruptive Change

Seven tools to ensure change actually happens

PUBLISHED BY

HR Advancement Center

Advisory.com/hrac

BEST FOR

Managers and directors implementing a disruptive change

READING TIME

1 hour

HR Advancement Center

Project Director

Barret Jefferds, MSc
jefferdb@advisory.com

Program Leadership

Steven Berkow, JD
Jennifer Stewart
Kate Vonderhaar
Micha'le Simmons, MHA

LEGAL CAVEAT

Advisory Board has made efforts to verify the accuracy of the information it provides to members. This report relies on data obtained from many sources, however, and Advisory Board cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, Advisory Board is not in the business of giving legal, medical, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, members should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given member's situation. Members are advised to consult with appropriate professionals concerning legal, medical, tax, or accounting issues, before implementing any of these tactics. Neither Advisory Board nor its officers, directors, trustees, employees, and agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by Advisory Board or any of its employees or agents, or sources or other third parties, (b) any recommendation or graded ranking by Advisory Board, or (c) failure of member and its employees and agents to abide by the terms set forth herein.

Advisory Board and the "A" logo are registered trademarks of The Advisory Board Company in the United States and other countries. Members are not permitted to use these trademarks, or any other trademark, product name, service name, trade name, and logo of Advisory Board without prior written consent of Advisory Board. All other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names, and logos or images of the same does not necessarily constitute (a) an endorsement by such company of Advisory Board and its products and services, or (b) an endorsement of the company or its products or services by Advisory Board. Advisory Board is not affiliated with any such company.

IMPORTANT: Please read the following.

Advisory Board has prepared this report for the exclusive use of its members. Each member acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to Advisory Board. By accepting delivery of this Report, each member agrees to abide by the terms as stated herein, including the following:

1. Advisory Board owns all right, title, and interest in and to this Report. Except as stated herein, no right, license, permission, or interest of any kind in this Report is intended to be given, transferred to, or acquired by a member. Each member is authorized to use this Report only to the extent expressly authorized herein.
2. Each member shall not sell, license, republish, or post online or otherwise this Report, in part or in whole. Each member shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.
3. Each member may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or membership program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each member shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each member may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.
4. Each member shall not remove from this Report any confidential markings, copyright notices, and/or other similar indicia herein.
5. Each member is responsible for any breach of its obligations as stated herein by any of its employees or agents.
6. If a member is unwilling to abide by any of the foregoing obligations, then such member shall promptly return this Report and all copies thereof to Advisory Board.

© 2019 Advisory Board • All rights reserved

Table of contents

Executive summary 4

Step 1: Craft a watertight change pitch 5

Tool 1: Change Pitch Template 6

Tool 2: FAQ Cheat Sheet 12

Step 2: Proactively engage key stakeholders 15

Tool 3: Stakeholder Identification Guide 16

Tool 4: Stakeholder Discussion Guide 18

Step 3: Manage team member feedback 20

Tool 5: Complaint Redirection Guide 21

Tool 6: Disruptive Outlier Diagnostic 23

Step 4: Keep the change front and center 26

Tool 7: Change Momentum Picklist 27

© 2019 Advisory Board • All rights reserved

Executive summary

Change management critical to organizational success

With the health care industry shifting faster than ever, the most successful organizations will be those that can quickly rally their workforce around changes and make them happen. As a manager, the responsibility of implementing and executing on many of these change initiatives ultimately falls to you.

But any leader who has tried to implement large-scale change knows it isn't easy. In fact, recent research suggests two out of every three change initiatives in health care ultimately fails. Not only is change difficult to implement, but poor change management is also a leading contributor to stress and burnout amongst staff and leaders.

In particular, our research identified four common missteps that all too often undermine a manager's ability to effectively lead change:

.

1 **Staff don't understand what's in it for them**
Clear, consistent communication is paramount when introducing any change initiative. But many change communications fail to effectively inform, let alone inspire, frontline staff.

2 **Key stakeholders aren't engaged from the start**
Virtually all change management models agree that proactive stakeholder engagement is a prerequisite to any successful change initiative. But it's often an overlooked step.

3 **Team member feedback is poorly managed**
Change can be hard, and you should expect to hear some complaints along the way. How you respond to those complaints can make – or break – your ability to effectively lead change.

4 **The change becomes the latest flavor of the month**
All too often, well-intentioned change initiatives lose momentum shortly after rollout. If you want your change to stick, you'll need to keep it front and center amongst other competing priorities.

Ready-to-use tools to help you lead change
Read on to find seven tools that can help you avoid these pitfalls – and ensure change actually happens.

How to use this toolkit

The toolkit is best suited for specific types of changes, including:

- Changes impacting the majority of your team
- Changes likely to provoke an emotional response from staff
- Changes requiring staff to work differently, or learn in new ways

We've designed the tools to be used in order, but you can also use them individually. To decide which tools will be most impactful, use our quick audit on the next page.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Not sure where to start?

The questions below will help you identify opportunities to lead disruptive change more effectively. If you answer “no” to a question, the column on the right directs you to the relevant tool.

Change Management Self-Assessment

Have you…	…If not, see…
… put the change into words your team members will understand and find inspiring?	Tool #1: Change Pitch Template
…prepared to respond to difficult questions staff have might have about the change?	Tool #2: FAQ Cheat Sheet
…identified all key stakeholders for the change – and double checked your list to make sure you haven’t missed anyone?	Tool #3: Stakeholder Identification Guide
… secured buy-in for the change from key stakeholders?	Tool #4: Stakeholder Discussion Guide
… considered how you’ll respond to complaints from staff?	Tool #5: Complaint Redirection Guide
… established clear guidelines to identify when a team member’s reaction to the change is out of line?	Tool #6: Disruptive Outlier Diagnostic
… mapped out a plan for how you’ll sustain momentum for the change in the coming months?	Tool #7: Change Momentum Picklist

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step
1

Craft a watertight change pitch

Tool	Goal
Change Pitch Template	Craft an authentic and compelling change pitch that will appeal to team members.
FAQ Cheat Sheet	Prepare for difficult questions team members may ask you.

© 2019 Advisory Board • All rights reserved

Tool 1: Change Pitch Template

Tool overview

Clear, consistent communication is paramount when introducing any change initiative. But many change communications fail to effectively inspire frontline staff. This tool helps you curate your pitch to appeal to frontline staff and position organizational initiatives in a way that makes sense for your team.

Time required

- 20-30 minutes to brainstorm and outline your change pitch

Instructions

1. **Answer the questions on the next page** to help you brainstorm aspects of the change likely to be the most exciting, and the most concerning, for your team members.
2. **Use our picklist** to help you identify and articulate the "WIFM" (What's In It for Me?) for your frontline team members.
3. **Outline your pitch** using your answers from steps one and two and the template provided on the next page.
4. **Schedule and complete meetings with all key stakeholders** in advance of communications to the larger team. For guidance on how to identify key stakeholders and manage these conversations, refer to Step 2: proactively engage key stakeholders.
5. **Decide how you'll communicate** your change for the first time.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step one: Consider how your staff will respond to the change

Building a compelling communication pitch begins with identifying the needs, motivations, and concerns that will capture the attention of your frontline team members. Use the questions below to brainstorm which aspects of the change are likely to be the most inspiring, and the most concerning, for your frontline team members.

- [ ] Briefly describe the change in your own words.
    - Consider the existing status quo and why this change will be disruptive to current norms.

- [ ] Why might this change be *exciting* for staff?
    - Consider the aspects of the change that are exciting to you personally, as well as additional factors that might resonate with your team members.

- [ ] Why might this change be *concerning* for staff?
    - Consider the aspects of the change that are concerning to you personally, as well as additional factors that might be concerning for your team.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step two: Clearly articulate the "WIFM" (What's In It For Me?) for your team members .

Think about the last time you heard an effective change pitch – why was it exciting? Likely because it appealed to your internal motivations – in other words, your "WIFM".

Review your brainstorming in step one and identify *at least one* emotional appeal likely to resonate with the majority of your team members. We've included a list of common change-related emotional appeals below – use our list to double check you haven't missed any. When selecting your emotional appeal(s), consider whether there is any additional evidence or data you can marshal to better support your argument. Refer to the table below for examples**.**

Emotional Appeal	Potential Evidence to Marshall
Better patient care The downstream impacts of this change will have a positive impact on the patients we serve.	• Patient satisfaction scores – if they've declined recently or are low compared to other providers in your market, or other units/departments within your own organization, this data can strengthen your case for change • Care quality outcomes – if they've declined recently or are low compared to other providers in your market, or other units/departments within your own organization, this data can strengthen your case for change
Clear link to organizational goals The change will play a key role in advancing one or more strategic goals.	• Your organization's strategic plan • Communications from your executive team linking the change to organizational priorities
Professional growth opportunity The change will give staff the opportunity to develop new skills and competencies that weren't previously part of their role.	• Engagement survey data indicating staff desire more opportunities for professional development
Executive exposure The change is a high priority for the executive team – our unit/department will have enhanced visibility to senior leadership.	• Communications from executives expressing strong commitment for the change
Risk of inaction Negative consequences will occur if the organization does not change. For example: worse patient outcomes, or fewer long-term career opportunities.	• Hospital/health system performance data – if performance on quality or financial metrics has declined in recent years or is low compared to other providers in your market, this data can strengthen your case for change
Other	

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step three: Outline your change pitch

Every interaction with a team member, whether formal or informal, is an opportunity to garner support for your change. Use your answers in steps one and two to prepare a concise two- to three-minute pitch that can be delivered to any team member at any time, even between floors on the elevator. Be sure to keep it short so that you're not overwhelming staff with too much information. Most importantly, make sure your pitch comes across as authentic - your team members will sense if you're not telling them the whole story or are sugarcoating the message. Use the below table to structure and outline your pitch.

Your Road Map	Your Scripting Notes
What is the change? Briefly describe the change in terms your team member will understand.	
Why is the change disruptive or hard? Build credibility by acknowledging that the change is disruptive, but be sure not to belabor this point.	
Why is the change important to the organization? Highlight the positive outcomes the organization is hoping to achieve.	
Why should your team member be excited about the change? Refer to step two.	
(Optional) How can your team member help you advance the change? For example, would you like the team member to: reinforce your message with other team members? Report back with team member reactions/ complaints? Maintain a positive attitude? Only include this component if you're confident the team member is supportive of the change.	

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step four: Schedule and complete meetings with all key stakeholders

Before communicating your pitch to team members, you'll need to enlist support from all key stakeholders. Refer to Tools #3 and #4 for guidance on identifying key stakeholders and managing stakeholder conversations.

Step five: Decide how you'll communicate your change for the first time

For most changes, you'll want to use one of two communication channels when communicating your change for the first time: email, or announcement at a team meeting. Use the considerations below to assess which channel is right for you.

	Email	**Team Meeting**	**Both**
Best for	✓ Changes team members may benefit from processing on their own terms. ✓ Changes likely to generate resistance from team members (and prompt questions you may not be prepared to answer in-the-moment)	✓ Changes you feel confident you can persuade team members to support ✓ Changes that key stakeholders are supportive of (and willing to help you make your pitch to other team members)	✓ Complex changes that are difficult to understand ✓ Changes requiring many smaller process steps or details that must be carefully explained

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Tool 2: FAQ Cheat Sheet

Tool overview

Any disruptive change is bound to generate questions at all levels of the organization, and in particular, from frontline staff who typically have less visibility into the decision process. If you're not prepared to respond to concerns and questions raised by staff, you run the risk of losing credibility. The good news is you don't have to have all the answers – the key is to clearly communicate information you do know, and be equipped to respond effectively when you're caught off guard. This tool helps you ensure you're prepared for these unanticipated moments.

Time required

- 10-15 minutes to compile your cheat sheet

Instructions

1. **Brainstorm a list of questions** specific to this change that your staff might ask you.
2. **Refer to our list of common change-related questions picklist** to double check there aren't any key questions you've missed.
3. **Briefly answer each question on your list.** Flag any questions you have difficultly answering and seek additional clarification from HR or your manager.
4. **Review our sample scripting** to help prepare for situations when you're caught off guard.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step one: Brainstorm a list of FAQs specific to your change

Take two to three minutes to brainstorm a list of questions your team members might have that are specific to the change you're leading – this list can serve as your personalized FAQ Cheat Sheet. Refer to our list of common change-related FAQs below to double check there aren't any additional questions you may have missed.

Common Change-Related FAQs	
"Why?" questions	• Why is it necessary that we change? • Why is the change happening *now*?
"When?" questions	• What is the timeline for this change? • When can we expect additional information regarding the next phase (if applicable)?
"Will _______ change" questions? Staff might want to understand the impact of the change on almost anything you could imagine. We've listed a few of the most common questions, but you may want to think through additional questions specific to your change.	• Will organizational infrastructure change (new facilities, new technologies, new equipment?) • Will staff or services be relocated? • Will new reporting structures be introduced? • Will new policies and procedures need to be introduced? • Will new processes be needed? • Will union relationships be impacted? • Will we see positive outcomes as a result of this change?

Step two: Make sure you know the answers to the questions on your shortlist

Once you have your list, take a few minutes to go through and briefly answer each question. Flag any questions that you have difficulty answering and ask for clarification from your manager or HR.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step three: Prepare for questions you weren’t expecting

In addition to preparing for questions you expect to get, it’s equally important to prepare for situations when you’re caught off guard with a question you’re not well equipped answer. In general, your scripting should include 3 components:

1) Thank your team member for posing a thoughtful question
2) Acknowledge that you don’t know the answer at this time – don’t attempt to answer the question if you’re not sure!
3) Set the expectation that you will seek out an answer and will follow up with the team member as soon as you have an answer

Refer to the sample scripting below for additional help:

“That’s a great question, I’m glad you asked it. To be honest, I don’t have a clear answer on that at the moment. Let me connect with [insert name of your manager or relevant superior] on this and I’ll get back to you.”

Once you’ve set the expectation that you’ll follow up, it’s important that you follow through. If you’re getting a high volume of questions, consider creating a simple document compiling all team questions so you don’t lose track of the questions you’ve received, and who you’ve followed up with.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step
2

Proactively engage key stakeholders

Tool	Goal
Stakeholder Identification Guide	Identify frontline team members most likely to have an outsized impact on the success of your change initiative.
Stakeholder Conversation Guide	Gain buy-in from key stakeholders and mitigate potential concerns.

© 2019 Advisory Board • All rights reserved

Tool 3: Stakeholder Identification Guide

Tool overview

Engaging key stakeholders early on can help you diffuse negative responses and shore up support for your change initiative. But before you can engage key stakeholders, you have to know who they are. Some may be easy to identify, however others may be easy to miss. Use this tool to pinpoint the key stakeholders in this change initiative.

Time required

- 10 minutes

Instructions

1. **Briefly describe the change initiative.**
2. **Brainstorm a list of individual team members** whose support is critical to the success of this change.
3. **Use our checklist** to help you think of individuals you might otherwise overlook.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step one: Briefly describe the change.

Step two: Brainstorm a list of individual team members whose support will be critical to the success of this change.

For most managers, we recommend identifying *at least three* but *no more than ten* individual stakeholders. The goal is to focus your efforts on the stakeholders with the largest potential impact. Use the table below to help you brainstorm.

Three Types of Stakeholders to Consider

Type	Description	Names
Most Impacted	• Has a personal stake in the decision • Stands to lose something, or will be the most excited	
Biggest Skeptics	• Often resists change • Combative or negative in group meetings	
Normative Leaders	• Has formal or informal influence • Others look to them to inform their own views • Has relevant knowledge or expertise specific to this change	
Other		

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Tool 4: Stakeholder Discussion Guide

Tool overview

Short, preemptive change conversations with key stakeholders in advance of larger communications are a great way to build credibility as a leader, anticipate pushback, and mitigate negative emotional reactions. They're also beneficial for the stakeholders themselves – the conversation makes them feel valued and considered, and it also gives them more time to process the change. This tool provides prompts and scripting to help you manage these conversations.

Time required

- 15 minutes

Instructions

1. **Schedule short conversations with all key stakeholders identified in Tool #4.** These conversations can be brief – 10-20 minutes is typically sufficient.

2. **Review scripting and prompts on the next page** to help you prepare for these conversations.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step one: Schedule short conversations with all key stakeholders *in advance* of communications to other team members. Review the logistics of an effective stakeholder discussion checklist below before completing these conversations.

Logistics for a key stakeholder discussion:

- ❑ These conversations can be brief – 10-20 minutes in length
- ❑ In-person is preferable – choose a quiet, private place for the conversation
- ❑ Over the phone can be effective, especially if you and your colleague don't work at the same facility
- ❑ Email is not recommended, because you won't be get a good read on their reaction

Step two: Review the scripting and prompts below to help you prepare for these conversations. To increase your confidence, practice delivering your message with your supervisor or a fellow manager.

Components of an effective stakeholder discussion:

1. **Open the conversation (~10% of the total conversation time)**
   Kick off the conversation on a positive or neutral note and let the team member know why their support is important. Example scripting:
   - "I wanted to spend a few minutes looping you into a change I'll be sharing with the broader group at next week's team meeting."
   - "You've been able to motivate our team in the past, I'd love to get your quick reaction to an upcoming change."
2. **Listen** (~**80% of the total conversation time)**
   Resist the urge to respond to reactions in-the-moment. Listen attentively so your team member feels heard. Example scripting:
   - "I'd like to pause for a moment to hear any and all reactions you have."
   - "Because you're most in tune with what the rest of our colleagues are thinking, I'd love to pause and hear any reactions that you have or that you think others might have."
3. **Close (~10% of the total conversation time)**
   Give the person a tangible next step to increase their support. Choose from the following options:
   - ❑ **Leverage good ideas**: "Would you be willing to share what we discussed in the team meeting next week?"
   - ❑ **Channel criticism**: "I think you've made some really valid points – especially X. Can I ask you to share your idea with the group?"
   - ❑ **Ask for an open mind**: "I'm asking you to suspend your disbelief for the time being to allow others the opportunity to react on their own terms."

Tip: Time-Bound the Conversation

Set the expectation up front that the meeting will be brief.

Tip: Practice Active Listening

- ❑ Resist the urge to interrupt
- ❑ Make deliberate eye contact
- ❑ Maintain a relaxed posture
- ❑ Summarize comments: "What I'm hearing you say is…"

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step
3

Manage team member feedback

Tool	Goal
Complaint Redirection Guide	Diffuse negative reactions from team members.
Disruptive Outlier Diagnostic	Identify disruptive outliers whose negative reactions could drag down others – and address their disruptive behavior.

© 2019 Advisory Board • All rights reserved

Tool 5: Complaint Redirection Guide

Tool overview

After you've communicated the change, you should be prepared to hear some complaints. But objectively responding to team members' complaints about change can be a challenge. This three-step guide helps ensure team members feel heard, and equips you with scripting to redirect and neutralize team member complaints.

Time required

- 10 minutes

Instructions

1. **Review the complaint redirection guide on the next page** to equip yourself with an effective strategy for responding to team member complaints.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step one: Label your emotional response to the complaint to respond objectively

Objectively responding to colleagues' complaints about change can be a challenge. Even the most level-headed managers often respond emotionally when fielding complaints – this can be distracting. Taking a moment to label your emotional response and acknowledge how that emotion might be affecting your response can help you look at the situation more objectively. Use the picklist below to help label your emotion.

Common emotions when fielding complaints:

- ❑ Personally attacked
- ❑ Annoyed
- ❑ Helpless
- ❑ Confused
- ❑ Other ____________
- ❑ Impatient
- ❑ Offended
- ❑ Stressed
- ❑ Vulnerable
- ❑ Other ____________
- ❑ Guilty
- ❑ Worried
- ❑ Self-Conscious
- ❑ Distracted
- ❑ Other ____________

Step two: Listen and validate your team member's concerns to ensure he or she feels heard

Listening to your team member and acknowledging their feelings is a quick and highly effective way to diffuse negative reactions and earn the team member's trust.

Sample scripting:

- ❑ "I understand your concern and it's on my radar. We're doing ____ to work on it."
- ❑ "I see that's frustrating. I appreciate you bringing this to my attention."
- ❑ "Rest assured I hear you. Thank you for letting me know."
- ❑ "I know this is a challenge. We'll have a chance to talk about how to make it work at our next team meeting."
- ❑ "Your input is important and I want to hear about it. I'm on my way to a meeting but let's find time to talk about it."
- ❑ Other: ____

Step three: Learn from the complaint to uncover underlying insights.

Understanding the rationale behind your team member's complaints can help you surface underlying concerns and uncover potential solutions to help the change run more smoothly. Use the below prompts to help surface insights.

Understand the problem:

- ❑ "Why does this make you feel so frustrated?"
- ❑ "What is the most difficult part of the problem?"
- ❑ "I could see ____ reasons why that might be concerning for you. Do any of those capture your concern or is it something else I'm not seeing?"
- ❑ "Have you heard something that makes you particularly concerned?
- ❑ Other: ____________________________

Understand potential solutions:

- ❑ "Do you have any solutions in mind?"
- ❑ "Are you aware of any tactics your team members are using that might address this problem?"
- ❑ "How can we work around these challenges to find a solution?
- ❑ "I'm hearing you say ____. Is that accurate?"
- ❑ Other: ____________________________

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Tool 6: Disruptive Outlier Diagnostic

Tool overview

It’s normal to have a range of reactions when confronted with change. But being overwhelmed isn’t an excuse for disruptive behavior. Use this tool to help assess whether your team member’s behavior has crossed the line. If it has, you may need to have a conversation with the team member, or seek an outside perspective on how to address their behavior from your manager or HR.

Time required

- 15 minutes to complete the diagnostic

Instructions

1. **Complete the Disruptive Outlier Diagnostic** on the next page.
2. **Review talking points** on page 25 before addressing disruptive outliers.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step one: Complete the Disruptive Outlier Diagnostic

Instructions

Answer each question on the provided scale. Score 0 points for each “Never” response, 1 point for each “Occasionally” response, and 2 points for each “Often” response.

Question	Never	Occasionally	Always
1. Is the employee noticeably more upset about the change than other employees in a similar position?			
2. Does the employee’s behavior make others uncomfortable?			
3. Has the employee hesitated to discuss the change with management?			
4. Has the employee resisted education on the change initiative?			
5. Has the employee’s behavior been disruptive in the past?			
6. Has the employee been argumentative with other staff members?			
7. Has the employee spread rumors or falsehoods about the change?			
8. Has the employee attempted to convince other staff members of his/her thinking?			
9. Have the employee’s actions appeared deliberate or planned?			
10. Does the employee exhibit more anger than stress?			
11. Has the employee openly predicted the change will fail?			
12. Does the employee speak in “us” and “them” terms?			
13. Does the employee question the honesty of management and/or executives?			
14. Does the employee question the motives of management and/or executives?			
15. Does the employee question the ability of management and/or executives?			

Scoring Guide

Score	Diagnosis
0-10	Employee likely exhibiting only typical change resistance – anxiety, denial, grief and even anger are all part of the normal change acceptance process. Speak with him/her one-on-one to determine if additional support or stress management tools are needed.
11-15	Proceed with caution. Speak with him/her one-on-one to determine if additional support or stress management tools are needed but be prepared to alter course if he/she is unresponsive to your attempts to help. Consider scheduling more frequent check-ins so that you can keep a close eye on his/her behavior.
16-30	This employee is a disruptive outlier – schedule time to meet with him/her as soon as possible. Use the talking points on the following page to structure your conversation. Seek additional support from your manager or HR as needed.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step two: Address disruptive outliers

Disruptive outliers can undermine even the most well-managed change implementation. It's important that you address your team member's behavior as soon as possible to prevent their negativity from contaminating the rest of your team. Once you've identified an outlier, schedule time to meet with him/her as soon as possible. Use the prompts and scripting below to structure your conversation.

Road Map	Suggested Scripting	Your Scripting Notes
Remind team member that the change is not negotiable	"I'm sorry that you're unhappy with the change(s), but the decision has been made. You need to find a way to get on board."	
Highlight consequences of continued resistant behavior	• Unfortunately, if this behavior continues, I will need to take _____ action" • Potential consequences: Escalation to HR; formal disciplinary action; termination • Ask your supervisor or HR if you need help identifying consequences	
Offer resources to cope with stress and burnout	• "I understand change can be stressful and want to make sure you are aware of the resources we have available to help employees better manage stress and anxiety." • Potential resources: Employee Assistance Program (EAP); onsite counselling services • Ask your supervisor or HR if you aren't sure which resources are available at your organization	

FOR ADDITIONAL GUIDANCE managing difficult conversations, access the *Guide for Delivering Difficult Feedback* on advisory.com.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step
4

Keep the change front and center

Tool	Goal
Change Momentum Picklist	Sustain momentum for key change initiatives over time.

© 2019 Advisory Board • All rights reserved

Tool 7: Change Momentum Picklist

Tool overview

How do you prevent your change initiative from becoming the latest flavor of the month? This picklist provides a range of options to help you sustain momentum for key change initiatives over time. We recommend choosing at least two options from the picklist to help keep your change front and center.

Time required

- 5-10 minutes

Instructions

1. **Review the picklist** on the next page.
2. **Select at least two options** you'll use to help you sustain momentum for your change.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

Step one: Review the change momentum picklist

The below tactics can be used to help keep your team engaged in the change across the coming months.

Tactic	Explanation
Set goals	• Rallying your team around a shared goal can be a powerful way to keep attention on change. For additional guidance setting team-based goals, review the **pre-defined team goals tool** on p. 58 of [The Manager's Guide to Engaging Staff] • Once you've set your goal(s), consider displaying them on a white board or poster to serve as a daily reminder for your team
Keep your communication fresh	• It's important to reinforce your message, but over-communication can cause even the most supportive team members to tune out. Look for new ways to talk about your change with team members in daily huddles, weekly meetings, or email communications. Examples: ❑ Acknowledge someone's efforts: call out a team member who has successfully advanced the change ❑ Grab your team's attention: share a memorable anecdote or piece of media related to the change ❑ Answer a common question: share the answer to a question you've received from one or more team members ❑ Share team "tips and tricks": share any valuable learning your team has surfaced through the change process (especially if it's made the adjustment to change easier) ❑ Celebrate team successes: acknowledge the collective effort of the group by sharing improvement on a key team metric or other anecdotal/qualitative success
Be a positive role model	• Prioritize your visibility as a leader during periods of disruptive change. Showing your staff that you've embraced the change will help keep the change top of mind, and mitigate any lingering concerns
Audit independently	• Each week, choose one team member to check-in on. Let your team know in advance that you'll be randomly touching base with them to discuss how the change is going so that it doesn't feel punitive. In these short check-ins, ask the team member how the change is going for them, and what barriers are getting in the way of advancing the change
Double down on recognition	• Formally recognize staff who have contributed to the change in a meaningful way • For additional guidance on **team-based recognition**, review p 55 of [The Manager's Guide to Engaging Staff]

Step two: Select at least two options and commit to using these tactics to sustain momentum for your change across the next several months.

Source: HR Advancement Center interviews and analysis.

© 2019 Advisory Board • All rights reserved

The best practices are the ones that work for **you.**℠

Advisory Board

Third Floor, Melbourne House, 46 Aldwych, London WC2B 4LL, UK
+44-(0)-203-100-6800 | **advisory.com**