



THE CHANGE LEADER'S ROADMAP®

How to Navigate the Complexities  
of Your Organization's Transformation

by Dr. Linda Ackerman Anderson and Dr. Dean Anderson

# INTRODUCTION

**How do you design and implement a major organization transformation so that you actually achieve sustained business results? Is there a roadmap to follow? Will the roadmap accelerate the achievement of outcomes? Reduce the cost of change? Lessen its stress on employees? Absolutely yes!**

How do you design and implement a major organization transformation so that you actually achieve sustained business results? Is there a proven roadmap to follow? Will such a roadmap accelerate the achievement and sustainment of outcomes? Reduce the cost of change? Lessen its stress on employees? There is such a roadmap....absolutely yes!

Venturing into the unknown without a roadmap usually leads to getting lost. Clearly, no successful executive would step into the marketplace without a well-thought-out business strategy and plans to guide the way. Neither should you embark on the journey of

transformation without a clear change strategy and plan. For over forty years we have been developing, testing, and refining The Change Leader's Roadmap® to provide comprehensive and trusted guidance for developing your change strategy and project plan.

In this eBook, we provide you with a high-level overview of the work outlined in The Change Leader's Roadmap. This eBook will help you identify how to tailor the Roadmap to fit your organization's change needs, people needs and outcomes. It will also help you identify major areas of work where your plans are doing well, and those you may be missing.



# What Is The Change Leader's Roadmap®?

A comprehensive change methodology consists of three areas:

1

**CONTENT:** the organizational and technical areas you must change

2

**PEOPLE:** the mindset, behaviors and cultural changes required to deliver and sustain your Content solutions

3

**PROCESS:** the actions required to plan, design, and implement ALL of your changes (content and people) in an INTEGRATED and UNIFIED manner

The process plan incorporates both the typical project plan and the people-related change management plan. Its intent is to help you design the process to determine the very best content solution in a way that your stakeholders will want to accomplish this solution and be very able to succeed in it.

The Change Leader's Roadmap is a nine-phase process model built to help you plan, design and implement your content and people changes. It organizes your process for moving your organization from where it is today to where it needs to be to ensure continued success in your marketplace. As a roadmap, the model doesn't tell you what to change; instead, it provides guidance for how to change so that you get your intended business outcomes while simultaneously engaging your people in positive ways that bolster your culture, change readiness and capability to succeed.

The Roadmap embeds the essential human dynamics of transformation within the concrete tasks of changing structures,



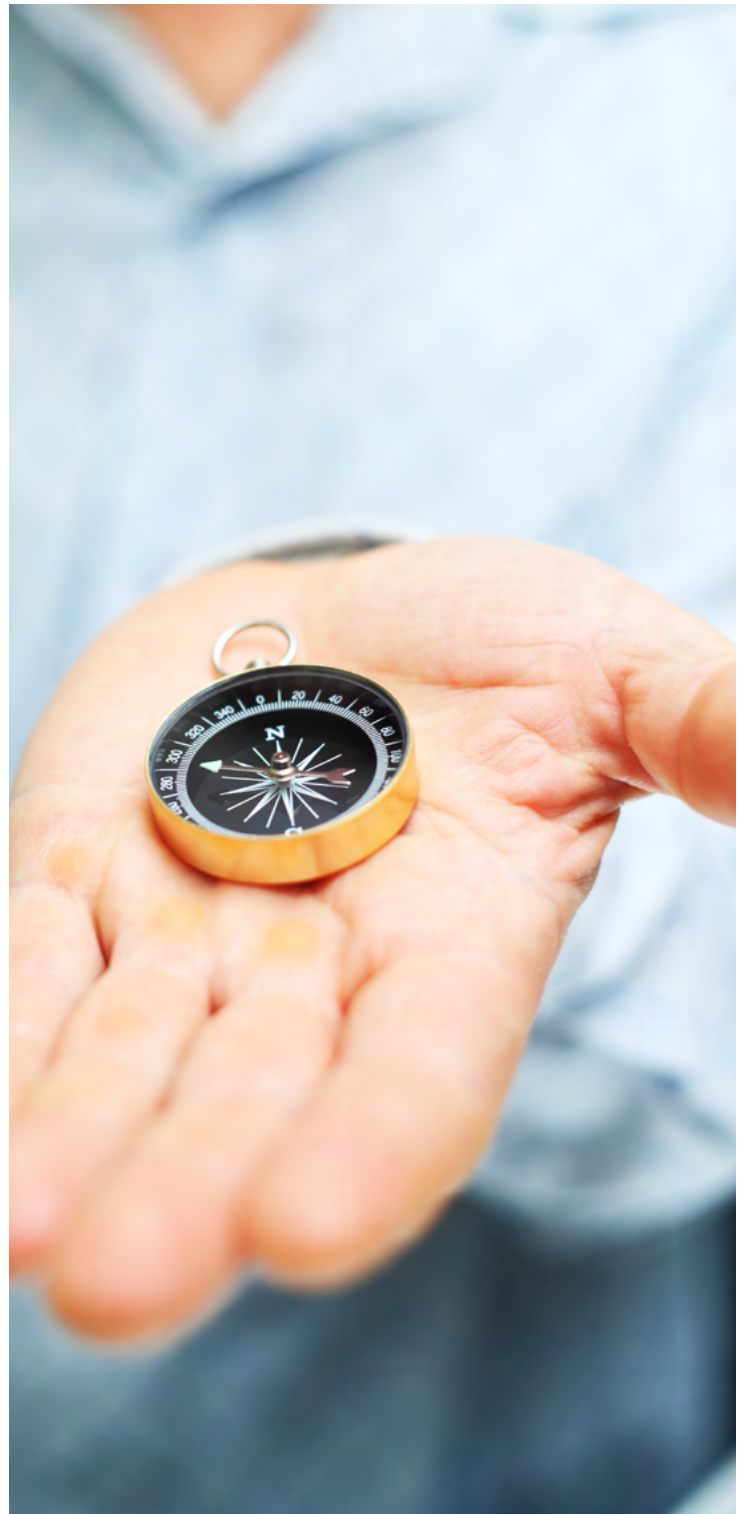


systems, processes or technology. Our research demonstrates that inadequate attention to the people dynamics of engagement, commitment, behavior and mindset change, relationship between leaders and teams, culture and emotional reaction is a certain guarantee of failure. These critical people-related tasks are not “bolted on” as an afterthought or as a nice-to-do in the CLR; they are integrated right into the tangible “content” work the CLR specifies.

The Change Leader’s Roadmap is the heart of Being First’s change methodology for succeeding at projects. The resources we have built around it offer a full range of guidance: conceptual to detailed. Consequently, the CLR can be used by leaders who fill the various change leadership roles—from the change sponsor who only needs to understand the 30,000foot picture, to the change process leader, project team member, or change consultant who need more detail to ensure tangible success.

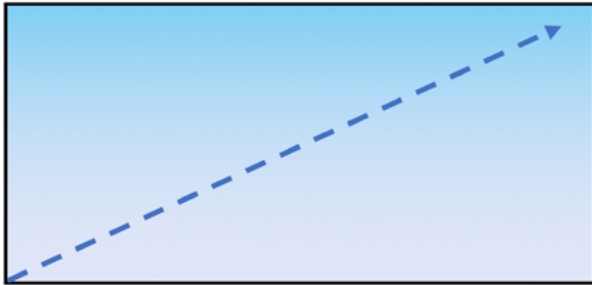
For ease of use, the CLR is organized like a project management methodology. Each of the nine Phases consists of Activities, which are further made up of Tasks. The work happens at the Task level; the Activities and Phases simply organize the Tasks into a logical flow for better understanding, tailoring and application. Our most detailed resources for each Phase include not only key Activities and Tasks, but also Task Deliverables, Work Steps, Tools, assessments and checklists and articles.

Although designed for transformational change, The Change Leader’s Roadmap can be tailored for all types of change, as well as for any magnitude of change effort. Smaller, less complex changes will require selective tailoring of the Phases, Activities, and Tasks in the model.



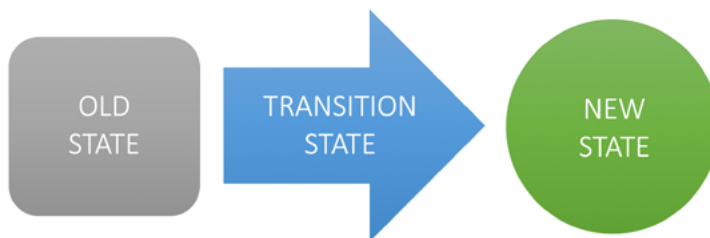
# Three Types of Change that Occur in Organizations

## Developmental Change



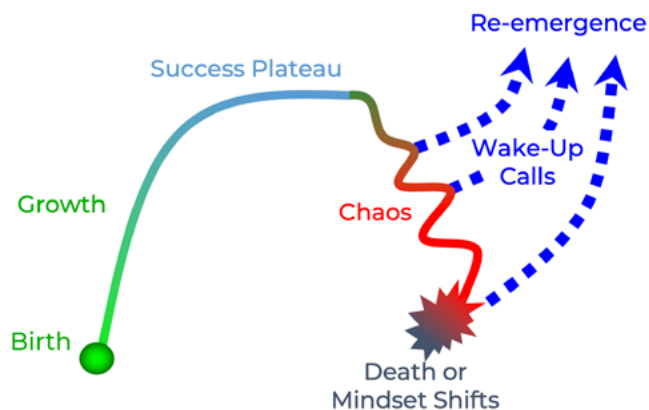
Improvement of what is; new state is a prescribed enhancement of the old state.

## Transitional Change



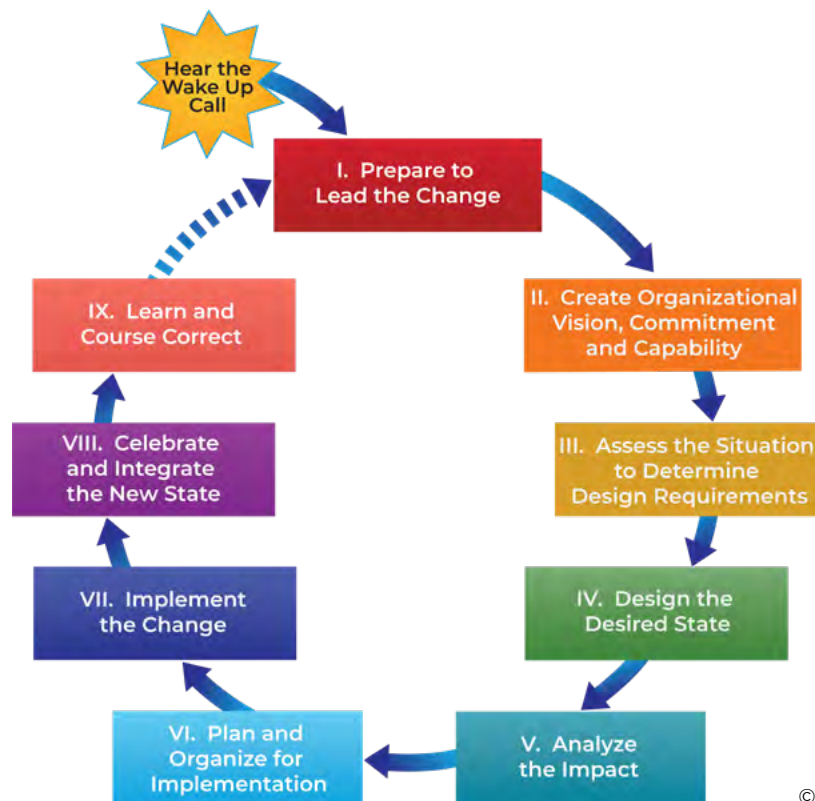
Design and implementation of a desired new state that solves an old state problem; requires management of the transition process to dismantle the old state while putting in place the new state; managed timetable.

## Transformational Change



Market requirements force fundamental changes in strategy, operations, and worldview: 1) New state is unknown – it emerges from visioning trial and error discovery, and learnings; 2) New state requires fundamental shift in mindset, organizing principles, behavior, and/or culture, as well as organizational changes, all designed to support new business directions. Critical mass of organization must operate from new mindset and behavior for transformation to succeed and new business model or direction to be sustained.

# The Change Leader's Roadmap®



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The depiction of the nine phases of the CLR represents the inherent logic and flow of the activities of leading and achieving real change—the full terrain of content and people requirements. However, do not be fooled into interpreting the model's sequential nature to mean that you must complete one phase before you proceed to the next. Not so. In reality, you may be in two, three, or even four phases simultaneously.

Furthermore, you may do the work of several phases in parallel!

The CLR is not a lock-step project management approach. Transformation is too dynamic and emergent for that and requires constant attention to the process and inevitable course corrections. Consequently, the CLR prescribes no set sequence of action. Instead, it is a navigation system, a thinking discipline that makes you aware of what change tasks you might need to engage in. It then

helps you decide what to do and how to do it. We have built it to be comprehensive. You will never want to do everything described in the CLR. Instead, our strongest recommendation is that you will want to do as little as possible, yet enough to succeed. Select only the key tasks that your change requires.

Keep this in mind as you read through the Phases. Due to the space limitations of this article, this is a brief overview. For a more detailed version of the CLR, see our book, "The Change Leader's Roadmap: How to Navigate Your Organization's Transformation." And keep in mind that the detailed Toolkit that supports the CLR is about 2000 pages long. (Wow!) As you read the overview, think about change that you are currently engaged in, and identify what work you have successfully completed, what you may have missed that is causing you problems, and what you need to do from this point forward.



## Overview of The Change Leader's Roadmap's Phases

### PHASE I

### PREPARE TO LEAD THE CHANGE

In Phase I, you set up the leaders of the change and your organization to succeed from launch. It is the most important phase, addressing the key people and process decisions you must make to get your change effort off to a strong start. Its purpose is to prepare your leaders to lead the transformation successfully by accomplishing six activities:

1. Starting up and staffing your change effort with the best change leaders, expertise and knowledge of the current reality
2. Determining your case for change, the accurate scope of change, and your initial desired outcomes
3. Assessing your organization's level of readiness and capacity to take on and succeed in the change at this particular time
4. Building your leaders' capability to collectively commit to the change, effectively lead it as an aligned team through to fruition, and to model the mindset and behaviors required for it to succeed (This is especially important in transformational change.)
5. Clarifying the overall change strategy which includes governance, scope, high-level change process, resources and project integration plans for achieving your results, plus your strategy for how you will engage and communicate with your stakeholders and entire organization in ways that reflect your values and guiding principles
6. Establishing the optimal conditions and change infrastructure to achieve your change

With all of these “ducks” in order, your leaders have assured their ability to work as a unified team, have established the conditions for the change to succeed and are capable of leading the organization through the thick and thin of your transformation as it unfolds.



## PHASE II

### CREATE ORGANIZATIONAL VISION, COMMITMENT, AND CAPABILITY

In Phase II, you take your clarity, leadership alignment and Phase I decisions out to the organization. You announce your case for change and your change strategy: how the overall effort and initiatives will be defined, integrated and orchestrated over time. Your purpose here is to build organization-wide understanding, commitment, momentum, skills and the capacity to succeed in the transformation, especially among your key stakeholders. In your communications and engagement, you and your change leaders begin to model the behavior and thinking that you are asking of the organization, and actively engage people in creating your new future.

Ideally, the entire organization affected by the change participates in the creation of a compelling vision of the future that will bring the organization greater success. In organizations that have a history of doing well in their old state, the leaders create bold actions to wake up the organization to the need to transform. Without understanding that the old way of operating is gone, your people will not be motivated to change. So, this Phase mobilizes the necessary understanding, builds readiness and capability, and prepares all stakeholders for aligned action.

## PHASE III

### ASSESS THE SITUATION TO DETERMINE DESIGN REQUIREMENTS

You will now use the desired outcomes and vision you created in Phases I and II to generate design requirements for determining the actual future state you will implement. In Phase III, you assess the current reality in the organization for three key pieces of information:

- 1 What you already have in place that serves your desired outcomes.
- 2 What you must stop doing or dismantle.
- 3 What you need to create afresh to make your vision a reality.

You will also gather information from your customers and surface important best practices in the industry that you want to embed in your desired state. These activities provide you with clear parameters to use to generate the best scenario for implementation. They also build the expectation for change within your organization. In all these tasks, you use your engagement and communication plans to ensure stakeholder involvement. The more you engage in doing this work, the more they will buy in to the change.



## PHASE IV

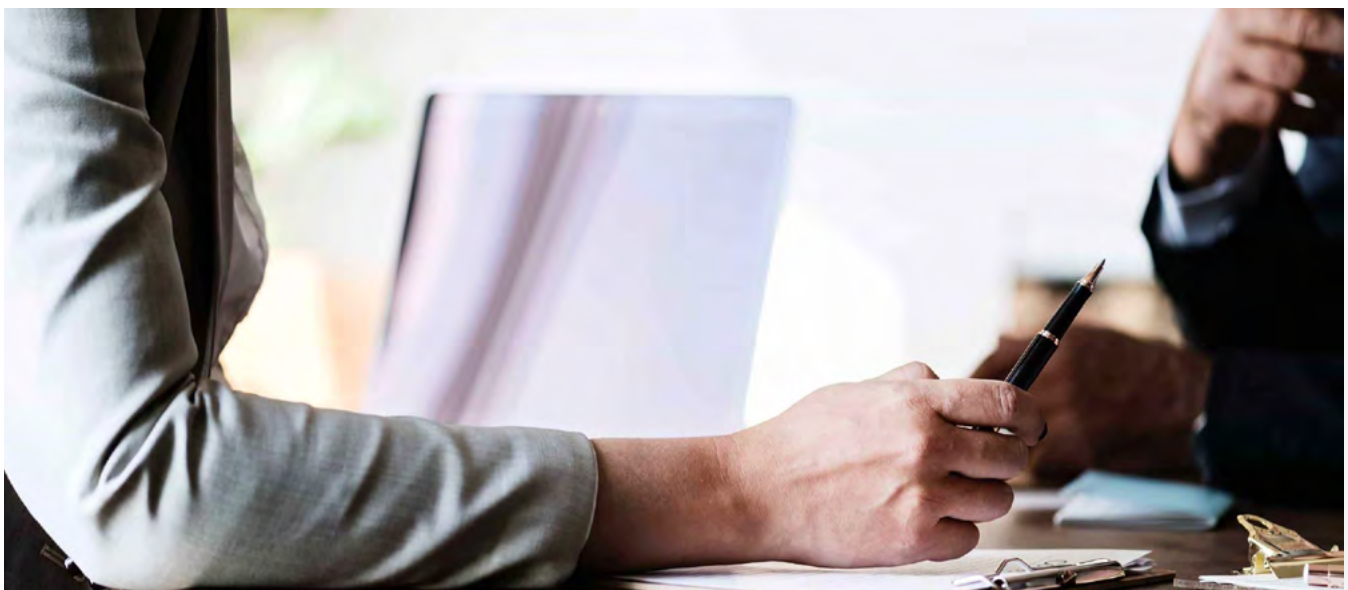
### DESIGN THE DESIRED STATE

In this phase, you design the specific organizational and cultural solutions that will enable you to successfully achieve your vision. The resources and vehicles you use to design your desired state can be critical drivers of momentum and excitement—or deterrents—for the future. If you use external experts to do your design work, you may get a sound solution, but also may alienate your in-house resources and employees who have a greater understanding of the organization's strengths and weaknesses. If at all possible, engage key in-house stakeholders in your design process, with or without external experts. And design to fulfill your design requirements from Phase III!

## PHASE V

### ANALYZE THE IMPACT

Once you have your preferred future state design, you must assess the magnitude of impact it has on your existing organization, its culture and your people—all in preparation for planning a realistic implementation process. Impact analysis is an essential step in understanding just how much work is required to put your desired future in place. However, it goes far beyond noting high, medium, or low impact. It identifies specific changes in structure, systems, technology, business processes and so on, as well as the cultural and human dynamics requiring attention before or during implementation. This is a great opportunity to engage your resistors, if you have not already...it is here that you want to know why they think the change will NOT work! This will inform you about any further work needed to ensure a successful implementation. Or, it may alert you to the need to redesign (go back to Phase IV) because the impacts of your current design are more than your organization, resources or timing can tolerate.



## PHASE VI

### PLAN AND ORGANIZE FOR IMPLEMENTATION

With lists of impacts and issues needing attention before implementation can occur, you can now identify the actions required to officially implement your desired state. You integrate actions as much as possible for efficiency and to optimize your resource utilization and develop your Implementation Master Plan. Only when you know the actual work required to put the future state in place can you realistically identify your timetable for implementation. You may need to renegotiate any prior estimates about timing. Once this is clear, you also ensure that the organization is prepared for implementation and has the time and skill to see the changes through while effectively continuing the ongoing operation. And of course, a key part of your Implementation Plan includes human issues like training needs, emotional support culture change and continued communications and engagement.

## PHASE VII

### IMPLEMENT THE CHANGE

Now it is time to carry out your Implementation Master Plan to achieve your desired state. Most methodologies call this phase “Deployment.” It is that and much more, especially for the people whose jobs are affected. Undoubtedly, your roll-out will not go as planned. They never do, especially if your change is transformational. You must build in ways to legitimately monitor what is happening and what is needed, and then course correct both the plan and your desired state design as required. Implementation is the phase when your people will realize how real the change is and when required to actually behave differently, may have a range of predictable emotional reactions that you have not yet seen. It is the job of all change leaders to support your people through their reactions, to being able to let go of the past and continue on their path to the future.

## PHASE VIII

### CELEBRATE AND INTEGRATE THE NEW STATE

Deployment is not the end of the change process. At this point in the process, it is time to celebrate achieving your desired state, and to let your organization know that they are now living in the new state, although the process has not ended and changes will continue to happen. Reward your people’s support for the changes to date and recognize all of the hard work they have contributed to achieve your new state. In this Phase, you must also support people’s integration and mastery of the new behaviors and work practices required to make the change successful. Just because people have taken on new roles or new technology does not guarantee they know how to succeed with them, or how everyone fits into the larger picture of the change across the organization. So, you will need to plan working sessions and communications to ensure your people learn what works, iron out remaining operational kinks, and continue to refine the new state as they learn how to make it work most effectively. This occurs in individual work groups as well as across departments, functions or processes, in support of the organization as a whole.

## PHASE IX

# LEARN AND COURSE CORRECT

By this point in your change process, you have been learning and course correcting your roadmap and outcome all along. This Phase focuses you on four important activities to conclude this round of change:

- 1 Creating mechanisms to continuously improve your new state.
- 2 Evaluating and learning from your well designed and implemented change strategy and change process plan...on behalf of continuously improving your leaders' capability to lead change.
- 3 Improving your organization's readiness and ability to lead future changes successfully.
- 4 Closing down the existing change process by dismantling your temporary change infrastructures and conditions that no longer serve the needs of your new organization. (Keep in mind that frequently leaders decide to maintain some of their change structures because they have discovered how useful these structures are for their agility and resilience.)





## Summary

The nine phases of The Change Leader's Roadmap take you from start-up through to sustained business results and prepare you for the next round of changes that inevitably knock on your door. Tailor the CLR's Phases and Activities, and where you consciously decide to skip key steps or decisions, be sure to first consider the impacts of doing so. Customize your process to each change effort you are leading and encourage your stakeholders to identify "Best Change Practices" for your organization and its unique needs. Make The Change Leader's Roadmap your own so that it provides your organization and change efforts the greatest chance for success. Best of luck on your change journey!







## About the Authors

Drs. Dean Anderson and Linda Ackerman Anderson are the pioneers of Conscious Change Leadership and are known as the “masters of transformation”. For the last four decades they have continually challenged mainstream thinking about leadership, transformation and human performance to the C-suite of Fortune 500 companies and traditional global organizations like NATO.

Together they founded Being First, Inc., an organization that guides visionary leaders to transform themselves and their organizations to *Achieve Breakthrough* in business results, culture, leadership, and executive team performance, while building world-class change leadership capability.

Dean and Linda co-authored two cutting-edge books that have become classics in the field of organizational change: [Beyond Change Management: How to Achieve Breakthrough Results through Conscious Change Leadership](#), and [The Change Leader's Roadmap: How to Navigate Your Organization's Transformation](#) and are the co-developers of The Breakthrough Process and The Change Leader's Roadmap®.



## About Being First®

Being First is a Breakthrough company. Founded in the 1980's by Drs. Dean Anderson and Linda Ackerman Anderson, we provide advanced expertise in personal and organizational transformation.

We open leaders' minds, develop their self-mastery and equip them with the advanced Conscious Change Leadership skills to transform themselves, their organizations, communities and cultures.

For forty years, we've been pioneering a new field of study – Conscious Change Leadership – that develops “transformational super-powers:”

- **Conscious** – “Vertical” leadership development that produces greater mindfulness and self-mastery
- **Change** – Strategies and methodologies for designing and leading organization and culture transformation
- **Leadership** – Co-creative leadership styles that unleash human and organizational performance

We are Strategic Advisors to the C-Suite, and provide an integrated System of Transformation to your executives, change leaders and internal consultants that includes strategic advising and consulting, training and development, coaching, methodology, tools and assessments.

We partner with our clients, and customize everything to their exact needs to fit the scope and scale of their required transformation to Achieve Breakthrough.

For more information, please visit [BeingFirst.com](http://BeingFirst.com) or call us at +1 970.385.5100.

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