

Active steps for transformation and change management practice

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Most leaders have experienced and been affected by change. Understanding the process of change and transition is helpful. Taking time to draw on our past learnings and experience of change can assist us in preparing our leadership for change along with being more empathically and in tune with ourselves and those we are leading.

The table below is adapted from the Kubler-Ross (1983) grief model, Levin (1988) cycles of development, Napper and Newton (2000) developmental needs for adult learners and Hay (1991, 2009) the competence curve based on cycles of development.

This well researched model provides identifiable phases of change, learning needs and management strategies. Each stage of change has identifiable behaviours and reactions, the reasons for the behaviours and what we and others need to support us going through change. Immobilisation, denial, frustration, acceptance, development, application and completion are from our emotional perspective as the cycles of developmental.

Being, exploring, identity, skills and integration are the competence curve and are iterative layers of experiencing change. There is also “spirals within spirals” (Hay, 1996) which are the experiential processes of learning new skills and proactive practical approaches to leading and managing change.

In my consultancy work I have used this model many times over the years and found that leaders have benefitted greatly when considering all the stages and phases of change – particularly in how to prepare, support and work with their team members. My observation when working with this model in my PhD research project was that when I asked people to think about their past experiences of change a week before it was included as a learning topic – that resilience strategies, learning, feelings and actions from a deep awareness and understanding of self in those past change environments emerged.

Self-awareness was exemplified from taking the time to look back at previous experiences and draw on learning, experience and lessons. These insights were invaluable and provided thoughtful considerations when preparing and planning for how best to support themselves and those in their teams, for the change.

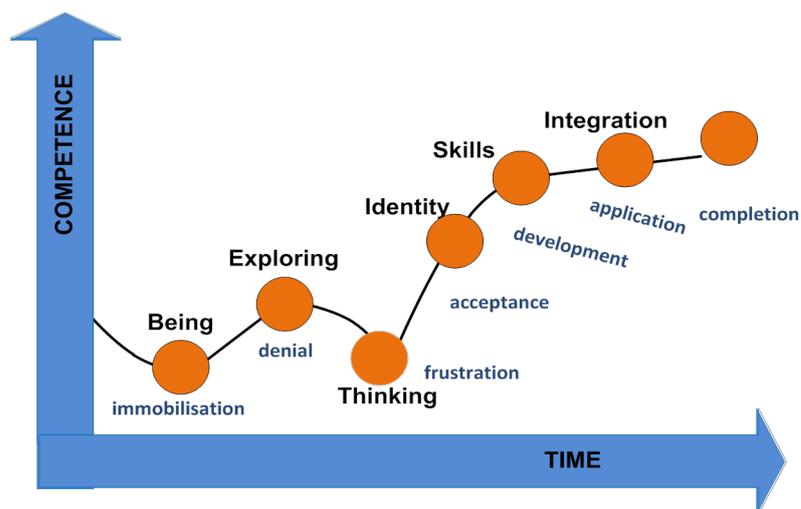
It is from this experience that I have added another column to the competence curve leadership strategies matrix. This additional column is called “previous learning from change” your knowing. This step aligns to the cycles of development and competence curve by inviting leaders to draw on and leverage from past experiences of change at work.

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The purpose of this step is for leaders to identify emotions and learning from their past experiences that could be purposeful to the upcoming change environment and context in regard to their roles, working with team members and the organisation generally. Further, that by preparing in this way plans can be made to ensure they identify and meet their own individual needs and then that of their team members’.



Competence Curve - Kubler Ross (1983), Levin (1988), Napper and Newton (2000) Hay (1991, 2009).

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Transformation Competence Curve – Incorporating your experiences when supporting others (Lacy 2019)

	STAGE	Behaviour Clues & Observations	Reason	Previous experience & learning Your knowing	Individual Needs: Yours & Others	Leadership strategies to support Staff
1	BEING Immobilisation	We need time to absorb the change and to compare our expectations to the new reality. Can appear to be marking time, doing nothing, maybe not coping. COMPETENCE DROPS WITHDRAWAL MARKING TIME	<ul style="list-style-type: none"> We lack information about the new situation. We are concerned about doing it wrong and appearing stupid. We may lack the motivation to make the change work. 	<ul style="list-style-type: none"> Think about previous work change experiences and context. What was the context of the change? Remember the range of experiences and emotions you felt. <p>What aspects of your being at this stage will be helpful to the current situation?</p>	Time to get used to being in a new situation. We need reassurance and not to be pressured into starting the change too quickly. REASSURANCE TIME TO GET USED TO THE CHANGE	Provide clear and written information about change You're doing fine Ask me anytime... Contain anxiety STAY IN FREQUENT CONTACT WITH INDIVIDUALS
2	Denial DOING	We act as if our behaviour patterns and knowledge from the past will still be appropriate. We hope our existing skills and knowledge will still be useful. CAN ACT AS IF NOTHING HAS CHANGED CAN WASTE TIME	Problems can arise if: <ul style="list-style-type: none"> We feel a threat to our level of competence and skill. We are reluctant to experiment. We fear failure and rationalize that it worked okay for us in the past so why not now. We can be unaware of our denial and continue to do and behave in that was previously successful. Slowly we allow our defense mechanisms to weaken and start to notice the need for change. 	<ul style="list-style-type: none"> What were the various roles you held and were involved with? What is similar about the current change that is about to occur? What is different? What were your lessons learned about yourself, groups and organisations from what happened during the change? <p>What aspects of what you were doing will be helpful for the current situation?</p>	We want to explore at our own pace. We want others to be patient with us while we take time to describe and assess our situation. We may want to go off on our own to get more information, or to meet others and find out what they would do. PATIENCE CHANGE TO EXPLORE OWN WAY	I like the way you ask awkward questions Provide clear boundaries including what is open to negotiation and what is a management decision STIMULATE STAFF – OPEN COMMUNICATION

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3	Frustration THINKING	We now recognize we need to do things differently and we don't know how. We can feel incompetent during our efforts to apply new approaches. Others may think of us as incompetent as we struggle with new skills, new knowledge and new situations. Sometimes we turn our frustration against others and see to blame them for our position. We can blame others for not helping us enough, not training us properly beforehand, even not warning us against the problems we now face. MAY WANT TO MANAGE THE MANAGERS KNOW THEY NEED TO CHANGE BUT NOT SURE HOW	<ul style="list-style-type: none"> Potential overload due to our genuine need to learn new approaches Fear of losing status through decreased competence Loss of our power base or our network of contacts We struggle to workout how we should be and what to do different, what new skills do we need, what qualities are required in the new situation. 	<ul style="list-style-type: none"> What were your key frustrations and emotions at the various stages and phases of the change? Do you remember repetitive themes of thinking (and feeling)? What was other people's thinking? How did this thinking differ or was the same as yours? <p>What aspects and kinds of thinking will be helpful for the current situation?</p>	We now want to do our own thinking about the change. We need tolerant listeners to discuss our thoughts and opinions. We need models and frameworks, so we can understand what is going on for us. It will help if people ask us questions and listen to our ideas with interest. TOLERANCE TEST OWN THINKING	Review information, timetables and roles Focus on individuals Invite feedback Listen to problem solving without judgment Ask how individuals are feeling PROVIDE CLEAR INSTRUCTURES

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4	Acceptance IDENTITY	<p>We let go of the attitudes and behaviours and skills that were comfortable and useful in the past. We can now start the process of acquiring new skills. We begin to test out our new ways of doing things. There will still be occasional moments of frustration, such as when our new skills are not quite practiced enough, or we identify yet another area where we lack knowledge. This phase represents our move psychologically into our personal learning cycle. We review the situation and compare it with the past to identify difference.</p> <p>TIME TO EXPLORE AND SELECT OPTIONS APPROPRIATE TO NEW SITUATIONS</p>	<ul style="list-style-type: none"> We consider the differences and develop frameworks for understanding where we are now. We begin to actively experiment. We may still appear incompetent to a degree. We are working out our identity in the changed situation, so although we have now accepted the change there will still be temporary problems as we try out new approaches. 	<ul style="list-style-type: none"> List the key acceptance turning points? What and who helped you through the change process? How do you remember your identity from your own and others perspectives? How will your experiences inform your leadership during this change process? What support will you specifically need? <p>What aspects about your identity will be helpful for the current situation?</p>	<p>We move into creating our revised identity. We need to believe that we have an element of choice and that others will be accepting of whatever we decide. At this stage we consider alternatives, so it will help if we have some knowledge of problem solving and decision-making models.</p> <p>ACCEPTANCE DEFINING OWN IDENTITY</p>	<p>Invite staff to work out implications of options and prioritise effectiveness Give positive feedback about individuals in front of their peer group</p> <p>GIVE RECOGNITION TO STAFF AND WORK</p>

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5	Development SKILLS	<p>We concentrate on developing the skills and knowledge required in the new situation. We become increasingly competent at operating in the changed environment. We make decisions about the most effective techniques and then become skilled at using them.</p> <p>ACQUIRING NEW SKILLS AND KNOWLEDGE</p>	<p>Our knowledge increases so that others come to regard us as the appropriate expert in our field.</p>	<ul style="list-style-type: none"> What types of learning served you well? Where the major learnings? How will these benefit this current change? Do you require further skills and how can this happen? <p>What skills and knowledge could you pass on or recommend for the current situation?</p>	<p>We are now ready to learn the skills required to effect the change. Coaching and training might be required once we have determined our action plan.</p> <p>TRAINING SUPPORT TEAM BUILDING</p>	<p>Provide time for training and development including mentoring and coaching Feedback to provide a sense of progress Focus on developing teams and interdependence</p> <p>FOSTER EXCITING ASPECTS OF WORK</p>
6	Application INTEGRATION	<p>Most importantly we consolidate our identity in our changed role / changed CRM. We develop our own views on how the job should be done, how we should relay this to others and how they should relay it to us.</p> <p>APPLYING NEW SKILLS TEAMS SETTLE</p>	<p>We resolve in our minds the questions about our status, our new skills, our beliefs about the situation, and our view of the organization. In particular we work out how we fit in the new scheme of things.</p>	<ul style="list-style-type: none"> How did you integrate your new knowledge, skills and learning? What did you notice other people in relation to integration of new skills, knowledge and learning? What and how would you notice in your leadership for this change project that has integrated your previous experiences? <p>How will you integrate your past experience and knowledge for the current situation?</p>	<p>We want to integrate the previous stages. We start pulling together our prior efforts of exploration, decision making and learning. Gradually, we begin to feel that we are performing as we should. We may rework some of the earlier stages to cover parts we missed.</p> <p>ENCOURAGEMENT DELEGATION</p>	<p>Compliment staff on how they are integrating change Be clear about future change, budgets, timetables Review strategic plan Revise objectives for the year</p> <p>ENSURE ENDINGS OF PROJECTS & MOVING ON / NEW CHANGES</p>

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7	Completion RECYCLING	We now feel comfortable and competent once again – so much so that we are no longer conscious of having experienced a transition. COMPETENCE CONFIDENCE	We are really into the new situation and have ceased to compare it, favourably or unfavourably, to our position before the change.	<ul style="list-style-type: none"> • <i>How did you recycle the lessons learned from the past?</i> <p><i>What are some of the ways you will note and capture your new learnings from this current change?</i></p>	We have completed our transition and are on our way with a changed approach. Soon we will hardly remember how we were before we made the changes. INTERDEPENDENCE	Roles models, champions and leaders

Lacy, A, 2019 Adapted from: Kubler Ross (1983), Levin (1988), Napper and Newton (2000), Hay (1991, 2009)