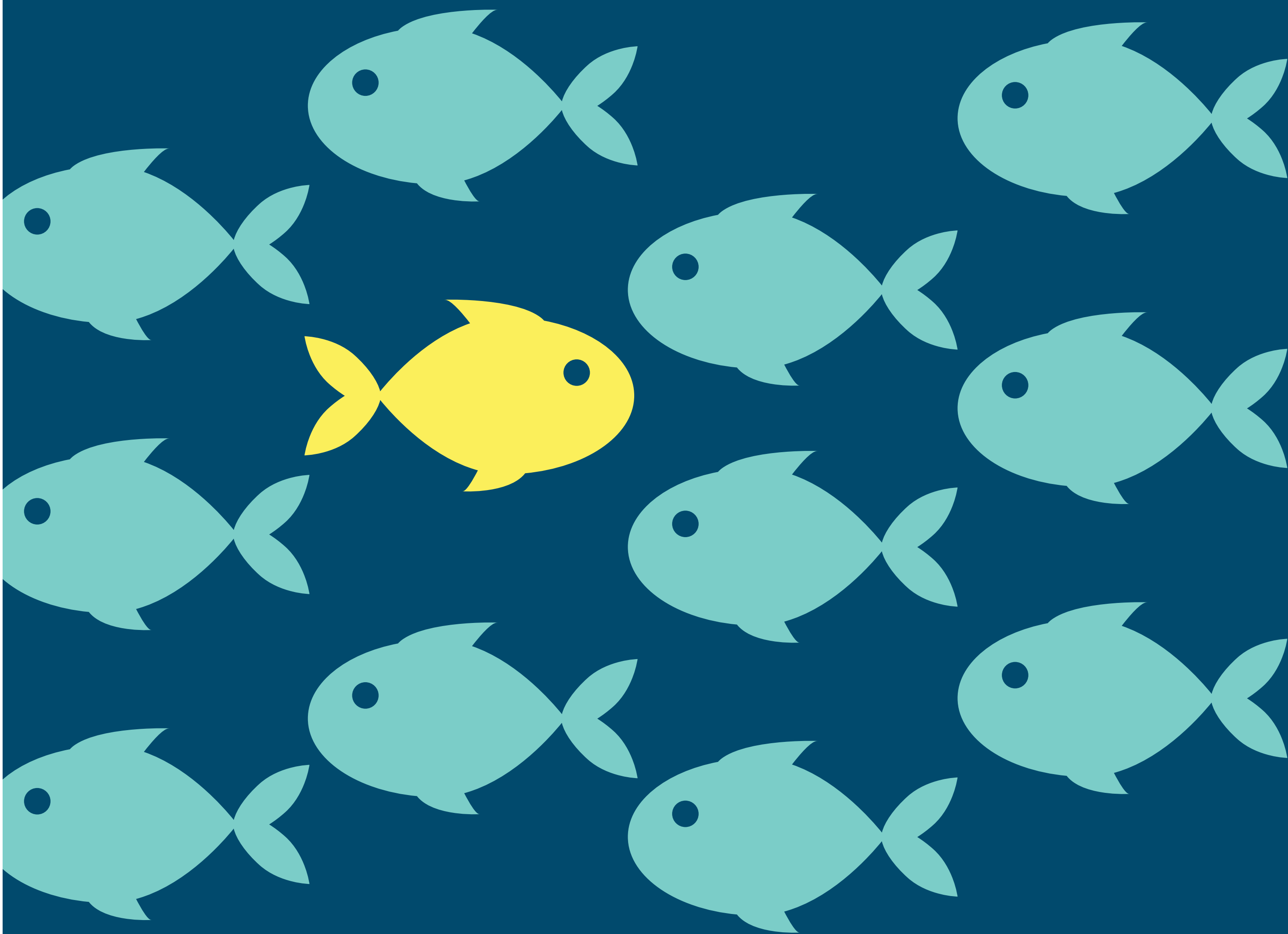
A Playbook For CHANGE

Assisting organisations with the transition to NDIS



A Partnership between Claire Edwards
& the Victorian Healthcare Association

A Playbook for Change: Assisting Organisations with the Transition to the National Disability Insurance Scheme

By Claire Edwards

In partnership with The Victorian Healthcare Association

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A PLAYBOOK FOR CHANGE

ASSISTING ORGANISATIONS WITH THE TRANSITION TO THE NATIONAL DISABILITY INSURANCE SCHEME

WRITTEN BY

CLAIRE EDWARDS

A PARTNERSHIP WITH

THE VICTORIAN HEALTHCARE ASSOCIATION

FOREWORD

A Catalyst for Change

From the introduction of new legislation, to the development of new services to meet the needs of communities, to adapting to expectations relating to consumer-directed care, Victoria's public health sector responds to change on an almost daily basis. Given the volume and complexity of change underway across the sector, it is critical that healthcare employees are equipped with the knowledge and tools to manage change in a way that is effective and efficient. The 'Playbook for Change to support NDIS transition' is a tool for building that capacity.

The National Disability Insurance Scheme (NDIS) is one of the biggest reforms introduced to the health sector in several decades. It is dramatically changing the way organisations deliver disability services, how they engage with their communities and how they generate their funding. It requires significant change across service delivery and workforce.

To support organisations involved in the transition to NDIS, the Victorian Healthcare Association (VHA) has co-created this simple and easy-to-use 'Playbook for Change' in collaboration with Claire Edwards, transforming healthcare and b.school Founder. It can be used by individuals or groups of staff to navigate the changes occurring within their organisations. While the core focus is on the NDIS, it can be adapted for use across small projects to multi-year programs.

The 'Playbook for Change' provides a range of activities to help employees determine and prioritise the actions they need to take in order to move the organisation from its current state to a desired future state. It is supported by a series of webinars as well as a set of case studies on organisations sharing lessons from their transition to NDIS.

The VHA acknowledges the Department of Health and Human Services for its support of the NDIS transition project, which has allowed it to develop a range of tools including this 'Playbook for Change'. The VHA is committed to its role in supporting its members to flourish under the reform agenda of governments, and it encourages organisations to use this tool and others to ensure that change is undertaken in the most effective way.

Tom Symondson
Chief Executive Officer

CHAPTERS

INTRODUCTION

A CONTEXT FOR CHANGE

Transitioning to the National Disability Insurance Scheme (NDIS)

The introduction of the National Disability Insurance Scheme (NDIS) is one of the biggest changes to the healthcare sector in Australia in recent history. With thousands of Victorians involved in the transition as clients and service providers, the change is being felt across the state.

The most significant change associated with the introduction of the NDIS has been the change to funding structures, with the NDIS 'choice and control' model giving consumers greater control over how their funding is allocated. For many organisations this means a shift from traditional 'block funding', where the organisation received funding from government to deliver services for a defined number of clients, to a client-funded model where individuals receive funding based on their NDIS plan and then choose which provider to allocate that funding to.

As a result of this shift, and the associated increased competitiveness within the disability sector, organisations are being challenged to create and develop unique service offerings that balance meeting community demand with ensuring the long-term sustainability of the organisation.

As a result of this shift in funding, organisations must now consider the financial performance of individual services and whether they have the potential to break even or ideally deliver a profit to cover additional costs within the organisation. This process involves analysing the funding available under the NDIS price guide, the cost of delivery within the organisation and the demand from the community.

Under the NDIS, a major consideration for many organisations has become whether to focus on delivering services that contribute to the organisation's growth or to pursue a values-based direction and provide all of the services required by the community, with only minimal consideration for the bottom-line. Either way, to succeed boards and management teams must ensure they have a clear understanding of the current and future states and the steps involved in moving successfully to the desired future.

In addition to the changes associated with pricing and funding, there is a range of other changes facing the sector, such as:

- workforce changes including the introduction of flexible work practices and an increasingly mobile workforce
- process changes including the development of new client-intake procedures aligned with the requirements of NDIA
- management of accreditation related to various service offerings
- a focus on marketing and engagement activities to reach potential clients
- technology changes to support the needs of the consumers and of the NDIA.

To successfully navigate the changes associated with the introduction of the NDIS, it is important that organisations dedicate time and resources to understanding the components of the change and the key actions required to facilitate that change. This 'Playbook for Change' aims to support that important and complex work.

WHAT IS A PLAYBOOK?

A playbook contains strategies and tools that can be deployed to achieve an outcome or result. This playbook focuses on change management strategies that will assist you as the National Disability Insurance Scheme (NDIS) Transition Leader to:

- build a shared understanding of all of the moving parts of your organisation
- assist with faster and smarter decision-making in relation to change
- increase the adoption of change by individuals
- streamline the process of change
- generate results that implement better-than-average solutions
- measure the impact of change for clients, the organisation, and the health and community services eco-system
- deepen your knowledge and enhance your skills to lead change within your organisation.

By implementing the strategies contained within this playbook your organisation will see new, more, and better value being generated for clients, the organisation, and the health and community services eco-system resulting in:

- improved organisational performance
- accelerated organisational growth (scale, impact or profitability)
- increased client loyalty
- increased staff productivity
- increased stakeholder buy-in and engagement.

This playbook provides you with a range of tools that can be deployed irrespective of the scale or scope of the change you are being asked to lead. Follow the plays sequentially or select your preferred play for any given situation.

The intent of this playbook is not to be the Holy Grail of all change management solutions but to be a starting point, a guide to help those of you who are new to change leadership, need a way to catalyse change within your organisation, or are struggling to know where to start or what to do when it comes to leading change.

This playbook is not complete nor fully comprehensive; therefore, like any playbook, as you become more familiar with change leadership you will be able to add to its content, include your favourite plays, adjust the plays or delete plays that are no longer serving you.

This playbook should be used as a resource for leading change. If you decided to fly north to drink pina coladas for two weeks, this playbook can be referenced by anyone within the organisation to help them continue to lead change in your stead.

WHY DOES THIS PLAYBOOK EXIST?

As the NDIS Transition Leader you know that things are changing. This isn't new and you don't need to attend another workshop or participate in another webinar about why things need to change and what's changing. You know that things need to change, but what you may not know is how to make those changes happen.

How can you help get your organisation from where it is today to where it needs to be tomorrow? How can you do this in the smartest, fastest and simplest way? How can you find a process that can be used irrespective of the scale and scope of the change you are trying to introduce?

Well, this playbook is the answer.

The Playbook for Change: assisting organisations with the transition to NDIS has been created to provide you with the tools to lead change within your organisation. This playbook has been developed from working with multiple health and community sector service providers across a variety of service settings, covering a multitude of changes.

The Leading Change Model (LCM) described in this playbook can be applied in any sector and it has been tested in a variety of them. However, the examples provided in the templates within this book come directly from organisations in the health and community services sector that have transitioned, or are in the process of transitioning, to the NDIS.

As helpful as the LCM will be to you, it is no panacea for leading change. For one thing, it's incomplete. Lots of great things on change management and leadership have been deliberately left out in the interests of creating a method that's simple enough to be practical.

So, while there is no promise that change will now be easy, at least it will be easier. The goal is to teach you a method, based on decades of research and experimentation, that is simple enough to remember and flexible enough to use in many different situations.

Over the past few years many organisations have been successfully making the transitions required under the NDIS. However, there are still a significant number of organisations that need to but haven't been able to make the transition. These organisations have one thing in common. They know they need to undertake change, and some know what needs to change, but they don't know how to lead the change.

The reality is that all organisations need to be successful at implementing change. Why? Because fundamental parts of your organisation, such as the people, service delivery, technology and your market, will change regardless of your organisation's intentions. Becoming more efficient, reducing costs and increasing revenues all require some sort of change in the way an organisation does its business. If you are not successful at change, your organisation may not survive.

Change can be hard; but this playbook aims to simplify the change process for you—especially if you are responsible for leading change.

WHO SHOULD USE THIS PLAYBOOK?

If not you, then who?

It is well established that organisations need to evolve in response to, and in preparation for, current and future change. What you are currently facing with the NDIS transition is but one tranche of a series of changes that your organisation will need to make. Given this situation, who is best positioned within your organisation to be the catalyst for change?

You, that's who.

This is where building your capability to lead change makes sense. As the NDIS Transition Leader you are well placed to act as a catalyst for change within your organisation. This requires you to make a conscious effort to fulfil this role and be ready, willing and well equipped to lead the changes here and to come.

It will require an investment in your personal and professional development, taking you from being a proficient staff member who has expertise in change to being a leader of change: a Change Agent.

From Change Administrator to Change Agent

It is no longer enough for your organisation to respond to change. For your organisation to remain relevant and survive it must keep pace with the rate of change. This means that you cannot do this alone. You cannot be the Lone Change Ranger. You need to build change capability throughout your organisation. You need to be a catalyst for change.

Your organisation needs you to lead change. Your organisation needs you not only to bring others on board for the changes here and yet to come, but to build change capability in others through your change leadership. To do this you need to know where your change capabilities lie.

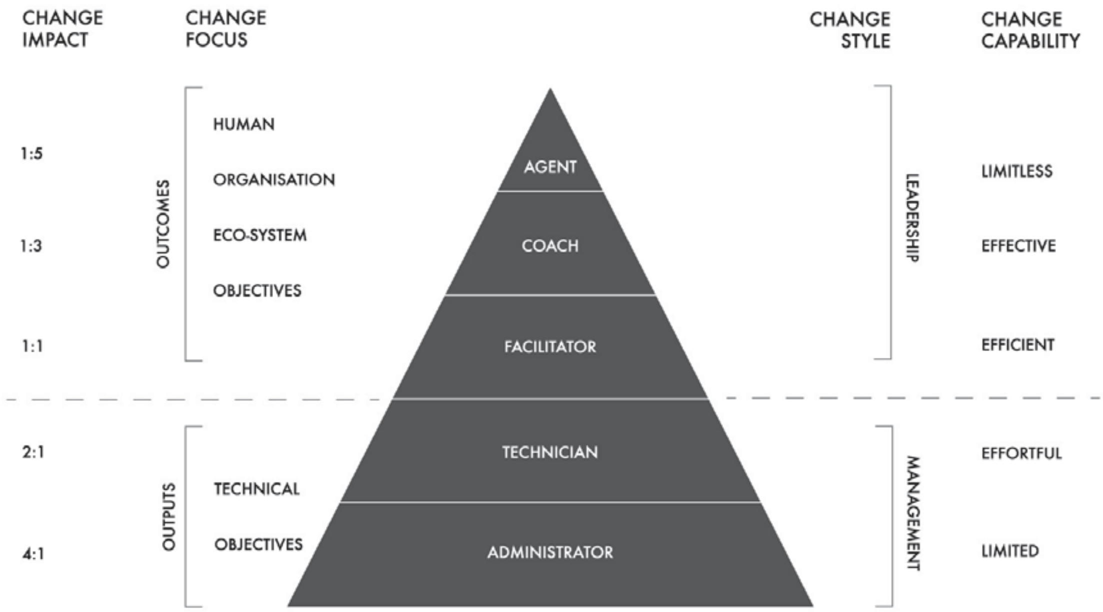

Diagram 1: From Change Administrator to Change Agent

Managing Change or Leading Change? You decide.

You have been asked to initiate change within your organisation. Where do your strengths lie in initiating change within your organisation? Are you technically great but lack facilitation skills, or are you able to bring others along whilst building their capability and capacity for change?

Are you a Change Administrator?

A Change Administrator has a strong focus on getting things done. Change is seen as a process of checking things off and completing tasks.

A Change Administrator creates a plan, follows the plan and doesn't adjust the plan until all the work is complete. They focus on ensuring all technical objectives are met. However, they may also continue to implement a change despite levels of buy-in by those affected by the change.

Are you a Change Technician?

A Change Technician has all of the skills of an administrator but is flexible when it comes to making adjustments when things arise throughout the change process.

A Change Technician ensures work is completed on time with minimal fuss and keeps things ticking along. They are the go-to person when issues arise and can generally resolve problems on the spot—or know whom to go to, to get the matter resolved.

Technical objectives are always delivered, but a Change Technician too can miss hitting the mark when it comes to human, organisational and eco-system objectives and collective buy-in to the change.

Both the Change Administrator and the Change Technician *manage* change.

Are you a Change Facilitator?

A Change Facilitator has clarity on the current state of the organisation, knows the desired future state of the organisation and can navigate the organisation through the options to enable transition. A Change Facilitator knows what needs to change and works with others to make that change possible.

A Change Facilitator has strengths when it comes to situation change but can struggle when it comes to supporting behavioural change in individuals. They may also lack focus on ensuring all technical, human, organisational and eco-system objectives are delivered.

Are you a Change Coach?

A Change Coach has clarity on the current state of the organisation, knows the desired future state of the organisation and can navigate the organisation through the options to enable transition. Like a Change Facilitator, a Change Coach knows what needs to change and works with others to make that change possible.

Unlike a Change Facilitator, they have strengths when it comes to guiding people through the change process but may miss the mark when it comes to situation change. They may also lack focus on ensuring all technical, human, organisational and eco-system objectives are delivered.

Are you a Change Agent?

A Change Agent has clarity on the current state of the organisation, knows the desired future state of the organisation and can navigate the organisation through the options to enable transition. A Change Agent knows what needs to change and works with others to make that change possible.

They take action to gain clarity and motivation. It is through this action that they are able to make smart decisions about the allocation of time, effort and resources associated with change. They are conscious of the return on investment and balance that against the desired technical, human, organisational and eco-system objectives.

They are conscious about balancing how change is designed and the amount of behavioural change required. They build the capabilities of others by embodying change leadership throughout a change.

While there are differences between them, Change Facilitators, Coaches and Agents all *lead* change. They all leverage off the strengths of others and build buy-in throughout the change process. They know that for the organisation to change it will take the effort of the many, not the few.

ARE YOU READY TO LEAD?

At this point, if you feel ready, you might want to head to the LCM and read what you need to do to embark on the journey of change. If not, you might like to read on and learn more about what catalysing change will require of you.

Getting your head into the game

Before you commence any change process you need to tap some of the key mindsets for change: an open mindset, a collective mindset, and a value-driven mindset.

A mindset is a set of assumptions, methods or notions held by one or more people or groups of people.

The open mindset

An open mindset is the single most important characteristic we have as individuals. To be open-minded means to remove your personal biases and prejudices from any situation and completely immerse yourself in another experience.

As a Change Agent this will involve emptying your cup, so your existing knowledge, theories, assumptions, and pre-conceptions don't get in the way. In Zen practice this is called the **beginner's mind**.

A beginner's mind means that you take on an attitude of openness, curiosity and eagerness to learn—that you come to a new situation with a blank slate and an open mind just as a beginner would, even if you are already an expert in the subject.

This is much harder than it seems. It requires you to suspend disbelief, at least temporarily, to forget things that you know like the back of your hand, to discount things that seem obvious, and to open your mind to ideas that seem strange, absurd, incoherent and sometimes even impossible.

But having an open mindset is a muscle. It requires practice. You must place yourself in another person's head, allowing yourself to think their thoughts and see things from their point of view. Building an open-mindset takes time, energy and patience.

An open mindset allows possibility in. It helps you to learn and grow. Being open-minded means admitting that you are not all knowing. It means believing that whatever you find, there always might be more to it than you realise.

An open-mindset is important. You might (no, you likely *will*) enter a situation that forces you to question the many things you've come to know. But you must remember that open mindedness doesn't mean that you have to change who you are.

An open mindset is a level of understanding that goes beyond a simple, 'Oh I see'. It involves asking questions, being genuinely interested in other people's perspectives and accepting them for what they bring, differences and all.

Having an open mindset means that you need to be willing to adjust your own conclusions and take someone else's into consideration when creating a final decision.

With an open mindset you will need to get comfortable with uncertainty. They say without uncertainty, tomorrow can at best only be a stale copy of today. Uncertainty and the unexpected are the drivers of growth.

An open mindset will allow you to generate a broader range of ideas to the problems, gaps and opportunities within your organisation. It will assist you in finding unique ways to create solutions that incorporate constraints while being desirable, feasible and viable.

Having an open mindset will put you in a situation where you are able to see things that others can't; it will allow you to find the right way to meet client, stakeholder, staff and funder expectations; it will assist you to navigate the possibilities available to meet changing clinical and operational requirements. An open mindset is like having a vault of untapped potential possibilities, any of which could better position the organisation.

The collective mindset

The strength of the collective mindset is in valuing the contribution of the many, not just valuing the contributions of those who think, feel and act the same way as you do. An individual exercising a collective mindset looks to the **wisdom of the crowd** for ideas and solutions—a concept popularised by James Surowiecki in his 2004 book, *The Wisdom of Crowds*, which shows how large groups have made superior decisions in pop culture, psychology, biology, behavioural economics and many other fields.

The wisdom of the crowd involves taking into account the collective opinion of a group of individuals rather than relying on a single expert to provide an idea or a solution. A collective mindset recognises that large groups of people are collectively smarter than even individual experts when it comes to problem-solving, decision-making, innovating, and predicting.

You may have heard it many times—'there is strength in numbers'. This theory is embedded in just about every aspect of life. By recognising the strength of the many, more ideas and strategies can be generated to help the organisation solve a problem, fill a gap, or leverage an opportunity.

By having a collective mindset that values the contribution of the many, you will have access to better problem-solving, increased innovation, and better results because of considering diverse views to come up with a unified solution.

Having a collective mindset will allow you to tap into the expertise that exists not only within your organisation but in a diverse range of individuals external to your organisation. This pooling of different knowledge sets can effectively eliminate the need to rely on so-called elite experts.

A collective mindset should remind you of the notion that 'two heads are better than one'. When it comes to change in a complex space like health, the idea of collective wisdom becomes even more important.

The value-driven mindset

The mindset that needs to underpin any change effort is one based on values. A value-creation, value-generation, value-driven mindset is what you need to have. Without it you will be doing change for change's sake and that will not be beneficial to clients, the organisation, or the health and community services eco-system.

A value-driven mindset is about being in service. Service means that you are creating value with no expectation of something in return. A value-driven mindset means that you are always looking to generate new, more, or better value from change. If the change will not result in new, more, or better value for clients, the organisation, or the health and community service eco-system, then you need to question why the change is being made.

Creating value for individuals, be they clients, stakeholders or funders, is the only way for your organisation to generate income. Individuals only pay for something that they think is worth more than the value of the money they are paying.

Weather it is a client paying directly for your services, private health insurance paying you a subsidy, the Commonwealth paying you a service fee, or a key stakeholder investing in the organisation, they are all individuals who are assessing the value that your organisation creates. At the end of the day, no matter what kind of organisation you are in, you get income for creating value for individuals.

It is easy to lose sight of this principle and this lesson, but successful organisations—i.e. organisations that make a difference—never forget this. The effective, very effective and really successful change leaders will:

- always make the time and effort to figure out which individuals are directly and indirectly affected by the value that is being created by a change
- determine which individual or individuals are the most important to maximise value for change
- learn where they need to focus change efforts to get the greatest increase in value.

When you have a value-driven mindset it expands your view. If you have a mindset based on selfishness, your view shrinks along with the opportunities for your organisation.

Creating value for others is an extremely powerful success strategy for a range of reasons. It raises the organisation's value because when you create value for others you become more valuable to them.

The Eight Rules of Change

Every game has rules and given this is a playbook teaching the plays to lead change, rules seem apt. The Eight Rules of Change are not intended to be stifling or limiting. These rules should guide you on what you need to consider when leading change.

Rule one: Consider everything to be true but only partially true

Truth comes in four packages: experiential, cultural, data, systemic.

Experiential truth comes from an individual's direct experience. You can only access this information from the individual and even then this information may be filtered depending on how much the individual trusts you.

Cultural truth comes from collective group belief and behaviour. You can access this information from the group or via observation.

Data truth comes from information and statistics collected and collated into intelligence. Whilst this information can be accessed without engaging individuals, you need to remember that it is influenced by who inputs, collates, and analyses it.

Systemic truth comes from systems, processes, policies and procedures. You can also access this information without engaging individuals; however, what is written on paper may be significantly different from what is actually done on the ground.

All four truths can be present in anyone given the situation and are multiplied and/or replicated when more than one person is involved in contributing. No one truth is truer than another. However, in Western society and in the health and community services sectors, data truth is sometimes preferred or seen to be more truthful than the others.

When contributing to the change process, individuals will occupy one of the four quadrants of truth. It is important to remember to communicate through a person's quadrant of truth before trying to introduce one of the other quadrant perspectives.

Rule two: Access multiple perspectives

Perspective is the way you see the world. It comes from your personal point of view and is shaped by your life experiences, values, your state of mind, the assumptions you bring to a situation, and a whole lot of other things.

Inviting multiple perspectives can be one of the most effective ways to understand a situation, explore potential solutions, and make important decisions. Your experience and background inevitably shape how you approach change; and including others' perspectives makes it possible to see what you may not have been able to see, or to create solutions that you may not have even considered.

Rule three: Seek out disconfirming data

During any change process you will be confronted with a large volume of information. Information about the change, information about how people are coping with the change, information on how well the change is progressing. Information, information, information and lots of it.

The information that you receive will need to be interpreted. And the information you interpret is influenced by your beliefs. Your beliefs will also influence how you recall and use information. As a result, you will tend to see more evidence that enforces your view of the world. This is confirmatory data, data that reaffirms your beliefs. This leads to a situation where confirmatory data are taken seriously, while disconfirming data, i.e. data different from your beliefs, will be treated with scepticism.

Don't treat disconfirming data with scepticism. Disconfirming data may provide you with a new perspective or bring to light information not previously known or understood. If all of the information is reaffirming what you already know, seek out the difference. Look for disconfirming data and what you can learn from it.

Rule four: Disrupt the pattern making

The human brain is a pattern-making machine. We seek and find patterns everywhere we look. We are so good at finding patterns that once we find one, it can be difficult to see anything else. Creating randomness is a way of fooling the mind so that you can more easily search for new patterns in familiar areas. By shuffling the deck, reversing the order or reframing the familiar, you can create enough space for new thinking to emerge.

Rule five: Use technology as an enabler not a solution

Saving time, cost or effort or increasing quality or quantity is the solution organisations are looking for. These are often the desired outcomes of change. So often we look to technology as the solution, but technology is not a solution but an enabler. Technology enables a change to be automated, digitised, 'fandanglised'. Technology enables actions to be taken faster, simpler, at lower cost, and at a higher production rate or with greater accuracy. Ensure technology is seen this way or it will be a very shinny distraction.

Rule six: Don't make it complicated

There are many things in life that are complex, that require a sophisticated level of knowledge to understand. Things that are complex do not need to be made complicated. We make things complicated by withholding information, adding additional layers, creating unnecessary confusion. We do this to elevate our own level of importance, to feel valued, to become irreplaceable, to demonstrate our skill and knowledge. A far more valuable contribution is the ability to find simplicity at the far side of complexity.

Rule seven: Meet people where they are and then stretch them

We all have our comfort zone and change is a direct threat to comfort. Placing change beyond a current boundary of comfort creates a direct threat. This direct threat will kick-in the fight or flight response. Understanding and meeting individuals where they are and then stretching them from there is far less of a threat; and overtime you will get them to where the organisation needs them to be.

Rule eight: Hold everything lightly

Methods, models, tools were adopted because they were what was needed at the time; they were seen to be useful. If you feel a method, model or tool is no longer serving you or the organisation, then move on. If you feel a method, model or tool is missing something, then add to it. If you feel a method, model or tool is too unwieldy, tweak it. A method is useful, until it isn't; a model is useful, until it isn't; a tool is useful, until it isn't. Use what is useful, hold it lightly, and change when change is needed.

Essential skills to play

There are two skills that all great change leaders need to possess: the ability to ask questions and the ability to create artefacts.

The art of asking questions

Perhaps there is nothing more important in change than the art of asking good questions. There are five types of questions that you will need to call upon throughout any change process. They are: opening, navigating, examining, experimental, and closing questions.

Opening questions are intended to open a portal into the change you want to explore. The trick of opening is to get everyone involved comfortable with the process of working together.

If everyone is too familiar they may have difficulty breaking out of the traditional limits of their collective culture and discussions may be too similar. If they are strangers, they will generate a lot of diverse conversations but may have trouble working together as a team.

The idea behind opening questions is to generate discussion, to provoke thought, and to reveal insights and possibilities. Good opening questions invite discussion.

Here are some examples of **opening** questions:

- How would you define the problem that the organisation is currently experiencing?
- Can you describe another situation that is similar to what we are discussing?
- Can you share a story where that situation has played out?
- What emotions do you feel when we talk about change?

Navigating questions assist in assessment and adjusting where everyone is throughout the change process. Navigating questions can be used to ensure shared understanding and to check if people are aligned. Navigating questions set the course, point the way, and adjust for error.

Here are some examples of navigating questions:

- Are we on track?
- Have I understood that correctly?
- Is this a useful discussion?
- Is this helping us get where we want to go?

Examining questions invoke observation and analysis. Examining questions narrow inquiry to focus on detail, specifics, and observable characteristics. They quantify and qualify what is being discussed.

Here are some examples of examining questions:

- How does it work?
- Can you give me an example of that?
- What does that look like?
- Can you describe that in terms of what it would look like for a client?

Experimental questions invoke the imagination. They are about possibility. They take individuals to a higher level of abstraction to find similarities with other things in order to make unlikely and unexpected connections.

Here are some examples of experimental questions:

- What else works like this?
- What are we missing?
- What if all the barriers were removed?
- What if we are wrong?

Closing questions perform the opposite function to opening questions. These are questions that bring the activity of the day to a close. They focus you on convergence and selection. They move you closer towards commitment, decision and action.

Here are some examples of closing questions:

- How can we prioritise these options?
- What is feasible?
- What can be achieved within the next two weeks?
- Who is going to lead that action?

Your role as a Change Agent is not to have answers but to demonstrate a level of curiosity that leads you to ask the right type of question at the right moment whilst navigating through the change process.

The value of creating artefacts

As you begin to collect, sort and organise information throughout the change process, it can become overwhelming. Creating artefacts is the solution. Artefacts are carriers of meaning; they make knowledge or information explicit, tangible, portable and persistent. They can come in a range of shapes and forms, but their purpose is to be a consolidated output of thinking, discussion and actions throughout the change process. One example of an artefact is a poster about the change placed on a wall where it is highly visible to those involved in the change.

At a high level, the purpose of those artefacts developed throughout a change process is to communicate intent. Artefacts are a communication tool. They're a sort of language we employ when communicating intent—a means to create a feedback loop between you as the change leader and others who are a part of the change.

Communication is hard work and clear communication is even harder work. Important inputs throughout a change process can get lost in bulky reports and documentations if they are not sufficiently visible.

Artefacts need to connect with each other to form a narrative of how a change is progressing through the change process. Unfortunately, too often artefacts are not developed, or they are not connected, or they are not sufficiently visible to help people understand what part of the process a change has reached, what has occurred already, and what is planned for the future.

This playbook provides a range of templates that, once populated, can be used as artefacts to assist in communicating the change process and the change.

THE
LEADING CHANGE MODEL

A FRAMEWORK FOR CHANGE

The Leading Change Model (LCM) has been created to guide those individuals responsible for leading change through the change process. The LCM is for the facilitators, mentors and agents called upon to lead change within their organisation. The LCM is for you, the NDIS Transition Leader.

The LCM can be used irrespective of the scale or scope of the change being introduced. The LCM includes three parts: direction, implementation, and translation.

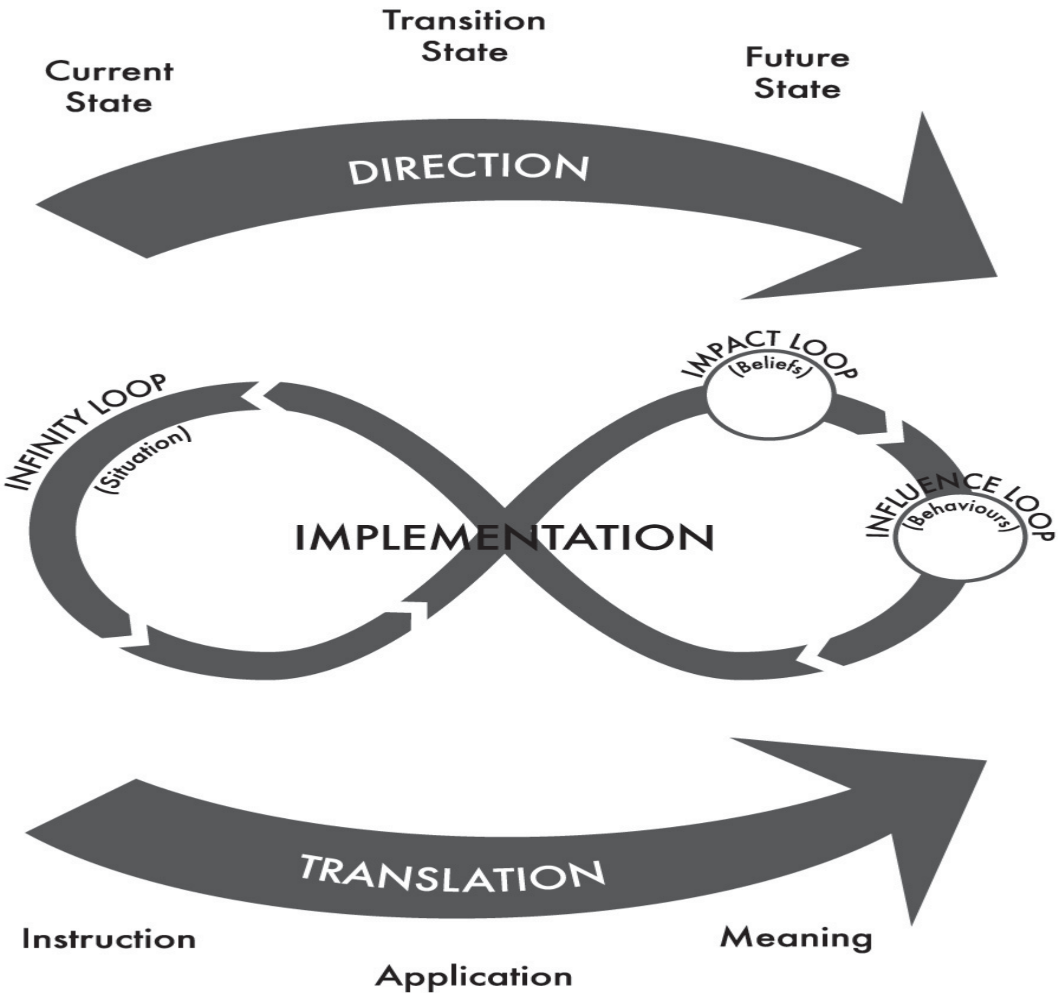

Diagram 2: The Leading Change Model

The work of a change leader is to assist others to navigate through these three parts using a range of plays (tools) to deliver success.

Direction

The first part of the LCM—direction—is the most critical part. Without spending adequate time on direction, everyone will be playing catch-up, which ultimately will require greater time, effort and resourcing of your change initiative.

It is easy to see changes in nature occurring as a process. Whether it is a caterpillar turning into a butterfly or a seed growing into a tree, we can easily appreciate the process of change. But when you begin change in an organisation with the launch of projects and initiatives, you can easily forget the fact that change does not happen instantaneously and isn't a one-off event.

Change is continuous.

It requires effort at the start (20%),

during transition (70%) and

at the end (10%) and then the cycle starts again.

The easiest and most basic approach to understanding change as a process is to break change down into distinct, understandable elements. The three states of change provide a powerful framework: the current state, the transition state, and the future state.

The **current state** is how things are done today. It is the collection of processes, behaviours, tools, technologies, structures and roles that constitute how work is done. The current state defines who the organisation is today. It may not be working well, but it is familiar and comfortable because everyone generally knows what to expect. The current state is where the organisation has been successful and where you know how to measure and evaluate how well the organisation is doing. Above all else, the current state *can be known*.

The **transition state** is messy and disorganised. It is unpredictable and constantly in flux. The transition state is often emotionally charged—with emotions ranging from despair to relief with lots of anxiety, anger and fear in between. During the transition state, productivity predictably declines. The transition state is challenging because it requires the acceptance of the new whilst maintaining the old until the new is sufficiently developed to take over. It is where many change efforts are aborted due to a lack of clarity, exhaustion, or misalignment between individuals and the situation in which the change is being introduced.

The **future state** is where the organisation is trying to get to. It is often not fully defined and can actually shift whilst moving through the transition state. The future state is supposed to be better than the current state in terms of performance. The future state is aspirational compared with the current state and there is a chance that the future state may not be successful. Above all else, the future state *is unknown*. It is a hypothesis of what could be.

Whether the change is clinical or operational there is always a current state (how things are done today), a future state (how things will be done) and a transition state (how you move from the current state to the future state).

The three states—current, transition, future—provide **DIRECTION**.

Implementation

The second part of the LCM—implementation—is where you zero in on a specific change that the organisation wishes to make, a change that has been identified by doing the direction work. It incorporates the use of three loops to provide a powerful framework for action: the Infinity Loop (situation change), the Influence Loop (behaviour change), and the Impact Loop (belief change).

Infinity Loop: situation change

Situation change requires a shift in thinking. It recognises that we need to change environments and systems, not just the behaviours of individuals. Rather than expecting the greatest shift and change to be driven by the efforts of individuals, we should instead be designing change with the faults and weaknesses of individuals in mind. We should be creating environments that allow people to be their best and bring their best.

If you assume that people failure is simply part of the process, then you can design change in such a way that compensates and even mitigates the average or below-average behaviours of individuals. A well-designed change reduces the gap between current behaviours and behaviours required in the future.

Situation change requires focus in five areas: exploring change, designing change, deciding on change, deploying change, and evaluating change.

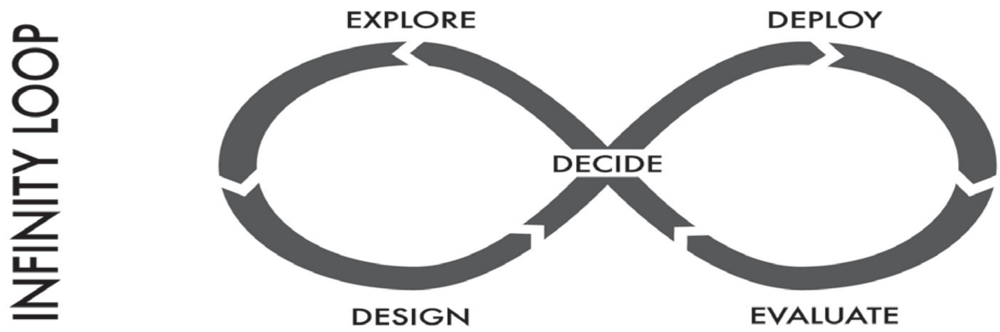

Diagram 3: The Infinity Loop (situation change)

Impact Loop: belief change

Belief change is a tricky thing. Change is all around us, all the time, but so much of the time it seems like change controls us, when we really would like it to be the other way around. We all want more control over change and whilst this may be elusive to us as individuals, as a Change Agent you can make a conscious effort to help people be better at change.

Belief change requires you to focus on three areas: understanding beliefs, shaping beliefs, and reframing beliefs.

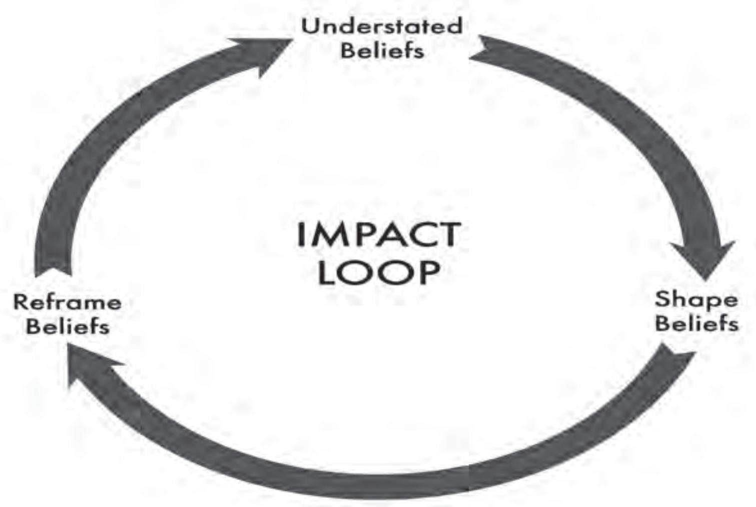

Diagram 4: The Impact Loop (belief change)

Influence Loop: behaviour change

Ultimately, your mission as a Change Agent is to get people to start behaving in a new way. Because for anything to change someone has to start behaving differently.

It is often believed that behaviour change occurs when an individual has clarity and is sufficiently motivated to act. When behaviour change doesn't occur, it is then attributed to a lack of clarity or lack of motivation. The cycle of clarity, then motivation, then action doesn't lead to behaviour change. Action provides clarity, which leads to motivation to do the behaviour again or to never do it again.

If your mission as a Change Agent is to get people behaving in a new way, then you need to focus on four key areas: identify the outcome, identify the easy-win behaviours, identify the trigger, and identify the celebration.

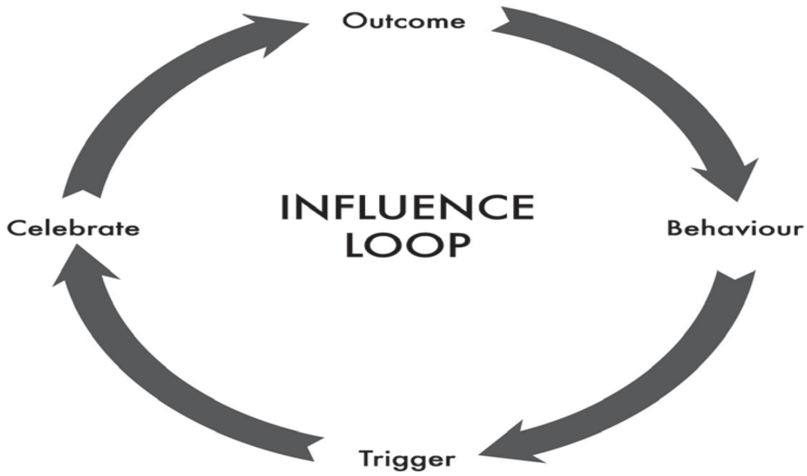

Diagram 5: The Influence Loop (behaviour change)

The three loops—infinity, impact, influence—support **IMPLEMENTATION**.

Translation

The final part of the LCM is translation. This is about building your capability and capacity to lead change. Change is everybody's business, in every role within an organisation. Every individual is responsible for building his or her capability and capacity for change.

Ultimately, every organisation should be striving for every one of their staff to be a change leader (agent, mentor or facilitator). Change management is no longer enough. Change leadership is what is required in the 21st century for organisations to be successful.

To build your capability for change you need to break it down into distinct, understandable elements. There are three phases that you will transition through when building your change capability: instruction (what to do), application (how to do it), and meaning (why you do it).

The first phase is **instruction**. The goal here is to develop your overall understanding of the processes involved when leading change. This is about being clear on 'what to do'. It is about breaking the process of change down into smaller parts and learning what needs to be done to achieve success. This is about breaking the LCM and its tools down into bite-sized opportunities for learning before applying them to an organisational change.

As a leader of change, your first step is to learn about the process of change.

The second phase is **application**. The goal here is to transfer your bite-sized learning into practice. This stage is about being clear on 'how to do it'. This is where you apply the tools of the LCM to real organisational change. This is where you are refining your skills and learning how each LCM tool can best be applied to different situations and contexts.

As a leader of change, this is your opportunity to test what you have learnt so you can build your skills.

The third phase is **meaning**. The goal here is to gain a better understanding of the intent behind the change process and be able to incorporate other methods or tools without compromising the outcome. This stage is about being clear on 'why you do it'. This is where leading change becomes mostly automatic. Progression to this level of learning allows you to lead change in any environment.

As a leader of change, this is where you have a sufficient level of understanding and skill to be a Change Facilitator, Change Coach, or Change Agent. It is your responsibility to take control of your personal and professional development. There are ample opportunities within your organisation to deepen your knowledge and enhance your skills in relation to leading change.

The three phases—instruction, application, meaning—enable **TRANSLATION**.

DIRECTION

THE THREE STATES PROVIDE DIRECTION

Diagram 6: The LCM – Direction

The first component of the LCM—direction—is the most critical component. Without adequate direction, everyone will be playing catch-up, which ultimately will require greater time and resourcing.

You have been asked to lead a change on behalf of your organisation. Perhaps the change you have been asked to lead is poorly defined, not well understood, or has a scope that means the change could range from something contained to something unwieldy. Whatever your situation you need to find **DIRECTION**.

The easiest and most basic approach to finding direction is to break the proposed change down into distinct, understandable elements. The three states of change provide a powerful framework for finding direction: the current state, the transition state, and the future state.

The current state is how things are done today.

The transition state is how you can move from the current state to the future state.

The future state is how things will be done in the future.

Whether the change you are being asked to lead is clinical or operational, there is always a current state (how things are done today), a future state (how things will be done), and a transition state (how you move from the current state to the future state).

If you don’t know the current state of the organisation, you won’t know the size of the gap from where you are to where you want to be.

If you don’t know the future state of the organisation, you won’t know what you are aiming for as a result of making change.

If you don’t know the transition state for the organisation, you won’t know what changes you need to make to get you from where you are to where you want to be.

KNOW THE CURRENT STATE

There are three tools that you can use to provide a clear picture of your organisation's current state. These tools, when used correctly, can provide a high-level point-in-time snapshot of what's currently happening in the organisation.

The current-state snapshot can be at:

- a strategic level
- an operational level
- a service or program level
- a function or process level.

The type of current-state snapshot depends on the scale and scope of change the organisation wants you to lead. The three tools used to represent the current state are: the Strategy Overview, the Client Journey Map, and the Service Blueprint.

The **Strategy Overview** is always aimed at understanding the current organisational strategy. This is important, as the strategy is what gives you permission to embark on the area of change that you have been asked to lead.

The **Client Journey Map** and the **Service Blueprint**, however, should focus on the journey(s) and blueprint(s) that specifically relate to the change you have been asked to lead. For example, they could capture a specific function (the in-take process) or they could capture a specific service (therapy for NDIS clients).

Irrespective of the type of snapshot, it is up to everyone collectively to paint as clear a picture of the current state of the organisation as possible. The idea is to portray a picture that is rich and accurate so that everyone has a collective understanding of the starting point for change.

Strategy Overview

Template One
Strategic Overview (current state)

Purpose					
Clients					
Values					
Priority themes					
Metrics					
Goals					
Measures					

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Template 1: Strategy Overview

The approach:

The Strategy Overview of your organisation should be able to fit on a page. By using the Strategy Overview template, you are looking to identify the current state of the organisation, focusing on five key areas: purpose, clients, values, priority themes, and metrics.

The Strategy Overview is always aimed at understanding the current organisational strategy. This is important, as the strategy is the document that provides permission for you to embark on the area of change that you have been asked to lead.

The capturing of this information will:

- highlight the scope of what the organisation currently does do, as well as making clear what it doesn't do
- demonstrate where the organisation is currently focusing its attention and efforts
- provide insight into where the change you have been asked to lead fits within the organisation.

Only 10 per cent of organisations have a current strategy—that is, a strategy that has been developed within the last three years. Most organisations have a business plan or operational plan; however, these are normally a to-do list not linked to overarching strategic direction and metrics.

If your organisation doesn't have a current strategy, see if you can populate the Strategy Overview template based upon what you know and other documentation (business and operational plans) that exists within the organisation. If this information is lacking, don't make it up.

Approach logistics:

1–50 people	**1–2 hours**	**Difficulty**	**Strategy Overview Template**	**Populated Strategy Overview Template**

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Strategy Overview template and the descriptions of the template sections to be populated.
3. Allow 30–60 minutes for each group to populate the template based on what they know. Group members may use existing organisational documentation and information to help them populate the template.
4. Allow 5 minutes for each group to report back to the whole group what they have captured in the template.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Strategy Overview template. Where there is agreement, no further discussion is required. Where there is disagreement, allow

time for discussion to form a consensus of what will be included in the Strategy Overview template.

Template information:

Use the following descriptions to assist in populating the content of the Strategy Overview template.

Purpose

This is the 'why' behind why the organisation exists and why anyone should care. The purpose is the organisation's reason for being. The purpose generally fits into one of three areas:

- Solving a problem that the organisation's clients would want solved.
- Filling a gap that the organisation's clients would want filled.
- Leveraging an opportunity that someone else has identified the organisation's clients would want leveraged.

The purpose is bigger than any one individual and bigger than the organisation. The purpose is the organisation's commitment to making a difference at a health eco-system level.

The organisation's purpose is the difference it can make at an eco-system level. It is big. It is inspirational. It is what excites staff about the work the organisation does; it is what gets them out of bed in the morning.

Clients

These are the people the organisation is in service to. Organisations often can have a skewed picture of their clients, based on whom they want to be in service to versus who they are currently in service to.

The best way to know whom the organisation services is to look at the organisation's current client profiles. Look at their age, their gender, the geographic area they come from, the type of conditions that they present with.

You may find that there are several cohorts that the organisation services; however, there is likely to be a predominant segment, or some high-level characteristics that best describe the current client cohort and therefore the clients the organisation services.

It is also worthwhile considering who else aside from clients that the organisation is in service to. Funders may need to be considered along with other key stakeholders.

Values

Values are how everyone in the organisation goes about providing the services that the organisation provides. These values are not aspirational but acknowledge the actual behaviours that are occurring within the organisation every day.

This is where you list how everybody in the organisation turns up and acts throughout the course of a day. These are the accepted 'norms' within the organisation.

To assist here, think about how clients and stakeholders would describe staff in the organisation to their friends.

Priority themes

These are the high-level areas that best describe what the organisation does. These are not the individual activities that occur but a high-level collation of the activities that occur.

If someone were to ask you 'What does your organisation do?', your response would normally be to articulate the high-level actions that occur regularly.

To assist here, get individuals to list what they do in the course of a normal day. Then collate the individual activities into high-level themes.

Metrics

This is the articulation of the difference the organisation is trying to make. The metrics are made up of goals and measures and should be aligned to each of the strategic themes. These are the articulation of what would be different as a result of the work undertaken by the organisation.

The metrics (goals and measures) assist in understanding how well the organisation is progressing towards the attainment of its purpose.

Intent of the approach:

The objective of undertaking the Strategic Overview is to understand the current direction that the organisation is taking, the current priorities where time, effort and resources are being allocated, and the expected outcomes once the current priorities are undertaken.

Once metrics are in place, the Strategy Overview can also provide evidence regarding the current return on investment and current state of performance of the organisation in achieving it purpose.

Further to this, you are trying to ascertain if the change you have been asked to lead fits within the organisation's current strategy.

If it does, 'permission granted' to proceed with the Client Journey Map and Service Blueprint.

If it doesn't, then this needs to be addressed before you go any further. Given organisations have a finite amount of time, effort and resources, the organisational strategy is the articulation of the priority areas where time, effort and resources will be allocated for change, ideally resulting in improvements. If your change doesn't fit within the current-state strategy, is it a priority? If yes, then the strategy needs to be adjusted. In no, then should you be leading this change?

Client Journey Map

Template Two
Client Journey

Phase in the journey									
What are clients doing?									
What questions do clients have?									
What is the clients desired outcome?									
What is the client experiencing?									

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Template 2: Client Journey Map

The approach:

The Client Journey Map is another key document that helps you to understand the current state of the change you are leading.

NDIS clients have an increasing range of options at their disposal when it comes to accessing care. For them to choose, and remain loyal to, your organisation, their needs must be understood and met. A Client Journey Map can help you understand how your organisation is currently fulfilling this need.

The client journey should be captured in the form of a map, as a visual representation of every experience your clients have with you. It helps tell the story of how clients experience your services from original engagement to long-term relationship.

At first glance, a client journey is pretty simple. But once you get into the detail, client journeys can be quite complicated and come in many varieties.

So, to make sure no interaction slips through the cracks, you need to map out every action and the clients' experience of that action along the client journey.

A Client Journey Map helps you gain insights into common client pain points, duplication of effort and poor sequencing. It can also highlight what is working well and whom it is working well for.

A Client Journey Map should contain quantitative and qualitative data. By overlaying data, a map may highlight where you are providing satisfying services—but equally where you are causing frustration. Data may also provide insight into service blockages and where barriers see people drop out or disconnect with the organisation.

A Client Journey Map also reveals how well the client experience matches up to the organisation’s promise. For example, the client experience may be portrayed as effortless. But when it comes to booking an appointment, clients face multiple challenges in finding a suitable date, booking a time, or getting their preferred provider.

You need to understand where these mismatches are happening and start to discuss issues and fix problems—and the Client Journey Map helps you identify where change is required.

Organisations need increasingly sophisticated processes and tools and that requirement is likely to increase in the future—the number of touch points is increasing by about 20 per cent per year, according to McKinsey. With more touch points comes the potential for more complexity in servicing client needs successfully.

A Client Journey Map will help highlight the areas where change can ease the burden and the challenges being faced in the organisation.

If this is the first time a Client Journey Map is being done in your organisation, try to keep it as high level as possible and focus on your most generic client cohort taking the most common journey.

You may also choose to focus on only one part of the client journey. Overtime, the more frequently the Client Journey Map is used the more familiar staff will be with the approach and the more rigorously the approach can be applied to change across the organisation.

All client journey maps should include four key elements: what clients are doing, what questions client might have, what a client’s desired outcome is, and what clients are experiencing (happy moment and pain points).

Approach logistics:

1–50 people	**1–2 hours**	**Difficulty**	**Client Journey Template**	**Populated Client Journey Template**

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Client Journey Map template and the descriptions of the template areas to be populated.
3. Allow 30–60 minutes for each group to populate the template based on what they know. Group members may use existing organisational documentation and information to help populate the template. Note: you are trying to capture what actually occurs for clients, not what the organisation is aspiring to deliver.
4. Allow 5–10 minutes for each group to report back to the whole group what they have captured in the template.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Client Journey Map template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Client Journey Map template.

Suggestion:

A Client Journey Map is far more accurate if it is based upon the actual experience of your clients. Engaging clients in the development of the Client Journey Map may be an ideal engagement opportunity. It also provides an opportunity for the organisation to truly understand what is happening for clients, from their perspective, using their words and experiences.

Template information:

Use the following descriptions to assist in populating the content of the Client Journey Map template.

Note: Some of the template sections may seem ambiguous or overlapping. Do not focus too much on being precise: if an item can fit into more than one area, just choose one.

What clients are doing

This is where you capture each step that a client takes on their journey. This is the physical action that the client is taking. These are the steps, choices and interactions that the client performs while interacting with the organisation to reach a particular goal. Remember, a client will be taking steps prior to directly engaging with the organisation and after they have exited the organisation. It is important to capture these steps as well.

What questions clients might have

This is where you capture what questions may be arising from a client's perspective that they want answered. This could be a query in relation to the process or a query in relation to what they feel they need to know before proceeding on their journey.

What the client's desired outcome is

This is where you capture what the client was trying to achieve as a result of the action that they have taken. This is also an opportunity to reflect on the congruence between what the client thinks/feels should be achieved and what has actually been achieved.

What clients are experiencing

This is where you capture how clients are feeling when they are undertaking each action. This is the client's emotional state. It is often represented as an adjective plus a short sentence for context. For example, a client may be 'frustrated' because they are referred onto another area for assistance. In contrast a client may be 'pleased' because they were able to get the assistance they needed at their first point of contact with the organisation.

This is also where you capture the client's happy moments and pain points. The client experience is heavily connected to the client's feelings at any given touch point. It is what they love and why and what they dislike and why.

As you will appreciate, clients are humans and humans are complex. It is natural to encounter inconsistencies—a seemingly positive action may result in a negative emotion. This can occur when you look at different market cohorts. For example, a client cohort that is technically savvy may prefer booking online whilst another client cohort may find online booking difficult and frustrating.

Intent of the approach:

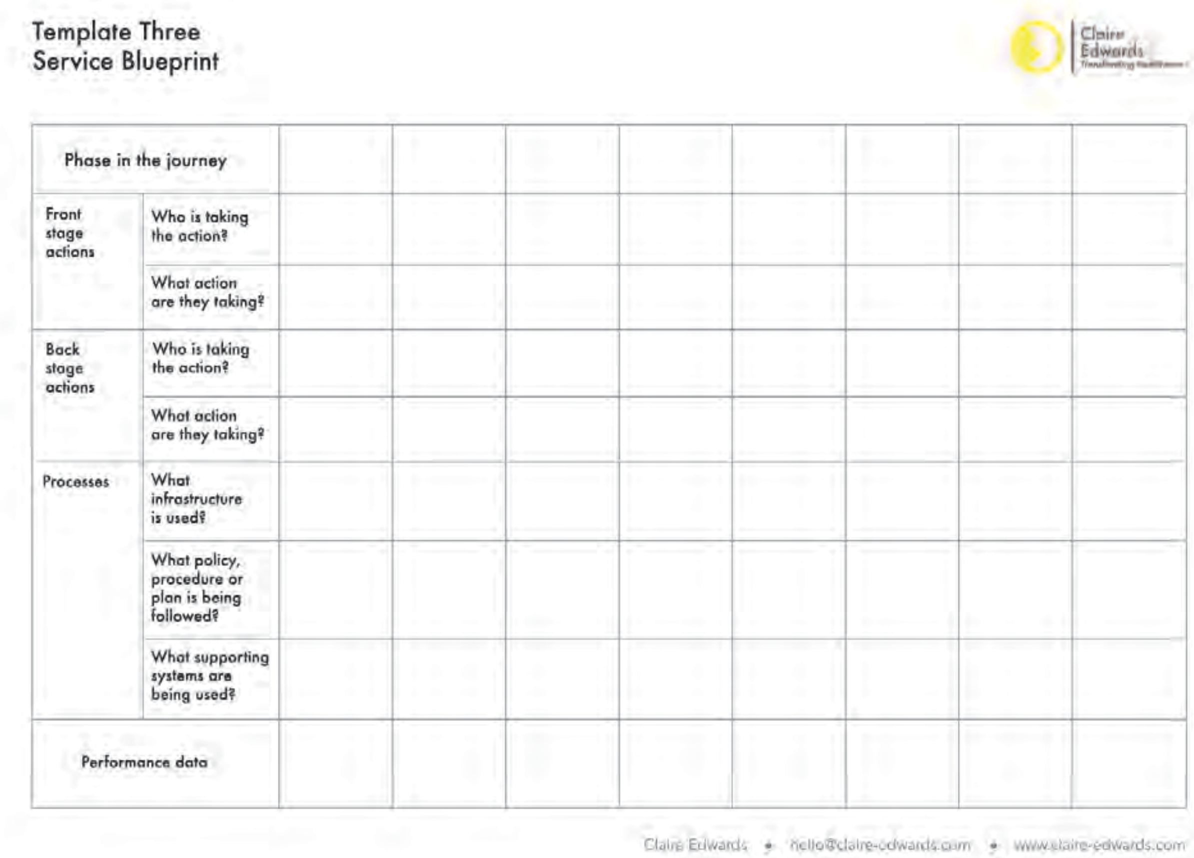
The intent of completing a Client Journey Map is to reflect on the current journey of clients. It is an opportunity to look *through the eyes of the client* at the area where the change is focused.

It helps individuals involved with the change to form a collective current-state understanding of:

- how clients interact with the organisation
- particular client cohort needs that are, or are not, being met at different stages throughout the journey
- the coherence or lack of coherence throughout the client journey
- the gap between the intended client experience and the actual client experience.

You may also find that the individuals who participate in developing the Client Journey Map start identifying problems, gaps and opportunities. Whilst this isn't the intent of the activity it is important to capture this input, as it will be useful when developing the transition and future states.

The Service Blueprint (current state)



Template Three
Service Blueprint

Phase in the journey									
Front stage actions	Who is taking the action?								
	What action are they taking?								
Back stage actions	Who is taking the action?								
	What action are they taking?								
Processes	What infrastructure is used?								
	What policy, procedure or plan is being followed?								
	What supporting systems are being used?								
Performance data									

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Template 3: Service Blueprint

The approach:

The Service Blueprint is the final key document that will help you understand the current state of the change you are leading. The Service Blueprint, sometimes referred to as a Business Blueprint, provides guidance on how the client journey is provided, specifying the staff actions and supporting systems and processes that are activated to deliver the service.

The Service Blueprint captures the experience of staff across physical and digital channels and shows interactions between clients and the organisation.

Think of the Service Blueprint as the companion document to the Client Journey Map. Similar to the client journey mapping, service blueprinting is an ideal approach to understanding experiences that involve multiple touch points or require a cross-functional effort (that is, coordination of multiple teams or services).

A Service Blueprint should correspond directly with the client journey and the specific client goals associated with that journey. A client journey can vary in scope—thus, for the same service you may have multiple actions occurring within the Service Blueprint representing several different scenarios.

The Service Blueprint provides you with a comprehensive understanding of the underlying resources and processes, seen and unseen by the clients, that make the organisation's services possible.

The Service Blueprint is like diagnostic test, it points out where things are working and highlights anomalies that need to be explored further. For example, poor client experiences are often due to an internal organisational shortcoming, a weak link in the organisational processes, this information will become apparent when populating the Service Blueprint.

While you can quickly understand what may be wrong in a client interface (bad design, cumbersome process), determining the root cause of a systemic issue (such as corrupted data or long wait times) is much more difficult. The Service Blueprint exposes the bigger picture and offers a map of dependencies, allowing you to discover a weak leak at its roots.

In the same way as the Client Journey Map, the Service Blueprint can help identify opportunities for optimisation. The visualisation of interdependencies and connections in the Service Blueprint can uncover potential improvements and ways to eliminate redundancy. For example, client information gathered earlier on in the client journey could possibly be repurposed later on, backstage. This approach has three positive effects:

- Clients are delighted when this occurs as the service feels personal and they save time and effort.
- Staff time and effort is not wasted re-gathering the same client information multiple times.
- No risk of inconsistent data when the same question isn't asked twice.

Blueprinting is most useful when coordinating complex services because it bridges multidisciplinary efforts. Often, an area's success is measured by the touch points it owns and how well the touch points are executed. However, clients encounter many touch points throughout one journey and don't know (or care) which section of the organisation owns which touch point. For example, a receptionist may be responsible for the greeting a client receives upon arrival, whilst a therapist is responsible for greeting the client prior to service provision. A client's reflection on how welcoming the organisation is will not be delineated between who is responsible for what welcoming but will be reflected on feeling welcomed as a whole.

While a section of the organisation could meet its goals, the big-picture, organisational-level objectives may not be reached. For example, if your organisation provides exemplary care but when it comes to billing the necessary information isn't there and the client is overcharged, the overall experience is spoiled.

Blueprinting forces you to capture what occurs internally throughout the totality of the client journey—giving you insights into overlaps and dependencies that any one area of the organisation could not see alone.

The Service Blueprint can take different visual forms, some more graphic than others. However, it should include four key elements: front-stage actions, backstage actions, processes, and performance data.

Approach logistics:

1–50 people

1–2 hours

Difficulty

Service Blueprint Template

Populated Service Blueprint Template

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Service Blueprint template and the descriptions of the template areas to be populated.
3. Allow 30–60 minutes for each group to populate the template based on what they know. Group members may use existing organisational documentation and information to help them populate the template. **Note**: the purpose of this exercise is to capture what is actually happening in the group, not to reflect on what the policy or procedure says should happen.
4. Allow 5–10 minutes for each group to report back to the whole group what they have captured in the template.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Service Blueprint template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Service Blueprint template.

Template information:

Use the following descriptions to assist in populating the content of the Service Blueprint template.

Front-stage actions

These are actions that occur directly in view of the client. These actions can be human-to-human or human-to-technology actions.

- Human-to-human are the steps and activities that the contact employee (the person who interacts with the client) performs.
- Human-to-technology actions are carried out when the client interacts with self-service technology (for example, a mobile app or an EFTPOS machine).

Note: There may not always be a parallel front-stage action for every client journey touch point. A client can interact directly with the organisation without encountering a front-stage actor. Each time a client interacts with the organisation (through a staff member or via technology), a moment of truth occurs. During these moments of truth, clients judge your quality and make decisions regarding future engagement.

Backstage actions

These are steps and activities that occur behind the scenes to support onstage happenings. These actions could be performed by a backstage staff member (for example, a bookkeeper managing the accounts) or by a front-stage staff member who does something not visible to the customer (for example, service providers entering the service information into the billing system).

Processes

These are internal steps and interactions that support staff in delivering the service. These elements include anything that must occur for all of the above to take place. For example, recruitment of staff, the client record system, the booking system, the NDIS verification process.

In a service blueprint, key elements are organised into clusters with lines that separate them. There are three primary lines:

- The **line of external interaction** depicts the direction of interactions between your client and the organisation.
- The **line of visibility** separates all service activities that are visible to the client from those that are not visible. Everything front stage (visible) appears above the line, while everything backstage (not visible) appears below the line.
- The **line of internal interaction** separates contact staff members from those who do not directly support interactions with clients.

Performance data

The last layer of a service blueprint is performance data. Performance data can be involved with both front-stage and backstage actions and processes. The organisation's current performance data should be overlaid directly onto the Service Blueprint to assist in understanding how effective the current organisational processes are at achieving the strategic and operational metrics.

Intent of the approach:

The Service Blueprint is the companion to the Client Journey Map: it helps you to see how services are implemented by staff and used by the clients. The Client Journey Map and the Service Blueprint pinpoint dependencies between staff-facing and client-facing processes in the same visualisation and are instrumental in identifying and improving the experience for clients and staff alike.

Mapping the organisation's key performance indicators and financial flows against the Client Journey Map and Service Blueprint at an action level brings the organisation's performance to life.

Spreadsheets, charts and graphs can highlight improved and declining performance, but they don't provide insight into the actions that have led to the results. Similarly, policy, procedures and practices can be documented, but until they are mapped into a service blueprint it is difficult to see the interdependencies, duplication of effort and inconsistencies in what is meant to occur versus what is actually occurring.

You may also find that the individuals who participate in developing the Service Blueprint start identifying problems, gaps and opportunities. Whilst this isn't the intent of the activity it is important to capture this input, as it will be useful when developing the transition and future states.

CAPTURE THE FUTURE STATE

This is where anything is possible and the clearer you are on what success looks like the clearer the destination will become. The future state is a description of what will look different as a result of the change(s) that the organisation wishes to make.

Whilst the tools used in the current-state approach are similar for the future state, the thinking and the content populated into the future state templates will be different. The use of similar tools for the current state and the future state provides the following intended benefits:

1. Staff become familiar with the structure used to understand what's happening today and what the preferred future looks like.
2. Staff become familiar with using the tools and may apply them to other change efforts within the organisation.
3. The current state and future state of the organisation seem more closely connected.
4. The ability to identify what needs to transition is simplified.
5. Using the populated current-state templates as a baseline for designing the future state means staff can clearly see what will be changing as well as what will endure.

Further to the use of the populated current state templates as a starting point for the development of the future state, one further tool should be used to establish the future state: the **Context Map**. This is used to establish an understanding of the environment in which any future changes will be occurring.

Context Mapping

Template Four
The Context Map (future state)

Themes	Political	Economic	Technological	Market Needs	Trend 1	Trend 2	Trend 3	Uncertainties
Market								
Geographic								
Sector								
Industry								
Society								

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Template 4: The Context Map

The approach:

No organisation can work effectively now or in the future in a silo. Understanding the wider eco-system and the organisation's place within it is vital for the organisation's continued success. Therefore, the first action required as part of documenting the future state is a context review.

A context review will enable the organisation to identify any emerging trends or changes to be incorporated when populating the Change Strategy template. The intent behind this process is to reduce the number of assumptions that may influence the organisation's future direction and to pick up on any significant changes that could diminish performance.

The Context Map is designed to show the external factors, trends and forces at work surrounding the organisation because it is difficult to have a good grasp of a situation until the fuller context is seen. Once a systemic view of the external environment of the organisation is established, you will be better equipped to lead change.

The health and community services eco-system is made up of a variety of layers and intersects with other industries and sectors, creating a complex spider web of connections, leverage points and tensions. The complexity of the eco-system can be overwhelming.

Breaking the eco-system down into layers and considering the trends and patterns of change occurring at each layer enables you to understand the shifting context in which the organisation exists. This means that you can start to prepare for external factors that may derail the change you are leading.

Approach logistics:

1–50 people	45–90 minutes	Difficulty	Context Map Template	Populated Context Map Template

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Context Map template and the descriptions of the template areas to be populated.
3. Allow 30–60 minutes for each group to populate the template based on what they know. Group members may scan documentation and information on the Internet or have other sources of research that they have undertaken. Finding a range of sources, materials and information will assist in populating the Context Map template. Populating each layer and then summarising the overall findings can provide both a current-state view and the emerging-context view. Encourage players to focus on observations and 'aha' moments.
4. Allow 5–10 minutes for each group to report back to the whole group what they have captured in the template.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Context Map template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Context Map template.

Template information:

Use the following layers to assist in populating the content of the Context Map template.

The layers

There are five layers to consider in the health and community services eco-system and you need to understand them: market, geography, sector, industry, society.

Market
Here you will look at what is happening to your preferred market cohorts. You will need to consider demographic, geographic, behavioural and psychographic data and information. Are numbers expanding or reducing? Are clients' needs, wants and desires shifting? What impacts are the different generational profiles having? Are clients' access expectations shifting? Are clients spending their money differently?

Geographic
Here you look at any changes occurring within a specific geographic location. What is happening in the geographic areas where you deliver services? Is expansion, growth corridors or urbanisation occurring? What plans do local, state or federal government have for the area? Who are your competitors and what are they doing?

Sector
Here you look at what is occurring in the NDIS sector. What policies are being introduced? How is the funding envelope shifting? What are the key drivers influencing the direction of the sector? How are other providers setting themselves up to meet client needs? What is changing in relation to the needs, wants and desires of clients, funders and decision-makers in this space? What is happening within the NDIS workforce? How is technology influencing the NDIS sector?

Industry
Here you look at what is occurring across the health and community services industries. What is occurring within these industries that may influence or affect NDIS service provision? What policy and funding decisions are occurring? What is occurring in relation to service provision? What is the role of technology? What is happening with the broader workforce? What is occurring with services that are similar or integral to NDIS service provision?

Society
Here you are looking at broad societal trends. These could affect a cohort of the community or be a bigger influence that is shaping community behaviours and expectations. At a societal level, these are the things that are important or are affecting individuals, funders and decision-makers directly in relation to their everyday lives. These are the things that are affecting decision-making across multiple sectors and industries. This is also where you are looking for cross-sector solutions to some of your challenges.

The questions

By asking the following questions at each layer you will be able to map the trends and changes that are occurring or are planned to occur and consider the impact that they may have on the organisation.

Ask and answer:

- What's happening?
- What does it mean?
- Why does it matter?
- How will it affect the organisation?
- What needs to be done about it (at a high level)?

Each identified change is then separated into the following themes: political factor, economic factor, technological factor, customer needs, trends, and uncertainties.

You may require additional trend sections; trends are categories that can be qualified by the individuals participating in populating the Context Map template. These could be online trends, demographic trends, growth trends, clinical trends etc. Find agreement on the priority trends that the organisation needs to be considering at the various layers.

Intent of the approach:

It's up to individuals to paint a picture of the environment in which they sit, but by asking thought-provoking and intelligent questions richer content can be generated, eliminating assumptions. The intent of this approach is to generate a display of the external environment in which the organisation will be deploying the change.

We don't truly have a good grasp of a situation until we see it in a fuller context. The Context Map therefore is designed to show the external factors, trends and forces at work surrounding the organisation. Once you have a systemic view of the external environment, you are better equipped to respond proactively to that landscape.

Context mapping should result in a holistic view of the external organisational landscape and show where time, energy and resources may need to be focused, or alternatively where risks need to be mitigated, so that the change can help deliver the organisation's purpose.

Change Strategy (future state)

Template Five
Change Strategy

Purpose					
Market					
Values					
Priority themes					
Metrics					
Goals					
Measures					

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Template 5: The Change Strategy

The approach:

The Change Strategy (future state) is about diving deeper into the change that you are leading and defining a scope for what will and will not be included in the change.

It is about identifying the difference that the organisation wants to make within a defined period and linking its desired outcomes to high-level priorities that the organisation believes will help it get there.

The Change Strategy will provide you with a high level picture of the key prioritise that will need to be deployed for the change. It isn't until the preparation of the Transition State Plan that you will develop the next level of details, which are the key activities that need to be deployed for the change.

Approach logistics:

1–50 people **2 hours** **Difficulty** **[Change Strategy Template]** **[Populated Change Strategy Template]**

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Change Strategy template and the descriptions of the template areas to be populated.
3. Allow 30–60 minutes for each group to populate the template.
4. Allow 5 minutes for each group to report back to the whole group what they have captured in the template in each of the sections. Have each group report on the same section before moving onto the next one.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Change Strategy template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Change Strategy template.

Template information:

Use the following descriptions to assist in populating the content of the Change Strategy template.

Purpose

This is the 'why' behind why the change is being undertaken and why anyone should care. The purpose generally fits into one of three areas:

- Solving a problem that the organisation's clients would want solved.
- Filling a gap that the organisation's clients would want filled.
- Leveraging an opportunity that someone else has identified that the organisation's clients would want leveraged.

The purpose is the organisation's commitment to making a difference. It is inspirational. It should excite staff about the change and motivate them to get out of bed in the morning.

Market
The market is the cohort of clients that the organisation wishes to make a difference for in relation to the change being introduced. This may be similar to existing client cohorts. However, it may include a better-defined market cohort if the organisation has undertaken market segmentation.

Market segmentation is when the organisation looks at demographic, geographic, behavioural, and psychographic data to determine whom the organisation is best set up to serve. Market segmentation often relates to the development of personas that the organisation can use to design and implement change for.

It is also worthwhile considering here who else, aside from the market, may be affected by the change. Funders may need to be considered along with other key stakeholders.

Values
This is about selecting specific behaviour that will be required to best enable the change to occur. These should not be aspirational values but acknowledge the actual behaviours that will need to occur within the organisation on a day-to-day basis.

These values need to be similar or complementary to the organisational values. Think about how you would like clients and stakeholders affected by the change to describe staff in the organisation to their friends.

Priority themes
These are the high-level areas that best describe what changes need to occur for the organisation to achieve the purpose and metrics associated with the high-level change. These are not individual activities but a high-level collation of change activities.

Get individuals to think about what activities they currently undertake that would continue to be required in the future. Once they have identified what works, get them to think about where there are gaps and what else needs to be done. Then collate the individual activities into high-level priority themes.

Metrics
These are the articulation of the difference the change needs to make as a result of the allocation of time, effort and resources. The metrics are made up of goals and measures and should be aligned to each priority theme. They are the articulation of what will be different; they can be quantitative or qualitative measures.

Intent of the approach:
The objective of undertaking the Change Strategy is to describe the desired future state. It is about identifying what will be different (for clients, the organisation or the health and

community care eco-system) as a result of the organisation investing time, effort and resources into the change.

The Change Strategy provides the high-level structure for where the organisation will be focusing its time, effort and resources over a defined period in relation to a specific organisational change. It assists the organisation to define why this change is important, who this change is intended to make a positive impact for, how the organisation will go about making the changes required, what areas the change will focus on, and what will be different as a result of making the change.

The Change Strategy also assists with future decision-making processes so that the organisation doesn't become distracted and undertake activity that doesn't assist in making progress.

Client Journey Map

Template Two
Client Journey

Claire Edwards

Phase in the journey									
What are clients doing?									
What questions do clients have?									
What is the clients desired outcome?									
What is the client experiencing?									

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Template 2: Client Journey Map

The approach:

The Client Journey Map (future state) is about identifying changes that are desired in relation to improving the client journey (service delivery). It is about identifying the difference that the organisation wants to make to improve the client experience.

Suggestion:

It may be useful to start with the Client Journey Map (current state) and identify the areas that need to endure from the current state into the future state. Then use the time to work on the areas that need to change—the areas where pain points, barriers to service and duplication of effort have been identified.

Approach logistics:

1–50 people	2 hours	Difficulty	Client Journey Template	Populated Client Journey Template

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Client Journey Map template and the descriptions of the template areas to be populated.
3. Allow 30–60 minutes for each group to populate the template based on what they want the future of the organisation to look like.
4. Allow 5 minutes for each group to report back to the whole group what they have captured in the template in each of the sections. Have each group report on the same section before moving onto the next one.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Client Journey Map template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Client Journey Map template.

Template information:

Use the following descriptions to assist in populating the content of the Client Journey Map template.

Note: You may already have a list of suggested improvements that were identified when documenting the current state.

What clients are doing

This is where you capture each step that a client would ideally take on their journey. This is each action that the client would be making. These are the steps, choices and interactions that the client would perform while interacting with the organisation to reach a particular goal. Remember, a client will be taking steps prior to directly engaging with the organisation and after they have exited the organisation. It is important to capture these steps as well.

Your focus here should be on reducing the number of steps, streamlining the steps, and eliminating repeated steps. Also, consistency is important. If the client is likely to access the service multiple times, the experience should be repeatable. The client should know what to expect and how to interact with the organisation.

What questions might a client have?

This is where you capture what questions may be arising from a client's perspective that they want answered. This could be a query in relation to the process or a query in relation to what they feel they need to know before proceeding on their journey.

Your focus here is to ensure client queries are addressed prior to getting to each step or resolved before they proceed to the next step. This may require coordination with the Service Blueprint (future state).

What are the client's desired outcomes?

This is where you capture what the client was trying to achieve as a result of the action that they have taken. This is where you need to test the congruence between what the client thinks and feels they should achieve and what the organisation is looking to achieve.

Your focus here is to exceed client expectations. At each step, client's objectives as a minimum should be met. If a client objective cannot be met, this needs to be understood prior to the client experiencing disappointment. This may require coordination with the Service Blueprint (future state).

What are the clients experiencing?

This is where you capture how you want clients to feel when they undertake each action. This is the client's emotional state. It is often represented as an adjective plus a short sentence for context. For example, a client may be 'frustrated' because they are referred onto another area for assistance. In contrast a client may be 'pleased' because they were able to get the assistance they needed at their first point of contact with the organisation.

Your focus here is on creating positive client emotions throughout the client journey. This may require you to think about different cohort needs to deliver a positive experience. For example, a technological solution may be desirable for one market cohort but may create a negative experience for another.

Intent of the approach:

The objective of undertaking the Client Journey Map (future state) is to describe what the ideal client journey would look like if pain points, confusion and duplication of effort were removed. It is also an opportunity to identify improvements in relation to the experience of clients including consistency, simplification, and streamlining throughout the journey.

Service Blueprint

Template Three
Service Blueprint

Phase in the journey									
Front stage actions	Who is taking the action?								
	What action are they taking?								
Back stage actions	Who is taking the action?								
	What action are they taking?								
Processes	What infrastructure is used?								
	What policy, procedure or plan is being followed?								
	What supporting systems are being used?								
Performance data									

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Template 3: Service Blueprint

The approach:

The Service Blueprint (future state) is about identifying changes that are desired in relation to improving the Service Blueprint (organisational operations).

The Service Blueprint (future state) is about identifying the changes that the organisation wants to make to its internal operations. These improvements should deliver value for the clients (by enabling the desired client journey to be achieved) and the organisation (by improving productivity, performance, and profit).

Suggestion:

If it is useful, start with the Service Blueprint (current state) and identify the areas that need to endure from the current state into the future state. Then use the time to work on the areas that need to change. This may be where efficiency and effectiveness are compromised, viability is questionable, and duplication of effort and staff dissatisfaction are evident.

Approach logistics:

1–50 people	2 hours	Difficulty	Service Blueprint Template	Populated Service Blueprint Template

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Service Blueprint template and the descriptions of the template areas to be populated.
3. Allow 30–60 minutes for each group to populate the template based on what they want the future of the organisation to look like.
4. Allow 5 minutes for each group to report back to the whole group what they have captured in the template in each of the sections. Have each group report on the same section before moving onto the next one.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Service Blueprint template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Service Blueprint template.

Template information:

Use the following descriptions to assist in populating the content of the Service Blueprint (future state) template.

Note: You may already have a list of improvement suggestions that were identified when documenting the current state.

Front-stage actions

These are actions that occur directly in view of the client. These actions can be human-to-human or human-to-technology actions. Human-to-human are the steps and activities that the contact employee (the person who interacts with the client) performs. Human-to-technology actions are carried out when the client interacts with self-service technology (for example, a mobile app or a website form).

There may not always be a parallel front-stage action for every client journey touch point. A client can interact directly with the organisation without encountering a front-stage actor.

Backstage actions

These are steps and activities that occur behind the scenes to support onstage happenings. These actions could be performed by a backstage staff member (for example, a bookkeeper managing the accounts) or by a front-stage staff member who does something not visible to the customer (for example, service providers entering the service information into the billing system).

Processes

These are internal steps and interactions that support staff in delivering the service. These elements include anything that must occur for all of the above to take place. For example, recruitment of staff, the client record system, the booking system, the NDIS verification process. In the Service Blueprint, key elements are organised into clusters with lines that separate them. There are three primary lines:

- The **line of external interaction** depicts the direct interactions between your client and the organisation.
- **The line of visibility** separates all service activities that are visible to the client from those that are not visible. Everything front stage (visible) appears above the line, while everything backstage (not visible) appears below the line.
- The **line of internal interaction** separates contact staff members from those who do not directly support interactions with clients.

When making changes to the front stage, backstage and processes of the organisation, the focus should be on making improvements for staff so that they can be their best and bring their best to every interaction. This in turn will require a focus on the processes, systems and structure that exist to support staff to do their best work, whilst ensuring ongoing organisational viability.

Performance data

The last layer of the Service Blueprint is performance data. Performance data can be involved in both front-stage and backstage actions and processes. The organisation's desired performance data should be overlaid directly onto the Service Blueprint to assist in understanding what expectations exist in relation to the performance of various functions throughout the organisation.

Intent of the approach:

The objective of undertaking the Service Blueprint (future state) is to describe the changes that need to occur to improve the client journey and organisational performance. It is also an opportunity to identify improvements in relation to the experience of staff including consistency, simplification, and streamlining of internal organisational processes. It is important to remember that any change to the Client Journey Map may require a change to the Service Blueprint and vice versa.

The Service Blueprint (future state) assists in identifying where time, effort and resources need to be allocated in the future.

DOCUMENT THE TRANSITION STATE

This is the stage where a defined scope of change occurs. The transition state is the collation of changes required between the current state and the future state. The Change Strategy provides the high-level scope of the changes and the desired impact of those changes.

The focus of the transition-state tools is to converge all of the information gathered during the current-state and future-state processes into an actionable plan for change.

The Transition Plan uses elements of the Change Strategy and captures the differences between the current-state client journey and service blueprint and the future-state client journey and service blueprint.

The tools used to document the transition state are Spot the Difference, Operational Hypothesis, and Transition Plan. The Transition Plan is then used to guide the work that occurs during the implementation in the LCM.

Spot the Difference (transition state)

Template Six
Spot the Difference (transition state)

Priority themes					
Priority actions					
Review					
Maintain					
Improve					
Conclude					
Develop					

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Template 6: Spot the Difference

The approach:

This allows the organisation to understand what it will be focusing on for a defined period. It involves breaking down the Strategic Themes into Strategic Activities that the organisation will be prioritising. The activity involves identifying what needs to be maintained, improved, concluded, developed, or reviewed.

Spot the Difference is not about idea generation, this occurs during the implementation phase of the LCM. Spot the Difference is about using the information at hand to make informed decisions about the future.

Approach logistics:

1–50 people	**45–90 minutes**	**Difficulty**	**Spot the Difference Template**	**Populated Spot the Difference Template**

How to deploy the approach:

1. Bring the players together and break them into small groups.
2. Provide each group with the Spot the Difference template.
3. Allow 30–60 minutes for each group to make comparisons between the current and future state Client Journey Maps and Service Blueprints. Differences identified are then populated against the priority themes identified in the Change Strategy (future state).
4. Allow 5–10 minutes for each group to report back to the whole group what they have captured in the template.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Spot the Difference template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Spot the Difference template

Template information:

Use the following descriptions to assist in populating the content of the Spot the Difference template.

Priority themes

These come directly from the Change Strategy template populated as part of capturing the future state.

Priority actions

When spotting the differences between the Client Journey Map and Service Blueprint current and future states, you will populate differences against five priority action areas: improve, maintain, conclude, develop, and review.

Improve

This is where actions identified in the current state need to endure and deliver improvements. It is where actions taken in the Client Journey or Service Blueprint need to generate new, more, or better value for clients, staff, stakeholders, or the organisation.

Maintain

This is where actions identified in the current state need to endure and continue to deliver the same outcome. It is where actions taken in the Client Journey or Service Blueprint need to maintain value for clients, staff, stakeholders, or the organisation.

Conclude

This is where actions identified in the current state need to conclude. It is where actions taken in the Client Journey or Service Blueprint are no longer delivering value for clients, staff, stakeholders, or the organisation.

Develop

This is where new actions have been identified in the future state. It is where new actions in the Client Journey or Service Blueprint need to generate new, more, or better value for clients, staff, stakeholders, or the organisation.

Review

This is where it is unclear if an action needs to be improved, maintained, concluded, or further developed. It is where further investigation needs to occur to generate a better understanding of what needs to occur.

Intent of the approach:

The objective of this activity is to identify the specific actions that will be the focus of change by the organisation and align these actions with the priority themes.

Transition Plan

Template Seven
Transition Plan (transition state)

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Transforming Healthcare

Priority themes	Priority actions	Timeline	Responsibility	Metrics	
				Goal(s)	Measures(s)

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Template 7: The Transition Plan

The approach:

The Transition Plan provides you with guidance and direction in relation to where time, effort and resources need to be deployed to enable the change. It also breaks the change down into smaller pieces to generate momentum and enable faster action.

Approach logistics:

1–50 people

30–45 minutes

Difficulty

Transition Plan Template

Populated Transition Plan Template

How to deploy the approach:

1. Bring the players together.
2. Populate the priority themes and metrics components of the Transition Plan using the Change Strategy. Populate the priority actions using the Spot the Difference populated template.
3. Break players into small groups.
4. Provide players with the Transition Plan template and the descriptions of the template areas to be populated.
5. Allow 20–30 minutes for each group to populate the template.
6. Allow 5–10 minutes for each group to report back to the whole group what they have captured in the template.
7. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Transition Plan template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Transition Plan template.

Template information:

Use the following descriptions to assist in populating the content of the Transition Plan template.

Priority themes

These come directly from the Change Strategy template populated as part of capturing the future state.

Priority actions

These come directly from the Spot the Difference template populated as part of capturing the transition state.

Timeline

This is the sequencing of the priority actions. The timelines need to be developed in accordance with the overall timeframe allocated to instigate change within the organisation.

Only one priority action should be deployed every 90 days. This is enough time to test the change and determine if it generated the desired outcome. See Chapter 4, the Infinity Loop section.

Responsibility

This is where a Change Agent may enlist the leadership of others to instigate the desired changes.

Metrics

These come directly from the Change Strategy template populated as part of capturing the future state.

Intent of the approach:

The objective of this activity is to document the change into a logical and implementable sequence of activity. The Transition Plan provides clarity regarding the scope of the change, the areas that the change will focus on, and the expected outcomes as a result of allocating time, effort and resources to the change.

PUTTING DIRECTION TO WORK

As a Change Agent you should be ready to coach individuals through feelings of uncertainty and encourage them to try new ways of thinking and doing throughout the change process.

We know that many individuals at some point may not have had a great experience of change. As a Change Agent you are responsible for creating a great change experience. This will require you to have some comfort and familiarity with guiding individuals and thoughtful preparation.

Without adequate direction, everyone will be playing catch-up, which ultimately will require greater time and resourcing.

Preparation for direction work

Direction work is best completed over the course of a one-day workshop or alternatively over three, two-hour sessions.

Direction work can be completed individually. It is recommended and encouraged, however, that it be done with as many people as possible, particularly those who may be affected by the change.

The direction work tools have been designed for 1–50 people. When working with larger groups it is recommended that the group be split into smaller groups of 4–5 people. Ideally, each group should have a range of diverse perspectives and different skill sets to get the most out of the direction work.

To enable a positive experience, preparation is key: knowing what needs to be done and when will assist with creating a great change experience.

Putting direction to work resources

One day direction workshop agenda

Multi day direction workshop agenda

IMPLEMENTATION

THE THREE LOOPS SUPPORT IMPLEMENTATION

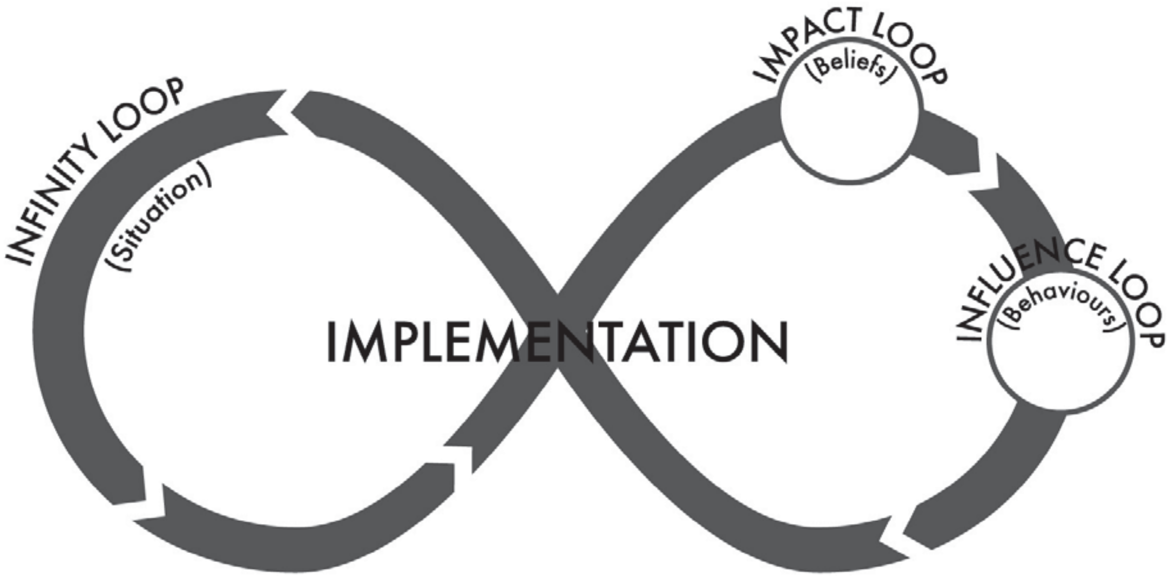

Diagram 7: The LCM – Implementation

'Start where you are. Use what you have. Do what you can. So many of us fail to accomplish things not because they are too difficult but because we never give them a chance.'

– Arthur Ashe

After completing the Direction Plays you should now be equipped with clarity about what is in place (current state), what the organisation wants in place (future state) and a series of priority activities (transition state) that will get you there.

The direction work has been leading you into the second component of the LCM: Implementation. This is where you zero in on a specific priority identified within the Transition Plan. This priority is the change that you will be working on throughout implementation.

If you have not undertaken the direction work, implementation will be significantly compromised. Common problems encountered when the direction work has not be completed are:

1. Lack of clarity is mistaken for resistance

Without clarity individuals may have questions, lack a collective understanding and express confusion with why time, effort and resources are being allocated the way they are. This lack of clarity can often be mistaken for resistance to change. The direction work provides individuals with clarity on the scope of the change, the areas that the change will focus on, and the expected outcomes as a result of allocating time, effort and resources to the change.

2. People, rather than situations, are seen as the problem

If you don't understand the root cause of a problem it can be easy to blame a person. They aren't doing their job properly, they don't work hard enough, and they create barriers. Direction work provides insight into the root cause of a problem by identifying *client and organisation* and *system and process* interdependencies. This focuses attention on the situation instead of a person.

3. Busyness is mistaken for progress

Everybody is busy and it is easy to fall into the busyness trap without making progress. This is often where the wrong change is being introduced because time hasn't been put into understanding where the organisation is now and where it needs or want to be in the future. Busyness also occurs when there is a lack of clarity about the outcomes that the change is trying to create, and the outcomes are not evaluated. The direction work focuses on progress by highlighting which actions are to be undertaken and their expected outcomes.

To avoid implementation being compromised, go back and undertake the direction work. Direction work can also be completed retrospectively if you have already embarked on the change process.

Remember every output is an input into something else. If an output is compromised, then all future outputs are compromised.

Implementation work incorporates three modules: situation change, behaviour change, belief change. When change works and people start to behave in a different way, a common pattern emerges:

1. Work is redesigned (situation change).
2. Beliefs are re-formed (belief change).
3. Behaviours are reconfigured (behaviour change).

It is the ability of the Change Agent to facilitate and coach individuals through implementation that will determine the success of the change being introduced.

THE INFINITY LOOP-SITUATION CHANGE

Now that you have selected the change that you will be working on throughout implementation it's time to turn your attention to situation change.

We tend to personalise failure when we experience it or alternatively attribute blame to others. Whilst change requires a shift in people's behaviour, you also need to change the environment and systems; you need to change the situation.

If you set an expectation of people to behave differently but place them in the same situation you will only encourage the same behaviour. If you want new behaviours, then you have to change the environment and systems.

Rather than expecting the greatest shift and change to be driven by the efforts of individuals, you should instead be designing change with the faults and weaknesses of individuals in mind. You should be creating environments that allow people to be their best and bring their best.

If you assume that people failure is simply part of the process, then you can design change in such a way that compensates and even mitigates the average or below-average behaviours of individuals.

As a Change Agent you will need to be able to generate situation and system change that is desirable, feasible, and viable. Situation Change uses the **Infinity Loop** to guide you through five key steps: explore, design, decide, deploy, and evaluate. Each of these steps can be achieved using a range of tools. This playbook uses the tools that have been found most effective when it comes to Situation Change.

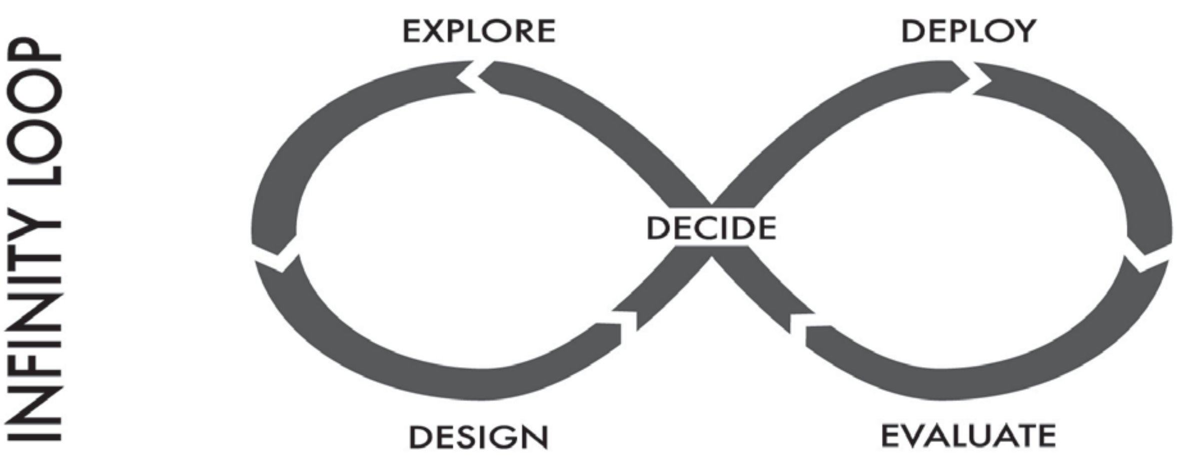

Diagram 3: The Infinity Loop

The Infinity Loop provides a methodical, socially aware approach that is engaging and useful in making the necessary changes in your organisation. If you don't design your changes, nobody else will.

Explore the Change

Template Eight
Explore the Change

Claire Edwards

We know that...	Enter the identified problem to be solved, gap to be filled or opportunity to be leveraged
Therefore we believe that if we...	Enter priority action
Then...	Enter metrics, include goal(s) and measure(s)
This hypothesis should...	☐ Remain the same ☐ Be adjusted to... ☐ Be replaced with...

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Template 8: Explore the Change

The approach:

From the Transition Plan you should have selected a priority action (change) to work on. Exploring the change provides you with the opportunity to understand the identified change further before determining how the change will be designed.

The priority actions, combined with the metrics documented in the Transition Plan, could be referred to as a range of change experiments. And like all experiments there is an underlying hypothesis that is being tested.

This activity looks to develop a range of hypotheses to confirm if the right change was identified when undertaking the direction work. The most common mistake when leading change efforts is to assume you, or others, understand the situation. For example, sometimes individuals may see a problem one way when the problem is seen very differently by others. Sometimes other people don't see a problem at all, or they see a different problem.

Exploring the change provides an opportunity to test if individuals have the same collective understanding and if they believe that the hypothesis developed could hold true.

Approach logistics:

1–50 people	1 hours	Difficulty	Exploring the Change Template	Populated Exploring the Change Template

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Populate the Exploring the Change template and the descriptions of the template sections to be populated.
3. Allow players 30 minutes to populate the template and build an understanding of the change hypothesis, whilst discussing it in small groups. Provide players with any available data and information relating to the change hypothesis to assist with this step.
4. Allow 5–10 minutes for each group to report back to the whole group what they have captured in the template.
5. During the report out, capture where there are similarities and differences and populate that information directly into a master version of the Exploring the Change template.
6. Collectively determine if the change hypothesis:
    - remains the same
    - is adjusted
    - is replaced with a new change hypothesis.

Template information:

Use the following descriptions to assist in populating the content of the Exploring the Change template.

Problem, gap or opportunity

Change should only be instigated as a result of:

- solving a problem that the organisation's clients, staff, or stakeholders would want solved
- filling a gap that the organisation's clients, staff or stakeholders would want filled
- leveraging an opportunity that someone else has identified that the organisation's clients, staff, or stakeholders would want leveraged.

The problem, gap or opportunity associated with this change will have been identified during the direction work.

Priority action

This is the change (priority action) that has been selected for implementation. It comes directly from the Transition Plan template populated as part of capturing the transition state.

Metrics

These are the metrics attached to the priority action that has been selected for implementation. They come directly from the Transition Plan template populated as part of capturing the transition state.

Determination

This is where you collectively determine if the change hypothesis:

- remains the same
- is adjusted
- is replaced with a new change hypothesis.

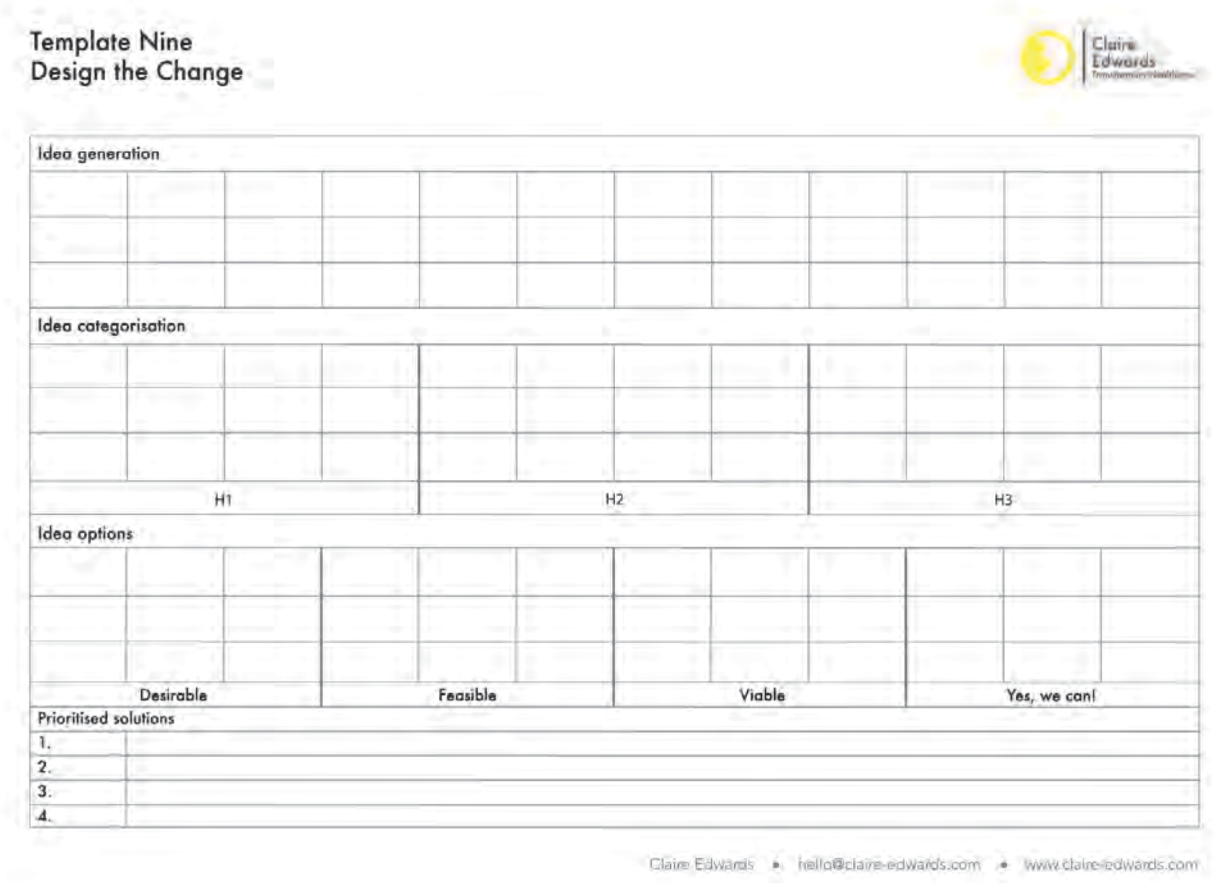
Intent of the approach:

At the conclusion of this exercise, either re-affirming or disconfirming statements should be emerging. It is about testing the rigour of the rationale, identifying the underlying assumptions and evidence that have led to this change being the focus of time, effort and resource allocation.

This activity is intended to provide validation and confirmation that the change hypothesis identified during the direction work is the right change for the organisation to be working on.

It also provides collective understanding of the change, how the change has been initiated, and the expected difference that will occur as a result of working on this specific change.

Design the Change



Template Nine
Design the Change

Claire Edwards

Idea generation

Idea categorisation

H1	H2	H3

Idea options

Desirable	Feasible	Viable	Yes, we can!

Prioritised solutions

1.
2.
3.
4.

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Template 9: Design the Change

The approach:

Now that you have clarity on the change hypothesis that you will be working on you can start to generate as many ideas about how this change could be deployed within the organisation.

Along with generating multiple possibilities, this step requires you to assess ideas based upon the amount of change required from continuous quality improvement through to disruptive change.

Further to this, it requires the ideas to meet desirable, feasible, and viable (DFV) criteria before being assessed as an implementable option.

Approach logistics:

1–50 people	1–3 hours	Difficulty	Design the Change Template	Populated Design the Change Template

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide players with a copy of the Designing the Change template with descriptions of the template sections to be populated.
3. Allow players 20–40 minutes to come up with as many ideas as possible in relation to the change.
4. Allow players 20–40 minutes to share their ideas within their group whilst allocating each idea to an idea category.
5. Allow players 40 minutes to move each idea through the DFV criteria.
6. Allow 5–10 minutes for each group to report back to the whole group the ideas that meet all three DFV criteria.
7. Capture the report out and collectively prioritise the ideas (this could be done using a 321-voting system).

Template information:

Use the following descriptions to assist in populating the content of the Designing the Change template.

Idea generation

These are ideas about how to undertake the change. We have all heard the saying 'there's more than one way to skin a cat'. This is your opportunity to generate as many ideas as possible. An idea should be able to be described using one to two sentences and fit on a single Post-it note. Some basic rules to keep in mind when generating ideas are:

Defer judgment

You never know where a good idea will come from. The key is to make everyone feel they can express the idea on their mind and allow others to build on it.

Encourage bold ideas

Bold ideas can often give rise to creative leaps. When devising ideas that are 'out there', try to imagine what you want without the constraints of resources, technology or capability.

Build on the ideas of others

Being positive and building on the ideas of others takes some skill. In conversation, try to use 'yes and …' instead of 'yes but …'.

Stay focused on the change

Try to keep the discussion on target; otherwise, you may diverge beyond the scope of the change.

One conversation at a time

You are far more likely to build on an idea and make a creative leap if you are paying full attention.

Be visual

Nothing gets an idea across faster than a sketch.

Go for quantity

Aim for as many new ideas as possible. Crank the ideas out quickly and build on the best ones. Use unconventional stimulus to extend or trigger new ideas.

Idea categorisation

This is where you take each of the ideas generated and categorise them according to the organisation's benchmarks. The categories are: continuous quality improvement, transformation, disruption.

Continuous quality improvement

These are ideas that are familiar to the organisation. They may involve the use of processes or practices that are already used by clients, staff, or stakeholders. Ideas in this category also align with the existing behaviours of the organisation. This category is often described in terms of 'same rules, same tools'.

Transformation

These ideas require a shift in both process and practice or in behaviour. These ideas are a combination of something new with something familiar. They may involve a new approach that may not have previously been used within the organisation. They may come from another sector or industry that works in a similar area or behaves in a similar way to your organisation. This category is often described in terms of 'same rules, new tools' or 'new rules, same tools'.

Disruption

These ideas require a shift in process, practice and behaviour. They may be seen as a radical shift for the organisation because they involve approaches that have never been used within the organisation before. These ideas may come from emerging movements and trends. They may also be a cross-sector solution. This category is often described in terms of 'new rules, new tools'.

Idea options

Now that the ideas have been categorised it is time to determine those ideas that will have the greatest chance of success. Ideas that are successful meet three criteria. They are desirable, feasible, and viable. Ideas can only progress if each criterion has been met sequentially (DFV). If all three criteria have been met you should have a range of deployable solutions for implementing the priority activity.

Desirable means that those affected by the change (clients, staff and stakeholders) would like the idea to be implemented. An idea is desirable if it:

- is faster, simpler and easier
- can do the job that needs to be done
- generates a good feeling or emotion.

Often an idea may be desirable to one group but not to another. If the idea is not desirable to those who will be affected by the change, what needs to be adjusted with the idea to make it desirable?

Feasible means that the idea can be done. That the skills, capability and capacity to develop and deploy the idea exist within the organisation or can be easily accessed. An idea is feasible if the organisation has the:

- technical skills or can access the technical skills to develop and deploy the idea
- capacity to develop and deploy the idea amidst other priorities and commitments
- commitment to develop and deploy the idea.

At first an idea may not seem feasible, especially if it is transformative or disruptive. However, with the introduction of more freelance workers, accessing someone with the right skills, capability and capacity may not be out of reach.

Viable means that the idea is sustainable. This is where the idea needs to have an underpinning business model and needs to be financially viable. This may mean that the organisation is willing to invest up front for a longer-term return or trade-off for achievement of a strategic objective; it may mean that the idea needs to generate a profit; it may mean that external funding needs to be sourced. The definition of viability is individual to each organisation. Understand what your organisation's definition is and ensure your ideas meet those requirements.

The ideas that pass the DFV criteria are the ideas that are more likely to have the greatest chance of success.

Prioritised solutions

These are the ideas that passed the DFV criteria, sorted into a prioritised list. This may involve:

- 321 voting
- negotiation and debate.

Intent of the approach:

At the conclusion of this exercise you should have a range of deployable solutions for implementing the priority activity. It is intended that any one of these solutions could be deployed.

Decide on the Change

Template Ten
Decide on the Change

The Change		Decision Maker Feedback
Change hypothesis		
Change idea		
Change prototype		
Change pitch		

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Template 10: Decide on the Change

The approach:

This is where the prioritised ideas are pitched to the decision-maker so that the decision-maker can decide which change to deploy.

There are two ways decision-makers make sense of new ideas:

- First, is it internally coherent? Does it make sense, given what they already know? In other words, does it make sense from their own personal bubble?
- Second, is it externally valid? Can it be tested? If we try it, does it work? This is an excellent way to test a new idea, but one big problem, which causes blind spots and reinforces those self-sealing bubbles, is that people rarely test ideas for external validity when they don't have internal coherence.

So, before an idea can be deployed you need to ensure it is internally coherent so that it can be externally validated during deployment. If the idea is not internally coherent with the decision-maker, deployment may never occur.

Approach logistics:

1–50 people	**1–2 hours**	**Difficulty**	**Decide on the Change Template**	**Populated Decide on the Change Template**

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide players with a copy of the Deciding on the Change template and the descriptions of the template sections to be populated.
3. Allow players 20 minutes to populate the change hypothesis and change the ideas sections of the template.
4. Allow players 60 minutes to develop a prototype and pitch for the idea.
5. Allow players 10 minutes per group to pair up so that they can make their pitch, demonstrate their prototype and receive feedback.
6. Allow players 20 minutes to iterate their pitch and prototype.
7. Capture each pitch individually.
8. Provide the populated Deciding on the Change templates to the decision-maker.

Note: The development of pitch and prototype may require the allocation of more time depending on the idea. If this is the first time this idea is being pitched and prototyped, aim for a concept-level prototype (low resolution and minimal time). There will be opportunity to increase prototype fidelity during deployment and subsequent implementation cycles.

Template information:

Use the following descriptions to assist in populating the content of the Deciding on the Change template.

Change hypothesis

This comes directly from the Exploring the Change template populated as part of Situation Change.

Change idea

This is the specific idea that you will be prototyping and pitching. It is the idea that has met the DFV criteria.

Change prototype

This is where you need to be a little creative, remembering that almost anything can be prototyped.

Make the prototype tangible in order to build others' understanding and gather feedback. In some cases, you want it to be partially complete, inviting others to build on the concept further. In other cases, you want it to be semi-functional to observe responses and how individuals interact.

Change pitch

Now that your plan is pretty much ready to go, you'll want to communicate it to decision-makers. A pitch is a great way to communicate your idea, how it works, why it matters, and whom the outcomes will benefit.

A pitch is the primary way to present your idea. This is where you formulate a two-minute explanation of the prototype to further build understanding and elicit feedback.

Intent of the approach:

At the conclusion of this exercise you should have a series of prioritised solutions where the decision-maker can select a preferred idea for deployment.

It is intended that the decision-maker select one idea for deployment over the coming 90-day cycle. Depending on the outcome of the evaluation step, a further idea may be deployed in the following 90-day cycle.

Pause:

At this stage the decision-maker will have selected one preferred idea for deployment. This is where you need to press pause. You need to stop the Situation Change work (Infinity Loop) and start the Belief Change work (Impact Loop).

BELIEF CHANGE

Belief Change is a tricky thing. Change is all around us, all the time, but for much of the time it seems like change controls us, when we really would like it to be the other way around. We all want more control over change and whilst this may be elusive to us as individuals, as a Change Agent you can make a conscious effort to help people be better at change.

For beliefs to change it requires focus in three areas: understanding beliefs, shaping beliefs, and reframing beliefs.

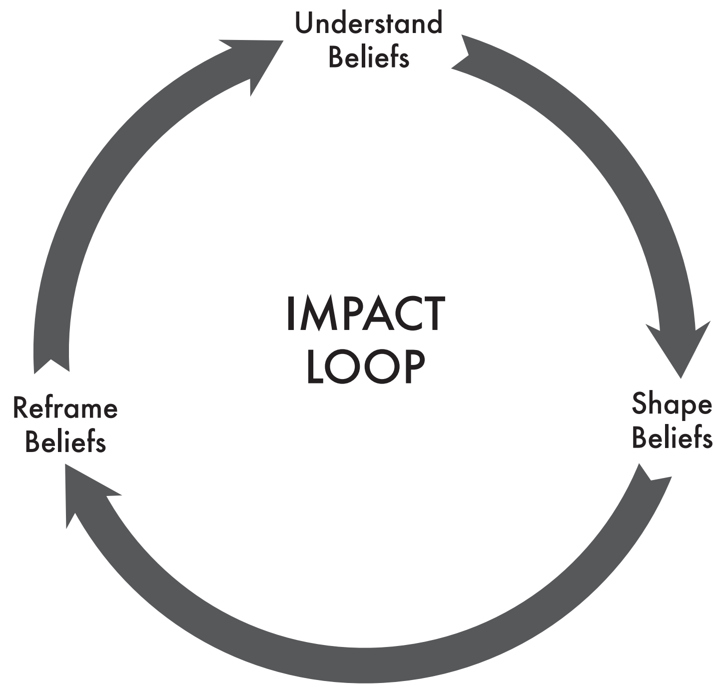

Diagram 4: The Impact Loop

Beliefs are a part of what stops individuals from changing. Beliefs form the basis of everything people say, think and do. When people change their beliefs, they can change their behaviour.

In order to maintain a sense of certainty and control, as well as a collective self-image and an image of what your organisation stands for, you need to work with others to create and maintain a shared map of reality.

These shared maps are useful because they allow you to do things together, based on shared assumptions. Shared maps are also efficient because they save everyone from asking questions all the time, so you can get on with the work.

But a shared map also has some negatives, especially when overtime the map begins to get out of sync with what's really going on. And the longer a group of staff have been operating with a shared map, the more likely there will be a mismatch between the map and reality.

People like stability. Once groups of people have formed a belief, they will tend to reinforce it in a way that creates blind spots to alternative beliefs. So, if you hope to lead change, you must understand and reframe beliefs.

Things change and beliefs that once served the organisation well will no longer be valid. Structures of belief must evolve continually if the organisation is to stay on top of change.

Formulating beliefs

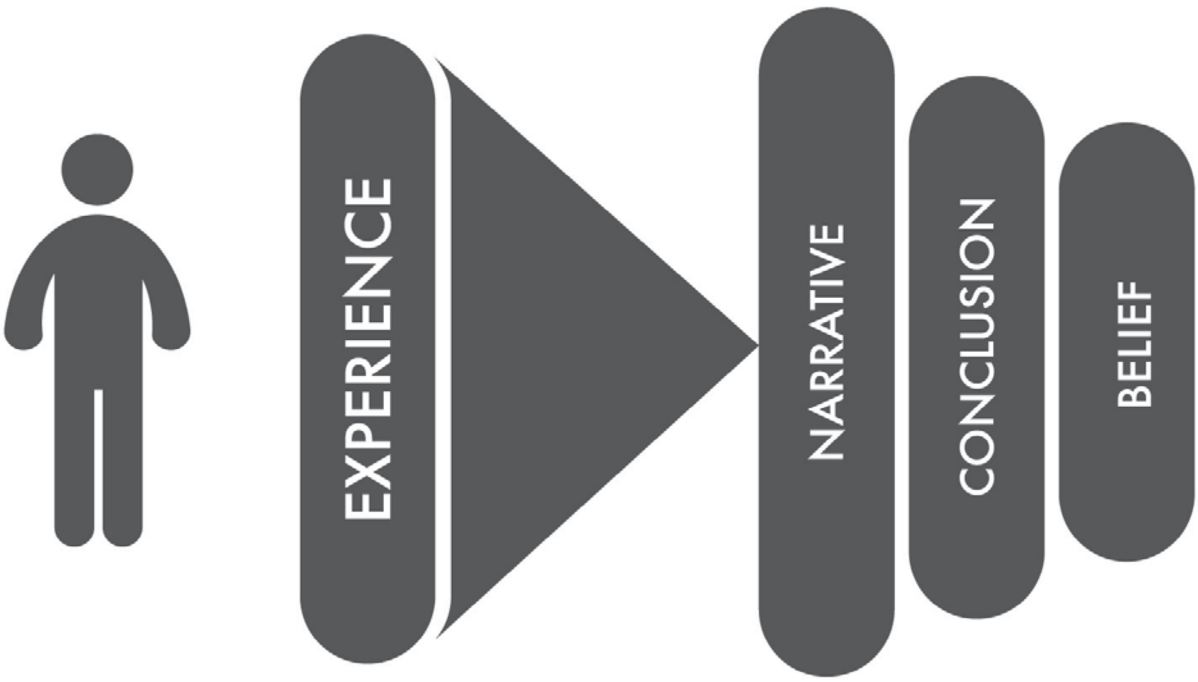

Diagram 8: Formulating Beliefs

People will have beliefs about the process of change, how it happens; and they will also have beliefs about the change being introduced, what works and what doesn't work. It is your job as a Change Agent to bring these beliefs to light and to create change by understanding, shaping and reframing others' beliefs.

The Impact Loop and its stages-understanding beliefs, shaping beliefs, and re-framing beliefs-is loosely based on the Ladder of Inference by Chris Argyris and the Pyramid of Belief by Dave Gray.

Understanding Beliefs

Template Eleven
Understanding Beliefs

Name the belief	I believe that...	I believe that...	I believe that...
Unpack the belief			
Experience Describe your experience			
Focus What did you notice during your experience?			
Narrative How did you make sense of your experience?			
Conclusion What did this experience mean?			

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Template 11: Understanding Beliefs

The approach:

As a leader of change you need to be able to understand people's beliefs. To do this you must first learn where their beliefs have come from, how they have been formed, and how they have been reinforced over time.

Approach logistics:

1–50 people	1–2 hours	Difficulty	Understanding Beliefs Template	Populated Understanding Beliefs Template

How to deploy the approach:

1. Bring the players together.
2. Provide each player with three Understanding Beliefs templates and the descriptions of the template sections to be populated.
3. Allow 30 minutes for each player to populate the templates in relation to the change being implemented (this is the change that the decision-maker has selected from the 'decide' part of the Infinity Loop).
4. Allow 5 minutes for each player to report back to the whole group what they have captured in their individual templates.
5. During the report out, capture where there is consistency with shared beliefs and populate that information directly into a master version of the Understanding Beliefs template. There may be beliefs that only one individual has; also capture these beliefs in the master versions.

Note: The master template should be a collation of all beliefs that individuals currently have in relation to the change being deployed.

Template information:

Use the following descriptions to assist in populating the content of the Understanding Beliefs template.

Name the belief

This is a brief description of the belief that you have in relation to the change being deployed.

Unpack the belief

Name your experience and give a brief description of an experience that you have had in relation to your current belief.

- Your focus: what you notice or observe during your experience.
- Your narrative: how you have made sense of your experience.
- Your conclusion: this is what you have interpreted the experience to mean.
- Your belief: this is the belief you have formed as a result of your experience.

By populating the gaps in the Unpack the Belief section of this template, you will now have a complete narrative, with the key influence points that exist in relation to your belief about the change being deployed.

Intent of the approach:

This activity is intended to be a collective representation of the beliefs individuals currently feel to be true in relation to the change being introduced.

This activity will provide insight into where barriers and blockages to the change may exist.

Template Twelve
Shaping Beliefs

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Transforming Healthcare

Your belief						
Organisational belief						
	Similar	Different	Similar	Different	Similar	Different
Experience						
Focus						
Narrative						
Conclusion						
Which belief appears to be more plausible?						

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Template 12: Shaping Beliefs

The approach:

As a leader of change you need to be able to shape people's beliefs. To shape an individual's beliefs, you need to help them see where there are similarities and points of difference between their current beliefs and the beliefs required for the change. This activity enables individuals to compare where their beliefs lie with where the organisation needs their beliefs to lie.

Approach logistics:

1–50 people	1–2 hours	Difficulty	Shaping Beliefs Template	Populated Shaping Beliefs Template

How to deploy the approach:

1. The Change Leader needs to develop three Understanding Beliefs templates. These represent the organisational view about the change being deployed.
2. Bring the players together and share the Shaping Beliefs template.
3. Allow players 30 minutes to discuss the following questions (with the player next to them or in small groups):
    - What is similar or different about the experiences?
    - What is similar or different about where attention is focused?
    - What is similar or different about the narratives?
    - What is similar or different about the conclusions reached?
    - Which belief appears to be to be more plausible?
4. Responses to the questions should be captured in the Shaping Beliefs template.
5. Allow 5 minutes for each group to report back to the whole group what they have captured in the templates.
6. During the report out, capture where there are similarities and differences and populate that information directly into a master version of the Shaping Beliefs template.

Intent of the approach:

This activity is intended to be a collective representation of where current beliefs are aligned or misaligned with the process of change within the organisation, noting that these will be the areas that need to be developed.

It is also a collective representation of where beliefs are aligned or misaligned about the change, noting that these will be the areas that need to be reframed.

Re-framing Beliefs

Template Thirteen
Reframing Beliefs

Claire Edwards

Difference						
Experience What experience needs to occur?						
Focus What is required for attention to be shifted?						
Narrative What is required for a new narrative to be conceivable?						
Conclusion What is required for an alternative conclusion to be reached?						

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Template 13: Re-framing Beliefs

The approach:

As a leader of change you will need to be able to reframe people’s beliefs. To do this you need to be able to meet individuals where they are and stretch them about their beliefs regarding the change being introduced.

Approach logistics:

1–50 people	1–2 hours	Difficulty	[Reframing Beliefs Template]	[Populated Reframing Beliefs Template]

How to deploy the approach:

1. Bring the players together and share the Re-framing Beliefs master template. Highlight for players where there was misalignment.
2. Allow players 30 minutes to discuss the following questions (with the player next to them or in small groups). Players should only be discussing areas of misalignment. Players need to contrast the two versions (the individual's view and the organisational view) of the Understanding Beliefs templates when discussing the following questions:
    - What experiences need to occur?
    - What is required for attention to be shifted?
    - What is required for a new narrative to be conceivable?
    - What is required for an alternative conclusion to be reached?
3. Responses to the questions should be captured in the Reframing Beliefs template.
4. Allow 5 minutes for each group to report back to the whole group what they have captured in the templates.
5. During the report out, capture the information directly into a master version of the Reframing Beliefs template.

Intent of the approach:

This activity is intended to provide insights for deployment. It provides critical information about how the idea can be deployed and the types of experiences individuals need to have, the areas of focus for the change, the narratives that need to be created, and the conclusions that need to be drawn to enable deployment success.

Pause:

This is where you need to press pause. You need to stop the Belief Change work (Impact Loop) and recommence the Situation Change work (Infinity Loop).

Deploy the Change

Template Fourteen
Deploy the Change

Claire Edwards
Transforming Healthcare

Change hypothesis					
Change idea					
Timetable for change					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

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Template 14: Deploy the Change

The approach:

You have now reached the second-last but perhaps the most critical step in the Infinity Loop: Deployment. If you've launched change before, you'll know that preparing for implementation can be a challenging task. But having followed the earlier parts of the LCM model and having involved those affected by the change throughout the process, you should feel reasonably comfortable that they are on board to support with deployment. However, there are a few more things to consider for the change to be successful.

You'll need a timeline and plan of action to get the change out into the organisation. Keep deployment on track with a roadmap. You've got a change you feel excited about. Now you need to create a plan for how you are going to deploy it. A roadmap helps you gather those affected by the change and collectively establish key milestones.

Approach logistics:

1–50 people | 1–2 hours | Difficulty | Deploy the Change Template | Populated Deploy the Change Template

How to deploy the approach:

1. Bring the players together and split them into small groups.
2. Provide each group with the Deploying the Change template and the descriptions of the template sections to be populated.
3. Allow 30 minutes for each group to populate the template.
4. Allow 10 minutes for each group to report back to the whole group what they have captured in the template.
5. During the report out, capture where there is consistency and agreement and populate that information directly into a master version of the Deploying the Change template. Where there is agreement, no further discussion is required. Where there is disagreement, allow time for discussion to form a consensus of what will be included in the Deploying the Change template.

Template information:

Use the following descriptions to assist in populating the content of the Understanding Beliefs template.

Change Hypothesis and Change Idea

The Change Hypothesis comes directly from the Exploring the Change template populated as part of Situation Change.

The Change Idea is the specific idea that was approved by the decision-maker for deployment.

Planning

For planning purposes, a 90-day calendar is used. This is sufficient for an organisation to get a better understanding of the difference the change is making (if any change). The purpose of a 90-day cycle is to reduce the amount of time, effort, and resources wasted when introducing a change that doesn't achieve the desired outcome.

Over the 90-day period (as a minimum) you should map the rollout and communication and feedback phases along with any other actions identified.

Note: Ensure you have incorporated into the 90-day plan the information from the Reframing Beliefs populated template.

Intent of the approach:

The intent of developing a roadmap is to provide those affected by the change and those leading the change with clarity in relation to what the next 90 days will look like until a preliminary evaluation is undertaken.

A roadmap provides the scope for what will and will not be achieved over the next 90 days. It holds both you as the Change Agent and individuals affected by the change to account. It also provides a tighter monitoring of activities to timelines and highlights when barriers to the change emerge.

Juggle:

This is where you need to juggle two parts of the LCM. You need to continue the Situation Change work (Infinity Loop) and concurrently undertake the Behaviour Change work (Influence Loop).

BEHAVIOUR CHANGE

When we embrace big change there are often two things at play: situation changes and behaviour changes. It could be debated which comes first but for change to occur both need to change. In our lives we embrace lots of big changes. Meanwhile, other behaviours are maddeningly intractable.

We know that for anything to change someone has to start acting differently. And big changes can start with very small steps, with small changes tending to snowball or create ripple effects.

It is easier to start new small behaviours and crowd out undesired behaviours than it is to stop existing behaviours. But this is not to say behaviour change is easy. All of your efforts as a Change Agent boil down to the same mission: can you get people to start behaving in a new way?

According to Professor BJ Fogg, a psychologist, 'doing something you don't enjoy and subsequently failing to make it habitual is more detrimental to a mission for change than doing nothing at all'.

Therefore, as a Change Agent your focus must be on supporting individuals to succeed at small adjustments, so that they gain confidence. To do that you need to help individuals to design behaviours aligned to the change that are both easy to do and can be seamlessly slipped into existing routines. The aim is for automaticity.

To help individuals figure out how to make new behaviours habitual, you need to navigate and support individuals through the Influence Loop. The Influence Loop takes individuals through five key steps: identify the impact, identify the outcome, identify the easy-win behaviours, identify the trigger, and identify the celebration.

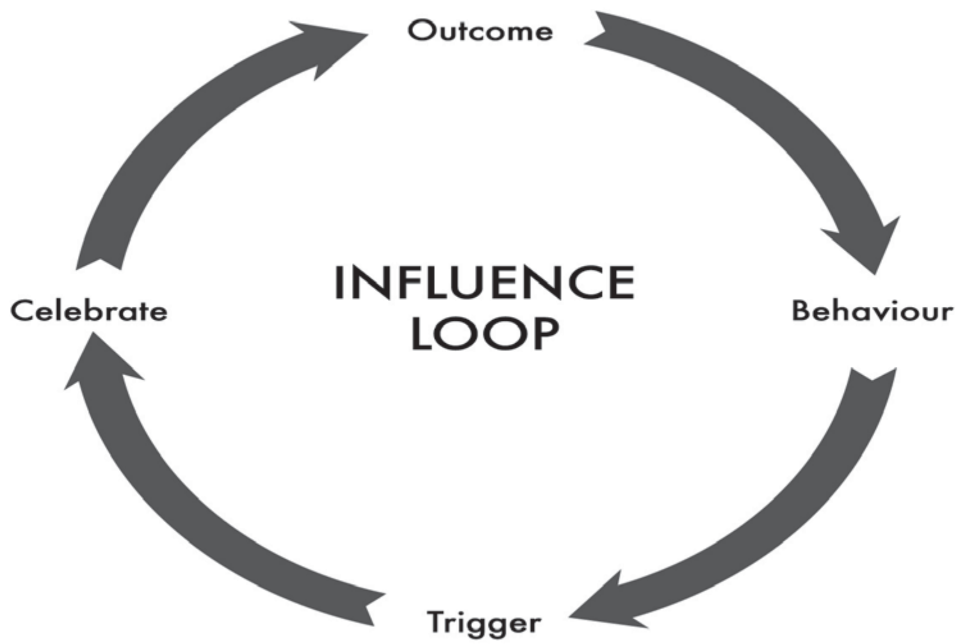

Diagram 5: The Influence Loop

The Influence Loop works by designing the need to motivate individuals to change in order to get a task done. It is often believed that motivation provides clarity which leads to action and for some individuals this may be the case. However, a more successful recipe for behaviour change is to flip the script—taking action provides clarity and generates motivation to keep going or stop.

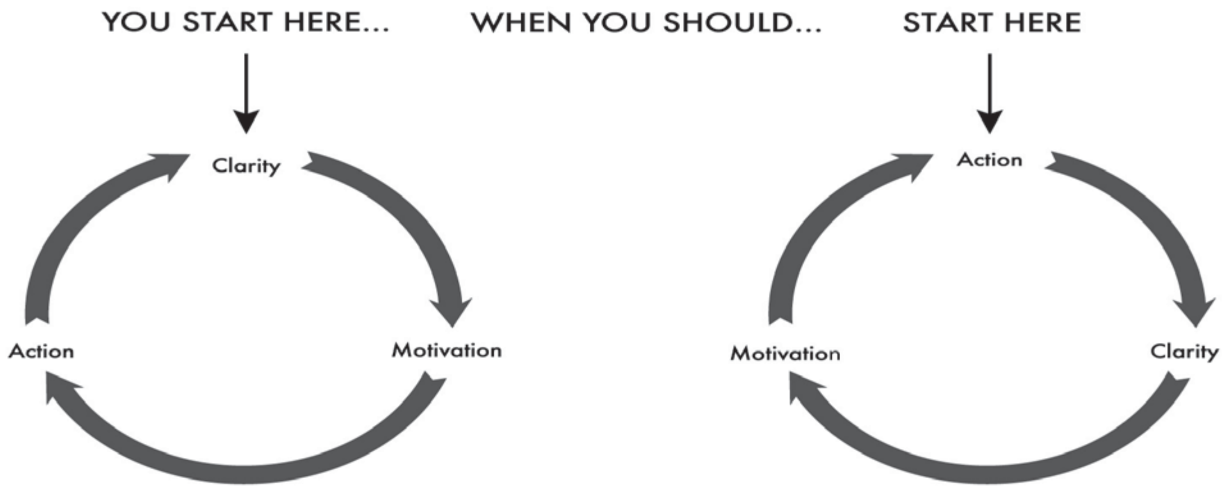

Diagram 9: Taking Action

The Influence Loop is loosely based on the Tiny Habits method devised by Professor BJ Fogg.

Taking Small Steps

Template Fifteen
Small Steps

Impact	This change impacts my day to day operations	This change impacts how I use technology to perform work tasks	This change impacts my roles and my necessitate creating or removing tasks from my role	This change impacts my basic fabric and beliefs	This change impacts the knowledge, skill and abilities I have to perform my work	This change impacts my patterns of communication and information flow	This change impacts the formal and informal guidelines for my daily work activities
Action I currently do this...							
Outcome I now need to achieve this...							
Behaviour Therefore I will now need to do this...							
Trigger The trigger that will remind me of my new behaviour is...							
Celebration I will celebrate thinking about or doing the new behaviour by...							

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Template 15: Taking Small Steps

The approach:

This is about assisting each individual affected by the change to identify and introduce new behaviours that will enable personal and organisational success. This is an individualised approach focused on building automaticity for each individual in relation to the change being introduced.

Small Steps focuses on teaching individuals how to change behaviours, instead of focusing on what behaviours need to change. By focusing on the process of behaviour change you are building each individual's capacity for future behavioural change.

Approach logistics:

1–50 people | 1–2 hours | Difficulty | Small Steps Template | Populated Small Steps Template

How to deploy the approach:

1. Bring the players together and explain the change being introduced, using a prototype to demonstrate.
2. Provide players with a copy of the Taking Small Steps template and the descriptions of the template sections to be populated.
3. Allow players 30 minutes to populate the Taking Small Steps template.
4. Allow players 10 minutes to share their responses with the person next to them and receive feedback.
5. Allow 5–10 minutes for each player to incorporate feedback and report back to the whole group what they have captured in the template.
6. Provide players with instruction on how their small steps will be supported by the organisation.

Template information:

Use the following descriptions to assist in populating the content of the Taking Small Steps template.

Identify the impact

Select areas that the change being introduced will affect and provide a brief narrative of how the change will impact on you.

- This change impacts my day-to-day operations.
- This change impacts how I use technology to perform work tasks.
- This change impacts my role and may necessitate creating or removing tasks from my role.
- This change impacts my basic fabric and beliefs.
- This change impacts the knowledge, skills, and abilities I have to perform my work.
- This change impacts my patterns of communication and information flow.
- This change impacts the formal and informal guidelines for my daily work activities.

Under each impact identified, populate what you currently do.

- I currently do this ___________ .

Identify the outcome

Under each impact identified, now specify the desired outcome. The desired outcome is what behaviour is required to enable the change to come into effect.

- I now need to achieve this ____________ .

Identify the easy-win behaviours

Next, identify an easy-win behaviour that will put you on the path to achieving that goal. This requires introspection, because it is about identifying what will work for you as an individual.

- I will now need to do this ___________ .

Identify the trigger

This is where you find a trigger—something that you already habitually do that the new activity can be attached to, thereby making it a habit too. It is important that you identify a trigger that will set off the desired sequence of behaviour. It is in finding the trigger and establishing a sequence that automaticity is created.

Identify the celebration

The final step in making a small step sustainable is the importance of celebration. Celebration isn't about waiting until automaticity is achieved but is about celebrating each time you:

- undertake the new behaviour, or even
- think about undertaking the new behaviour.

Celebrating rewrites your identity as someone who succeeds and it is through celebration of your success that motivation is generated to keep doing it, ultimately leading to automaticity of the new behaviour.

Intent of the approach:

At the conclusion of this exercise you should have clarity on how each individual is going to introduce the necessary behavioural changes into their daily work practices associated with the change.

From this information you will be able to establish a structure to support the small steps identified, including identifying where small steps are working and where they need to be adjusted for each individual to achieve the desired behavioural change.

This process will also identify where there may be situational barriers to achieving change versus human barriers to achieving change.

Juggle:

This is where you need to continue to juggle both the Situation Change work (Infinity Loop) and the Behaviour Change work (Influence Loop) until 90 days are up, and Evaluation can occur.

Evaluate the Change

Template Sixteen
Evaluate the Change

Change hypothesis	Metrics						Recommendations
	Goal(s)	Measure(s)	Data source	Data	Analysis	Data indicator	

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Template 16: Evaluate the Change

The approach:

The goal of change is to create new, more, or better value for clients, staff or stakeholders, all whilst generating a desired outcome.

Evaluating the change isn't just about technical objectives being met but about human, organisational and eco-system objectives being met.

There will be lots of ways to measure and evaluate the change; the key is to understand which kind of approach is best for the deployed change. For example, technical objectives may look at a change being delivered on budget, the number of participants in a training session, or a reduction in complaints. These measures should be straightforward to demonstrate.

But if you are trying to improve the outcomes of a service, improve internal organisational behaviours, improve access to services etc., these human, business, and eco-system objectives may need a more nuanced approach. And in some cases, it may take longer to really understand the impact and find the right measures to best demonstrate the impact.

Approach logistics:

1 person	1–2 hours	Difficulty	Evaluate the Change Template	Populated Evaluate the Change Template

How to deploy the approach:

1. Gather the data.
2. Analyse the data.
3. Populate the Evaluating the Change template using the template descriptions as a guide.
4. Based on the data, make a recommendation regarding the change being continued, tweaked, or stopped.
5. Provide the populated Evaluating the Change template to the decision-maker.

Template information:

Use the following descriptions to assist in populating the content of the Evaluating the Change template.

Change hypothesis

The Change hypothesis comes directly from the Exploring the Change template populated as part of Situation Change.

Metrics

The metrics come directly from the Exploring the Change template populated as part of Situation Change.

Data source

This is the location in which the data for the metrics have been sourced.

Data

These are the raw data that will be used for the purpose of analysis.

Analysis

These are the raw data consolidated into figures or statements aligned to the metrics. Along with the consolidation of data, this is where any additional commentary about the data may be included. This may include statements about trends, validation of data, or reasons for why the data look the way they do.

Data indicator

A traffic-light system may be used to provide a visual representation of the data analysis. Alternatively, you may choose to use up and down arrows.

Recommendations

This is where you provide recommendations to the decision-maker about the impact of the change and the next steps.

If the change has achieved all of the technical, human, organisational and eco-system objectives, you may recommend a further 90-day cycle, increasing the fidelity of the prototype deployed.

If the change is trending towards achievement of the technical, human, organisational and eco-system objectives, you may recommend a further 90-day cycle using the existing prototype.

If the change is trending towards achieving some but not all of the technical, human, organisational and eco-system objectives, you may recommend tweaking the prototype before proceeding with a further 90-day cycle.

If the change has only achieved the technical objectives, you may recommend stopping this change and implementing one of the other DFV ideas over the next 90 days.

If the change is not achieving any of the objectives, you may recommend stopping this change and implementing one of the other DFV ideas over the next 90 days.

If a number of the DFV changes have been tested through the 90-day cycle and none has achieved the objectives, you may recommend commencing the Infinity Loop again.

Intent of the approach:

By evaluating the change, you are trying to determine if it is achieving what it was intended to achieve. Too often organisations implement changes that don't create new, more, or better value for clients, staff or stakeholders, nor do they generate a good outcome for clients, the organisation or the eco-system.

This approach is intended to shine a light on the change and determine if it needs to be continued, tweaked, or stopped. In this way, time, effort and resources can be allocated to changes that produce the desired results and continue to progress and deliver the organisation's purpose.

PUTTING IMLEMENTATION TO WORK

As a Change Agent you should be ready to coach individuals through feelings of uncertainty and encourage them to try new ways of thinking and doing throughout the change process.

We know that many individuals at some point may not have had a great experience of change. As a Change Agent you are responsible for creating a great change experience. This will require you to have some comfort and familiarity with guiding individuals and thoughtful preparation.

Zero in on a specific change and make it work.

Preparation for implementation work

Implementation work is best completed over the course of 90 days. It will generally involve a one-day workshop at the beginning to refine the change being worked on and can immediately follow on from the direction work.

Implementation work must include participation from those who will be affected by the change.

The implementation work tools have been designed for 1–50 people. When working with larger groups it is recommended that the group be split into smaller groups of 4–5 people. Ideally, each group should have a range of diverse perspectives and different skill sets to get the most out of the implementation work.

To enable a good experience, preparation is key: knowing what needs to be done and when will assist with creating a great change experience.

Putting implementation to work resources

One day implementation workshop agenda

Multi day implementation workshop agenda

TRANSLATION

THE THREE PHASES ENABLE TRANSLATION

Diagram 10: The LCM – Translation

Why learn continuously? The rate and volume of change in the health and community services sectors is not slowing down. The environment of constant change, uncertainty and volatility is now the new normal. To adapt, you need to adopt an always-learning mindset.

A continuous learning mindset means that you view human intelligence as infinite and believe that you're always able to learn new skills. In the end you need to crave personal growth and development. However, according to Forbes, only 42 per cent of workers are always or frequently learning on the job, while a big portion, 39 per cent, say that they are never or rarely learning.

Continuous learning is important for three key reasons:

1. Competence leads to confidence

Few things in life create fear in people's hearts like simply not knowing. Thinking that you don't have the skills to perform a certain action can frighten you. This concept applies to most areas of your life. Even if you don't have a specific skill, you may still have the courage to take action, but the final outcome may be compromised. Learning something new will give you a feeling of accomplishment, which in turn will boost your confidence in your own capabilities. You will feel readier to take on challenges and explore new opportunities for change.

2. Creates more options

Non-stop learning and improvement will give you more options. It will make it easier to change what you are doing and make adjustments as you go. You will find that what you know is transferable to a range of situations and contexts. Developing new skills and capabilities will open up opportunities. Continuous learning will keep you from falling into a capability rut. The more you learn, the more you are able to do.

3. Changes your perspective

Continuous learning opens your mind and changes your attitude by building on what you already know. The more you learn, the better you'll get at seeing more sides of the same situation, helping you to understand more deeply.

No one can know or learn everything there is to know, but you can try. Decide what skills or specific knowledge would most improve your ability to catalyse change within your organisation and start there. Learn all you can. Learn and keep learning.

The Translation part of the LCM is all about learning; it is about acquiring knowledge and competencies in order to expand your skill set and develop future opportunities to lead change within your organisation. It is about extending your personal and professional development in an effort to avoid stagnation and reach your full potential when leading change.

While there are multiple learning methods specific to adult learning, there is a model proposed by Lila Davachi, Associate Professor of Psychology at New York University, that is known to be effective. Known as AGES (attention-generation-emotion-spacing), this model highlights four key principles that make learning as an adult effective.

1. Attention

The first step in any learning process is to pay attention. While a little distraction is good in some situations, during learning it is important for you to be single-mindedly focused. Research has revealed that though it is physically possible to multitask, our efficiency and effectiveness, or the time we take to complete a task, is compromised during multitasking. This is because the cerebral cortex in the brain can focus on only one thing at a time. The importance of managing your attention effectively cannot be undermined.

2. Generation

The second step in the learning process is generation—i.e. creating learning that lasts. The way you learn as an adult is different from how you learnt as a child. As an adult you will capitalise on what you already know and build upon it. This is why self-directed learning is a hit with adults. Self-directed learning allows you to control what you learn and to an extent how you learn. Now, why and how is this more effective? The brain depends on experiences, both individual and social, for its growth. Whenever the human brain is actively involved in the learning, it is more effective and efficient.

3. Emotion

The third step in the learning process is emotion—sparking the right emotion to enable a good learning experience. It is a well-known fact that your emotions and memories are interlinked. Emotions create more memories, both positive and negative. Each time you get an emotional cue, neurons get activated in the brain and remind you of things associated with that particular emotion. Your learning needs to spark the right emotions to enable a good learning process.

4. Spacing

The final step in the learning process is spacing, including the right time intervals and repetition to embed learning. The human brain has limited cognitive power and overloading information isn't going to ensure learning.

Hermann Ebbinhaus, a German psychologist, came up with the Forgetting Curve. It refers to the period just after learning has taken place when you start to forget what you have learned. According to the findings, you will tend to forget 50–80 per cent of all new information you have learned within a few days after the learning event has occurred. But you tend to recall more and forget less when the learning is spaced across time and repeated during the learning session. According to the same finding, the space-repetition method improves long-term retention by 200 per cent.

When you distribute your learning in spaced stages, it ensures long-term memory, thus making the learning effective and more impactful.

Your role as Change Agent has two parts:

- Work with others to introduce a specific change (Direction and Implementation)
- Increase your skills and capability to lead the change process (Translation)

The translation work incorporates three phases: instruction (what to do), application (how to do it) and meaning (why you do it). It is by progressing your learning through each of these three phases using the AGES principles that you will build your capability to lead change within your organisation.

As a leader of change it is your responsibility to take control of your personal and professional development. There are ample opportunities within your organisation to deepen your knowledge and enhance your skills in relation to leading change.

INSTRUCTION

Instruction work is about developing your overall understanding of the processes involved when leading change. This is about being clear on 'what to do'. It is about breaking the process of change down into smaller parts and learning what needs to be done to achieve success. It about breaking down the LCM and its tools into bite-sized opportunities for learning before applying them to an organisational change.

The learning landscape is evolving faster than ever. It is highly likely that you are distracted, impatient, and overloaded with information. Your expectations, training needs and learning preferences are diverging from the well-beaten paths that your organisation has provided in the past. You are busy; you are multitasking and can work from anywhere.

You know that you need to learn more about leading change, but you are also aware that you need to do this in a way that is aligned to your fast-paced organisational work environment.

That's where bite-sized modules of training are needed to help you achieve your goals. You need bite-sized learning opportunities to better suit your fast-paced work environment.

Instruction

Template Seventeen
Bite Sized Learning

Claire Edwards
Transforming Healthcare

Gaps					
Gap themes					
	Knowledge			**Skills**	
Bite size learning ideas					
Timetable for bite-sized learning					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

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Template 17: Bite-Sized Learning

The approach:

For many individuals bite-size is the right size. Snackable content makes it easier for you to savour every lesson step after step—something that is not possible with lengthy material.

There are many good reasons to start with bite-sized learning:

1. It will improve you psychological engagement

It is no secret that people are easily bored. Once boredom creeps in, getting your attention back on track is difficult, if not futile. Bite-sized learning provides a promising antidote to boredom by increasing your psychological engagement. Instead of spending a long time trying to learn the whole LCM in one sitting, consume short, snappy yet meaningful content by focusing in on one tool, or an element of a tool, at a time.

For example, if you are learning about Situation Change and using the Infinity Loop you may focus on one part of the loop like Exploring the Change. Alternatively, you may go even more bite sized and only focus on ideas generation, which sits within the Designing the Change part of the Infinity Loop.

This approach can prevent mental burnout too. Moreover, it encourages you to process information carefully—not hastily and thoughtlessly consume an overwhelming amount of information.

2. It takes full advantage of your natural energy ebb and flow

It is impossible for you, and of course all humans, to focus on a task for an extended period without pause. That's because of the ebb and flow of our energy. Normally, after 60 to 90 minutes our alertness decreases. During this time, you're likely going to want to start moving or stare out of a window or think about something else—you're likely going to pause.

You operate on a recurrent pattern of activity and rest. That's why undertaking bite-sized learning opportunities throughout your day when you are at your peak energy will lead to successful learning results. This approach speaks directly to your apparent ever-shrinking attention span. Sharp bursts of energy are a good match for the right amount of learning.

Physiologically, your neurons are keen and alert for no more than 20 consecutive minutes. At the end of those 20 minutes, your neurons have gone from fully alert to total collapse, and it takes two to three minutes for those neurons to be completely recovered and back to the total alert state. – Abreena Tompkins

3. Bite-sized chunks of content extend the limits of our working memory

Bite-sized content is easier to digest, understand, and recall. There's no question about this fact. According to George Miller's Information Process Theory, your attention span and short-term memory is limited to processing information in chunks. Splitting up the LCM content into small, manageable sections will make learning the LCM easier to integrate into your long-term memory. Once it is in your long-term memory, you can recall it and transfer the knowledge into future change processes.

4. Bite-sized learning can lead to better learning results and organisational outcomes

It's not just about learning to lead the process of change per se. Creating bite-sized learning opportunities is about getting maximum benefits through minimal input. It's about developing short, yet relevant, chunks of learning based on your need to lead the process of change better on behalf of the organisation. This way, as you are learning, the organisation is immediately benefitting at the same time you are benefitting.

Approach logistics:

1 person	**1 hour**	**Difficulty**	**Bite-Sized Learning Template**	**Populated Bite-Sized Learning Template**

How to deploy the approach:

1. Allow 40–60 minutes to populate the Bite-Sized Learning template using the template descriptions as a guide.
2. Identify areas of the LCM where your understanding or skill set may be lacking.
3. Split the areas into two categories: 'knowledge' and 'skills'.
4. Brainstorm a range of ideas (learning opportunities) on how your knowledge and skill gaps could be developed. Each idea needs to have key learning metrics attached. Each idea needs to be actionable in less than 20 minutes.
5. Prioritise learning opportunities.

Template information:

Use the following descriptions to assist in populating the content of the Bite-Sized Learning template.

Gaps

These are self-identified areas where you need to increase your knowledge or enhance your skills.

Knowledge

This is about the things you know. It relates to areas identified where your knowledge or understanding of a topic could be deepened. You may have a simple or high-level understanding of an approach or concept, but to be a leader of change you need to build a more comprehensive understanding.

Skills

This is about the things you do. It relates to areas identified where you skills could be enhanced. This may be where you have not had to use a particular skill before or where you have only used a skill intermittently. To be a leader of change, you need to have high-level skill execution.

Learning opportunities

Opportunities to learn can come in a range of formats and settings. It is about selecting the best format and setting for you to be able to build your knowledge or enhance your skills in relation to the change process.

Building knowledge and enhancing your skills do not need to occur only when leading the change process. They can occur outside of the change environment. For example, if you need to build your information-capture skills during a report-out process, you could practise this by capturing the content from a team meeting. If you need to build your knowledge about beliefs, you could head online and find a webinar.

Learning opportunities need to be prioritised. You can't learn everything at once, but you can learn it all overtime. It is recommended that you focus on three knowledge and skill priorities every 90 days. This way you can deploy a range of bite-sized learning opportunities to determine your preferred learning method for future learning opportunity cycles. After 90 days, learning opportunities should be evaluated to determine the effectiveness of the bite-sized learning deployed.

Intent of the approach:

This approach is intended to highlight existing knowledge and skills and flag gaps in your baseline knowledge and skills in relation to leading change. Further to this, the approach provides focus for knowledge and skill attainment that is aligned to your busy work environment.

The focus on bite-sized learning within the workplace environment provides you with insights into the barriers and opportunities that may occur when deploying the LCM for a change within your organisation.

APPLICATION

Application work is about transferring your bite-sized learning into practice. This stage is about being clear on 'how to do it'. This is where you apply the tools of the LCM to real organisational change. It is where you are further refining your skills and knowledge of the change process and learning how each LCM tool can best be applied to different situations and contexts.

The application of learning refers to your ability to apply the behaviours, knowledge and skills acquired in one learning situation to another. Overtime, this is what ends up making the change process within an organisation faster, because you can apply what you already know from previous experience.

There are three distinct types of transfer: previous knowledge applied to learning, old learning applied to new, and learning applied to a real-life task. This last one is the one you need to be most interested in as this is what learning about the process of change is meant to lead to.

Application

Template Eighteen
Applied Learning

Claire Edwards
Transforming Healthcare

Applied learning ideas					
Applied learning priorities					
Theme 1		Theme 2		Theme 3	
Timetable for applied learning					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

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Template 18: Applied Learning

The approach:

Applied learning or learning transfer refers to the degree to which you are able to apply your previously learned knowledge and skills (your bite-sized learning) to new situations (the change you are leading).

Researchers who study learning transfer say that there are many barriers to the application of prior learning to new and different situations. Becoming aware of these barriers can help you to overcome these obstacles.

Two key reasons are:

- **The failure to design for transfer**

  The failure to design experiences that integrate across the boundaries of learning into the workplace is a major barrier to transfer. Complex learning requires systematic follow-up support in the form of discussion, coaching, observation and feedback, scaffolding and performance support, to a name a few. If you do not design these processes into the process when you are leading change, you will miss opportunities to enhance your skills and deepen your knowledge.

- **Lack of opportunity to practise the transfer**

  Without opportunities to practise knowledge and skills in new settings, you will have no way to modify your existing schema (theoretical network-like structures for organising information). Not only is practice important, but it needs to occur in non-repetitive and unpredictable situations.

This doesn't mean learning transfer is difficult. It means that you have to consciously build-in opportunities for learning transfer to be able to enhance you skills and deepen your knowledge to better lead change. This will require you to:

- **Establish opportunities for reflection and self-explanation**

  Reflection strategies will encourage you to expand on what you have learnt and to identify further gaps in order to fill them with additional bite-sized learning. Metacognitive strategies like these encourage you to be aware of your own thinking as you are learning. An example of implementing this approach could include providing a reason column in a workshop running sheet where you reflect on why you have sequenced activities in a particular order. After the workshop you would reflect on whether the decisions regarding sequencing achieved the desired outcomes.

- **Use a random practice schedule**

  Research shows that sequencing practice tasks randomly can increase retention and transfer post learning. A typical pattern you could introduce would be to look for micro-application opportunities throughout the organisation. This could be by facilitating a session within a team meeting where a collective decision needs to be made; or applying the Infinity Loop concepts to a change that you would like within your own work practices. A random practice schedule provides a more realistic simulation of the types of critical thinking and quick judgments required throughout a change process.

- **Enhance social learning at work**

  In many organisations, the work itself is a learning experience. Learning transfer and work will become one process as you continuously acquire the knowledge and skills to apply them. Learning transfer is enhanced and improved through social learning. As you embark on leading change throughout the organisation and discuss and problem-solve with other staff members, you are applying your knowledge to new situations. Social learning is where you are able to learn through shared problem-solving and shared practices, as well as from the experiences and mistakes of others.

Approach logistics:

1 person	1 hours	Difficulty	Applied Learning Template	Populated Applied Learning Template

How to deploy the approach:

1. Allow 40–60 minutes to populate the Applied Learning template using the template descriptions as a guide.
2. Brainstorm a range of ideas (applied learning opportunities) on how your knowledge and skill gaps could be applied into the organisational setting. This may include action associated with the change that you are responsible for leading. If you are having difficulties coming up with ideas, discuss potential opportunities with your manager.

Template information:

Use the following descriptions to assist in populating the content of the Applied Learning template.

Applied learning opportunities

Opportunities to learn can come in a range of formats and settings. It is about selecting the best format and setting for you to be able to continue to deepen your knowledge or enhance your skills in relation to the change process.

Building knowledge and enhancing your skills do not need to occur only when leading the change process. They can occur outside of the change environment. Applied learning opportunities should include:

- reflection and self-explanation techniques
- a random practice schedule
- opportunities for social learning.

Applied learning opportunities need to be prioritised. You can't learn everything at once, but you can learn it all overtime. It is recommended that you focus on three areas of applied learning every 90 days. This way you can apply a specific aspect of your learning multiple times within 90 days. After 90 days, applied learning opportunities should be evaluated to determine their effectiveness.

Intent of the approach:

This approach is intended to highlight existing knowledge and skills and flag gaps in your application of acquired knowledge and skills in relation to leading change.

The focus on applied learning within the workplace environment will provide you with insights into the barriers and opportunities that may occur when deploying the LCM within your organisation.

MEANING

Creation of meaning or 'meaning work' is about gaining a better understanding of the intent behind the change process. Once intent is understood, you will be able to incorporate other methods or tools into the LCM without compromising the outcomes. This stage is about being clear on the 'why you do' what you do throughout the change process. Once you are at this stage, leading change becomes mostly automatic. Progression to this level of learning allows you to lead change in any environment.

Meaning work focuses on revealing perspectives to create new 'aha' moments. We have all experienced aha moments—flashes of inspiration that have led us to see reality in new ways; nuggets of wisdom that have radically changed our mindsets; deep insights that have busted through long-held beliefs and conventions.

These are transformative experiences that shift our consciousness and provide a new level of meaning. Your challenge is to create learning experiences that do this for you. Such experiences will rouse the mind, stir powerful emotions, and leave you with a lasting impression. Learning experiences such as these trigger radical changes in thoughts, perspectives, attitudes, and behavioural patterns.

As a leader of change, this is where you acquire the depth of understanding and skills to be a Change Facilitator, Change Coach, or Change Agent. This is also where the playbook becomes a living document that grows with you, not a stone tablet dragging you down. By developing a deeper understanding of the change process, you will be able to add to the playbook. You can insert your favourite tools, resources, and templates. The more you learn, the less likely you are to find yourself in an unsolvable situation throughout the change process.

Meaning

Template Nineteen
Experiential Learning

Claire Edwards
Transforming Healthcare

Experiential learning ideas					
Experiential learning idea categories					
Abstract experience					
Concrete experience					
Active experience					
Reflective experience					
Timetable for experiential learning					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

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Template 19: Experiential Learning

The approach:

As human beings we are shaped by our experiences. For adults, no amount of textbook learning can take the place of the knowledge, clarity and wisdom that come from experience.

In fact, according to the 70-20-10 model, 70% of what we know comes from experience and trying new things. Yet, the real learning happens when we reflect on those experiences.

Professor David Kolb, an educational theorist and psychologist, suggests that knowledge results from the combination of grasping experience and transforming it, with this taking place over four defined stages:

1. Concrete experience

This is the hands-on personal experience that you learn from. It's where you try new things, get stuck in and step out of your comfort zone. Through experience you can learn from your successes and failures.

2. Reflective observation

Next, you need to engage with and reflect on your experiences to glean insights and acquire new knowledge. It is critical not only to create opportunities for experience-based learning but also to provide time and space to encourage reflection. So, at this stage you should be observing alternatives and drawing up pros and cons, recognising how it could have been done differently and learning from others.

3. Abstract conceptualisation

Once you have identified and understand the defining characteristics of your experience, you can decide what you will do differently next time, if anything. This is a time for planning and brainstorming strategies for success.

4. Active experimentation

This final stage is where you get to experiment with your ideas. It's time to test your plan of action in the real world. After all, if you don't try something you won't know if it works. Whatever you are trying to master, at some point you have to put away the textbooks and do it for real. However many times you may have to go back to the drawing board, the taste of success will make it worthwhile.

Approach logistics:

1–50 people | **1–2 hours** | **Difficulty** | **Experiential Learning Template** | **Populated Experiential Learning Template**

How to deploy the approach:

1. Allow 40–60 minutes to populate the Experiential Learning template using the template descriptions as a guide.
2. Brainstorm a range of ideas (experiential learning opportunities) on how your knowledge and skill gaps could be developed through experiences. This may include action associated with the change that you are responsible for leading. If you are having difficulties coming up with ideas, discuss potential opportunities with your manager.

Template information:

Use the following descriptions to assist in populating the content of the Experiential Learning template.

Experiential learning opportunities

Opportunities to learn can come in a range of formats and settings. It is about selecting the best format and setting for you to be able to continue to deepen your knowledge or enhance your skills in relation to the change process.

Building knowledge and enhancing your skills do not need to occur only when leading the change process. Experiential learning opportunities are best applied to the change being implemented within the organisation. Experiential learning opportunities should cycle through the four stages of:

- concrete experience
- reflective experience
- abstract experience
- active experience.

Experiential learning opportunities need to be prioritised. You can't learn everything at once, but you can learn it all overtime. It is recommended that you focus on three experiential learning opportunities every 90 days. After 90 days, experiential learning opportunities should be evaluated to determine their effectiveness.

Intent of the approach:

This approach is intended to continue to support your personal and professional development whilst implementing change within the organisation. Experiential learning means that every opportunity is seen as an opportunity to learn. It is an opportunity to better understand the intent behind the change process and incorporate new understanding and skills throughout the change process.

PUTTING TRANSLATION TO WORK

As a Change Agent you should be ready to learn.

Intellectual growth should commence at birth and only cease at death.

– Albert Einstein

Preparation for translation work

Translation work is best completed over the course of a 12-month period, focusing on 90-day development cycles. It should involve a combination of bite-sized learning, learning transfer, and experiential learning experiences.

As a Change Agent you are responsible for designing your own learning experience. It is your responsibility to take control of your personal and professional development. There are ample opportunities within your organisation to deepen your knowledge and enhance your skills in relation to leading change.

Putting translation to work resources

90 day learning calendar

CONCLUSION

PUTTING THE LEADING CHANGE MODEL TO WORK

So, how will your change story end? The change you lead can succeed, of course, or the change you lead can fail. But there's also often an in-between kind of ending. Some progress was made, but not everything that was being aimed for was achieved. Or the situation changed, and progress was better in a different way than anticipated. Progress but not perfection. That's what happens with change efforts.

Now that you have stuck with it and read until the end it is hoped that you have become so in love with the process of change and seeing things happen that you just want to do it over and over; that you want to become a Change Agent—someone who has the capability and capacity to lead successful change within your organisation.

The thing to remember is that no matter how it ends, you are building your own ability for change, and you are creating a new future. You are contributing to creating a future that will benefit clients, the organisation, and the health and community service eco-system.

B.SCHOOL

At b.school we recognise that a one-day, one-week, or even a one-month change-management training program isn't the best way to build your capability and capacity to lead change.

That's why we created b.school.

b.school has been created to help individuals realise their dream of becoming a Change Agent in the health and community services sectors.

b.school is a 12-month program that uses a range of techniques to assist you to become the best Change Agent for your organisation. During a 12-month period with b.school, you will be exposed to:

- a comprehensive on-boarding process
- a full-day induction
- 10 virtual individual mentoring sessions
- 4 full-day group immersions
- 4 virtual master classes
- access to the curriculum online
- access to a peer-support network
- access to online tools and templates
- plus 24/7 b.school virtual support.

Over that 12-month period you will work on four priority changes for your organisation using the Leading Change Model (LCM). b.school is about building your ability to apply the LCM, irrespective of the scope, scale, or content of change.

At the end of 12 months you will be able to:

- competently lead change within your organisation using the LCM
- integrate new tools and methods into the LCM
- successfully implement situation, belief, and behaviour change
- select changes that will have the greatest chance of successful implementation within the organisation
- make faster and smarter decisions regarding the allocation of time, effort, and resources towards the change
- reframe the beliefs and behaviours of those affected by the change
- assess the impact of the change against technical, human, organisational, and eco-system objectives.

b.school is currently available to individuals in Melbourne, Sydney and Brisbane. Registrations are open all year round with inductions occurring in February, May, August and November. We limit each induction to 10 people to ensure an individualised learning experience.

b.school is also offered as an in-house program for organisations. Organisations interested in running an in-house b.school must have a minimum of 10 participants. Registration for in-house b.school is open all year round.

To find out more about b.school, head to: **www.claire-edwards.com/programs**

To register your interest in b.school, contact: **hello@claire-edwards.com**

Not ready for b.school then why not book an Accelerated Leading Change One-day Workshop for your organisation? This workshop is ideal for organisations wanting to get a better understanding of the Leading Change Model and who want to try some of the LCM tools within a supported environment. Organisations interested in running a one-day Accelerated Leading Change Workshop must have a minimum of 10 participants.

To find out more about the Accelerated Leading Change Workshop, head to: www.claire-edwards.com/programs

To register your interest in the Accelerated Leading Change Workshop, contact: hello@claire-edwards.com

EXTRA RESOURCES

Victorian Healthcare Association Membership

Since 1938, the Victorian Healthcare Association (VHA) has been supporting Victoria's publicly funded healthcare providers to respond to system reform, shape policy, and advocate on key issues.

Membership of the VHA provides:

- advocacy—your voice heard by government and other key stakeholders
- assistance with implementing reforms in aged care, the NDIS, home care, and other sectors
- policy support and thought leadership
- strategic business support
- voting-member access to committees and industry groups.

For more information about how the VHA can assist you and your organisation, head to: **www.vha.org.au**

List of diagrams, templates and resources

ACKNOWLEGDEMENTS

Thanks are due to so many:

- to Kieran Murrihy—if we hadn't started Foresight Lane I would never have started this amazing journey of learning and discovery about how else to do things and what else is possible;
- to Peter Cook and Matt Church, who showed me that writing a book is just one way to genuinely be in-service;
- to Mardi Featherston, whose unbelievable graphic design skills helped make my work look amazingly slick;
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- to Jane Anderson, for her coaching and encouragement to find my voice in the early days;
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- to the entire health and community service sector, whose work continues to inspire me to keep working in the sector;
- to my beautiful sister Kim Henry, whose unwavering love, support and belief in me helped keep me going when things seemed all too hard.

And most of all, thank you to Jarrod Edwards, Madison Edwards and Pippa Edwards—my supports, my loves and my motivations—always encouraging me to be my best and bring my best each and every day to everything I am and everything I do.

TEMPLATES

Template One
Strategic Overview (current state)

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Purpose					
Clients					
Values					
Priority themes					
Metrics					
Goals					
Measures					

Template one: Strategic Overview

Purpose:	To support people with a disability to live an everyday life to their full potential				
Clients:	Individuals with a disability and their families and carers who support them Our funders who support individuals with a disability Our referrers who support individuals with a disability				
Values:	PEOPLE MATTER	NIMBLE WITH FOCUS	IMPACT	ENGAGED	INNOVATIVE
	We are here to be in service, to make a positive impact and difference for the individuals we work with, their families and carers so that they are able to be the best they can be in any given situation.	We are naturally curious and we question everything in the pursuit of achieving our purpose. We consider multiple perspectives and are willing to adjust our views in light of new information. We know the difference we are looking to make and pursue this in partnership with those we work with	We do more of what matters. We are clear on what progress looks like. We are organised and prioritise making sure we work on the most important tasks first that will provide the greatest positive difference for individuals	We are committed to our purpose and achieving our goals. We challenge the status quo, we love learning something new and we value working with others in the pursuit of making a difference to the independence of individuals	We use multiple sources of data, information and intelligence to inform our work. We keep an open mind whilst discerning what knowledge we are looking for. We are not afraid to fail as this contributes towards our ongoing development
Priority themes:	DELIVER THERAPY SERVICES	SUPPORT STAFF FOR IMPACT	BROKER STRONG PARTNERSHIPS	ENHANCE BUSINESS FUNCTIONALITY	
	At Everyday Independence we are committed to delivering the highest quality therapy services that meet individual and funders needs We focus on producing research outputs that influence decisions and actions while achieving tangible outcomes. We are not satisfied unless our research is making its intended difference.	At Everyday Independence we know that our services are only as successful as our staff. We recruit, supervise and support staff to be their best and produce their best We know that building the capability and capacity of our staff enhances our impact for the individuals that we are in service too	At Everyday Independence our success is underpinned by whom we work with and how well we work with them. We understand the importance of building and nurturing relationships. We appreciate the contributions of our partners and know what we need to do to ensure a return on their investment in Everyday Independence We know that generating value for our partners, the business and the NDIS eco-system will contribute towards our longevity	At Everyday Independence we pursue the development of simple systems. We have policies, procedures and processes to produce our best work. We reduce barriers and blockages for all individuals, staff, referrers and funders. We support individuals and our staff through our structures to achieve success. We are smart with our attraction and allocation of resources.	
Metrics:					
Goals	Improve access to services to ensure	Ensure the number and quality/ skills of staff are resourced to match individuals needs	Sustain our engagement score Sustain our impact score	Ensure business viability and profitability to continue to delivery therapy services Increase efficiency (	
Measures	95% of individuals can access services within 20 minutes of our sites	100% staff are trained to fulfil their roles within the business	90% (individuals report that they are happy and confident with their therapy)	Revenue of $30 million	
			85% (individual are attaining their documented gaols)	Business productivity at 70%	

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Template Two
Client Journey

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Phase in the journey									
What are clients doing?									
What questions do clients have?									
What is the clients desired outcome?									
What is the client experiencing?									

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Template two: Client Journey Map
In-take process for NDIS Clients (current state)

Phase in the Journey	Trigger event	Decision point	Awareness		Decision point	Contact							Decision point	In-take			Waiting Period	On-boarding	
What are clients doing?	NDIS funding identifies therapy		External recommendation - word of mouth - research internet	Internal recommendation - previous experience - attendance at an expo		Phone Local Office	Phone 1300 number	Website/ social media enquiry	Populating website form	Visit local office	Direct approach to therapist	Via referrer		Phone 1300 number	Populating website form	Walking into local office		Receive request for more information	Receiving a call from on-boarding - notification about therapist and first appointment
What questions do clients have?	What does this mean? What do I need to do?		What do I need to do? There are so many options. Can they really help? Are they the right fit?			Can you help?	Can you help?	Can you help?	Please get back to me	Can you help?	Can you help?			Will this get me access to the services that I need fast?	Will this get me access to the services that I need fast?	Will this get me access to the services that I need fast?		Why do they need more information? Who is this person asking me for more information?	
What is the clients desired outcome?	I need someone to help me understand		That I understand who you are, how you can help and what I need to do to get access to services			Someone who can help Access to services fast	Someone who can help Access to services fast	Someone who can help	Access to services fast	Someone who can help Access to services fast	Someone who can help Access to services fast			Access to services fast	Access to services fast	Access to services fast		Access to a therapist	Access to a therapist
What is the client experiencing? Happy Moments	I have funding		Finally someone who understands				Someone who can help	Someone answers my enquiry	The process has started					The process is moving	The process is moving	The process is moving		At least someone is looking at my information	Access to a therapist
What is the client experiencing? Pain Points	I am now overwhelmed and unsure what to do		This is a really confusing process			Why am I being referred to website/ 1300 number for more information	Why do I need to receive and email or go to the website to provide information?	I haven't heard back	I don't know where I am in the process. How long until I access a service?	Why am I being referred to website/ 1300 number for more information	Why am I being referred to website/ 1300 number for more information			Why do I need to provide so much information? This email is confusing and I don't want to send my information this way. Why can't they let me know when I will see a therapist?	Why do I need to provide so much information? Why are they asking me for more information? Why can't they let me know when I will see a therapist?	Why do I need to provide so much information? Why can't they let me know when I will see a therapist?		Why do I need to provide so much information? Why are they asking me for more information? Why can't they let me know when I will see a therapist?	
Opportunities for improvement																			

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Template two: Client Journey Map
In-take process for NDIS Clients and Referrers (future state)

Phase in the journey	Trigger event	Decision point	Awareness		Decision point	Contact to gather more information			Decision point	Making an appointment for a therapist			Waiting Period	On-boarding
Action taken	NDIS funding identifies therapy		External recommendation - word of mouth - research internet	Internal recommendation - previous experience - attendance at an expo		Making a phone call enquiry via 1300 number	Making an on-line enquiry	Making a local office or in-person enquiry		Registering to make an appointment via 1300 number (H2H)	Registering to make an appointment via website form (H2T)	Receiving a follow up phone call • requesting more information • advising of on-boarding		Receive notification about therapist and first appointment
What questions do clients have?	What does this mean? What do I need to do?		What do I need to do? There are so many options. Can they really help? Are they the right fit?			Can you help?	Can you help?	Can you help?		Have I provided all of the information required to make an appointment?	Have I provided all of the information required to make an appointment?	Have I provided all of the information required to make an appointment?		
What is the client's desired outcome?	That I know what needs to be done next		That I understand who you are, how you can help and what I need to do to get access to services			Someone who can help Access to services fast	Someone who can help Access to services fast	Someone who can help Access to services fast		Access to services fast	Access to services fast	I understand who you are, how you can help and what I need to do to get access to services		Access to a therapist
What is the client experiencing? Happy Moments	I have funding		Finally a service provider who understands			I accessed advice I have an option of H2H or H2T interaction	I accessed advice I have an option of H2H or H2T interaction	I accessed advice I have an option of H2H or H2T interaction		It was great to talk to a person	It was great to complete the registration on-line	It was great to talk to a person		Access to a therapist
What is the client experiencing? Pain Points	I am now overwhelmed and unsure what to do													
Opportunities for improvement														

Template Three
Service Blueprint

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Phase in the journey									
Front stage actions	Who is taking the action?								
	What action are they taking?								
Back stage actions	Who is taking the action?								
	What action are they taking?								
Processes	What infrastructure is used?								
	What policy, procedure or plan is being followed?								
	What supporting systems are being used?								
Performance data									

Template three: Service Blueprint
Current State – In-take process for NDIS Clients

Journey		Trigger event		Awareness		Contact								In-take				On-boarding	
Backstage Process		Communication to sector about role of therapy in NDIS Plan	Decision point	Promotion of Everyday Independence services	Decision point	Call received at Local Office	Call received via 1300 number	Website/ social media enquiry arrives in email in-box	Populated website form notification from ABCCare	Individual attends a local office	Individual approaches a therapist	Contact from a referrer	Decision point	Call received via 1300 number	Populated website form notification from ABCCare	Individual attends a local office and staff member populates website form with individual	Waiting Period	Insufficient information from in-take process follow up with individual	Notify individual about therapist and first appointment
Individuals involved	Administration in-take						X	X	X			See referrer journey map and service blueprint		X	X	X			
	Administration on-boarding																	X	X
	Therapist			X						X	X								
	Local Office Staff	X		X		X				X						X			
	Other	X		X															
Channel	Phone			X		X	X							X				X	X
	Email	X		X														X	
	Letter			X														X	
	On-line	X		X				X	X						X				
	In-person	X		X						X	X					X			
	Other	X		X															
Infrastructure	Website	X		X			X	X	X	X	X			X	X	X		X	
	ABCCare						X		X					X	X	X		X	X
	Manual Process	X		X			X							X				X	X
	Other	X		X			X			X	X			X				X	X
Supporting documentation	Policy																		
	Procedure	Communications Plan		Communications Plan Marketing Plan Signage at locations		Refer individual to website or 1300 number	In-take process for new individual registration, email sent to individual directing them through process, manual upload into ABCCare	In-take action enquiry via email address	In-take process for new individual registration direct into ABCCare	Refer individual to website or 1300 number	Refer individual to website or 1300 number			In-take process for new individual registration, email sent to individual directing them through process, manual upload into ABCCare	In-take process for new individual registration direct into ABCCare	In-take process for new individual registration direct into ABCCare		Contact individual for additional information, manual upload into ABCCare	Generate service level agreement for first appointment
	Other																		
Enabling structure	HR																		
	Finance			X															X
	IT support	X		X			X		X		X			X	X	X		X	X
	Other	X		X														X	X
Opportunity for improvement																			

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Template three: Service Blueprint
Future State – In-take process for NDIS Clients and Referrers

Journey		Trigger event	Decision point	Awareness	Decision point	Contact to gather more information			Decision point	Making an appointment for a therapist			Waiting Period	On-boarding
Action taken		Communication to sector about the role of therapy in NDIS Plan		Promotion of Everyday Independence services		Receive a phone call enquiry via 1300 number	Receive an on-line enquiry	Receive a local office or in-person enquiry		Request for an appointment via 1300 number (H2H)	Request for an appointment via website form (H2T)	Follow up phone call • requesting more information • advising of on-boarding		Notification about therapist and first appointment
Individuals Involved	Administration in-take					X	X			X	X	X		
	Administration on-boarding													X
	Therapist							X						
	Local Office Staff							X						
	Other	X		X				X						
Channel	Phone					X		X		X		X		X
	Email	X		X										X
	Letter	X		X										
	On-line	X		X			X				X			
	In-person	X		X				X						
	Other	X		X										
Infrastructure	Website	X		X			X	X		X	X	X		
	Enrite Care						X	X		X	X	X		X
	Manual Process	X		X		X		X						
	Other	X		X										
Supporting documentation	Policy													
	Procedure	Communication Plan		Communication Plan Marketing Plan		Action enquiry via ABCCare@ email address Action enquiry via return phone call	Action enquiry via ABCCare @ email address Action enquiry via return phone call	Action enquiry via ABCCare @ email address Action enquiry via return phone call		In-take process for new individual registration direct into ABCCare Generate Service Agreement	In-take process for new individual registration direct into ABCCare Generate Service Agreement	Follow up phone call In-take process for new individual registration direct into ABCCare Generate Service Agreement		Notification to advise of therapist and first appointment
	Other													
Enabling structure	HR													
	Finance									X	X	X		
	IT support	X		X		X	X	X		X	X	X		X
	Other	X		X										
Opportunity for improvement														

Template Four
The Context Map (future state)

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Themes	Political	Economic	Technological	Market Needs	Trend 1	Trend 2	Trend 3	Uncertainties
Market								
Geographic								
Sector								
Industry								
Society								

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Template four: The Context Map

Themes	Political	Economic	Technological	Market needs	Trend 1 - workforce	Trend 2 – business models	Trend 3	Uncertainties
Market		Individuals are increasingly investing more of their own money into therapy services Families making financial decisions for loved ones eligible for NDIS services	Cohort of market prefer 24/7 on-line access to information/ booking systems More on-line comparison websites emerging where clients can comment on quality of services provided	Increased demand for therapy services People wanting a one stop shop to access all of their care needs Increased use of brokerage services to assist in accessing services			What the needs of the local market is and if we have the workforce to meet demands and needs?	
Geographic	Local Government looking to reduce its role in disability service and aged care service provision			Increased number of brokerage services moving into the geographic area Population growth in the local area	Lack of local opportunities for education relevant to NDIS service provision	New market entrants	Which market cohort to deliver services too?	
Sector		Government continuing to drive individualised care and funding following the individual instead of lump sum allocation to organisations More funding opportunities in preventative health Cost to maintain out-dated legacy IT systems to deliver services	Employees can now work for remote employers due to use of on-line platforms for matching clients and service providers		Private practice not bound by the same workforce funding constraints as public sector	Private practice agile and adapting and creating new business model to capitalise on new funding envelopes		
Industry	More organisations and service providers are delivering service to NDIS clients		Increased use of telehealth to provide services to remote locations Increased use of cloud based applications New sensor technology being used to support individualised care		Workforce continuing to age Competition across the healthcare workforce Lack of willingness to change	Increased use of cloud based technology to support client and workforce management		
Society	Election year current government likely to change		Increased client expectations regarding service provision that is more closely aligned to their experiences in other aspects of their life	People wanting to access services in a range of ways (in home, on the go) shift away from centre based care	Remuneration levels for staff			

Template Five
Change Strategy

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Purpose					
Market					
Values					
Priority themes					
Metrics					
Goals					
Measures					

Template five: Change Strategy
Change area of focus – In-take process for NDIS Clients and Referrers (future state)

Purpose:	To simplify and engender confidence in accessing therapy services				
Market:	Individuals with a disability and their decision makers who support them Our referrers who support individuals with a disability Our ABCCare On-boarding team				
Values:	A CONSISTENT APPROACH	TRANSPARENT TO ALL	TIMELY RESPONSES	EVERY ENQUIRY IS VALUED	
	We follow our processes and procedures each and every time. We identify when there needs to be changes to our processes and procedures and adjust accordingly	We share our knowledge and wisdom freely. We understand what personal information can be shared and with who, we respect all individuals rights to privacy.	We respond within our benchmarked timeliness and continually strive to surprise by exceeding expectations. We provide high quality, timely advice and information throughout the in-take system	We learn through others questions, it helps broaden and deepen our knowledge. We may not have the answer to every enquiry but we will endeavour to connect with those that do	
Priority themes:	STREAMLINE OUR PROCESSES	DEFINE ROLES AND RESPONSIBILITIES	SIMPLIFY OUR DOCUMENTATION	RESPOND TO ALL ENQUIRIES	
	At ABCCare every individual that interacts with our in-take system will have the same experience irrespective of method, mode or place of contact We will endeavour to maximise the use of technology where it enhances the individuals experience and increases the efficiency and effectiveness of staffs time and effort	At ABCCare staff are clear on their roles and responsibilities and have been appropriately trained and supported to build their capability and capacity	At ABCCare we will design all of our documentation to be in plain English and easy to read, understand and complete We only ask for information that can and will be used	At ABCCare every enquiry is valued and individuals can expect a clear, timely and accurate response. We use enquires as an opportunity to learn and will use the collective data to inform future decision making within the business	
Metrics:					
Goals	Sustain our engagement score Increase efficiency	Ensure the number and quality/ skills of staff are resourced to match individuals needs	Sustain our engagement score Increase efficiency	Sustain our engagement score	
Measures	90% of individuals report that they are happy and confident with services provided	100% of staff are trained to fulfil their roles within the business	90% of individuals report that they are happy and confident with services provided	90% of individuals report that they are happy and confident with services provided	
	Business productivity is sustained at 70%		Business productivity is sustained at 70%		

Template Six
Spot the Difference (transition state)

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Priority themes					
Priority actions					
Review					
Maintain					
Improve					
Conclude					
Develop					

Template six: Spot the Difference

Change area of focus – In-take process for NDIS Clients and Referrers (transition state)

Priority themes	Streamline our processes At ABC every individual that interacts with our in-take system will have the same experience irrespective of method, mode or place of contact We will endeavour to maximise the use of technology where it enhances the individuals experience and increases the efficiency and effectiveness of staffs time and effort	Defined roles and responsibilities At ABC staff are clear on their roles and responsibilities and have been appropriately trained and supported to build their capability and capacity	Simplify our documentation At ABC we will design all of our documentation to be in plain English and easy to read, understand and complete We only ask for information that can and will be used	Respond to all enquires At ABC every enquiry is valued and individuals can expect a clear, timely and accurate response. We use enquires as an opportunity to learn and will use the collective data to inform future decision making within the business
Priority actions				
Review		Review and communicate the roles and responsibilities of the In-take Team (including generation of service agreements) Review the staffs skills matrix to understand where investment in training or recruitment may need to occur (include a gap analysis)		Review existing enquiry data to understand the type, nature and source of enquiries – looking at phone, on-line, face-to-face
Maintain				
Improve	Improve the on-line enquiry process by directing enquiries through to one collection portal email address	Improve and communicate the In-take team staff structure (including new position descriptions for staff and staff supervision processes)	Improve the website form to: • align with the Phone in-take process for streamlined data entry • incorporate all data points necessary for the in-take team to generate a service level agreement • ensure it is in plain English and is easy to read, understand and complete	Improve the enquiry process by creating a dual point of enquiry (on-line or via 1300 number) for all new individuals and referrers
Conclude				
Develop	Develop scripts for staff to re-direct in-take enquiries to the in-take team (noting preference for H2H or H2T transactions) Develop scripts for staff to re-direct new individual registrations to the in-take team (noting preference for H2H or H2T transactions) Develop a quality assurance process for in-take (including the introduction of spot audits for quality control)	Develop formal feedback loop between In-take team and on-boarding team		Develop FAQ, website content and explore the potential for automated responses for all on-line enquiries Develop a set of KPIs to monitor enquiry timeliness and quality Develop a process to use Net Promoter Score (our equivalent application) to monitor individual and referrer satisfaction levels with the enquiry and in-take process

Template Seven
Transition Plan (transition state)

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Priority themes	Priority actions	Timeline	Responsibility	Metrics	
				Goal(s)	Measures(s)

Template seven: Transition Plan

Change area of focus – In-take process for NDIS Clients and Referrers (transition state)

Priority Themes		Priority Actions	Timeline	Responsibility	Operational measures					Metrics
					YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	
Streamline our processes	At ABC every individual that interacts with our in-take system will have the same experience irrespective of method, mode or place of contact We will endeavour to maximise the use of technology where it enhances the individuals experience and increases the efficiency and effectiveness of staffs time and effort	Develop scripts for staff to re-direct in-take enquiries to the in-take team (noting preference for H2H or H2T transactions)	Q1	Staff A	55%	60%	65%	70%	70%	Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided) Increase efficiency (70 % productivity) of business operations
		Develop scripts for staff to re-direct new individual registrations to the in-take team (noting preference for H2H or H2T transactions)								
		Develop a quality assurance process for in-take (including the introduction of spot audits for quality control)								
		Improve the on-line enquiry process by directing enquiries through to one collection portal email address								
Defined roles and responsibilities	At ABC staff are clear on their roles and responsibilities and have been appropriately trained and supported to build their capability and capacity	Review and communicate the roles and responsibilities of the In-take Team (including generation of service agreements)								Ensure 100% of staff are trained to fulfil their roles within the business
		Review the staffs skills matrix to understand where investment in training or recruitment may need to occur (include a gap analysis)								
		Improve and communicate the In-take team staff structure (including new position descriptions for staff and staff supervision processes)								
		Develop formal feedback loop between In-take team and on-boarding team								
Simplify our documentation	At ABC we will design all of our documentation to be in plain English and easy to read, understand and complete We only ask for information that can and will be used	Improve the website form to: • align with the Phone in-take process for streamlined data entry • incorporate all data points necessary for the in-take team to generate a service level agreement • ensure it is in plain English and is easy to read, understand and complete								Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided) Increase efficiency (70 % productivity) of business operations
Respond to all enquiries	At ABC every enquiry is valued and individuals can expect a clear, timely and accurate response. We use enquires as an opportunity to learn and will use the collective data to inform future decision making within the business	Review existing enquiry data to understand the type, nature and source of enquiries – looking at phone, on-line, face-to-face								Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided)
		Improve the enquiry process by creating a dual point of enquiry (on-line or via 1300 number) for all new individuals and referrers								
		Develop FAQ, website content and explore the potential for automated responses for all on-line enquiries								
		Develop a set of KPIs to monitor enquiry timeliness and quality								
		Develop a process to use Net Promoter Score (our equivalent application) to monitor individual and referrer satisfaction levels with the enquiry and in-take process								

Template Eight
Explore the Change

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We know that…	Enter the identified problem to be solved, gap to be filled or opportunity to be leveraged
Therefore we believe that if we…	Enter priority action
Then…	Enter metrics, include goal(s) and measure(s)
This hypothesis should…	☐ Remain the same
	☐ Be adjusted to…
	☐ Be replaced with…

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Template eight: Explore the Change

Example one: In-take process for NDIS Clients and Referrers

We know that….	Enter the problem to be solved, gap to be filled or opportunity to be leveraged
	Each individual be it a client, carer or refer has a different experience and is navigated along a different journey each and every time they contact ABC to make an enquiry to access therapy services
Therefore we believe that if we….	Enter the priority action
	Develop scripts for staff to re-direct in-take enquiries to the centralised in-take team (noting preference for H2H or H2T transactions)
Then we will….	Enter metrics, include goal(s) and measure(s)
	Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided) Increase efficiency (70 % productivity) of business operations
This hypothesis should…	X Remain the same
	Be adjusted to…..
	Be replaced with……

Example two: In-take process for NDIS Clients and Referrers

We know that….	Enter the problem to be solved, gap to be filled or opportunity to be leveraged
	Data shows that some enquiries are taking up to one week to receive a response with some email enquiries not being responded to or those making an enquiry being re-directed around ABC trying to access a response
Therefore we believe that if we….	Enter the priority action
	Develop a set of KPIs to monitor enquiry timeliness and quality
Then we will….	Enter metrics, include goal(s) and measure(s)
	Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided)
This hypothesis should…	Remain the same
	X Be adjusted to….. We believe that if we develop a set of KPIs to monitor avenues of enquiries, timeliness and quality we will sustain our engagement score at 90% (individuals report that they are happy and confident with the services provided)
	Be replaced with……

Template Nine
Design the Change

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Idea generation

Idea categorisation

H1				H2				H3			

Idea options

Desirable			Feasible			Viable			Yes, we can!		

Prioritised solutions

1.	
2.	
3.	
4.	

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Template nine: Design the Change

Change hypothesis being designed: Develop scripts for staff to re-direct in-take enquiries to the centralised in-take team

Idea generation

Have scripts laminated to PC and telephones	Produce short video example for staff to watch	Run role play in staff meetings	Have the script appear on the home screen of PC as screen saver	Have scripts on the back of access cards	Hang script on the back of toilet doors
Have a mini test to see if staff remember the script	Have script as a voice option when people call in	Hang script in visible staff areas	Have ipad located at each site that provides individuals with script and re-directs them		

Idea categorisation

Have scripts laminated to PC and telephones	Have script as a voice option when people call in	Have a mini test to see if staff remember the script	Produce short video example for staff to watch	Have ipad located at each site that provides individuals with script and re-directs them	
Hang script in visible staff areas	Have the script appear on the home screen of PC as screen saver	Run role play in staff meetings			
Have scripts on the back of access cards	Hang script on the back of toilet doors				
H1		H2		H3	

Idea options

Hang script in visible staff areas	Have script as a voice option when people call in	Produce short video example for staff to watch	Have scripts laminated to PC and telephones
Have the script appear on the home screen of PC as screen saver	Have ipad located at each site that provides individuals with script and re-directs them		Have scripts on the back of access cards
Have a mini test to see if staff remember the script			Hang script on the back of toilet doors
Run role play in staff meetings			
Desirable	Feasible	Viable	Yes, we can!

Prioritised solutions

1.	Have scripts laminated to PC and telephones
2.	Have scripts on the back of access cards
3.	Hang script on the back of toilet doors

Template Ten
Decide on the Change

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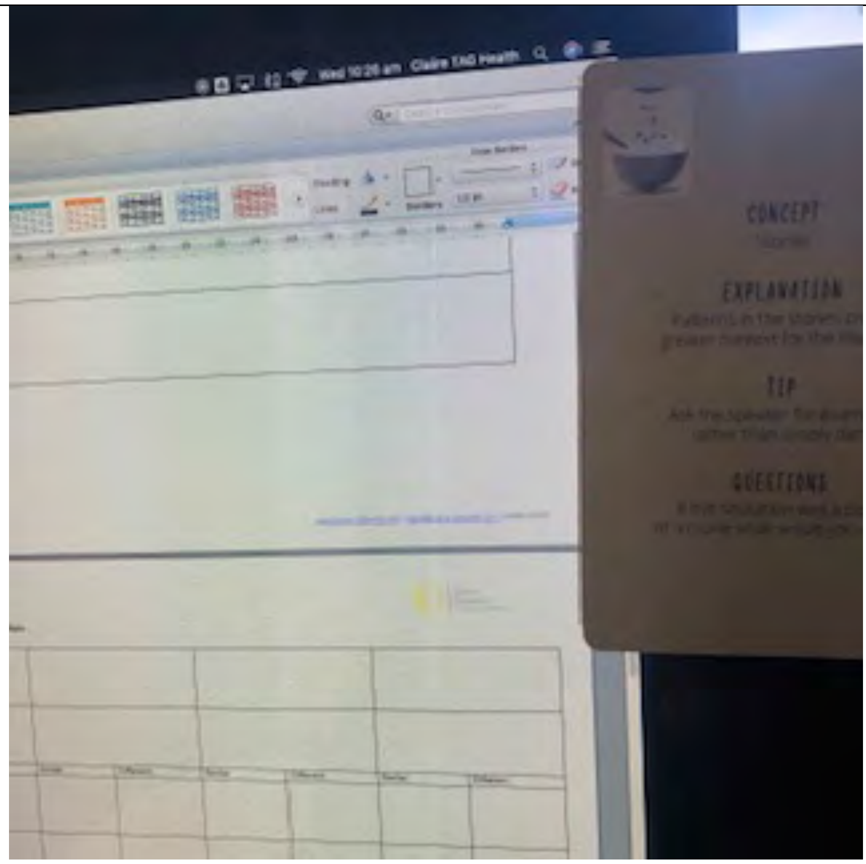
The Change		Decision Maker Feedback
Change hypothesis		
Change idea		
Change prototype		
Change pitch		

Template ten: Decide on the Change

Change idea being provided to the organisational decision maker

Change hypothesis	**We believe that if we:** Develop scripts for staff to re-direct in-take enquiries to the in-take team (noting preference for H2H or H2T transactions) **We will:** Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided) and increase efficiency ((business operations maintaining 70%)
Change idea	**We can achieve this by:** Having scripts laminated to staffs computers and telephones
Change prototype	
Change pitch	We have noticed and it has been reported that each individual be it a client, carer or refer has a different experience and is navigated along a different journey each and every time they contact ABCCare to make an enquiry to access therapy services. This inconsistent approach sees: • Incorrect information being provided by staff who are unaware of the in-take process • Impacts in the recruitment of new clients into the service • Delays in service provision for clients • Clients, careers and referrers having a poor experience To ensure a consistent approach to in-take each and every time irrespective of enquiry point we have produced a script that can be used by all staff members to re-direct all enquiries through to the centralised in-take team. This script is brief and provides clients, carers and referred with the option to access information using technology (H2T) or access information directly from a person (H2H). To assist staff with implementing this process the scripts have been attached to all computers and telephones across the organisation, including mobiles. We know how important first impressions are and we believe that clients, carers and referrers will report that they are happy and confident with the in-take process as a result of implementing this idea.

Template Eleven
Understanding Beliefs

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Name the belief	I believe that...	I believe that...	I believe that...
Unpack the belief			
Experience Describe your experience			
Focus What did you notice during your experience?			
Narrative How did you make sense of your experience?			
Conclusion What did this experience mean?			

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Template eleven: Understanding Beliefs

Change idea approved by the organisational decision maker: Introduce the net promoter system to evaluate client, career and referrer satisfaction levels with the in-take process (individual response)

Name the belief	I believe that …	I believe that …	I believe that …
	People will not use the system	The organisation will not do anything with the information	Receiving a text to comment on an experience is annoying
Unpack the belief			
Experience Describe your experience	I have received these types of mini surveys asking how I would rate my experience and why I have rated it this way for a range of services that I have accessed	When the organisation has implemented similar systems, we started to receive a heap of complaints and the organisation did nothing with the information	I have found that if you don't respond you continue to receive multiple text messages asking for your feedback. If I wanted to respond I would have responded to the first message
Focus What did you notice during your experience?	The process isn't personalised and it feels like a tick box exercise that everyone organisation jumping on board with	Why ask people to contribute if you don't want to hear what they have to say and aren't going to change anything	It
Narrative How did you make sense of your experience?	I can't believe that we are going to implement this. We don't really care what individuals have to contribute, if we did we would make it more personalised	The organisation doesn't really want to make improvements it just wants to feel better about what it is currently doing	It is annoying to receive multiple text messages
Conclusion What did this experience mean?	I am not going to send out the messages to everyone	I am not going to gather and analyses the information	I am not going to set up the reminder system

Template eleven: Understanding Beliefs

Change idea approved by the organisational decision maker: Introduce the net promoter system to evaluate client, career and referrer satisfaction levels with the in-take process (organisational response)

Name the belief	The organisation believes that …	The organisation believes that …	The organisation believes that …
	People will us the system	The organisation will make improvements based on the feedback received from clients, carers and referrers	Receiving a text is a convenient, timely way to provide immediate experiential feedback
Unpack the belief			
Experience Describe your experience	Other areas within the organisation have implemented a similar system successfully to obtain client, carer and referrer feedback	The organisation will use the data from the net promoter system to make improvements to the in-take process	Brief immediate feedback directly after an experience provides greater insight than a lengthy survey distributed months after an experience
Focus What did you notice during your experience?	Feedback levels increased by 50% compared to surveys and other techniques used in the past	The organisation values feedback from individuals who have had a direct experience with the in-take process	The amount of feedback will increase as it is more convenient and relevant to provide feedback immediately after an experience
Narrative How did you make sense of your experience?	The ease and simplicity of responding to two questions directly after an experience means it is relevant and fast to complete	The organisation wants to make improvements and better understand what it is doing well	Delays in the feedback process may dilute the quality of feedback provided
Conclusion What did this experience mean?	Client, careers and referrers will appreciate the simplicity of being able to provide the organisation with timely feedback	The information will be gathered, analysed and acted upon	Asking for feedback in the moment provides insightful feedback

Template Twelve
Shaping Beliefs

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Your belief						
Organisational belief						
	Similar	Different	Similar	Different	Similar	Different
Experience						
Focus						
Narrative						
Conclusion						
Which belief appears to be more plausible?						

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Template twelve: Shaping Beliefs

Change idea approved by the organisational decision maker: Introduce the net promoter system to evaluate client, career and referrer satisfaction levels with the in-take process

Your Belief	People will not use the system		The organisation will not do anything with the information		Receiving a text to comment on an experience is annoying	
Organisation Belief	People will use the system		The organisation will make improvements based on the feedback received from clients, carers and referrers		Receiving a text is a convenient, timely way to provide immediate experiential feedback	
	Similar	Different	Similar	Different	Similar	Different
Experience		X	X		X	
Focus		X	X			X
Narrative		X		X	X	
Conclusion		X		X	X	
Which belief appears to be more plausible?	Both beliefs are plausible however due to the levels of difference belief change here will require increased investment of time, energy and effort		Both beliefs are plausible however due to the balance between similarity and difference belief change here will require some investment of time, energy and effort		Both beliefs are plausible however due to the levels of similarity belief change here may be simpler	

Template Thirteen
Reframing Beliefs

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Difference						
Experience What experience needs to occur?						
Focus What is required for attention to be shifted?						
Narrative What is required for a new narrative to be conceivable?						
Conclusion What is required for an alternative conclusion to be reached?						

Template thirteen: Reframing Beliefs

Change idea approved by the organisational decision maker: Introduce the net promoter system to evaluate client, career and referrer satisfaction levels with the in-take process

Difference	People will not use the system People will use the system	The organisation will not do anything with the information The organisation will make improvements based on the feedback received from clients, carers and referrers	Receiving a text to comment on an experience is annoying Receiving a text is a convenient, timely way to provide immediate experiential feedback
Experience What experience needs to occur?	Set a defined period of time in which the system will be tested and establish quantitative measures of user up take		
Focus What is required for attention to be shifted?	Collection of data to demonstrate usage Approach for feedback needs to feel more personalised this may require a combination of text message requests and phone call requests for feedback using the same structure		Collect input from participants to determine the appropriate level of reminders
Narrative What is required for a new narrative to be conceivable?	The organisation develops a duel process for feedback gathering	An improvement process is in place and understood by all staff	
Conclusion What is required for an alternative conclusion to be reached?	The organisation supports two processes for feedback gathering	Staff participate in improvement processes and improvements are communicated to all staff	

Template Fourteen
Deploy the Change

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Change hypothesis					
Change idea					
Timetable for change					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

Template fourteen: Deploy the Change

Change idea being deployed: Having scripts laminated to staffs computers and telephones

Change hypothesis	**We believe that if we:** Develop scripts for staff to re-direct in-take enquiries to the in-take team (noting preference for H2H or H2T transactions) **We will:** Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided) and increase efficiency ((business operations maintaining 70%)				
Change idea	**We can achieve this by:** Having scripts laminated to staffs computers and telephones				
Timetable for change					
Days	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Set-up time for in-take and communications team to meet Email sent to asset management to determine how many laptops, PCs and phones are at each service site		Printing and laminating prices and timeframes accessed inline with procurement processes	In-take team meet with communication team to develop script and draft email for site leaders regarding implementation and current state baseline metrics	Script and site leader email sent to organisational decision maker for feedback and approval
Week 2			Script and email approved Email sent to site leaders	Script sent for printing and laminating in PC size and phone sizes	Site leaders initiate influence loop process
Week 3	Staff complete influence loop process over the course of the week			Scripts sent to site leaders	Site leaders develop individualised site implementation process based on influence loop data Site leaders initiate impact loop process
Week 4					Site leaders work with individuals based on impact loop data
Week 5	Idea deployed				Staff feedback sought based on each individuals impact loop data
Week 6					
Week 7					Staff feedback sought based on each individuals impact loop data
Week 8					
Week 9					Staff feedback sought based on each individuals impact loop data
Week 10					
Week 11					Staff feedback sought based on each individuals impact loop data
Week 12					
Week 13	Site Leaders prepares for input into the evaluation process				Staff feedback sought based on each individuals impact loop data
Evaluate					

Template Fifteen
Small Steps

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Impact	This change impacts my day to day operations	This change impacts how I use technology to perform work tasks	This change impacts my roles and my necessitate creating or removing tasks from my role	This change impacts my basic fabric and beliefs	This change impacts the knowledge, skill and abilities I have to perform my work	This change impacts my patterns of communication and information flow	This change impacts the formal and informal guidelines for my daily work activities
Action I currently do this…							
Outcome I now need to achieve this…							
Behaviour Therefore I will now need to do this…							
Trigger The trigger that will remind me of my new behaviour is…							
Celebration I will celebrate thinking about or doing the new behaviour by…							

Template fifteen: Small Steps

Change idea being deployed: Having scripts laminated to staffs computers and telephones

Impact	This change impacts my day to day operations	This change impacts how I use technology to perform work tasks	This change impacts my roles and may necessitate creating or removing tasks from my role	This change impacts my basic fabric and beliefs	This change impacts the knowledge, skill and abilities I have to perform my work	This change impacts my patterns of communication and information flow	This change impacts the formal and informal guidelines for my daily work activities
I currently do this …	Try to provide information at point of enquiry		I will no longer need to provide in-take advice		I have learnt about the in-take process so that I can provide clients, carers and referrers with advice		
Outcome I now need to achieve this …	I need to understand the preferred method of communication H2T or H2H and connect the individual to the website or the 1300 number		I will need to provide different advice		I can still learn about the in-take process to improve my own work		
Behaviour Therefore I will now need to do this …	Not provide advice and make a referral based on the individuals preference		Not provide advice and make a referral based on the individuals preference		No change required		
Trigger The trigger that will remind me of my new behaviour is …	Every time the phone rings I am going to look at the organisational script on my PC		Every time the phone rings I am going to look at the organisational script on my PC		No change required		
Celebration I will celebrate when I think and complete the new behaviour by …	Saying: "Another happy client"		Saying: "Another happy client"		No change required		

Template Sixteen
Evaluate the Change

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Change hypothesis	Metrics						Recommendations
	Goal(s)	Measure(s)	Data source	Data	Analysis	Data indicator	

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Template sixteen: Evaluate the Change

Change idea being deployed: Having scripts laminated to staffs computers and telephones

<table>
<tr><th>Change hypothesis</th><th colspan="6">Metrics</th><th>Recommendations</th></tr>
<tr><td rowspan="3">We believe that if we: Develop scripts for staff to re-direct in-take enquiries to the in-take team (noting preference for H2H or H2T transactions)

We will: Sustain our engagement score at 90% (individuals report that they are happy and confident with services provided) and increase efficiency (business operations maintaining 70%)

We can achieve this by: Having scripts laminated to staffs computers and telephones</td><th>Goal</th><th>Measure</th><th>Data source</th><th>Data</th><th>Analysis</th><th>Data indicator</th><td rowspan="3">The introduction of laminated scripts attached to staffs computers and telephones has increased stakeholder engagement levels by 5% overall in the in-take process. It should be noted that there has been varying levels of improvement at individual sites.

Whilst enquiries have increased on the 1300 number and in the on-line system the average processing time has increased by an average of 2 minutes.

It is recommended that this process be sustained and that a further 90-day implementation cycle be completed prior to considering any alternative implementation ideas.</td></tr>
<tr><td>Sustain our engagement score</td><td>90% of individuals report that they are happy and confident with services provided</td><td>Net promoter score and commentary from in-take</td><td>Raw data</td><td>Over the last 90 days the average net promoter score was 4 stars

Qualitative feedback relating directly to enquiry re-direction equalled less than 2% of comments

Breakdown by sites provided different results</td><td></td></tr>
<tr><td>Increase efficiency</td><td>Business productivity is sustained at 70%</td><td>1300 number enquiries database (in-take only)

On-line enquires database (in-take only)</td><td>Raw data</td><td>The number of in-take call received via the 1300 number increased by 25% (H2H data)

The number of on-line enquiries increased by 30% (H2T data)

Breakdown by site provided different results

Processing time for in-take enquires averaged 8 minutes per enquiry</td><td></td></tr>
</table>

Template Seventeen
Bite Sized Learning

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Gaps					
Gap themes					
Knowledge			Skills		
Bite size learning ideas					
Timetable for bite-sized learning					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

Template seventeen: Bite Sized Learning

Gaps					
Taking notes during a report out session		Knowing ideal group numbers to enable everyone to contribute		Knowledge about beliefs	
Understanding where to access context mapping inputs		Staying in facilitation instead of being drawn into participation		How to create artefacts	
Gap themes					
Understanding where to access context mapping inputs	Knowledge about beliefs		Taking notes during a report out session	Knowing ideal group numbers to enable everyone to contribute	Staying in facilitation instead of being drawn into participation
			How to create artefacts		
Knowledge			Skills		
Bite sized learning ideas					
Practice capturing information in a staff meeting as if you were gathering it for a report out		Present meeting notes back to staff using different templates and tools		When working with others see what group sizes feel most comfortable for yourself	
Listen to a podcast about beliefs		Read articles about beliefs		When meeting with another person try facilitating the conversation	
Try using the context mapping template		Practice drawing pictures instead of using words to take notes			
Timetable for bite-sized learning					
	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Read an article about beliefs		When meeting with another person try facilitating the conversation		
Week 2		Try using the context mapping template	When meeting with another person try facilitating the conversation		
Week 3					Listen to a podcast about beliefs
Week 4				Practice capturing information in a staff meeting as if you were gathering it for a report out	Present meeting notes back to staff using different templates and tools
Week 5	Practice drawing pictures instead of using words to take notes		When meeting with another person try facilitating the conversation		
Week 6	Read an article about beliefs		When meeting with another person try facilitating the conversation		
Week 7		When working with others see what group sizes feel most comfortable for yourself			
Week 8				Practice capturing information in a staff meeting as if you were gathering it for a report out	Present meeting notes back to staff using different templates and tools
Week 9		Try using the context mapping template	When meeting with another person try facilitating the conversation		
Week 10	Practice drawing pictures instead of using words to take notes		When meeting with another person try facilitating the conversation		
Week 11				When working with others see what group sizes feel most comfortable for yourself	
Week 12	Read an article about beliefs				
Week 13					Listen to a podcast about beliefs
Evaluate					

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Template Eighteen
Applied Learning

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Applied learning ideas					
Applied learning priorities					
Theme 1		Theme 2		Theme 3	
Timetable for applied learning					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

Template eighteen: Applied Learning

Applied learning ideas		
Idea generation	Idea prioritisation	Design the change
Applied learning opportunities		
Use inspiration cards to promote idea generation	Use dot voting system	Facilitate a design the change session for another team
	Use money and staff allocation system	Run a lunch and learn about the design the change process
	Pitch off process	
Theme 1	Theme 2	Theme 3

Timetable for applied learning					
	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1				Use inspiration cards to promote idea generation Use dot voting system	Reflection
Week 2					
Week 3					
Week 4		Run a lunch and learn about the design the change process	Reflection		
Week 5				Use inspiration cards to promote idea generation Use money and staff allocation system	Reflection
Week 6					
Week 7					
Week 8	Facilitate a design the change session for another team Pitch off process	Reflection			
Week 9					
Week 10					
Week 11					
Week 12		Run a lunch and learn about the design the change process	Reflection		
Week 13					
Evaluate					

Template Nineteen
Experiential Learning

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Experiential learning ideas					
Experiential learning idea categories					
Abstract experience					
Concrete experience					
Active experience					
Reflective experience					
Timetable for experiential learning					
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					
Week 6					
Week 7					
Week 8					
Week 9					
Week 10					
Week 11					
Week 12					
Week 13					
Evaluate					

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Template nineteen: Experiential Learning

Experiential learning ideas					
Co-facilitate sessions		Facilitate session within organisation		Facilitate sessions for partner organisation	
Experiential learning idea categories					
Concrete experience	Facilitate direction process for team A		Facilitate implementation process for team A		
Reflective experience	Reflective observation of direction facilitation process		Reflective observation of implementation facilitation process		
Abstract experience	Abstract conceptualisation of the direction process		Abstract conceptualisation of the implementation process		
Active experience	Facilitate direction process for team B		Facilitate implementation process for team B		
Timetable for experiential learning					
	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1		Facilitate direction process for team A	Reflective observation of direction facilitation process	Abstract conceptualisation of the direction process	
Week 2					
Week 3					
Week 4	Facilitate implementation process team A	Reflective observation of implementation facilitation process	Abstract conceptualisation of the implementation process		
Week 5					
Week 6					
Week 7					
Week 8					
Week 9	Facilitate direction process using new techniques for team B	Reflective observation of direction facilitation process	Abstract conceptualisation of the direction process		
Week 10					
Week 11					
Week 12		Facilitate implementation process using new techniques for team B	Reflective observation of implementation facilitation process	Abstract conceptualisation of the implementation process	
Week 13					
Evaluate					

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RESOURCES

90-day application calendar

Bite-sized learning (takes less than 10 minutes)	Applied learning (takes less than an hour)	Experiential learning

Timetable for learning					
	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Read an article about beliefs		When meeting with another person try facilitating the conversation	Use inspiration cards to promote idea generation Use dot voting system	Reflection
Week 2	When working with others see what group sizes feel most comfortable for yourself	Try using the context mapping template	When meeting with another person try facilitating the conversation	Use inspiration cards to promote idea generation Use money and staff allocation system	Reflection
Week 3	Facilitate direction process for team A	Reflective observation of direction facilitation process	Abstract conceptualisation of the direction process		Listen to a podcast about beliefs
Week 4				Practice capturing information in a staff meeting as if you were gathering it for a report out	Present meeting notes back to staff using different templates and tools
Week 5	Practice drawing pictures instead of using words to take notes		When meeting with another person try facilitating the conversation		
Week 6	Read an article about beliefs		When meeting with another person try facilitating the conversation	Run a lunch and learn about the design the change process	Reflection
Week 7		Facilitate direction process using new techniques for team B	Reflective observation of direction facilitation process	Abstract conceptualisation of the direction process	
Week 8				Practice capturing information in a staff meeting as if you were gathering it for a report out	Present meeting notes back to staff using different templates and tools
Week 9		Try using the context mapping template	When meeting with another person try facilitating the conversation	Facilitate a design the change session for another team Pitch off process	Reflection
Week 10	Practice drawing pictures instead of using words to take notes		When meeting with another person try facilitating the conversation		
Week 11				When working with others see what group sizes feel most comfortable for yourself	
Week 12	Read an article about beliefs				
Week 13			Run a lunch and learn about the design the change process	Reflection	Listen to a podcast about beliefs
Evaluate					

One-day direction workshop running sheet

Time	Activity	Resources	Output
9:00am	Welcome	Set the scene for the change being discussed	
9:10am	Overview of days objectives	Explain the objective(s) of the day: • To obtain a shared current state view • To design a desired future state that is attainable within a designated timeframe • To understand and prioritise the changes required to move the organisation from its current state to the desired future state	All participants have clarity about how the day will follow and the key objectives to be attained by the end of the day
9:20am	Getting participants ready	This can be any activity that brings participants into the room and best prepares them for the experience ahead. Participants may have come directly from dropping their kids off at school, or their desk, or responding to an email, or answering a phone call. Whatever the situation you need them to be present, in the room and ready to work	Participants are present in the room and ready to work
9:30am	Know the current state	Multiple copies of the current state templates or alternatively butchers paper and post-it notes Participants could be asked to pre-populate the three current state templates prior to attendance at the workshop Participants could be asked to present current state information to assist in building a collective understanding Direct consumer/ client input could be used to assist in populating the Client Journey Map Existing organisational documentation could be provided to participants: • Strategy • Performance data • Policies, procedures and protocols • Operational plans	The following templates will be populated by participants: • Strategy Overview • Client Journey Map • Service Blueprint
11:30am	Break		
11:40am	Capture the future state	Multiple copies of the future state templates or alternatively butchers paper and post-it notes Participants or the workshop facilitator could complete an environmental scan prior to the workshop Participants could be asked to present future state information to assist in building a collective understanding Participants could be provided with access to on-line resources to undertake context mapping Presentations could be provided from peer or cross sector organisations Direct consumer/ client input could be used to assist in populating the Client Journey Map	The following templates will be populated by participants: • Context mapping • Change Strategy • Client Journey Map • Service Blueprint
1:40pm	Lunch		
2:10pm	Document the transition state	Multiple copies of the transition state templates or alternatively butchers paper and post-it notes Current and future state master copy templates	The following templates will be populated by participants: • Spot the Difference • Transition Plan
4:10pm	Reflections	This time provides opportunity for participants to reflect on the process of the day and the content developed throughout the day	Participants have an opportunity to reflect and provide feedback
4:20pm	Next steps	This time provides opportunity for participants to learn about the implementation phase of the Leading Change Model and understand what the next one-day workshop will entail	Participants have a high level understanding of the Implementation phase of the Leading Change Model and how it relates to the changes the organisation is looking to implement
4:30pm	Close		

One-day implementation workshop running sheet (from explore to decide)

Time	Activity	Resources	Output
9:00am	Welcome	Set the scene for the specific change selected from the Transition Plan to be implemented implemented (you can run this workshop for multiple changes documented in the Transition Plan. However, you will need to split participants into separate groups and be clear on the specific change that they will be working on. Alternatively you can have multiple groups working on the same single change as selected from the Transition Plan.	Participants know the specific change that they will be working throughout the course of the day
9:10am	Overview of days objectives	Explain the objective(s) of the day: • To explore the change hypothesis • To design the change being implemented • To present the desirable, feasible and viable solutions to the organisational decision maker	All participants have clarity about how the day will follow and the key objectives to be attained by the end of the day
9:20am	Getting participants ready	This can be any activity that brings participants into the room and best prepares them for the experience ahead. Participants may have come directly from dropping their kids off at school, or their desk, or responding to an email, or answering a phone call. Whatever the situation you need them to be present, in the room and ready to work	Participants are present in the room and ready to work
9:30am	Explore the change	Multiple copies of the Explore the Change template or alternatively use butchers paper and post-it notes Participants work through the Explore the Change template and populate each section in relation to the specific change that they are working on	Explore the change template populated by participants Participants have a shared understanding of the change that they will be working on including the scope of the change and the intended outcomes that the change is looking to achieve
10:00am	Design the Change	Multiple copies of the Design the Change template or alternatively use butchers paper and post-it notes Part one: Idea generation This is where participants are trying to come up with as many ideas as possible to deliver on the change Participants should start individually, then share ideas and then combine ideas. The intent here is volume. Stimulus can be provided to assist with idea generation: • Presentations • Cross sector solutions (what other industries, sectors are doing) • Literature searches • Internet searches	Multiple ideas for implementing the change
11:00am	Break		
11:20am	Design the Change	Part two: Idea categorisation This is where participants are categorising ideas in relation to the organisations level of risk tolerance and change scope. Ideas are categorised against the organisations definition of continuous improvement, transformation, and disruption	Participants have a collective view of the perceived scale of change required for each implementation idea
11:50pm	Design the Change	Part three: Idea options This is where participants assess the desirability, feasibility and viability of each implementation idea. Upon assessing each implementation idea participants will know which ideas could progress to the decision maker	Participants will have a collective view of the ideas that could be implemented and which ideas require further work before being considered for implementation
12:30pm	Design the Change	Part four: Prioritised solutions This is where participants determine a process to prioritise ideas, this could be achieved via defined organisational criteria, a voting system or via debate	Participants will have a collective view of the priority order of ideas that could be implemented
1:00pm	Lunch		
1:30pm	Decide on the Change	Multiple copies of the Decide on the Change template or alternatively use butchers paper and post-it notes Part one: Prototype the idea This is where participants build a working prototype of the idea. This could be a physical prototype, a flow chart, or a video of the idea in action. It is the participants opportunity to flesh out the idea further and understand how it works and what needs to be considered for successful implementation	Decide on the Change template populated by participants Participants have built a working prototype of the idea
2:30pm	Decide on the Change	Part two: Pitch the idea	Participants have developed a pitch for the organisations decision maker

		This is where participants formulate a 2-5 minute pitch of the idea for the decision maker's consideration. The pitch could be written, a presentation, or a video, the medium used depends on the decision makers preference. It is also useful during this time for participants to pitch to one another to further develop their prototype and pitch content	The organisations decision maker has sufficient information to decide on the preferred idea to be deployed
3:30pm	Reflections	This time provides opportunity for participants to reflect on the process of the day and the content developed throughout the day	Participants have an opportunity to reflect and provide feedback
3:40pm	Next steps	This time provides opportunity for participants to learn about the deploy and evaluate steps of the Infinity Loop and understand what future participation will entail	Participants have a high level understanding of the Implementation phase of the Leading Change Model and how it relates to the changes the organisation is looking to implement
3:50pm	Close		

Multi-day direction workshop running sheet

Session	Time	Activity	Resources	Output
Session one	9:00am	Welcome	Set the scene for the change being discussed	
	9:10am	Overview of session objective	Explain the objective of the session: • To obtain a shared current state view	All participants have clarity about how the session will follow and the key objective to be attained by the end of the session
	9:20am	Getting participants ready	This can be any activity that brings participants into the room and best prepares them for the experience ahead. Participants may have come directly from dropping their kids off at school, or their desk, or responding to an email, or answering a phone call. Whatever the situation you need them to be present, in the room and ready to work	Participants are present in the room and ready to work
	9:30am	Know the current state	Multiple copies of the current state templates or alternatively butchers paper and post-it notes Participants could be asked to pre-populate the three current state templates prior to attendance at the workshop Participants could be asked to present current state information to assist in building a collective understanding Direct consumer/ client input could be used to assist in populating the Client Journey Map Existing organisational documentation could be provided to participants: • Strategy • Performance data • Policies, procedures and protocols • Operational plans	The following templates will be populated by participants: • Strategy Overview • Client Journey Map • Service Blueprint
	11:20am	Reflections	This time provides opportunity for participants to reflect on the process and the content developed throughout the session	Participants have an opportunity to reflect and provide feedback
	11:30am	Close		
	The artefacts developed from each session should be displayed in a public area where participants (non-participants) can reflect on what was developed and can make contributions towards each state.			
Session two	9:00am	Welcome	Re-cap on the Current State Overview	All participants have a shared understanding of the Current State
	9:10am	Overview of sessions objective	Explain the objective of the session: • To design a desired future state that is attainable within a designated timeframe	All participants have clarity about how the session will follow and the key objective to be attained by the end of the session
	9:20am	Getting participants ready	This can be any activity that brings participants into the room and best prepares them for the experience ahead. You need them to be present, in the room and ready to work	Participants are present in the room and ready to work
	9:30am	Design the future state	Multiple copies of the future state templates or alternatively butchers paper and post-it notes Participants or the workshop facilitator could complete an environmental scan prior to the workshop Participants could be asked to present future state information to assist in building a collective understanding Participants could be provided with access to on-line resources to undertake context mapping Presentations could be provided from peer or cross sector organisations Direct consumer/ client input could be used to assist in populating the Client Journey Map	The following templates will be populated by participants: • Context mapping • Change Strategy • Client Journey Map • Service Blueprint
	11:20am	Reflections	This time provides opportunity for participants to reflect on the process and the content developed throughout the session	Participants have an opportunity to reflect and provide feedback
	11:30am	Close		
	The artefacts developed from each session should be displayed in a public area where participants (non-participants) can reflect on what was developed and can make contributions towards each state.			

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	Time	Activity	Resources	Output
Session Three	9:00am	Welcome	Re-cap on the Future State Design	All participants have a shared understanding of the Future State
	9:10am	Overview of sessions objective	Explain the objective of the session: • To understand and prioritise the changes required to move the organisation from its current state to the desired future state	All participants have clarity about how the session will follow and the key objective to be attained by the end of the session
	9:20am	Getting participants ready	This can be any activity that brings participants into the room and best prepares them for the experience ahead. You need them to be present, in the room and ready to work	Participants are present in the room and ready to work
	9:30am	Document the transition state	Multiple copies of the transition state templates or alternatively butchers paper and post-it notes Current and future state master copy templates	The following templates will be populated by participants: • Spot the Difference • Transition Plan
	11:20am	Reflections	This time provides opportunity for participants to reflect on the process and the content developed throughout the session	Participants have an opportunity to reflect and provide feedback
	11:30am	Next steps	This time provides opportunity for participants to learn about the implementation phase of the Leading Change Model and understand what the series of workshop will entail	Participants have a high level understanding of the Implementation phase of the Leading Change Model and how it relates to the changes the organisation is looking to implement
	11:40am	Close		

Multi-day implementation workshop running sheet (from explore to decide)

Session	Time	Activity	Resources	Output
Session One	9:00am	Welcome	Set the scene for the specific change selected from the Transition Plan to be implemented (you can run this session for multiple changes documented in the Transition Plan. However, you will need to split participants into separate groups and be clear on the specific change that they will be working on. Alternatively you can have multiple groups working on the same single change as selected from the Transition Plan.	Participants know the specific change that they will be working throughout the course of the session
	9:10am	Overview of days objectives	Explain the objective(s) of the day: • To explore the change hypothesis • To design the change being implemented	All participants have clarity about how the session will follow and the key objectives to be attained by the end of the session
	9:20am	Getting participants ready	This can be any activity that brings participants into the room and best prepares them for the experience ahead. Participants may have come directly from dropping their kids off at school, or their desk, or responding to an email, or answering a phone call. Whatever the situation you need them to be present, in the room and ready to work	Participants are present in the room and ready to work
	9:30am	Explore the change	Multiple copies of the Explore the Change template or alternatively use butchers paper and post-it notes Participants work through the Explore the Change template and populate each section in relation to the specific change that they are working on	Explore the change template populated by participants Participants have a shared understanding of the change that they will be working on including the scope of the change and the intended outcomes that the change is looking to achieve
	10:00am	Design the Change	Multiple copies of the Design the Change template or alternatively use butchers paper and post-it notes Part one: Idea generation This is where participants are trying to come up with as many ideas as possible to deliver on the change Participants should start individually, then share ideas and then combine ideas. The intent here is volume. Stimulus can be provided to assist with idea generation: • Presentations • Cross sector solutions (what other industries, sectors are doing) • Literature & Internet searches	Multiple ideas for implementing the change
	11:00am	Break		
	11:20am	Design the Change	Part two: Idea categorisation This is where participants are categorising ideas in relation to the organisations level of risk tolerance and change scope. Ideas are categorised against the organisations definition of continuous improvement, transformation, and disruption	Participants have a collective view of the perceived scale of change required for each implementation idea
	12:00pm	Reflections	This time provides opportunity for participants to reflect on the process and the content developed throughout the session	Participants have an opportunity to reflect and provide feedback
	12:10pm	Next steps	This time provides opportunity for participants to learn about the actions that need to be taken in between session one and two	Participants have a high level understanding of the actions to be taken between session one and two
	12:20pm	Close		
	Artefacts developed during the first session should be displayed in a public area. In between session one and two participants should use this time to test ideas against the desirable, feasible and viable criteria and to vote on the implementable ideas. This enables broader organisational participation in the process and provides further perspectives in relation to the ideas from individuals who may not have been able to participate in the session			
	Design the Change		Part three: Idea options This is where participants assess the desirability, feasibility and viability of each implementation idea. Upon assessing each implementation idea participants will know which ideas could progress to the decision maker	Participants will have a collective view of the ideas that could be implemented and which ideas require further work before being considered for implementation
	Design the Change		Part four: Prioritised solutions This is where participants determine a process to prioritise ideas, this could be achieved via defined organisational criteria, a voting system or via debate	Participants will have a collective view of the priority order of ideas that could be implemented

	Time	Activity	Resources	Output
Session Two	9:00am	Welcome	Set the scene for the idea(s) participants will be further developing for the organisational decision maker	Participants know the specific change that they will be working throughout the course of the session
	9:10am	Overview of days objectives	Explain the objective(s) of the day: • To present the desirable, feasible and viable solutions to the organisational decision maker	All participants have clarity about how the session will follow and the key objectives to be attained by the end of the session
	9:20am	Getting participants ready	This can be any activity that brings participants into the room and best prepares them for the experience ahead. Participants may have come directly from dropping their kids off at school, or their desk, or responding to an email, or answering a phone call. Whatever the situation you need them to be present, in the room and ready to work	Participants are present in the room and ready to work
	9:30am	Decide on the Change	Multiple copies of the Decide on the Change template or alternatively use butchers paper and post-it notes Part one: Prototype the idea This is where participants build a working prototype of the idea. This could be a physical prototype, a flow chart, or a video of the idea in action. It is the participants opportunity to flesh out the idea further and understand how it works and what needs to be considered for successful implementation	Decide on the Change template populated by participants Participants have built a working prototype of the idea
	10:30am	Break		
	10:50am	Decide on the Change	Part two: Pitch the idea This is where participants formulate a 2-5 minute pitch of the idea for the decision maker's consideration. The pitch could be written, a presentation, or a video, the medium used depends on the decision makers preference. It is also useful during this time for participants to pitch to one another to further develop their prototype and pitch content	Participants have developed a pitch for the organisations decision maker The organisations decision maker has sufficient information to decide on the preferred idea to be deployed
	11:50pm	Reflections	This time provides opportunity for participants to reflect on the process and the content developed throughout the session	Participants have an opportunity to reflect and provide feedback
	12:00pm	Next steps	This time provides opportunity for participants to learn about the deploy and evaluate steps of the Infinity Loop and understand what future participation will entail	Participants have a high level understanding of the Implementation phase of the Leading Change Model and how it relates to the changes the organisation is looking to implement
	12:10pm	Close		

Claire Edwards
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