Strategic Planning and Change Management in Times of Uncertainty

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Mission: To partner with people who have developmental disabilities and other complex conditions, resulting in the highest possible quality of life through integrated, whole-person care.
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  • Lean Six Sigma Black Belt (LSSBB)

• Specialization in Strategy
• Strategic Human Resource Leadership
• Initial Thoughts
• Strategic Planning - The Process
• Mindset - The Shift
• Change Management - Roles and Maturity
• Emerging Competencies for the Future
• Final Thoughts
Why is it that about 67% of well-formulated strategies fail to deliver?

- Leaders are too internally focused
- Employees don’t understand the corporate strategy
- The organization does not know how to execute the strategy
- The organization taps the wrong team members for a specific project
- The organization does not track progress
- People aren't held accountable for performing strategic activity
“Hope is not a strategy.”

- Vince Lombardi, Football Coach -
A process to:

- Get clarity about what matters most to the organization’s ongoing success
- Identify and commit to the most important priorities so that the organization can focus its limited resources and attention
- Get the organization aligned, ready, and accountable to make these priorities happen
• Mission/Vision
• Analysis - Internal/External
• Goal Formulation
• Strategy Formulation
  • Strategic priorities - Plus a theme
• Project Formulation
• Implementation
• Accountability
• Feedback and Control
The pandemic has forever changed all we do, including strategic planning.
The future is uncertain.... but this uncertainty is at the very heart of human creativity.

- Ilya Prigogine, Chemist -
WHAT IS SCENARIO PLANNING

• Principles used by military intelligence and adopted by the world of business
• A form of strategic foresight in which organizations consider a variety of possible or probable futures
• Descriptions of potential events and their likely impact on the organization
• Used as a basis for long-term strategy development
What is the purpose of scenario planning?

Prepare for the future by considering a variety of different scenarios and making sure that we are ready for what might happen.

The High-Level Process:
• Choose scenarios
• Plan for what happens
• Identify action steps to prepare
Play “What happens if this scenario occurs?”

- What would it mean for our financials, operation, and future if we aren’t ready?
- What would be the opportunity if we are ready?
- What would we have to do to prepare?
- What strengths could we build upon?
- What weaknesses would we have to shore up?
- What else would we need to do?
- What would be the cost to prepare?
- What is the probability of this scenario happening?
- What is the expected cost if we aren’t ready?
Which scenario or scenarios are most likely?
What are interim triggers or signals to watch for, before it is too late?
What is the action plan?
Step # 1. Identify trends and produce the four most critical uncertainties

Step # 2. Identify your triggers

Step # 3. Build and play out your scenarios

Step # 4. Determine options

Step # 5. Assign a champion and team roles (RACI)
If a strategy is already in place, scenarios can be used to identify weaknesses and areas where a contingency plan may be required.

In this case, think of your scenarios as different hands of cards you might be dealt; think of scenario planning as the way you would play those cards.
If you change the way you look at things, the things you look at change.

- Wayne Dyer, Author -
Characteristics that make up an agile mindset:

- Positive attitude
- Thirst for knowledge
- Goal of team success
- Pragmatism
- Willingness to fail

There is no failure, only feedback.
Rapid Cycle Testing

- Plan
- Do
- Study
- Act
CULTURAL MINDSET: COMPETING VALUES

- **Clan - Collaborate**
  - Values cohesion, participation, communication, a personal place like a family, nurturing, tight social networks. 

- **Adhocracy - Create**
  - Dynamic, entrepreneurial, people taking risks, values innovation, adaptability, growth, cutting-edge services.

- **Hierarchy - Control**
  - Structure & control, coordination & efficiency, stability is important, timeliness and smooth processes.

- **Market - Compete**
  - Results-oriented, getting the job done, values competition and achievement, customer driven.

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**Held Together by Values**
- Long-Term Sustainability
- Doing things together

**Held Together by Process**
- Incremental Innovation
- Doing things right

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**Flexibility and Discretion**

**Inward Facing and Integration**
- Inward Facing and Integration

**Outward Facing and Differentiation**
- Outward Facing and Differentiation

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**Highly Flexible & Eternally Focused**
- Radical Innovation
- Doing things first

**Highly Competitive & Externally Focused**
- Short Term Wins
- Doing things Fast
Human Resources: Talent Acquisition

Scenario - Critical workforce shortage

Monthly Trend

New hires

Month
There is nothing more certain and unchanging than uncertainty and change.

- John F. Kennedy, 35th President -
According to McKinsey & Company, 70 percent of change programs fail to achieve their goals, largely due to employee resistance and lack of management support.
A sponsor provides resources required for change and has the ultimate responsibility for the program or project, building commitment for the change particularly at the senior management level across the organization.
THE ROLE OF SPONSORS - ABC’s

A - Active and visible participation

B - Building support with peers and managers

C - Communicating directly with employees
IDEAL SPONSOR TRAITS

1. Strong communication skills
2. Create engagement through passion and enthusiasm
3. Engaged and involved
4. Visible and supportive
5. Approachable and available
6. Recognized leader with sponsorship experience
What percent of organizational success is tied to our staff doing their job in a new way?
Correlation of change management effectiveness with meeting objectives

Important Note

The current state has tremendous holding power, and the uncertainty of success and fear of the unknown can block change and create resistance.
• Awareness of the need to change
• Desire to support the change
• Knowledge needed to support this change
• Ability to implement the required skills and behaviors
• Reinforcements to sustain the change
Prosci Research reports that research participants consistently identify lack of awareness as the primary reason why employees and managers resist a change.

Without awareness of the need for change, individuals lack crucial pieces of information and block progress with change.
CHANGE MANAGEMENT - FLIGHT RISK

Prosci, 2021
THE ROLE OF MANAGERS - CLARC

Communicator: Share personal impact messages with direct reports about the change
Liaison: Engage with and support the project team
Advocate: Demonstrate support for the change
Resistance Manager: Identify and mitigate resistance to the change
Coach: Help employees through the change process
Maturity is the capacity to endure uncertainty.

- John Huston Finley, Professor -
# Change Management - Maturity

<table>
<thead>
<tr>
<th>Level</th>
<th>Organizational Competency</th>
<th>Change management competency is evident in all levels of the organization and is part of the organization's intellectual property and competitive edge</th>
<th>Continuous process improvement in place</th>
<th>Highest profitability and responsiveness</th>
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<tbody>
<tr>
<td>Level 5</td>
<td>Organization-wide standards and methods are broadly deployed for managing and leading change</td>
<td>Selection of common approach</td>
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<tr>
<td>Level 4</td>
<td>Organizational Standards</td>
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<tr>
<td>Level 3</td>
<td>Multiple Projects</td>
<td>Comprehensive approach for managing change is being applied in multiple projects</td>
<td>Examples of best practices evident</td>
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<tr>
<td>Level 2</td>
<td>Isolated Projects</td>
<td>Some elements of change management are being applied in isolated projects</td>
<td>Many different tactics used inconsistently</td>
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<tr>
<td>Level 1</td>
<td>Ad-hoc or Absent</td>
<td>Little or no change management applied</td>
<td>People-dependent without any formal practices or plans</td>
<td>Highest rate of project failure, turnover and productivity loss</td>
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EMERGING COMPETENCIES FOR THE FUTURE

- Embracing Inclusive Leadership
- Empowering peer coaching and leadership on teams
- Building capabilities in project management and change management
- Becoming open-minded and flexible in thought and tactics
- Embracing an experimenter’s mindset
- Creating a culture of well-being
- Improving leaderships emotional intelligence
- Investing in your employees’ development
- Addressing inequality within your culture
- Building your technology infrastructure
Considering what we are experiencing with the pandemic, the Great Resignation and the ongoing workforce crisis in our industry, how can you use this information presented today to rethink how you approach strategic planning and change within your organization?


