1

VALIDATE THE JOURNEY

Order people around and you probably won't like the results. Appeal to their agenda and you can work wonders.
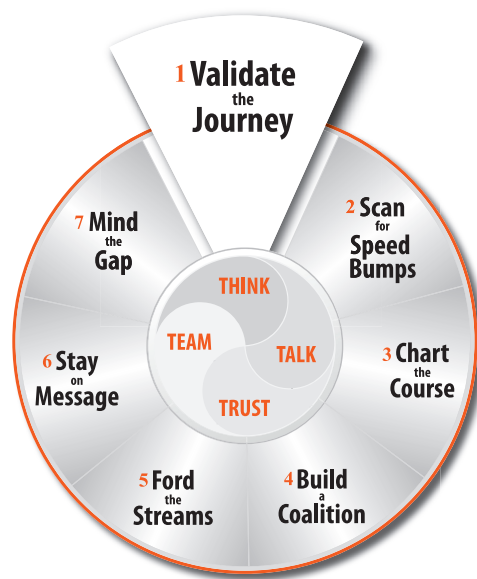
TUTORIAL

Key Points:

- Take off the Blinders
- Tend to the CAST of Characters
- Remember Context
- Use **SMART** Goals
- Keep it Simple
- Answer the W, W, WI Questions

DW

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● **PRINCIPLE:**   Alignment around a commonly understood *Business Case for Change* (BCC) accelerates implementation, thereby improving Return on Investment (ROI).

● **TASK:**   A compelling BCC message translated into the Frame of Reference of Change Agents and End Users and communicated to all impacted parties in a way that produces alignment of understanding.

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NOTES

Jot down some of your key take-aways from the **Validate the Journey** tutorial.

Take off the Blinders:

Tend to the CAST of Characters:

Remember Context:

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Use SMART Goals:

Keep it Simple:

Answer the W, W, WI Questions:

HOW DO WE KNOW WE ARE SUCCESSFUL?

- **On Time**
- **On Budget**
- **Technical Objectives Met**

INSTALLATION

EXECUTION

- **Business Objectives Met**
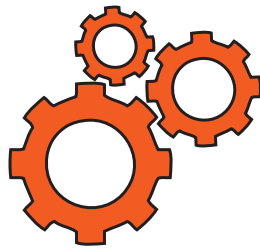- **People Objectives Met**

IMPLEMENTATION

- **On Time**
- **On Budget**
- **Technical Objectives Met**
- **Business Objectives Met**
- **People Objectives Met**

IMPLEMENTATION

● **"Go Live" Does Not Guarantee Adoption**

FORCED RANKING

*Think of a specific implementation project in which you have a strong vested interest. Then force rank **(1-5)** the following metrics as to their importance to project success:*

_____ **On Time**

_____ **On Budget**

_____ **Technical Objectives Met**

_____ **Business Objectives Met**

_____ **People Objectives Met**
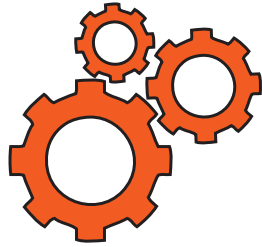
Step 1 VALIDATE the Journey

> *"Let us have integrity and not write checks with our tongues which our conduct cannot cash."*
>
> *– John Adams*

1	**Validate the Journey**	
	B.C./PCC — Set SMART Goals — Answer W, W, WI Questions	
2	**Scan for Speed Bumps**	
	Identify and Manage Resistance — Gather Pertinent Data	
3	**Chart the Course**	
	Present–Neutral Zone-Future — Use Multiple Influence Levers	
4	**Build a Coalition**	
	Manage CAST — Contract, Re-contract with Sponsors	
5	**Ford the Streams**	
	Reach Explicit Agreement on Values — Focus on Behaviors	
6	**Stay on Message**	
	Manage the Meaning — Communicate, Train/Coach, Reinforce	
7	**Mind the Gap**	
	Monitor, Adjust, Hold Accountable	

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VALIDATE THE JOURNEY CASE

Instructions: *Read this case study carefully. Then answer the three questions on the following page.*

Paul is the CEO of a major grocery store chain. His company is introducing new software to track inventory in the stores. The new software is reportedly less user-friendly than the old software, but would save the company millions because it more accurately tracks items stocked on shelves and then purchased by the customer. The old software had been used by the company for the last ten years and employees were very familiar with it.

Before making the change, Paul spoke at a corporate retreat to each of the general managers to see how they felt about the change. He encouraged them to adopt the new technology in their stores as soon as possible. The thought of greater efficiency rang true with the general managers, so they decided to implement the new inventory program during the next quarter.

During the month before installation, the corporate office sent trainers to each store to teach employees how to use the software. During training, employees complained about how "unintuitive" the program was. They said that although it might be more accurate, it processed slower and users had to take more time to be sure they were using the program correctly.

Store managers reported the problems to Paul. But he was assured by the software vendor that everything would be okay after the initial "break-in period." Over the next six months, although familiar with the new program, employees complained more and more about the change. Meanwhile,

checkout lines at the stores continued to bog down, frustrating employees as well as customers. The new program did not seem to be creating the improved productivity it promised.

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1. How could the store employees' **WIIFM** issues been dealt with better?

2. What unique needs of different stakeholders should have been considered?

3. What are some of the **What**, **Why**, and **What If** questions that should have been addressed better before the implementation?

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VALIDATE THE JOURNEY
Protocol Checklist

Instructions: *Read each statement and decide how accurately it describes your organization's adherence to the* **Validate the Journey** *principles described in this chapter:*

(**0** points)   We never or rarely do this
(**1** point)   We sometimes do this
(**2** points)   We regularly do this
(**3** points)   We always or almost always do this

Place the **point value** *of your response choice beside each statement.*

_____ **1.** We ensure that our messages about the intended change explicitly address the WIIFM (What's In It For Me?) questions that most people ask.

_____ **2.** We consider the unique needs of each member of the CAST of Characters (Champions, Agents, Sponsors, Targets) in making a case for change.

_____ **3.** We pay special attention to the context of the change, making sure that we consider the frame of reference of each stakeholder group.

_____ **4.** We position the change by using SMART goals to help clarify what the change will mean for the organization's new Future.

_____ **5.** We talk about the change in simple terms to help answer the What, Why, and What If questions that many people likely have about the change.

_____ **Total Number of Points**

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Interpreting Your Scores

0-5: You may be trying to practice change-by-announcement, change-by-slogan, or change-by-executive-decree. To engage the heads, hearts, and hopes of the people you wish to influence, you need to make a strong psychological case for action, not simply a business case for action.

6-10: Your organization is doing a lot of things right, but there's still a lot of room for improvement in terms of connecting with the people whose support you need. Are you conducting active dialogue with your people? Are you genuinely listening to their concerns? Are you accommodating their needs and concerns as you tweak your change plans? Do your people express explicit appreciation for the way you're engaging them? If your response is "no" to any of these questions, that's a clue to what your next steps should be.

11-15: Excellent. You're clearly on the right track as you Validate the Journey. Identify the things you're doing right, and do them some more. Identify the things that could help make both a business case and a strong psychological case for your change, and make sure they are included in your ongoing change efforts. This up-front work pays huge dividends.

**Step 1
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the Journey**