CHANGE FACILITATION

TOOLKIT

evergreen PM

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FACILITATING CHANGE

At Evergreen, we believe that **managing organizational change is important.** But, there is an element beyond managing change: **change facilitation.**

Facilitating change focuses **on guiding and supporting teams and organizations throughout the change process,** making change as stress-free as possible.

A facilitator does not direct or control: he or she creates an environment where **people feel safe to express their ideas,** concerns and suggestions, facilitating dialogue.

WE CAN ALL BE CHANGE FACILITATORS!!

But where to start?

We share with you a toolkit of best practices to facilitate change conversations and **make people the stars!**

ABOUT THIS TOOLKIT

1

THIS TOOLKIT IS FOR GUIDANCE ONLY

We provide you with dynamics to generate dialogues and actions on change, and adapt them according to your needs!

2

INVOLVE PEOPLE

The more they are involved with the change, the better. Be transparent with the expectations of generated dialogues and push for a safe space!

3

REFLECT AND ACT

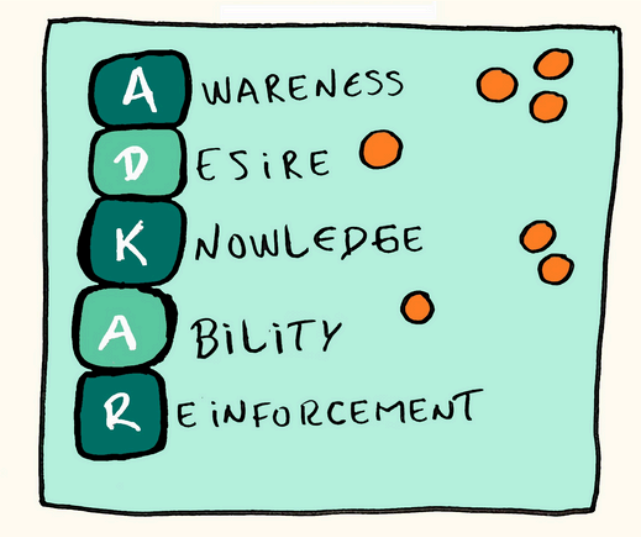
Seek to get people to reflect on themselves and to generate concrete actions to drive change.

4

CHANGE IS SYSTEMIC

To achieve sustainable change, you have to manage change and influence the system (objectives, tools, policies, standards, etc.). Facilitating is only one part of change management.

ADKAR RETROSPECTIVE



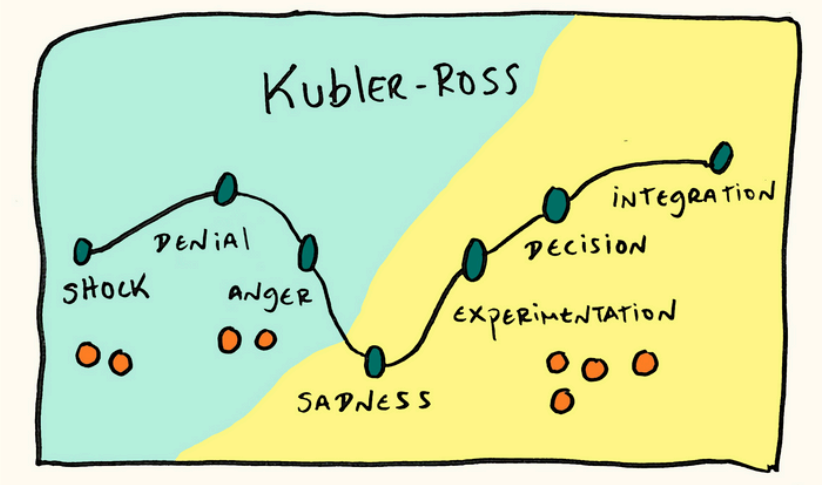
1 WHEN TO USE THIS TOOL?

When you want to raise awareness of change and identify where people perceive themselves.

2 HOW TO USE IT?

- Draw on a board the ADKAR model and explain its phases.
- Ask reflective questions: How do I see myself positioned in this model and why? What do I need to move forward? Encourage people to mark their answers and share insights.
- Encourage people to generate and prioritize actions that support the integration of change.

KUBLER-ROSS RETROSPECTIVE



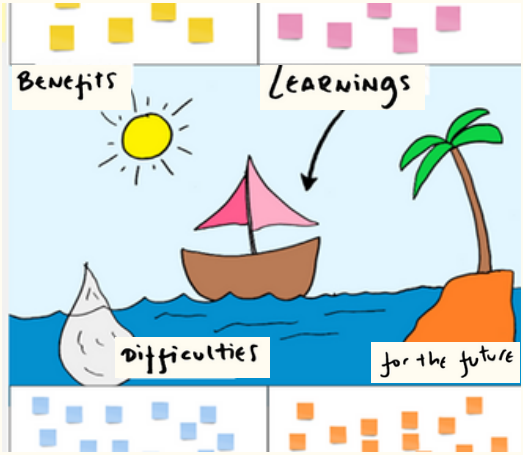
1 WHEN TO USE THIS TOOL?

When you see that people are not comfortable with change and need to share their emotions.

2 HOW TO USE IT?

- Draw and explain the Kubler-Ross model.
- Ask reflective questions: Where do I stand on the curve? What do I need to move forward? How would I like to feel? Allow people to mark their response.
- Inspire people to propose viable, desirable and feasible solutions that enhance their transition to integration.

AD-HOC RETROSPECTIVE



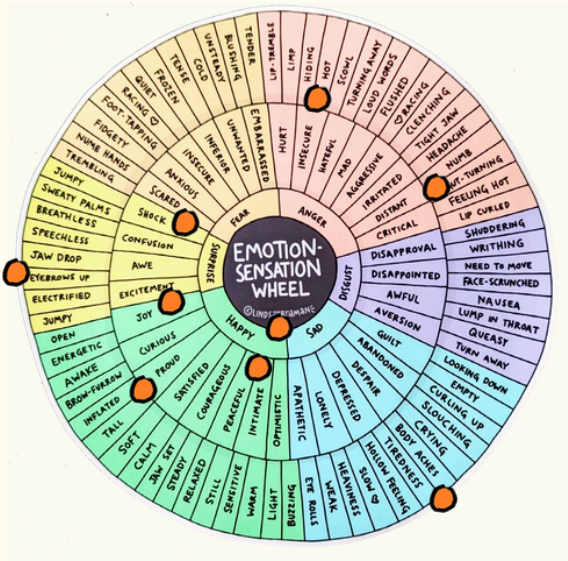
1 WHEN TO USE THIS TOOL?

When you need to generate important reflections on change, throughout the transition.

2 HOW TO USE IT?

- Write on a board the dimensions to be explored in the face of change. For example, difficulties, resources, perceived benefits, ideas for improvement, lessons learned, etc.
- Encourage reflection and generation of concrete actions to be applied at a personal, team and/or organizational level.

WHEEL OF EMOTIONS



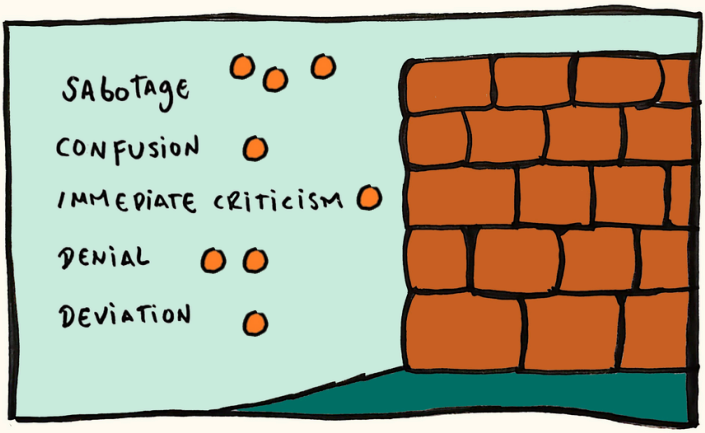
1 WHEN TO USE THIS TOOL?

When you observe feelings of fear and discomfort. When you want to identify emotions and/or generate in-depth conversations about them.

2 HOW TO USE IT?

- Place the wheel of emotions on a virtual or physical board.
- Ask questions related to emotions: How do I feel about change? How do I want to feel?
- Encourage people to mark their answers.
- Foster people to share insights, observations and emotions. Depending on the context, start on a voluntary basis.
- Inspire people to share possible actions.

RESISTANCE RETROSPECTIVE



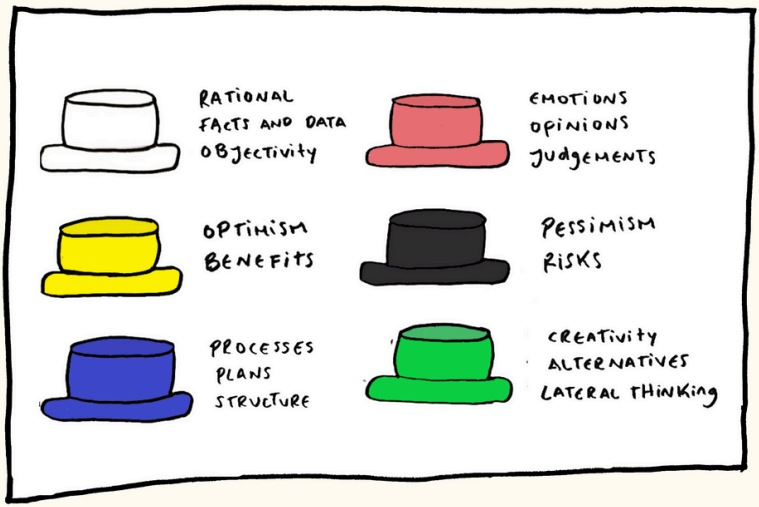
1 WHEN TO USE THIS TOOL?

When you observe behaviors and attitudes of resistance to change, and you need a tool that allows you to generate conversations on this topic.

2 HOW TO USE IT?

- Write down the different types of resistance to change and explain their meanings.
- Facilitate reflection: Have I experienced any of these resistances? Why? What could be the cause? What could lead me to feel resistance?
- Encourage people to share their insights, especially speaking in first person.
- Inspire people to propose actions.

6 THINKING HATS



1 WHEN TO USE THIS TOOL?

When you need to generate other points of view about change. When there is resistance.

2 HOW TO USE IT?

- Introduce the 6 Thinking Hats from Edward de Bono and place hats or objects of the respective colors.
- Establish a theme linked to change. Invite people to give points of view from the different hats.
- Encourage them to change hats and see the change from a different point of view.
- Seek to generate agreements and next steps.

LIST OF BELIEFS

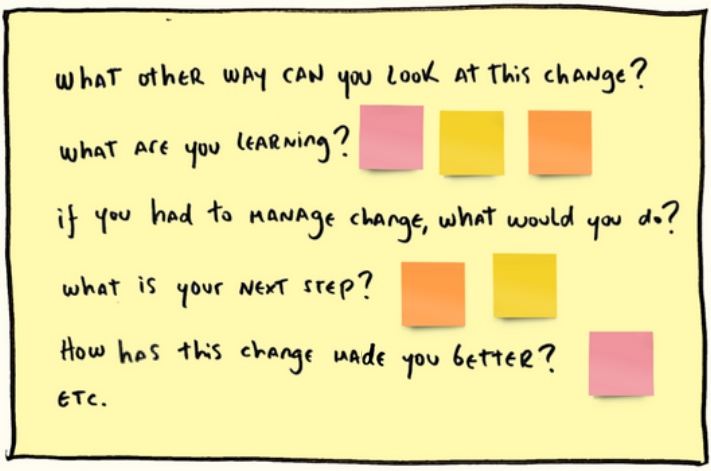
1 WHEN TO USE THIS TOOL?

When you need to generate other visions and new beliefs about change.

2 HOW TO USE IT?

- Ask participants to make a list of beliefs about change - "anything works!" For example, "I believe this change is very difficult," "I believe this change needs support from leaders," etc.
- Generate reflections on beliefs: Why do I have this belief? Is it justified? Is it limiting?
- Encourage people to question their own beliefs and look at them from other points of view.

POWERFUL QUESTIONS



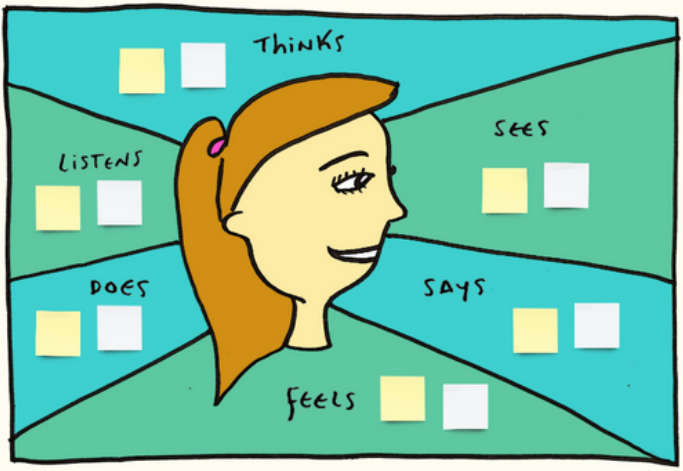
1 WHEN TO USE THIS TOOL?

When you need to generate other perspectives on change.
When language is your only available tool.

2 HOW TO USE IT?

- This technique is applicable in any type of conversation and context, whether one-on-one or in a group.
- In conversation: Focus on listening and asking questions that lead the other person to reflection, instead of giving your opinion, applying as many questions as you consider necessary.
- As a group dynamic: select some of the questions and encourage participants to respond, share and generate actions.

EMPATHY MAP



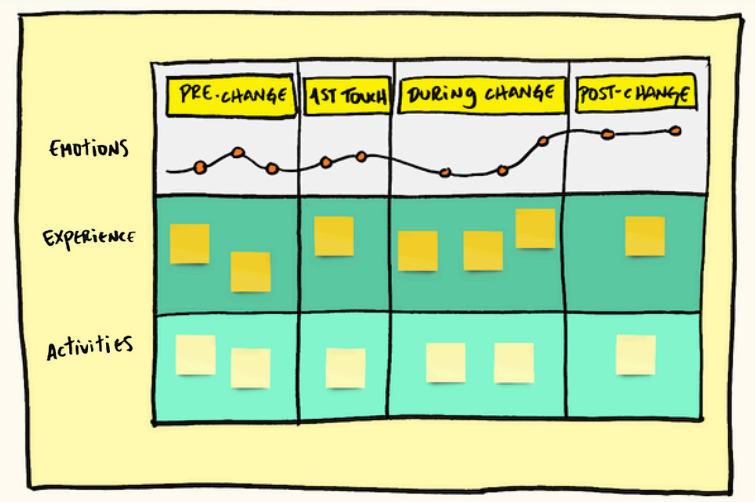
1 WHEN TO USE THIS TOOL?

When you want to gain insights on people's perspectives. At any time throughout the change, especially in the early stages.

2 HOW TO USE IT?

- On a board, ask participants to provide insights on how they see, think, feel and do about change today.
- Encourage them to generate insights on the same aspects in the future: What they would like to see, do, think and feel about change.
- Foster the group to identify a feasible next step to achieve the ideal state.

CHANGE JOURNEY



1 WHEN TO USE THIS TOOL?

When you are in the early stages of change and want to involve those affected in the design of the strategy.

2 HOW TO USE IT?

- On a board, ask participants to elaborate what the change process would ideally look like, defining the main emotions, experiences and activities along the different stages. For example: top management communication, awareness of needs, training, etc.
- Ask them to point out those critical points that they would value for their transition to be successful.

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through people and projects