# The CHANGE LEADER'S CHECKLIST

## GREG GIULIANO and PAT NEWMANN

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# The CHANGE LEADER'S CHECKLIST

A ship is seaworthy if it is safe and fit to undertake a sea voyage and weather a variety of conditions. Like seaworthy ships, we need our organizations to be change-worthy—able to learn, adapt, and act quickly in an always-changing and sometimes volatile marketplace. There will always be another change, because change isn't a bug in the system; it's a feature. Your work is to empower your team to be exceptional at navigating and leading transformation, thereby building an unsinkable organization.

Transformative leadership empowers people by focusing on both driving business results in support of change and developing people by helping them manage their transitions. When we are out of balance, we may drive results while losing people through disengagement or departure; conversely, we may make everyone feel great and fail to achieve stated business objectives. To empower people and build a change-worthy, unsinkable organization, you need to remember your ABCs:

- Align People—Create a clear direction (vision, mission, strategy) and a plan (structure, roles, and responsibilities, systems, processes) to make change real.

- Build Bench Strength (Capacity)—Build leadership and organizational capacity while creating a state of "change-worthiness."

- Coordinate Action—Ensure ongoing follow-up and follow-through with tracking and adjustment mechanisms to lead and manage through the change.

The CHANGE LEADER'S CHECKLIST can help you gain a clearer understanding of your readiness to lead change successfully by laying out the many factors and variables that deserve your consideration and attention.

Whenever you're at the front edge of organizational transformation, take a look at the following list of items. Read each statement carefully. Is this something that you will require for your change initiative to succeed? If so, is it completed, in progress, or missing?

Look at the items you determine are needed for your change initiative to succeed. For each item, is the work done and working? Is it in progress and needs some work? Is it missing and needs to be started? If, by your estimation, more than one-third of the items are still in progress or missing, your organization may not be "change-worthy" yet. There is still work to do.

The checklist uses the pronoun, "We." Take this to mean the leaders responsible for the change initiative, as well as key stakeholders.

If you'd like to talk to one of our team members about helping you with your change initiative, email us at Hello@UltraLeadership.com.

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| Align People | Not Needed | Done | In Progress / Needs Work | Missing / Need to Start |
|---|---|---|---|---|
| We have an executive sponsor willing and able to build a leadership coalition for change (Is that you?) | | | | |
| We know and understand how the senior leadership team will work to lead the entire effort. | | | | |
| We know and understand the organizational vision (2-3 years out). | | | | |
| We know and understand the purpose for this change initiative. | | | | |
| We know and understand what the impact will be if this change is not successful. | | | | |
| We know and understand how the project management of the change initiative will be conducted and by whom. | | | | |
| We know and understand the key milestones and timelines for this change initiative. | | | | |
| We know and understand the success measures for the change initiative. | | | | |
| We know and understand what every employee and leader can do to help this succeed. | | | | |
| We know and understand who will provide leadership for various elements of the change including who makes what decisions. | | | | |
| We know and understand how this change will impact the whole value chain (activities performed to bring our product/service to market). | | | | |
| We know and understand how this change will impact other key partners inside of the organization. | | | | |
| We have allocated adequate resources (e.g., people, time, money, consulting) to support the change initiative. | | | | |

| Build Bench Strength | Not Needed | Done | In Progress / Needs Work | Missing / Need to Start |
|---|---|---|---|---|
| We understand and accept that change is normal and ongoing. | | | | |
| We have a plan for engaging employees throughout the change process so they continue to learn and grow as they take part in making the change work. | | | | |
| We are willing and able to adjust plans and approaches to implementing the change as conditions require. | | | | |
| We have the talent (people, skills, and practices) at all levels key to leading the change initiative. | | | | |
| There is a shared commitment to continuous learning among those responsible for leading people and managing the change. | | | | |
| We have the strong and demonstrated engagement of middle managers who are committed to making this change happen. | | | | |
| We have a clear picture of the leadership mindset and skills we will need to lead change successfully. | | | | |
| We have the capacity to assess and develop the leadership mindset and skills we will need to lead change successfully. | | | | |
| We have an outplacement plan, if necessary. | | | | |
| We have retention plans for keeping the people and skills we do not want to lose. | | | | |
| We have a talent management / workforce development strategy and plan that assures the timely development of mission-critical people and skills. | | | | |

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| Build Bench Strength | Not Needed | Done | In Progress / Needs Work | Missing / Need to Start |
|---|---|---|---|---|
| We have appropriate engagement of external vendors and suppliers in the value chain and their commitment to making this change happen. | | | | |
| We have appropriate engagement of internal key partners and stakeholders and their commitment to making this change happen. | | | | |
| We have a commitment to institutionalizing change so there is no turning back. | | | | |
| We have the skills to create the policies and procedures that ensure we will institutionalize the change. | | | | |
| We have a culture that will encourage experimentation and learning throughout the change initiative. | | | | |
| We have a culture of mutual trust and cooperation that will enable us to leverage differences to produce best thinking. | | | | |

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| Coordinate Action (Get it Done) | Not Needed | Done | In Progress / Needs Work | Missing / Need to Start |
|---|---|---|---|---|
| We have a strong leadership team that oversees the effort and stays engaged. | | | | |
| Regular meetings are scheduled for the change leadership team to track progress and resolve issues. | | | | |
| We have an agreed decision-making model that enables the change leadership team to resolve issues. | | | | |
| We have a communications plan that is being followed and features success stories. | | | | |
| We have a mechanism in place for providing regular & on-going feedback about how the change is progressing. | | | | |
| We have a change roadmap to provide ongoing visibility into key success indicators. | | | | |
| We have a clearly defined and trackable work breakdown structure. | | | | |
| We design and implement policies and guidelines that support the changes to be made. | | | | |
| We have an identified project management team guiding the workflow and ensuring progress according to timeline and budget. | | | | |
| We have planned and scheduled activities designed to honor the past and enable employees to engage with change and let go of how it used to be. | | | | |
| We track and address perceived loss and individual and organization unit level resistance to change. | | | | |
| We have built in celebrations that will acknowledge achievements of key milestones. | | | | |
| We have a plan for rewarding follow up and follow through. | | | | |

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**About Giuliano Associates (ultraleadership.com)**

**Everything produces exactly what it's designed to produce.** At Giuliano Associates, our mission is to work with leaders and teams who want to go beyond usual and ordinary to engage, empower, and activate people and teams to shape the future consciously and confidently.

We focus our work in three intersecting areas: Advising and coaching leaders to create strategic and cultural alignment, developing top team and leadership effectiveness, and building individual and collective capacity for organizational transformation.

**Why Giuliano Associates?**

For over two decades, leaders and teams have partnered with us to build their capacity to increase engagement, raise performance, and drive business results.

We employ the first principles of leadership, learning, and development along with our tested and proven tools to engage with our clients to design and deliver services highly customized to fit with their culture and relevant to their needs and strategic objectives.

**About Greg Giuliano (greg@ultraleadership.com)**

Dr. Greg Giuliano is an advisor and executive coach to senior executives and teams all over the world, designing change leadership and team development strategies to lead organizational transformation. His mission is to help leaders and teams grow their capacity to enable positive disruption for markets, organizations, teams, and individuals.

Greg is the host of the *Ultra Leadership Podcast* and author of two #1 Amazon Bestsellers— *The Next Normal: Transform Your Leadership, Your Team, and Your Organization*, and *Ultra Leadership: Go Beyond Usual and Ordinary to Engage Others and Lead Real Change* as well as *The Hero's Journey: Toward a More Authentic Leadership*.

Greg is available for keynotes, executive coaching and team development, and organizational change consultation, and high-potential leadership development.

**About Pat Newmann (pat@partnerinchange.com)**

*Pat Newmann* has over 25 years of highly successful experience helping leaders, teams, and organizations achieve maximum effectiveness. Her work has taken her throughout the world to assist organizations in becoming places where employees learn, grow and enjoy themselves as they perform – in an inspired way – in support of visions, goals and daily practices they have had a hand in shaping.

Pat assists organizations, leaders, and teams to design and implement change, including clarifying direction and values, shaping leadership practices, and developing strategies and processes for implementing the desired changes.

Prior to working as a consultant, Pat held senior management level positions in several major organizations, where her work involved managing and leading departments responsible for equipping employees and teams with skills required to succeed in changing times. She has a Masters Degree in Behavioral Sciences from the University of Minnesota and completed doctoral coursework in Business/Organizational Behavior and Education at the University of California at Berkeley.