



The Process / Roadmap

Phase 1 - 'Alpha'

- Gather together the people who are likely to be your 'guiding coalition', and hold a workshop. These are the people who will lead the change with you. It should include as many people from senior management as are directly involved, as well as people from across the organisations who may or may not be formal leaders, but are relational, influential and engaged.
- Work on your 'why', your purpose, your vision — in other words, what you want to achieve through this change.
- Also work on your values – the 4-7 guiding principles and behaviours that, if you do them, you'll all be working towards your vision successfully.
- Define what the shorter-term goals / objectives / results are, which will form a score board that you can track on a weekly basis.
- Do your best to make your vision and values memorable by making them novel, or tie them into a metaphor. Anything that makes it stick in peoples' heads, and motivate peoples' hearts.

Phase 2 - 'Beta'

- Gather all the people in your organisation to hear you share your draft vision and values. This might be in one event, it might be in many events. But get around to everyone. Do it in person, with online as a last resort.
- When you share it, make sure that the people who share the vision include yourself, other senior members of the organisation, and also non-formal leaders. This last group is important, because the people in your organisation need to hear about the vision and values from their peers, in addition to their superiors in the organisation.
- At these gatherings, ensure you communicate that your vision and values are a draft, and then invite everyone's feedback. Take notes of what they say, or have a formal mechanism for recording to it, and replying to everyone.
- Finally, at these gatherings ask everyone to share what your vision of change means to them. This is important because everyone needs to understand the various benefits of the change, including what will be the benefit to themselves. Give space to discuss this. Break into smaller groups of 3-6 if you

have more than a dozen people present. Take notes of what people say, because what they say should be key phrases that you use and return to in your own communication!

Phase 3 - 'Concreter!'

- To make the change a concrete part of your organisational life, make it a priority to communicate to the whole organisation on a weekly basis with updates of your progress. Within this, share examples of different team members doing things according to the values, and praise this – so that other team members can imitate. For bonus points, ask other team members to write and share their perspective in your weekly communication. Explore your vision and values, and reflect on them.
- Ensure you have weekly team meetings. At these team meetings, celebrate behaviour that is in line with the values, and review the scoreboard that you created. (For more on meeting structures and rhythms, read *Death By Meeting*, by Patrick Lencioni.)
- Overtime, adapt the vision, values and scoreboard, based on your progress, and also on input. Everything is a draft, and open to being adapted.

Key Moves

Head Engagement

- Communicate consistently. This doesn't have to be all the time, but make it consistent. Communicate is like oxygen to an organisation. Schedule it in your diary.
- Communicate clearly. Be very clear in what you are asking people to do, or with what you are letting them know.
- Make an invitation, don't just provide information. People are generally reactive, rather than proactive / initiative takers. So most people won't act unless you invite them to. Therefore, make a clear ask, and make it easy for people to respond.
- When you communicate, either on a regular basis through email, or in ad hoc emails, or in meetings, or one-to-one, always link to the key vision and values that your organisation is gathered around. Most managers under-communicate vision to a factor of 100, i.e. if an employee spends 1 hour talking about vision a month, that's only 1/172, or 0.58% of their time.

Hands Engagement

- Don't neglect meetings just because you have bad meetings. Good meetings are essential as a place to tactically touch base and make decisions, but also as a place to strength engagement and culture. Physical gatherings release chemicals that help people bond to one another, and also open up their mind to new ideas.
- Stir the senses at your meetings by making good use of food and drink, music, heating of the room, aesthetic, etc. Various tests show that these environmental factors determine inter-personal connection and creativity.
- At meetings, include various voices, and invite people's contributions. The more people share, they more they are likely to be engaged. Also the more that people see their peers sharing, the more authoritative this will be.
- Have people work on new behaviours together. Don't have your leaders (formal and informal) work alone, because this wastes a portion of that effort. Make all effort work double, by coaching / training someone else at the same time.

Heart Engagement

- Make your vision and values such that they fill the intangible needs of identity and a purpose to live for. This is why a vision which has a metaphor is powerful, because story engages us more deeply than arbitrary information.
- Ensure that people are psychologically safe. This means ensuring good communication, and talking with people about their needs. For instance, if someone is at work and doesn't feel listened to, this will create a story in their head that they aren't valuable, and thus they are unable to engage fully at work.
- Supply emblems, clothing, paraphernalia and slogans that create a sense of shared identity among team members, of course in a way that suits your organisation. This is the only pathway to high engagement.
- Regularly invite feedback and input, and as far as you can, let people build your organisation with you. The more that people are involved, the more engaged they will be.