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The Managing Change Scorecard



Managing Change

Our managing change model is built around a generalized performance model, as follows:

$$\mathbf{P} = \mathbf{f} (\mathbf{U}, \mathbf{S}, \mathbf{E}, \mathbf{M})$$

Where,

P = Performance

U = Understanding

S = Skills

E = Environment

M = Motivation



U = Understanding

U = Understand what needs to be done
(people understand what's expected, what we're trying to accomplish, what the goal is, what the plan is, what the roles are)

S = Skills

S = Skill to pull it off (people have the necessary aptitudes, abilities, knowledge, and experience to perform)



E = Environment

E = Environmental factors are in place (we've removed barriers, provided the resources people need, and we've insured a supportive management climate)

M = Motivation

M = Motivation (people have the passion, energy, and desire to perform, as driven by beliefs, appropriate intrinsic or extrinsic rewards, and trust)

Implications for Managing the Change Process

For change to be effective, leaders must insure that:

- Employees understand what the change goal is (U)
- Employees understand why we are trying to change (U)
- Employees understand what the plan is (U)
- Employees understand what their roles are (U)
- Employees understand what we expect from them (U)



Implications for Managing the Change Process (continued)

- Employees have the abilities and aptitudes to carry out the change (S)
- Employees are trained in the new skills required (S)
- Employees have the knowledge and information they need (S)
- Environmental barriers have been removed (E)
- Employees have the resources they need (E)
- A supportive climate has been created (E)

Implications for Managing the Change Process (continued)

- Employees feel a sense of ownership in the change (M)
- Employees believe that the change can be accomplished (M)
- Employees believe that the change is beneficial to them (M)
- We provide relevant intrinsic and/or extrinsic incentives (M)



The Managing Change Scorecard

Change situations

- Think of changes that have taken place in your company in the last twelve months. This can be a company-wide change or a department change only.

Application of the Managing Change Scorecard

- How many of the changes could have been managed more effectively? Pick one of the changes to use with the Managing Change Scorecard.

1. Communication Process

No.	Item	Yes	No	Comments
1	Did we let people know about the change far in advance?			
2	Did we communicate frequently about the change (before, during, and after)?			
3	Did we use multiple communication methods?			
4	Did we employ multiple communicator sources?			
5	Did we communicate empathy for the change?			
6	Did we devise innovative forms of communication (e.g., slogans, ceremonies)?			
7	Did we develop and execute a systematic communication plan?			

2. Communication Content

No.	Item	Yes	No	Comments
8	Did we outline the reasons for the change (true rationale)?			
9	Did we explain the benefits of the change?			
10	Did we explain the roles that people were going to have during the change?			
11	Did we explain the plan for carrying out the change?			
12	Did we communicate our expectations?			
13	Did we brainstorm likely questions and concerns employees might have?			
14	Did we develop straightforward responses to the concerns and questions?			
15	Did we communicate what stays, what is left behind, and what is gained?			

3. Involvement

No.	Item	Yes	No	Comments
1	Did we empower the affected people to make the decision?			
2	If not, did we get input from people before the decision was made?			
3	Did we empower affected people to design the implementation?			
4	If not, did we get input from people about how to implement?			
5	Did we involve people at the lowest levels possible?			
6	Did we communicate this involvement to others?			



4. Leadership

No.	Item	Yes	No	Comments
1	Did managers provide the resources employees needed to make the change?			
2	Did managers provide for training in the new skills needed to make the change?			
3	Did managers provide the information that employees needed to make the change?			
4	Did managers provide psychological support and encouragement during the change?			
5	Did managers identify and remove barriers to implementing the change?			
6	Did managers identify and train change agents and/or facilitators?			

4. Leadership (continued)

No.	Item	Yes	No	Comments
7	Did managers install feedback systems for motivational purposes?			
8	Did managers display a positive attitude about the change? (i.e., no “scapegoating”)			
9	Did managers live by their commitments during the change?			
10	Did managers model the change for others?			
11	Did managers provide recognition for accomplishing the change?			
12	Did managers provide rewards (if appropriate) for accomplishing the change?			
13	Did managers include successful change as part of the performance appraisal process?			

Summary Evaluation

Communication Score

How well was the communication aspect of change managed? Circle the appropriate level.

Level 1	Level 2	Level 3	Level 4
Poor. We did a poor job of communicating during this change. Very few elements on the scorecard were checked.	So-So. We communicated OK in some areas; but we could have improved in other areas.	Fairly Good. Communication was a strength. We did more things right than wrong.	Very Good. This was a model project from the standpoint of communication; there are very few improvements needed.

Summary Evaluation

Involvement Score

How well was the involvement aspect of change managed? Circle the appropriate level.

Level 1	Level 2	Level 3	Level 4
Poor. We did a poor job of involving people in designing or implementing the change.	So-So. We did only a fair job of involving people in the change decisions; we could have significantly improved in this area. .	Fairly Good. Involvement was a strength on this project. We did more things right than wrong.	Very Good. This was a model project from an involvement standpoint; there are very few improvements needed.

Summary Evaluation

Leadership Score

How well did we manage the leadership aspect of change? Circle the appropriate level.

Level 1	Level 2	Level 3	Level 4
Poor. We did a poor job of leadership during this change. Very few elements on the scorecard were checked.	So-So. We exhibited OK leadership in some areas; but we could have improved in other areas.	Fairly Good. Leadership was a strength. We did more things right than wrong.	Very Good. This was a model project from the standpoint of leadership; there are very few improvements needed.



Managing Change Scorecard

- What are your organization's strengths?
- What could be improved?
- What should leaders in your organization do to support change transitions better?

