Tools for Team Counselors

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Strategic Leadership and Change

Organizational Consulting

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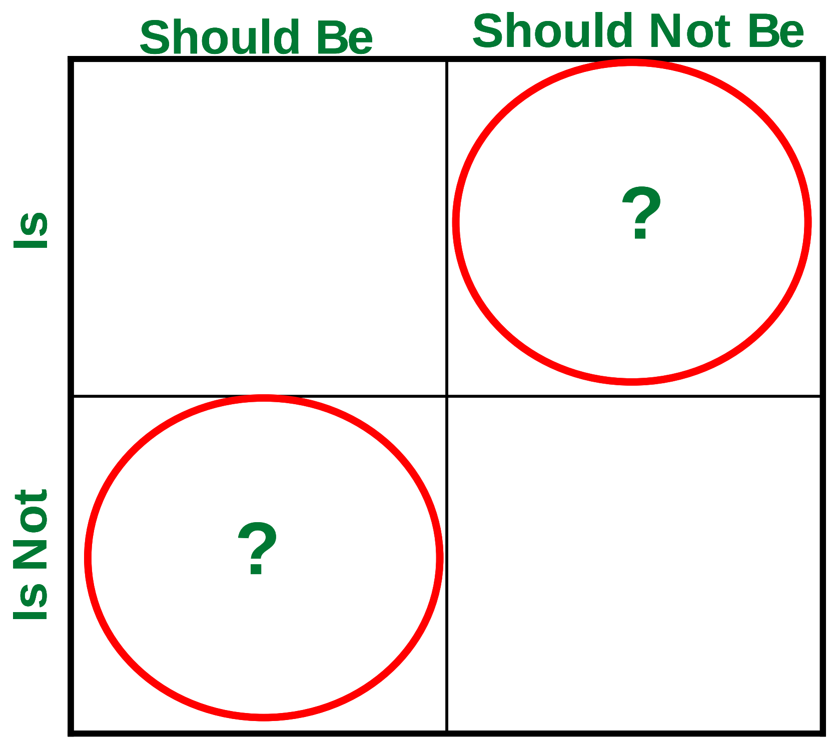
The Is-Should Matrix

Useful as a coaching device for going from non-specific "*headache*" to more defined problem



- Focus on what is currently happening that should not be happening and/or what is not happening that should be t add specificity to the statement of the problem.
- The Is/Should be and Is Not/Should not boxes show what to avoid changing.

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Tool One-pager: SWOT

Tool Application

- Stands for Strengths, Weaknesses, Opportunities, & Threats
- The SWOT Analysis is a strategic planning method used to evaluate the Strengths, Weaknesses, Opportunities, and Threats involved in a project. It involves specifying the objective of the project and identifying the internal and external factors that are favorable and unfavorable to successfully completing and implementing the project.

Tool Illustration

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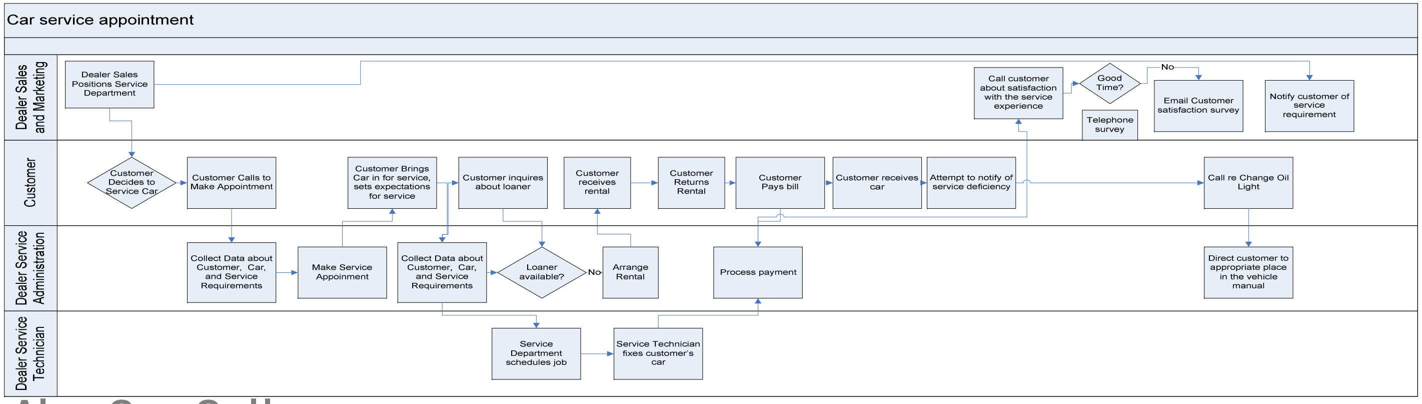
Tool One-pager: Swim-lane Process Map

Tool Application

- A Swimlane chart is a Process Map divided by the function that performs each task.
- Use a Swimlane process map for cross functional processes or when you suspect cycle time delays or rework loops from multiple inputs, hand-offs, reviews, approvals, or absent feedback mechanisms.
- As-Is Swim-Lane Process Map Steps:
  - Define the boundaries of the process (What are the first and last steps)
  - Determine who is involved and make a "swim-lane" for each involved function or role
  - Map the As-Is Activities and decisions from the process in the appropriate symbols

Tool Illustration: A car service appointment at a dealership including service promise/delivery



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Similar Tools: Process Mapping, Value Stream Mapping

Tool One-pager: Stakeholder Analysis

Tool Application

- A tool for the Project team to evaluate stakeholder awareness and commitment to the project in order to plan stakeholder engagement
- Steps:
  - List stakeholders
  - Evaluate according to pre-established criteria: e.g. Degree of Awareness/support
  - Make plans to improve stakeholder commitment as needed

Tool Illustration

Key Stakeholders	Block It	No Commitment	Let It Happen	Help It Happen	Make It Happen
1.	X		0		
2.			X	0	
3.			0	X	
4.				X0	
5.		X	0		
6.		X			0
7.			X0		
8.		X		0	
9.			0		X
10.	X			0	

Under Control	Manageable	Worrisome

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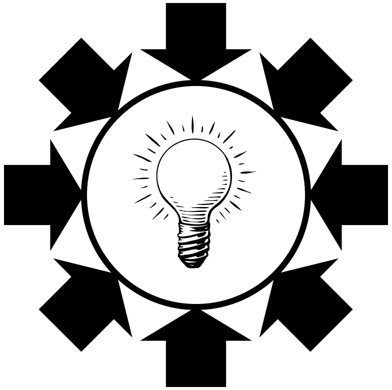
Tool One-pager: Brainstorming

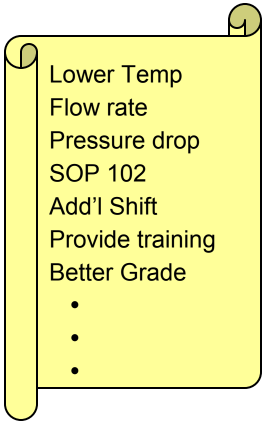
<u>Tool Application</u>

- A structured method of generating unconstrained ideas/solutions and gaining engagement/involvement in the improvement process
- It produces many ideas/solutions in a short time, facilitates the creative thinking process, and separates idea generation from the assessment of the ideas
- Use a flipchart to write down as many ideas as the group can come up with. Suspend judgment; the objective is quantity, “no idea is a bad idea.”

<u>Tool Illustration</u>

Brainstorm





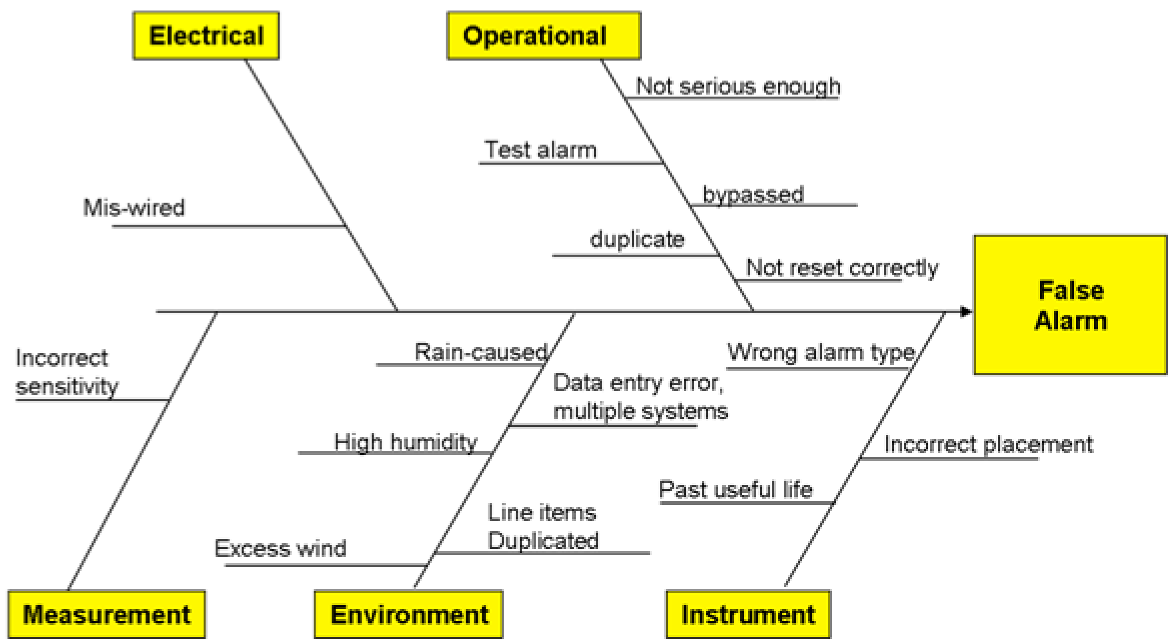
Create a List

Tool One-pager: Fishbone Diagram

Tool Application

- Also known as Ishikawa chart
- Simply a systems of mnemonics to help come up with a list of inputs, which might be likely causes of the defect
- Can use either 6M's or 5P's

Tool Illustration



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Tool One-pager:
Edward DeBono's Six Thinking Hats

Tool Application

- Another tool that may help the team reach a good decision is the six thinking hats technique invented by Edward DeBono (*Lateral Thinking*)
- Each of the hats represents a particular perspective to look at a problem to come up with causes or solutions
- Some hints for using the six hats technique are:
  - A thinker puts on or takes off one of the hats (for a period of time); and then changes to a different hat
  - All thinkers should wear hats they do not "normally" wear

Tool Illustration

"Just the Facts" | Emotional | Cautious | Process Driven | Creative | Optimist

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The Five Whys

- **The 5 Whys** technique is a very simple but powerful process for identifying the causes of an incident that helps get towards the root cause. It is a "brain-storming" technique questioning "Why" the incident happened and/or "Why" the unfavourable conditions existed. It can be used by an individual working on their own or with a group of people.
- **Using the 5 Whys**
- Select an event associated with the incident
- Ask why this event occurred
- Solicit as many subevents or conditions as possible
- For each subevent or condition, ask why it occurred
- Record these subevents or conditions on a tree type chart
- Repeat the process until five iterations are complete
- The process need not require all five iterations to get to the "root or system" causes. When you get to a level that shows that some management function is out of control, or going any further doesn't really add any value to the investigation, then that branch of the tree should be considered complete.
- **5 Whys Advantages**
- Minimal training necessary
- Judgement / experience key factors
- Resulting subevents should be root causes
- It is a very simple and straightforward process. Effective use of a flipchart will allow a group to keep track of responses and select the important roots to pursue. Minimal training is necessary, however, judgement, experience and a positive attitude are very important team member attributes and contribute substantially to the successful discovery of the incident's "root or system cause(s)".
- **5 Whys Disadvantages**
- Can be time-consuming
- Results not reproducible / consistent
- System causes may not be identified
- The 5 Whys technique is not appropriate for use to investigate very complex incidents, where a formal root cause failure analysis (RCFA) process should be used. It does rely on having people available with appropriate knowledge and experience on the system being investigated.
- Since experience is an important factor in determining the investigation results, the results of one particular investigation may not be reproducible from team to team.

The Five Whys: Example

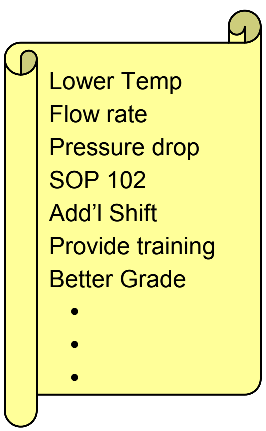
- **Example**
- **Problem:** I am being turned down for risk capital.
- **Q1:** Why am I being turned down?
- ***A:*** *Because no investor wants to back my business.*
- **Q2:** Why don't investors want to back my business?
- ***A:*** *Because they don't see the true potential in my business.*
- **Q3:** Why don't they see the true potential in my business?
- ***A:*** *Because they aren't getting the proper information and facts about the business that they need in my investment proposal.*
- **Q4:** Why aren't they getting the proper information and facts about the business that they need in my investment proposal?
- ***A:*** *Because the communication of my investment proposal isn't very effective.*
- **Q5:** Why isn't my communication of investment proposal very effective?
- ***A:*** *Because I don't understand the needs of the investors.*
- **Q6** (You don't have to stop at 5!): Why don't I understand the needs of investors?
- ***A:*** *Because I haven't spoken to them or sought advice from someone with experience and knowledge who may be able to help me know what they need and create an effective investment proposal that addresses these needs.*

Tool One-pager: Multivoting

Tool Application

- A semi-quantitative, experiential prioritization tool for assigning priorities to causes or solutions in order to make a preliminary decision.
- Typically a fixed number of votes (1.5 times the number of items to which you hope to reduce the list.) are given to each individual and then the person can allocate those votes as they see fit.

Tool Illustration



List of Ideas

	Response
Input 1	IIII
Input 2	I
Input 3	I
Input 4	
Input 5	II
Input 6	IIII
Input 7	III
Input 8	IIIII
Input 9	
Input 10	I

Vote by Input

	Response
Input 8	IIIII
Input 6	IIII
Input 1	IIII
Input 7	III
Input 5	II
Input 2	I
Input 3	I
Input 10	I
Input 9	
Input 4	

Sorted by Votes

Tool One-pager: Criteria Prioritization Matrix

Tool Application

- An expansion of the multi-voting technique which responses based upon pre-established criteria
- Each person responds on a pre-established scale to each of the criteria (e.g. 1-5 where the group has discussed what each number means) The criteria can be weighted.
- The calculation of the answers provides opportunity for the group to discuss priorities further

Tool Illustration

Causes	Criteria				Total	Weighted total
	#1/ Weight	#2/ Weight	#3/ Weight	#4/ Weight		
1						
2						
3						
4						
5						

List of Causes voted upon **Sorted by Votes**

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Improve Tool One-pager: Twenty Questions

Tool Application

- Useful to "tear apart" an existing process or service and challenge all current assumptions prior to developing the next generation
- Asks questions such as: What should we do? Who should do it? How should it be done? Where should it be done? When should it be done?

Tool Illustration

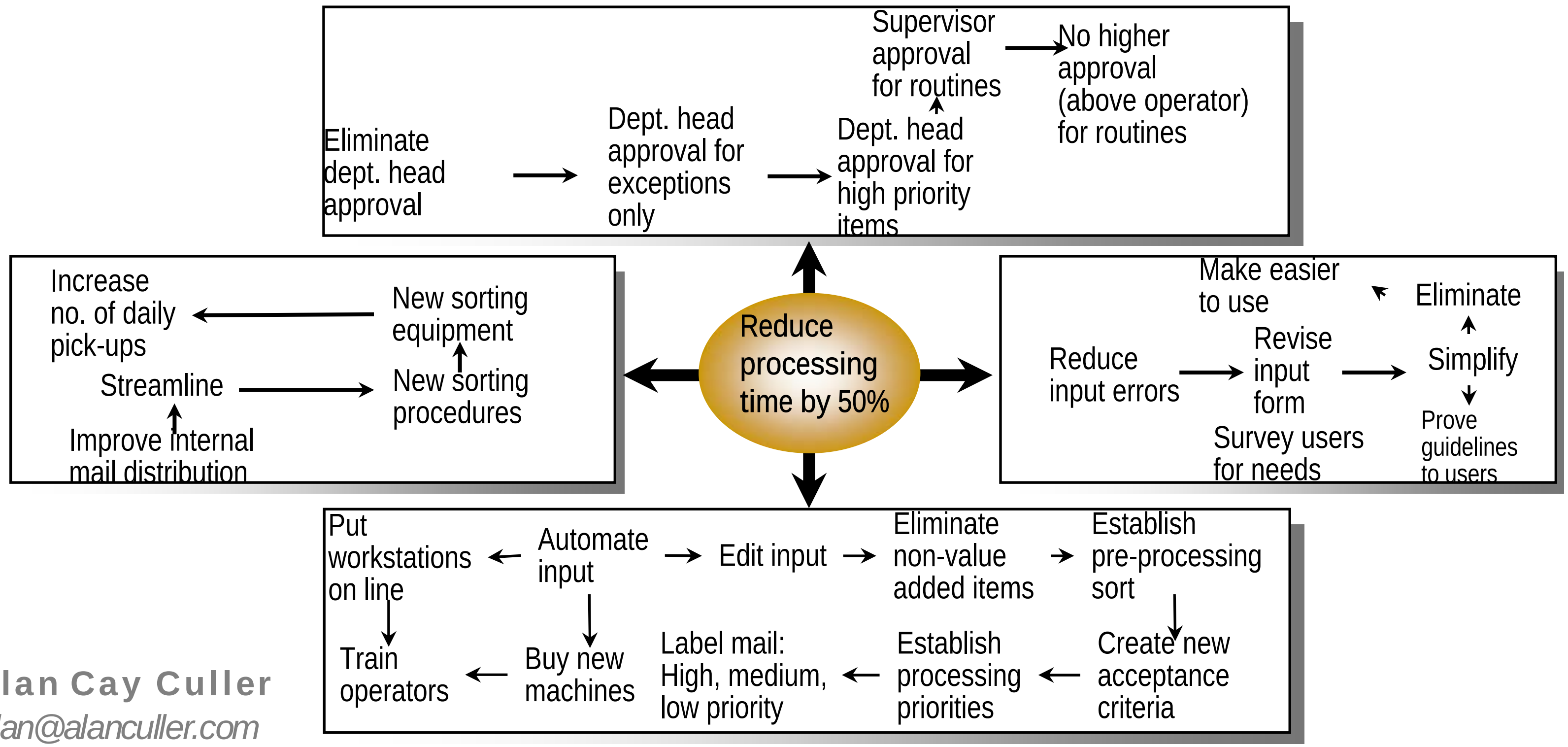
	What?	Where?	When?	Who?	How?
Current method	What happens?	Where is it done?	When is it done?	Who does it?	How is it done?
Reason	Why do it?	Why do it there?	Why do it then?	Why them?	Why do it this way?
Better way	Can we do something else?	Can we do it somewhere else?	Can we do it some other time?	Can somebody else do it?	Can we do it some other way?

Tool One-pager: Mind Mapping Solutions

Tool Application

- Solution maps start with a core premise that can be stated as either an objective or a challenge

Tool Illustration



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Tool One-pager: Challenge Assumptions

Tool Application

- Everyone brings assumptions to the problem-solving table. Such assumptions can reflect what we know or, as is often the case, what we think we know.
- Challenging conventional assumptions about your problem can help you turn obstacles into opportunities
- Work to escape the self-imposed constraints that traditional assumptions often create

Tool Illustration

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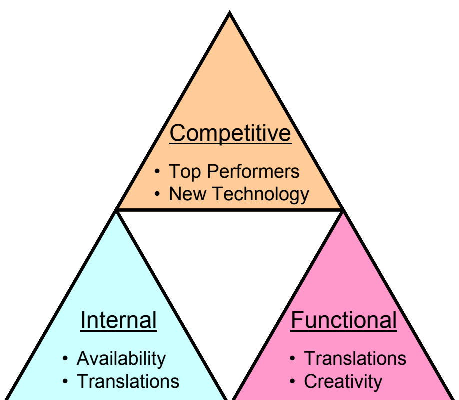
Tool One-pager:
Benchmarking Solution Ideas

Tool Application

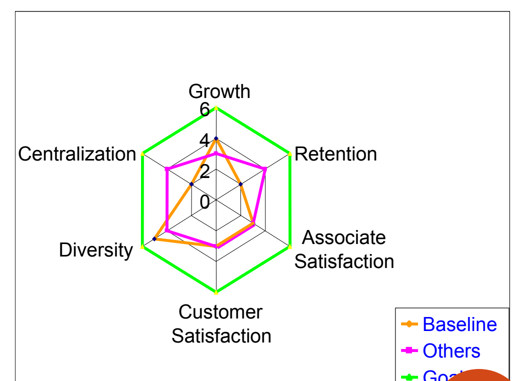
- Another source of innovation is benchmarking
  - Benchmarked a competitior to compare performance; or
  - Benchmark for ‘best practices’ to see how other organisations provide their services or products
- Benchmarking can be very helpful to inject new ideas into the process and borrow the good ideas from other companies/industries

Tool Illustration



Type of Benchmark

Take a Trip



Record Results

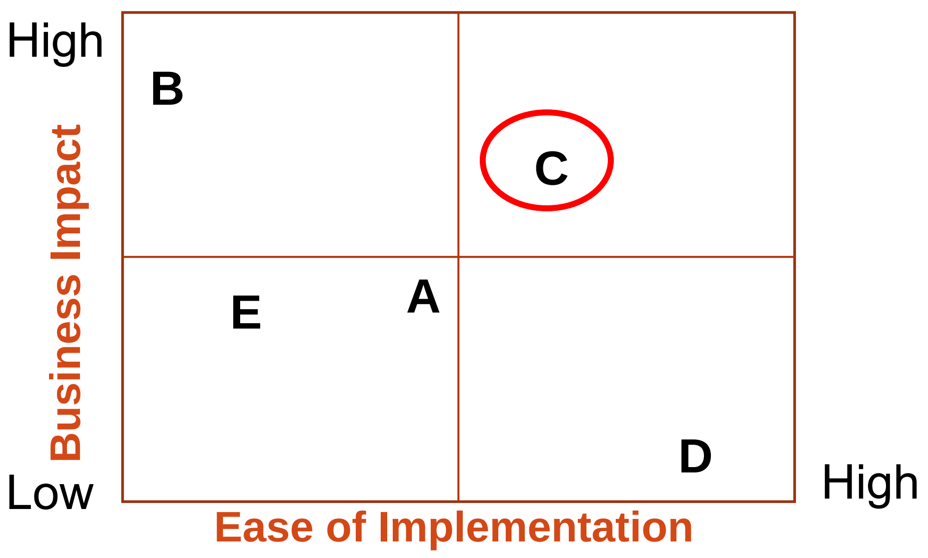
Tool One Pager: The Filtering Matrix

Tool Description

- A tool for groups to preliminarily prioritize solutions against two criteria
- The filtering matrix criteria can be anything the group agrees upon.
- One popular matrix (Ease of Implementation vs. Business Impact) is often called the Boston Square after the Boston Consulting Group, which popularized its use for strategy in the 1970s

Tool Illustration

- In the example at right solution C holds the most promise



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RACI
Responsibility Charting

Strategic Leadership and Change

Organizational Consulting

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What is Responsibility Charting?

- **A discussion process to achieve clarity about roles and responsibility**
- **A common language to talk about responsibility**
- **A way to assign roles and responsibilities to all activities by using the roles:**
  - **R = Responsible (who carries out the job? Who is the do-er?)**
  - **A = Accountable (who makes the - last - decision? Where does the buck stop?)**
  - **C = Consults to the "responsibles" and "accountables" e.g., an expert in the field (Those who you ask for input, help and advice BEFORE the fact?)**
  - **I = Informed about results and decisions (Those who need to know that this decision or this activity completed has been made AFTER the fact?)**
- **A way to diagnose:**
  - Unclear or multiple responsibilities
  - Excessive division of tasks
  - Repetition of procedures/ bottlenecks
  - Too much/little information flow -communication
  - Over-loading/under-utilization of individuals

RACI — Example: Building the Toolkit

Activity \ Person	Niko	Karen	Ben	Stephanie	Consultants	Marc	Katz	Doug
Design the Basic Structure of the Toolkit	A	R		C		I		
Design the Prototype	A	C		R				C
Write the Tools	R, C		A		R			
Collect Input From Consultants	I		A, R					
Program the Prototype	I	C		A, R				C
Screen the Tools	A, R				C			
Test the Toolkit	A	C	R	R	C	C	I	C
Promote and Celebrate Launch of Toolkit	A	R	R	C	C	C	C	C

R = Responsible person

A = Accountable person

C = Consulted person

I = Informed person

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What to Watch For When Using Responsibility Charting

- Conflicting accountabilities -more than one ‘A” for an activity
- Ill defined tasks -difficulty assigning ‘A’s
- Duplication -very similar activities with different ‘A’s and ‘R’s
- Too many chiefs and not enough braves -a shortage of ‘R’s
- Over-loaded people -too many ‘A’s and ‘R’s for a single person
- Lack of communication -missing ‘C’s and or ‘I’s
- Paralyzing bureaucracy- too many ‘C’s or ‘I’s

The Trust Formula

$$T = \frac{I \times C}{R}$$

Trust is a function of:

How well you know someone and they know you **(Intimacy)**

Multiplied by(not added to)

the history and track record of your interactions **(Credibility)**

Divided by

the degree of potential loss in the situation **(Risk).** *(smaller denominator = less risk = easier to trust)*

$$\text{Trust} = \frac{\text{Intimacy x Credibility}}{\text{Risk}}$$

- **Intimacy** - Would trust improve if you just got to know each other better? Team-build, exchange backgrounds, share decision processes, create social events.
- **Credibility** - Is there a problem in the track record of your relationship? Problem solve to overcome the problem.
  - **Information** –Has it always been timely and accurate
  - **Judgment** –Is your decision process always clear to the other party?
  - **Execution** – Do you always do what you say you are going to do?
- **Risk** - Does the nature of your relationship pose potential loss to either party? Problem solve ways to reduce the risk.

Trust

- Here are a few suggestions for practicing behaviors that lead to trust:
- **Empathy and an understanding mind-set**--Behaving in the other person's best interest requires that one ask thoughtful questions and listen with obvious interest,
- **Information**-- always make sure that the information you give is **timely, accurate and framed in away that it can be easily received and understood.**
- **Judgment**--Make your decision processes apparent-- explain how you prefer to take in information and how you make your decisions. When others can understand how you arrive at conclusions you become more predictable. They can trust your judgment.
- **Execution**-- Always --Always **do what you say you are going to do** --under-promise in order to over- deliver-- never over-commit -- and if you do find yourself in the unfortunate position of not being able to deliver on a commitment -- Communicate immediately and recontract.
- ***PERSEVERE***   - - the genuine intention to rebuild trust will go a long way. In the words of Lao Tsu:

"Trust first; Trust is in the giving."

Consulting Skills

February 21, 2011/Alan Culler

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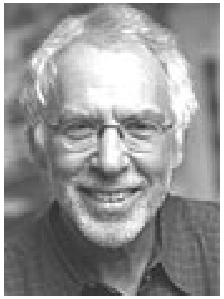
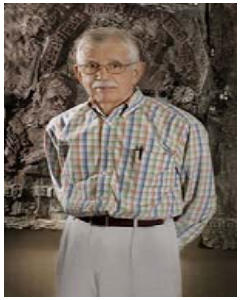
Consulting Skills Sources



- Peter Block, *Flawless Consulting;* Values, roles, consulting process, (engaging, contracting, discovery, diagnosis, etc)
  - Peter Block is one of the leading thinkers in organization development. *Flawless Consulting* is one of the few business books that has sold over a million copies. Through Designed Learning he has trained thousand of consultants. www.peterblock.com



- Robert H Schaffer, *High Impact Consulting;* structuring projects to collaborate and achieve results
  - Robert Schaffer started Robert H. Schaffer & Associates in 1966. The firm is still relatively small as strategically planned, but they have been instrumental in the development of WorkOut and the Change Acceleration Process for GE, and many other world class methodologies for very well known clients

- John P. Kotter is the Konosuke Matsushita Professor of Leadership at the Harvard Business School. He has studied hundreds of change efforts and written a series of articles and books about what makes change succeed or fail.
  - Dr. Kotter's 8 stage change model, in *The Heart of Change* has become a standard by which all change efforts are judged

Peter Block
Consultant Roles

- "A ***Consultant*** is a person in a position to have some influence over an individual, group of organization, but who has no direct power to make changes or implement programs. A ***Manager*** is someone who has direct responsibility over the action"
- Most consultants have goals:
  - To solve important problems so they stay solved.
  - To work in a collaborative relationship
- Many manager view consultants in one of 3 roles:
  - **Expert**
  - **Part of hands**
  - **Collaborative partner**

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Source: _Flawless Consulting,_ Peter Block, 1999

Peter Block
Consultant Roles

Activity	Expert	Pair of Hands	Collaboration
Interaction	Manager plays an inactive role	Consultant takes a passive role	Consultant and manager are interdependent
Decision Making	Made by the consultant	Made by the manager	Bilateral
Data collection and analysis	Gathered by the consultant	Manager selects methods	Joint effort
Control	Rests with consultant	Rests with the manager	Negotiated
Collaboration	Not required	Not required	Essential
Communication	Limited	Limited	Two way
Implementation responsibilities	Consultant plans and implements main events	Manager specifies change procedures to the consultant to implement	Discussed and agreed
Manager role	To judge and evaluate after the fact	To judge and evaluate at a close distance	Discussed and agreed
Consultant goal/problems	To solve the immediate problem	To make the system more effective by the application of specialized skills	To solve problems so they stay solved

Source: *Flawless Consulting*, Peter Block, 1981, 1999, 2000

The Differences Between Internal and External Consultants

- You have a boss with departmental objectives – you can't just say "Yes" or No" to a client
- You are evaluated on how much your clients adopt the department's approved approach – there is pressure to push one approach to the client
- Having one key client angry at you can be a disaster –the potential client universe for the internal consultant is smaller than for the external
- There is pressure to convert an adversary, where an external consultant might just "move on."
- You have a status and job level that are known to most people in the organization – where the external consultant' level and status are more ambiguous so they can bounce around between levels more easily.
- Because you and your background are better known, it is more difficult to distinguish yourself as having something special to offer.

Source: *Flawless Consulting,* Peter Block, 2000

Noticeable Differences between Internal and External Consultants

Noticeable Difference	Internal Consultants	External Consultants
Clothing	Blue and gray suits, skirts and jackets, occasional sport clothes depending on company, high end country club business casual on specified days	Sweaters, turtlenecks, slacks, pinpont cotton shirts, browns and greens, occasional gold bracelet or Buddhist prayer beads obtained at a global spiritual retreat
Favorite Words	Measurement, Long run, Quick, Practical, Objectives, Background, Cost	That raises an interesting issue, fundamental and underlying, deal, honor your integrity, work through, dilemma, Model, Implications, reassess at some point in the process
Personal Life	Reasonably stable, responsible , only one divorce, and maintaining good relations with first spouse and kids	Like Hiroshima right after the bomb. Has seen the world but can't remember it.
Fantasy Life	Wish for freedom and variety of the external consultant	Wish for the continuity and stability of the internal consultant
Underlying Anxiety	Being ignored, rejected and treated as unimportant	Being ignored, rejected and treated as unimportant

Source: *Flawless Consulting*, Peter Block, 2000

Peter Block
Consulting Process and Skills

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Entry	Discovery, Diagnosis	Feedback, Decision to act	Engagement Implementation	Extension Disengagement

Phase 1
- Connecting
- Establishing credibility
- Scoping
- Contracting

Phase 2
- Dialogue
- Discovery
- Scoping
- Data collection & analysis

Phase 3
- Data display
- Feedback
- Communication
  - Oral
  - Written
- Contracting
- Closing – empowering decision

Phase 4
- Generate options- Put real choices on the table
- Delivery
- Documentation
- Project management

Phase 5
- Celebrating
- Connecting
- Scoping
- Contracting

"To consult flawlessly is to :
1. *Behave authentically*
2. *Complete the requirements of each phase"*

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Source: *Flawless Consulting,* Peter Block, 1981, 1999, 2000

Peter Block: Contracting

1. Consultant connects around the context of the project

"I'm very enthusiastic to be here because______ How'd did this meeting come about?

3. Consultant summarizes definition of the problem, clarifying as necessary (Adds own opinions or similar problems faced by others if appropriate)

5. Consultant describes approach, offers, and requirements (including consideration, resources, attention, access) Asks questions about concerns (exposure, loss of control)

7. *"Who besides you must be satisfied with the outcome of this improvement?"*

9. Consultant summarizes agreements about the scope and timing of the project, consultant requirements (e.g. client resources, consideration)

Connecting

Understanding the problem

Client Needs/ Wants

Consultant Offers/Needs

Surfacing concerns

Establishing the Client System

Summarizing Agreements

2. Client explains the context of the meeting and may explain the initial definition of the problem

(if not the consultant asks "Please describe the result you are hoping to achieve')

4. Client confirms definition of the problem asks for how the problem would be addressed

6. Client explains risks to the project

8. Client describes any triangular contracting requirements

10. Client agrees the project parameters and authorizes the start of work

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Source: *Flawless Consulting*, Peter Block, 1999

Robert Schaffer:
Five Fatal Flaws of Conventional Consulting

1. **Projects defined in terms of consultant's products or deliverables (not in terms of client results to be achieved)**
2. **Project scope based upon subject matter logic (not on client readiness for change)**
3. **One big solution (rather than incremental successes)**
4. **Hand-offs back and forth (instead of client-consultant partnership)**
5. **Labor intensive use of consultants (instead of leveraged use of consultants)**

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Source: *High Impact Consulting,* Robert H. Schaffer, 2002

Robert Schaffer:
Overcoming The Five Flaws

Instead of	Try
Deliverables, solutions, processes, reports	Performance goals: Time saved, cost saved, barrels produced, etc.
Methodology, Tools, Process, Metrics	What client can and will implement today, next week, next month
One big solution, with huge up front investment	Dividing up projects into increments with rapid cycle times
Passing responsibility back and forth with the client	Forming a joint team to learn and work together
Descending with hordes of EPT resources	Using a few EPT resources matched with the clients whose job this will be

Help Clients to Start Small, Focus on Quick Results,
Try-it-fix it-try it Again

Source: *High Impact Consulting,* Robert H. Schaffer, 2002

Robert Schaffer:
Conventional vs. High Impact Consulting

Conventional Consulting

1. ***Defining the project***
- Project Goals are defined in terms of deliverables, solutions, systems, recommendations, or techniques to be provided by the consultant

2. ***Determining the project's scope***
- The project's scope is determined by the systems or technical issues to be studied

3. ***Designing the project***
- Projects are large scale with long cycle times and the speed and maneuverability of a glacier

4. ***Working the Project***
- First the client passes the problem to the consultant, then the consultant does the job and passes the recport to the client to implement

5. ***Deploying consultants***
- Large consulting teams do the work with little client involvement

Consequences
- Big up-front investment and long cycle times before value can be assessed; high risk and frequently low returns and low client learning

High Impact Consulting

- Projects are defined in terms of measurable improvements in the client's bottom-line results
- The project scope is determined by assessing what the client will be able to absorb and implement
- Projects are divided into steps to produce rapid results and to gain the experience that enables further progress
- The client and consultant work together as partners at every stage of the project
- Consultants provide focused support to client teams, who take the major responsibility for the project

Consequences
- Low risk, high returns; consultant time highly leveraged; short cycle time, so there is little investment before seeing a payoff; client capabilities expand with each cycle

Source: *High Impact Consulting*, Robert H. Schaffer, 2002

Change Models

Strategic Leadership and Change

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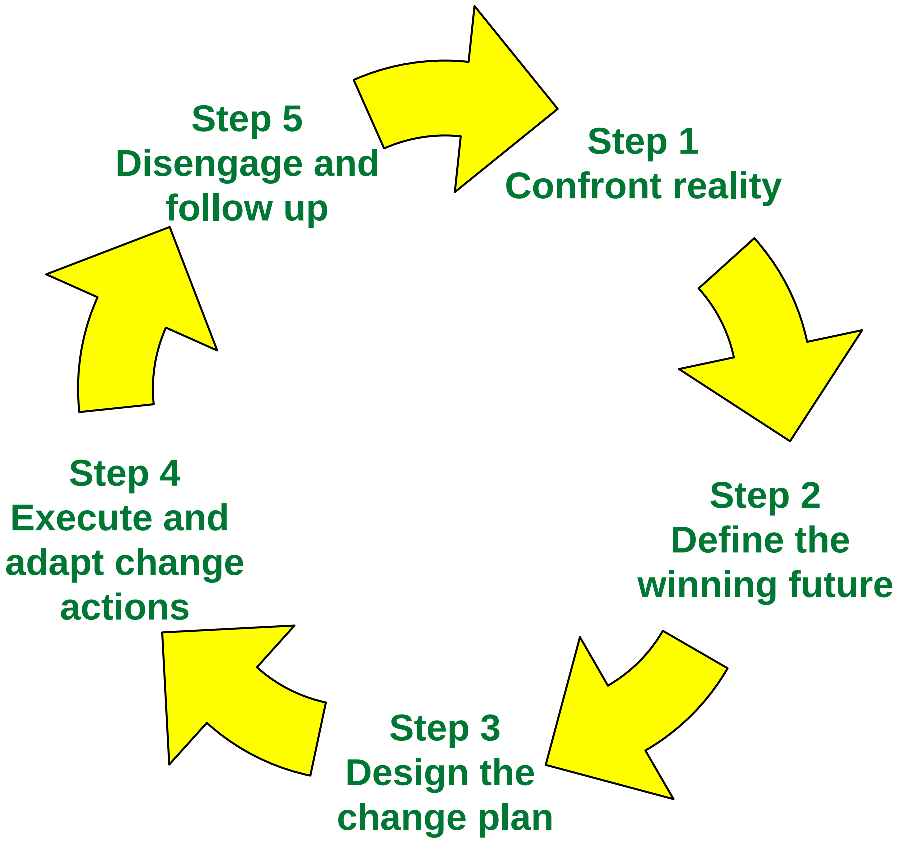
Robert Schaffer:
Activity or results driven change?

Activity driven	Results driven
1. The improvement effort is defined mainly in terms of high level, long term, global descriptions	1. There are measurable short term performance improvement goals, even although the effort is a long term sustaining one
2. Management takes actions steps because they are "correct" and fit the program philosophy	2. Management take action steps because they appear to lead directly towards improved results
3. The program's champions counsel patience and fortitude ("This is a long term process and not a short term fix")	3. The mood is one of impatience and management wants to see results now even though the change is a long term commitment
4. Staff experts and consultants indoctrinate everyone into the mystique and vocabulary of the program ("We need to develop a common language and toolkit")	4. Staff experts and consultants help managers achieve results
5. Staff experts and consultants urge managers and employees to have faith in the approach and to support it	5. Managers and employees are encouraged to make certain for themselves that the approach actually yields results
6. The process requires managers to make big investments upfront before results have been demonstrated	6. Relatively little investment is needed to start the process: conviction builds as results materialize

Source: Robert H. Schaffer, *Results Driven Change,* HBR 2001

Robert Schaffer:
Change Acceleration Process



John Kotter's 8 Steps of Successful Change

Step	Action	New Behavior
1	**Increase Urgency**	People start telling each other "Let's Go, we need to change things!"
2	**Build the guiding team**	A Group powerful enough to guide a big change is formed and they start working together well.
3	**Get the vision right**	The guiding team develops the right vision and strategy for the change effort.
4	**Communicate for buy-in**	People Begin to buy-into the change and this shows in their behavior
5	**Empower action**	Most people feel able to act, and do act, on the vision
6	**Create short term wins**	Momentum builds as people try to fulfill the vision, while fewer and fewer resist change
7	**Don't let up**	People make wave after wave of changes until the vision is fulfilled
8	**Make change stick**	New and winning behavior continues despite the pull of tradition, turnover of change leaders, etc.

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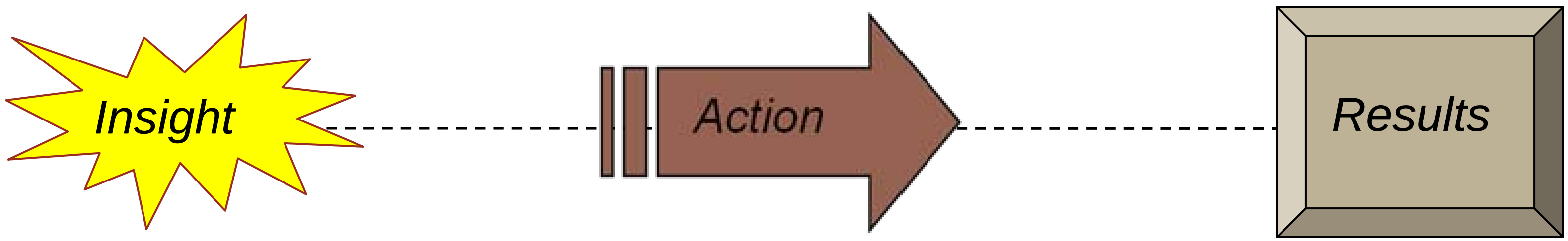
Source: *The Heart of Change;* John Kotter, 2000

One Model Of Change



- Understand the “why”
  - Context
  - Need for change
- See the Vision
  - What it could be like
  - The benefit of change
- Understand the plan
  - Planned action
  - Metrics
- A sense of urgency

- Actions that build commitment
  - Critical Populations
  - Critical Mass/ Tipping Point
- Actions that make change
  - Leadership sponsors
  - Change teams
  - Symbolic events
- Actions that drive the process
  - Milestones / metrics

- End measures
  - Benefits tracking
- Process /milestone measures
  - Pace and effectiveness
- Document learning
  - What works
  - What doesn’t
  - Next steps

Sustainable Change is about Changing Behavior . . .
It’s about the People!

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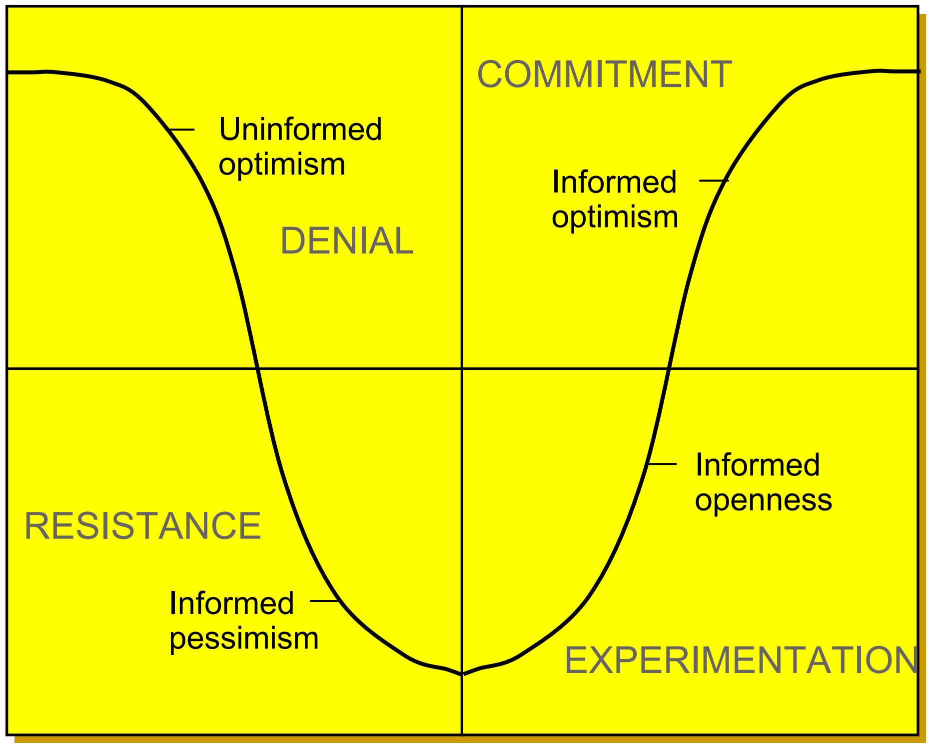
Source: www.alanculler.com 2003

HELPING PEOPLE GO THROUGH CHANGE

Company

Past



Future

Personal

Help people focus on the company and the future

Change Communications

Strategic Leadership and Change

Organizational Consulting

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Change Communications : Some Principles to Observe

- **Communicate X 10**
- **Visible “Fair Process” - *“What we know- When we know it”***
- **Building energy, critical mass and speed - not transferring information**
- **A Planned Process**
  - Target Audiences-Craft Messages-Select Media-Execute-Monitor Reception
- **Two-Way is Better - at least 50% of communication should contain an opportunity for response or dialogue**
- **Establish “Rumor Control”**
- **Deal with Rational, Political and Emotional**
- **Frame Communications in terms of what it means to key constituencies - customers, employees, shareholders**
- **Communicate the “why” of the change as well as the “how” and “when”**
- **Communicate X 10**

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A Simple Process for Planning Change Communications

- **Define Target Audiences**
- **Define Communication Needs of Each Audience**
- **Prioritize Target Audiences**
- **Determine Best Media for “Reach” for Each Audience**
- **Determine Optimum “Frequency” of Message for Each Audience**
- **Plan Messages for Each Audience**
- **Select Media (think multiple impressions and mixed media for each message)**
- **Execute Plan**
- **Monitor Reception**
  - Two-Way Dialogue with key members of each audience
  - Check Response Rates on Email and Hot- Lines
- **Adjust and Continue**

Some Sample Target Audiences

- **The Leadership Team**
- **Managers and Supervisors**
- **All Employees**
- **Families**
- **Communities**
- **Unions**
- **Customers**
- **Distributors**
- **Suppliers**
- **Shareholders**
- **The Press**
  - local
  - national
  - trade
- **Stock Analysts**
- **Trade Associations**
- **Regulators or other Government**
- **Industry Opinion Leaders**
- **Competitors**

Some Sample Media

- One-on-One Personal Communication
- Leadership Speeches
- Videos
- Voice-Mail
- Posters and Bulletin Boards
- Memos
- E - Mail
- Intra-Net Web-Site
- House Organs
- Employee Newsletters
- Customer Newsletters
- Hot- Lines
- Rumor Control Lines
- Site Communications Coordinators
- Meet the Leadership
- Town-Meetings
- Focus Groups
- Brown Paper Fairs
- Best Practice Fairs
- Innovation Fairs

Media / Message Matrix

	Message: Vision / Objectives	Project Status	Change Process	Path Forward
Meetings				
Steering Committee	✓	✓	✓	✓
Management One-on-One Meetings	✓	✓	✓	✓
Plant Managers	✓			
Key Communicators	✓	✓	✓	✓
Electronic				
E-Mail				
Voice Mail System (VMS)				
Publications				
Project Newsletter	✓	✓	✓	✓
Special Events				
Letter From Steering Team	✓			✓
Focus Groups	✓	✓		✓
Town Meetings	✓			
Customer Meetings	✓		✓	
Brown Paper Fairs				✓

Critical Success Factors For Effective Communication

- **Leadership commitment and participation**
- **Open and honest exchange**
- **Delivery of clear and consistent messages through multiple media**
- **Clear two-way communication channels - feedback loops**
- **Focused on key target audiences**

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Alan Cay Culler Background and Connections

Alan Cay Culler

- 30+ years delivering business results as a strategic change consultant
- Specializing in Strategic Leadership, Organization Consulting, Process Change Infrastructure, Leadership Group Work Change Teams and Change Agent Development
- Clients in: Airlines, Chemicals, Construction, Manufacturing, Media, Oil & Gas, Pharmaceuticals

Connected Resources

- Connections to over 25 independent consultants and executive coaches and several small consulting firms
- Specialists in Strategy, Operations, Organization and Change
- Resources in
  - United States and Canada
  - United Kingdom and EU countries
  - Asia, Hong Kong, Singapore, Japan