



The Deliberate Creative Podcast with Amy Climer Transcript for Episode #015: Leading Change and Transition

September 3, 2015

Amy Climer: Welcome to the Deliberate Creative Podcast [episode #015](#). On today's episode we're talking about how to lead change in organizations and the importance of both change and transition. Creativity is all about implementing change so if you want to implement creative ideas, you need to know how change works.

For this episode, I have created a series of slides for you to download for free and that you're welcome to use the slides with your teams. If you want to teach your team about change and transition, you can get everyone together for a brown bag launch or something and play the episode and show the slides. It's kind of like having a little mini workshop. You can pause at various points and have some conversations about the points that we're making today. One of the reasons that I'm creating the slides for you all is that there are a few pieces particularly one model I want to talk about where having the visual will make it easier to understand. I'm going to try to explain it verbally but if you get the chance download the slides. You can just head over to the show notes at ClimerConsulting.com/015. Head on over there. You can download them. It just takes a moment and then you can follow along.

What we're going to talk about today are four things. First, we're going to talk about how we think change works then I'm going to give you an overview of change and one change model in particular. Then we'll talk about how change actually works and the last portion will be eight tips on leading change. Here we go.

When we think about change and implementing something new in an organization, usually what happens is that a task force is created, whether that's a committee or whether it's executive team getting together and that task force comes up with, "Here's the plan. Here's how we're going to implement this change. And then they announce it to everybody who is involved and expect that everyone is going to just be like, "Yeah, sounds great. Let's go" and then everyone is going to just implement the plan, but it never really quite works that way. The reason is because of something called transition. Let me explain change versus transition. Both of them are very important.





Change, these are the external factors. This is the situation we're striving for, the desired outcome. Change is what's happening around us. It's something that you can see or at least experience. For instance, the type of change might be we're trying to implement some new financial software in our organization, so that would be the change. Then there's the transition and the transition is the psychological shift that needs to occur in order for us to accept, welcome and embrace that change. It is much slower than change. Every transition begins with an ending. So something else is ending in order for us to move into this new state. The transition happens within us whereas the change happens outside of us and around us. This difference is critical.

I think a great example of transition that needs to happen is when a couple decides to get pregnant and have a baby. I think that there's a reason we have a nine-month gestation period so that when you find out your pregnant and then you have up to nine months, maybe you don't find out quite right away, but you have a number of months to mentally transition. So if you are in a relationship with someone and you're pregnant then part of that transition will be like, "Okay, we're not going to be going to many movies after this so let's get a few movies in the next nine months. Let's go hang out with friends late into the night because we know that once this baby comes, we're not going to have the opportunity to do the same things."

Think about how often people voluntarily choose to get pregnant. How often they bring change into their lives whether it's getting pregnant and having a baby, whether it's their moving into a new house, moving to a new city. They go on vacation to a place they have never been to. They decide to get married. We bring change voluntarily into our lives all the time and so I think this old adage of like, "Oh, people hate change." I don't think that's true. I just think that people sometimes don't like change when it's shoved down their throats and they don't get the opportunity to transition.

What we're going to talk about today is how to work with your organization or with your teams and help them make that transition psychologically so that the change happens much easier, faster and smoother. I want you to do a little exercise with me. I want you to just cross your arms in front of your chest. Most of you are probably very comfortable with that. I want you to look down and notice which arm is on top of the other. Is your left arm on top or is your right arm on top? I want you to switch them. If your left arm is on top, switch them and rearrange them so that your right arm is now on top. It might be a little bit weird, a little awkward. Switching your arms like that is change. That's the change, but now you're in this new position and just hang out there for a few minutes while I'm talking. Getting comfortable with the arm



switch that's the transition. The change is easy. Okay, it was a little bit cumbersome, but once you figure it out, no big deal, but that transition takes more time. So even in this amount of time that I've been talking, you may be getting a little bit more comfortable with your arms in this new position, maybe not. Chances are if you did this a lot, you would get very comfortable with it and that comfort, that's the transition and it takes more time than change. Okay, you can unfold your arms.

We're going to talk about how to make that transition a bit smoother for the people that you work with. If you have the slides - great. This is the one section where the slides would be really helpful. We're going to talk about how change actually works. I'm going to show you a model by William Bridges, a very well known model that describes how change actually works. I want you to imagine an X and Y axis. On the Y-axis going up and down, that's the vertical axis, that's the level of management. So at the very bottom, there's very low level of management. That's a zero. That might be frontline staff. If it's a retail place, maybe that's the staff who are selling on the floor. It could be secretaries. It could be cleaning staff, zero level of management. Moving all the way up to the very top of that axis are the highest level of management – the CEO, the president, the executive team – that's at the very top. That's the vertical axis.

Horizontally, the X-axis is time. At the far left, that would be zero immediate and moving along time gets longer so on the far right would be a long time whatever that might be - years, months, whatever. What happens is that there are three stages that we go through throughout a change process and the first change is called saying goodbye. This is where we're ending, something is ending, we are losing something. We have to let go. I want you to imagine the space between the X and Y axis as divided into three diagonal segments. That first diagonal segment, I'm going to make like a triangle in the bottom left corner, that's the saying goodbye.

If you're a lower level of management, it's going to take you much longer to say goodbye whereas if you're a high level of management, that may happen so quickly or it may not happen at all because if you think about the different roles people have based on their management level, if you're a CEO, your job is to always be looking ahead and having this very big broad picture of what's going on in the organization and what are the things we're changing so you're always looking ahead. So saying goodbye may be nothing whereas if you're frontline staff, say you're a nurse on the floor at the hospital. Your job is to pay attention to day-to-day things that are happening and to pay attention to those details. Your job is not to look ahead at the bigger organization at what's going on. Now there may be at times where you do and you come up with ideas on how to change things which is great but the primary purpose of your job is in the



smaller space. So it makes sense that saying goodbye would be a bit harder because it might take a little bit longer because that's more of what your day to day life is. That's the first stage, saying goodbye.

The next stage is called the neutral zone and this is where things might be a bit uncomfortable, uncertain. This is where new energy and creativity is found. This is the transformation. This is where the transformation happens and this zone usually is the biggest and again, if you're a higher level of management, you're going to move into the zone pretty quickly and if you're a lower level, it's going to take you longer to get into the zone and it will take you longer to get out of the zone.

The third zone is called Moving Forward. These are the new beginnings. This is the change being implemented. Again, if you're a CEO or if you're high level, you're ready to jump there right away, but if you're a lower level of management that takes longer to get there because you're not so used to looking ahead and that hasn't been your frame of reference. That hasn't been your mindset all along. This is how change actually works. If you're leading a change process, you need to help the group transition and let go, move out of that saying goodbye period into the neutral zone and into the moving forward period.

Let's walk through this with an actual example from the organization. I want you to think about one change you want to implement in your organization and if you can, just hit the pause button real quick and write that down. This might be a change, like a change I mentioned earlier, a new financial software, maybe it's a new patient intake process if you're a medical organization. Maybe it's a new product you're trying to launch. Maybe you're reorganizing the staff and who does what. Maybe you have a new member of your team and they have different strengths so you want to make some adjustments. Whatever it is, write down one type of change you want to implement in your organization.

Let's walk through those three stages. The saying goodbye stage, I want you to think about who will be letting go of what. Think about relationships that might be happening, job duties, job security, maybe some autonomy that's either being developed or relinquished. Whatever those things are that people are going to be letting go, write those down. Here's an example. Let's say your organization is doing some changing of teams. Because of the change, people are going to be working with different teams than they used to work with. One of the things that they need to let go of is those teams that they worked with, they have a sense of identity with those teams and they have developed relationships with those people and hopefully, they were



good relationships, but that means that when they are moving into a new team, it's kind of like they are breaking up. We have to have a transitioning. Give them an opportunity to say goodbye to each other. Even if they still may see each other every single day, they are still not working together as closely and so there may be a bit of sadness around that. Quite frankly that's very normal and actually in some ways a good thing. That means that they had a positive relationship and a good sense of identity with that previous team. My point is, you want to give an opportunity and you want to be very cognizant of this saying goodbye period.

Next we move into the neutral zone. Think about how can you communicate and engage with your team or with your staff to help them with that transition. Generally when people are involved in a process, they have more ownership of it. They are more excited about it. How can you get people involved? Be careful here. Don't get people involved just as an exercise. If you are going to include them and get them involved in the process of making a change and coming up with the ideas, then be sincere and actually listen and take their ideas – not every single one of course, some of them might not work – but you want to be very respectful of that. Think about how can you communicate and engage with the staff to help them with that transition.

The third stage moving forward, what new behaviors will staff need to embrace? Be specific here. What are the things they are going to have to do in this new state of change? If you're working along, if you have the slides, I'd say hit pause and take a moment and write down each of these three things if you haven't already.

Let's talk about how to make changing transition successful. So now that you know how changing transition works, I'm going to walk through eight tips to help make that change successful and these are all based on research from a number of different change experts.

1. Know the why. Understand why you're doing something and make sure that it is super clear to everybody involved. This comes from Simon Sinek who has a great [TED Talk](#) and a book called [Start with Why](#). We often talk about what we're doing or how we're doing it, but we often skip over the why. Why are we doing what we're doing? Why are we making this change? It needs to be something compelling. It needs to fit with people's values and the values of an organization.

Let's say for instance the thing you're trying to change is to implement a new patient intake process. The why would be - Because our current process is slow and cumbersome, and it makes it difficult for the patients so our new process is going to be quicker. It's going to be more accurate. It's going to be a positive experience for the patient and the staff and we're



going to be able to provide better customer service, higher quality. Those are the things you want to think about and you want to talk about over and over. I would suggest that at some point, maybe every meeting or every day, at least every week, you should be talking about the why. That is going to help get people excited about “Oh yeah, I care about helping patients have a good experience so that’s going to help me get excited about this change.” That #1 is know the why.

2. Understand and use the change formula. Here is the change formula. It’s going to sound like math but don’t worry. It’s $D \times V \times F$ must be greater than R . Let me explain. D , that’s dissatisfaction with the status quo. There needs to be some reason we want to move out of what we’re doing. Something is not smooth, it’s not working, some dissatisfaction needs to be there. That’s the $D \times V$ which is vision. What’s the vision? Where are we going? Dissatisfaction is current state, vision is future state and so that future state, that vision should be compelling, exciting, and clear and something that people can rally around. Essentially it’s the why. Know the why. What’s the vision? F is first steps. Sometimes the dissatisfaction and the vision are clear but it’s not clear of how do we begin and all of those must be greater than R , which is resistance.

Let’s say you don’t know the first steps. Because this formula is multiplication, if the first steps are zero and we don’t know anything about that, anything times zero is zero. That means that the resistance is going to be greater and we want these other pieces to be greater than resistance. That’s why you have to have all three of these pieces in place - dissatisfaction of the status quo, vision and first steps. Those multiplied together must be greater than the resistance. That’s the change formula. This is in the slides so if you download the slides, you’ll see this. You don’t have to write it down. It might sound complicated but it’s really not.

3. Plan the change and be clear about who is doing what by when yet at the same time be flexible. This needs to be a plan written on paper or in a spreadsheet. You might want to use one of the project management tools that [Vicky Cassidy mentioned in episode 13](#) when she was talking about moving creative ideas into reality. She mentioned a number of tools and you can listen to that episode or even just go to the show notes which is ClimerConsulting.com/013 and you’ll find some recommendations from her. However you do it, the point is you want to be clear about who is doing what by when.

I have found that some organizations struggle with this and they don’t have clear plans written down or they will have really high level things written down. “Okay, this is going to happen in



June, this will happen in August and this will happen in October,” but they haven’t talked about what’s happening between June and August. What’s happening this first week? Who is doing what? You got to get a little detailed, a bit nitty gritty here and there is probably somebody in your team that loves doing this so let them have that process, but it needs to be written and visible by everybody.

4. Create clear accountability. Of course this goes along with #3 and there needs to be obvious and clear of who is responsible for what and then what happens if they either meet that responsibility or don’t, particularly if they don’t. Making sure there is accountability perhaps you begin every meeting with, “Okay, let’s pull out our sheet. Who has done what? Let’s review quickly or what have we missed?” It depends on your purpose and your project - this could be over email, this could be in a meeting, but you want to make sure that there’s some accountability.

5. Help people feel safe and supported. This one may seem a little bit vague but again, transition is the psychological shift and so you want to make sure that people feel safe and supported, that the team leading this process recognizes that they are letting go of something and so support them with that and make sure that they realize you understand that and that that can be hard. Also safe and supported in a sense that they get to share some input. Again, not just going through the motions but actually welcoming their input and if they disagree with something, how do you respond? Do you shoot it down immediately or do you have a conversation about it and consider it, so making sure people feel safe and supported.

6. Communicate again. You really have to over communicate. I recently heard this line that I love. “No leader was ever accused of over communicating.” That is so true. When you’re communicating, you want to think about doing this in a number of ways - written communication, verbal communication, two-way communication so not just you telling people what’s going on but actually having some dialogue and conversation about the project and again soliciting input and making this a more collaborative group project will go a long way. One of the things about communicating is I’ve heard leaders say, “Well I told them that two months ago. Why don’t they get it?” Tell them again and tell them in different ways. Have a conversation not just a telling, making that a dialogue. Being clear and communicate well is important.

7. Reward new behavior. Let’s say that one of the changes you’re implementing in your new structure is going to involve more of a team work focus yet you tend to reward for individual achievement. If that’s the case, people are only going to have half an eye for team work. Think



about how are you rewarding behavior and are you actually really rewarding the new behavior? When I say reward, I'm not a big fan of rewards in the tangible sense. I'm definitely a bigger fan of helping to develop some intrinsic motivation versus the extrinsic motivation, but thinking about what do you focus on. Basically, you're going to get back what you focus on. If you're focusing on the old behaviors, well, people are going to keep doing these old behaviors. If you're focusing more on the new behaviors, that's what you're going to get. You can reward new behaviors in very creative ways. There are just so many great ideas out there. It can just be as simple as thanking people or maybe you do some sort of fun recognition at a meeting or you have like a silly trophy that gets passed around. Whoever is doing a really good job that particular week has it at their desk. It's just like a fun thing. It doesn't necessarily have to be money or financial, a promotion. That's not necessarily what we're talking about. All of those things can be valuable but just small ways. How are you going to reward the new behaviors?

8. Gain critical mass and alignment. Whenever you announce a new change project, 10-15% of the people involved are going to immediately jump in. That's just their nature. They just enjoy change and they are excited about it, but you need to get about 30% to really have a bit of a momentum, so really focusing on right away how do we get that critical mass and getting people excited focusing back on that change formula, making the vision very clear, the dissatisfaction of the status quo very clear, making those first steps very clear. Just really focusing on getting that critical mass to align to the new ideas and that's going to really give you some momentum to move forward.

Let's do a quick summary here of these things. We're talking about a lot today. So we talked about how we think change will work. We talked about the difference change and transition. Change being the actual external change that's happening around us that's being changed where transition is that psychological shift that needs to occur. We looked at Bridges' Change Model where the level of management dictates how quickly you'll be able to move through the change process and then we looked at eight tips. Those are 1) Know the why, 2) Understand and use the change formula, 3) Plan the change and be clear about who is doing what by when yet be flexible, 4) Create clear accountability, 5) Help people feel safe and supported, 6) Communicate again, 7) Reward new behavior, and 8) Gain critical mass in alignment. Those are eight things you can do. I hope that this is helpful and I hope that you use these and go implement some change. Go make it happen. That creative idea that you have in your head that you've been trying to work on, think about these things as you present that creative idea and as your team leads this process.



Here's your weekly challenge. Think about what you just learned regarding change and just write down one thing you want to do differently in the next week regarding that change so one thing that you want to do differently as you go back into your work and as you go leading this change process.

I want to share with you a couple of things here before we close. First is I am teaching two workshops in the next two months in Milwaukee, WI. If you are interested in coming to either of these, they are open to the public, the first is a two-day workshop called Effective Speaking and Presentation Skills. That's September 23-24, 2015. The second one is called From Conflict to Resolution: Managing and Mediating Conflict at Work. That's a one-day workshop on October 28, 2015. If you are interested in either of those, I will put the links in the show notes and go check them out.

I also want to give a quick review thank you. I want to thank those of you who have written a review and shared the podcast on social media. I love it. It's awesome. If you do share it on Twitter, tag me. That would be great. I want to share a new review. This is from Develop Your Team and they state, "I just listened to [episode #011](#) and found Amy's discussion of the relationship between creativity and risk to be insightful. Her style is relaxed and straightforward, easy to listen to, and she includes practical steps to tackle perceived risk and stretch one's comfort zone." Thank you so much for the review. That's awesome. I love it. If you haven't listened to [episode #011](#), go check it out and get some tips and tricks on how to stretch your comfort zone.

I will put the resources I mentioned in today's episode in the show notes. Again that is ClimerConsulting.com/015. The big thing that will be there is the free download of the slides so you can follow along. You can share this with your team. I highly recommend doing a brown bag launch or something like that with your team and walk into this process together.

Thank you. Have a wonderful week. Go out and implement change. Be creative and I'll see you next time. Bye!