



Strategic Planning and Change Management in Times of Uncertainty

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KOINONIA

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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SPEAKER

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 - Senior Professional of Human Resources (SPHR)
 - Certified Executive Coaching (CEC)
 - Certified Diversity Executive (CDE)
 - Organizational Development Certified Professional (ODCP)
 - Certified Change Management Practitioner (CCMP)
 - Certified Manager of Quality and Organizational Excellence (CMQ/OE)
 - Certified Professional in Healthcare Quality (CPHQ)
 - Lean Six Sigma Black Belt (LSSBB)
- Specialization in Strategy
- Strategic Human Resource Leadership



AGENDA

- Initial Thoughts
- Strategic Planning - The Process
- Mindset - The Shift
- Change Management - Roles and Maturity
- Emerging Competencies for the Future
- Final Thoughts



INITIAL 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 -

STRATEGIC PLANNING - WHAT IS IT?

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



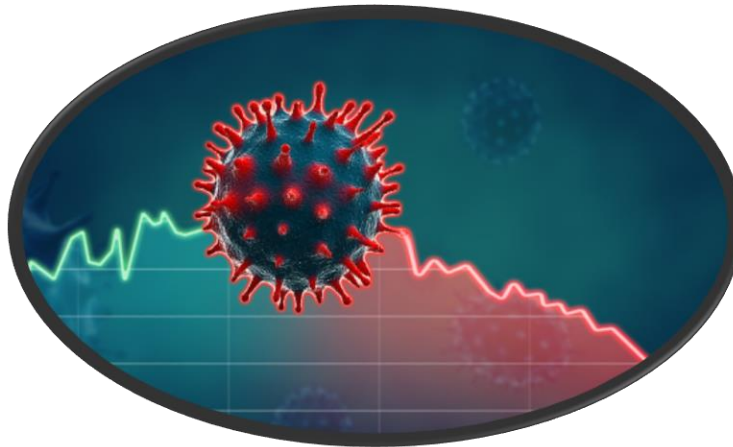
STRATEGIC PLANNING - THE PROCESS

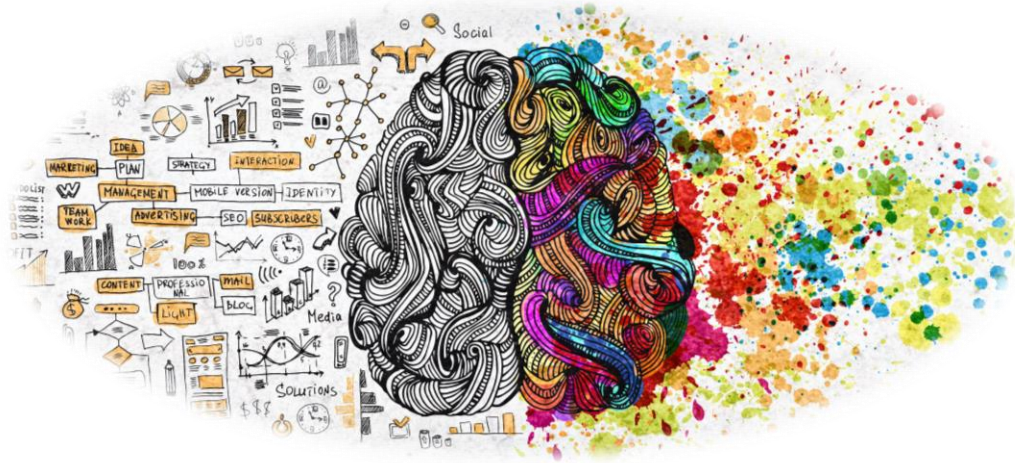
- Mission/Vision
- Analysis - Internal/External
- Goal Formulation
- Strategy Formulation
 - Strategic priorities - Plus a theme
- Project Formulation
- Implementation
- Accountability
- Feedback and Control



THE STATE OF LONG-TERM STRATEGIC PLANNING

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



STRATEGIC PLANNING - THE SHIFT TO SCENARIO PLANNING

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:

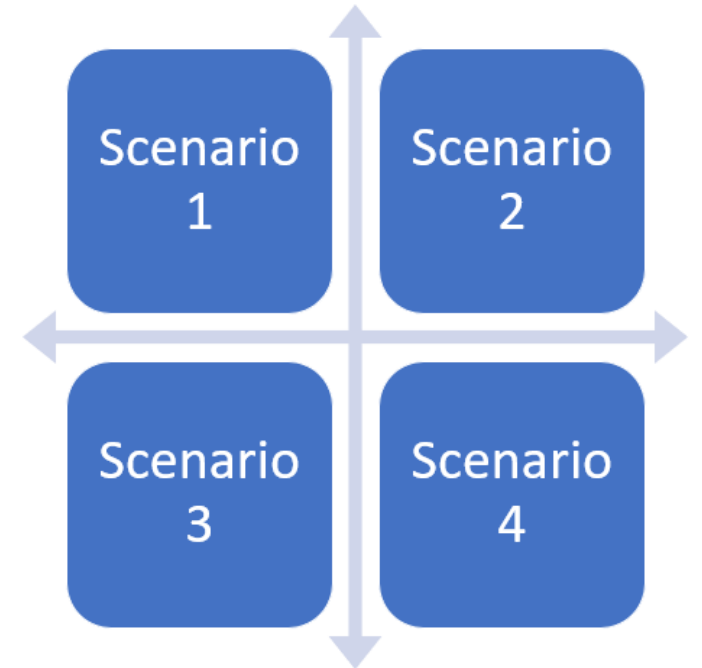
- Choose scenarios
- Plan for what happens
- Identify action steps to prepare



SCENARIO PLANNING - PLAY OUT SCENARIOS

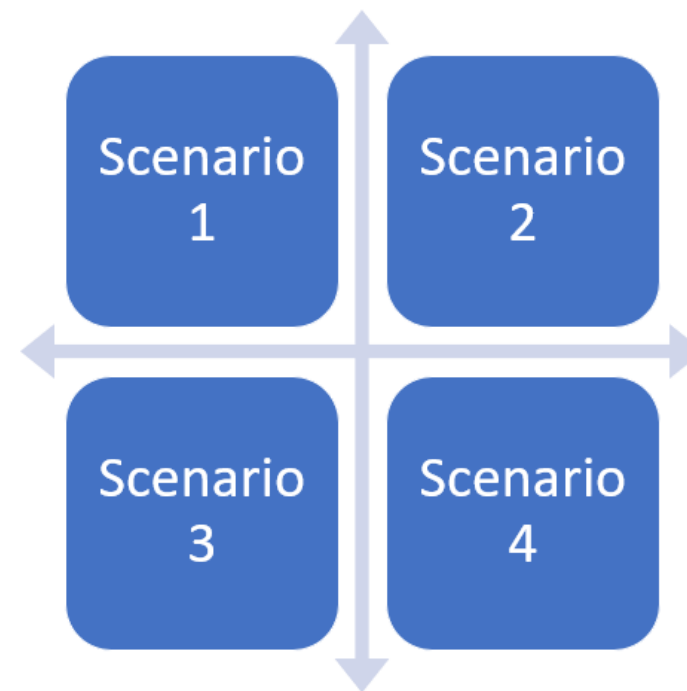
Play “What happens if this scenario occurs?”

- 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?



SCENARIO PLANNING - DETERMINE WHAT TO DO, IF ANYTHING

- 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?



SCENARIO PLANNING WORKSHEET

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)



The image shows a printed 'SCENARIO PLANNING WORKSHEET' on a wooden surface. The worksheet features a colorful logo at the top, a title bar, and a brief introduction. It is divided into five steps, each with a specific task and a corresponding table or form for data entry.

SCENARIO PLANNING WORKSHEET

This worksheet serves as a tool to help you try your hand at a fast-paced version of scenario planning.

Step 1. Identify trends and come up with the four most critical uncertainties

Trends	Influencing Factors	Criticality 1-3

Step 2. Identify your triggers:

--

Step 3. Build your scenarios:

A.	B.
C.	D.

Step 4. Determine options:

A.
B.
C.
D.

Step 5. Assign a champion and team roles (RACI):

Scenario	Champion	Responsible	Accountable	Consulted	Informed



FROM SCENARIO TO STRATEGY

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 -

STRATEGIC PLANNING - AGILITY



Agility is the ability to
adapt and respond to change
... agile organizations view
change as an opportunity,
not a threat.

Jim Highsmith

Characteristics that make up an agile mindset:

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

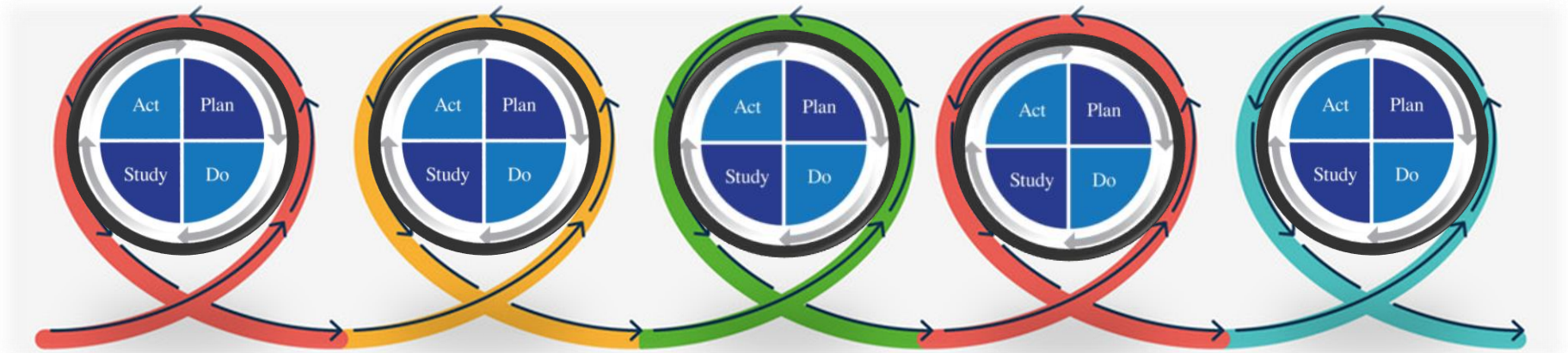
There is no failure, only feedback.



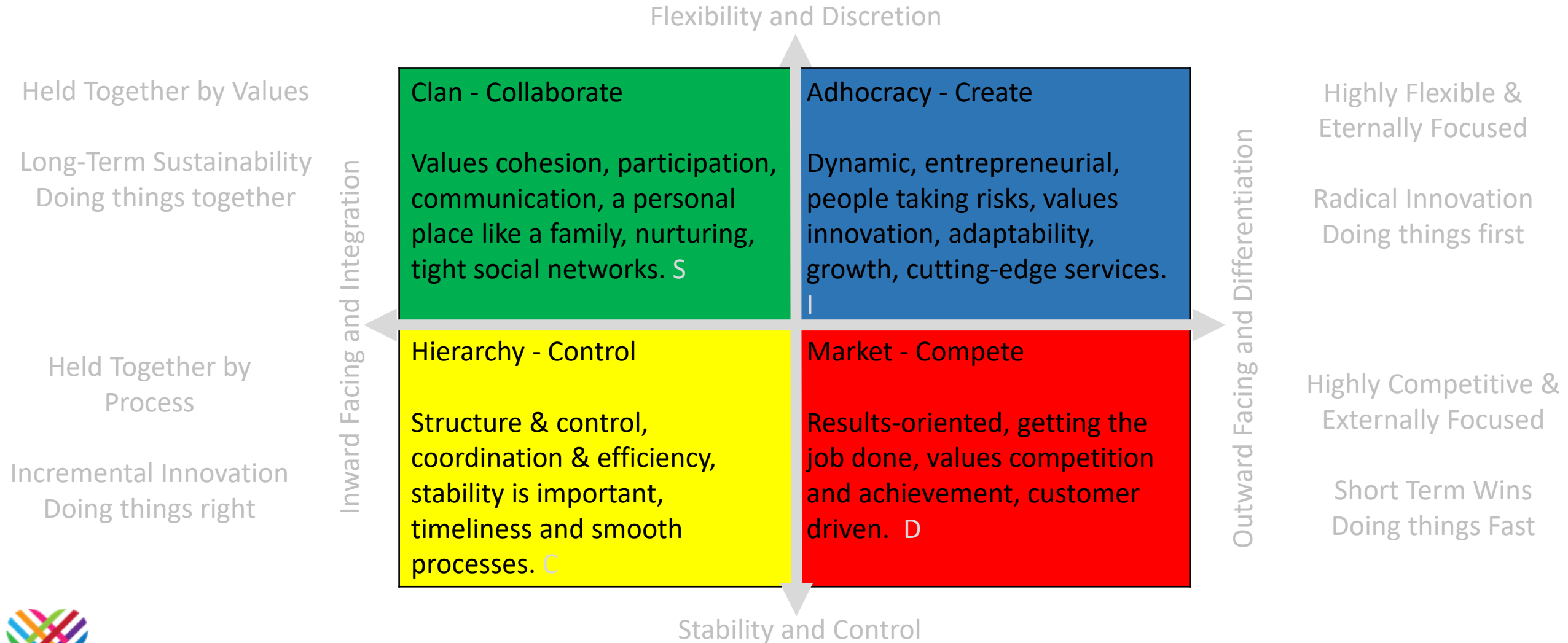
STRATEGIC PLANNING - RAPID CYCLE TESTING

Rapid Cycle Testing

- Plan
- Do
- Study
- Act



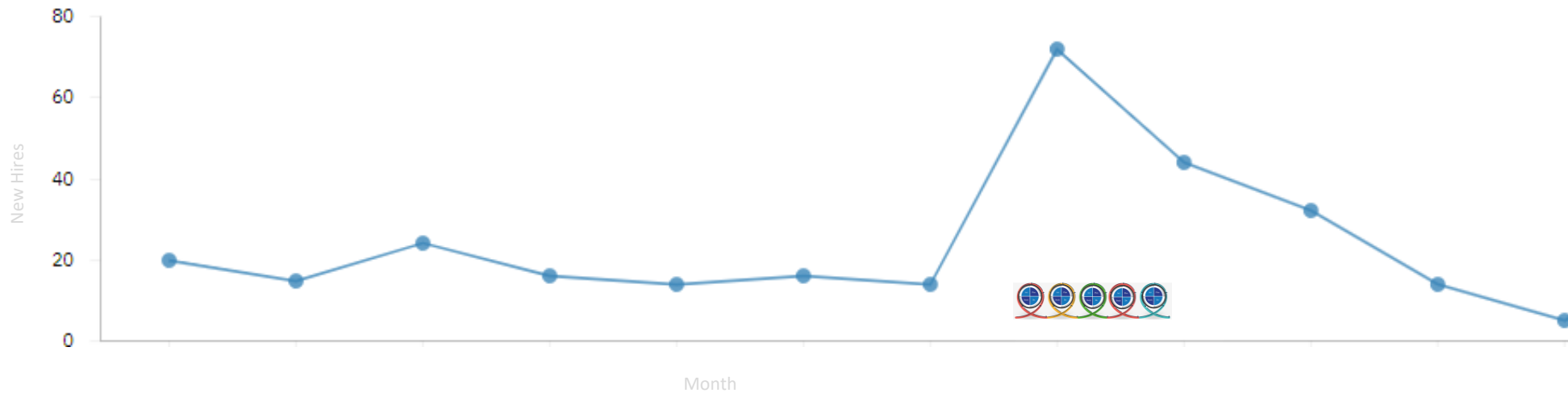
CULTURAL MINDSET: COMPETING VALUES



TALENT AQUISITION CASE STUDY - HARRY SMART

Human Resources: Talent Acquisition Scenario - Critical workforce shortage

Monthly Trend





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

- John F. Kennedy, 35th President -

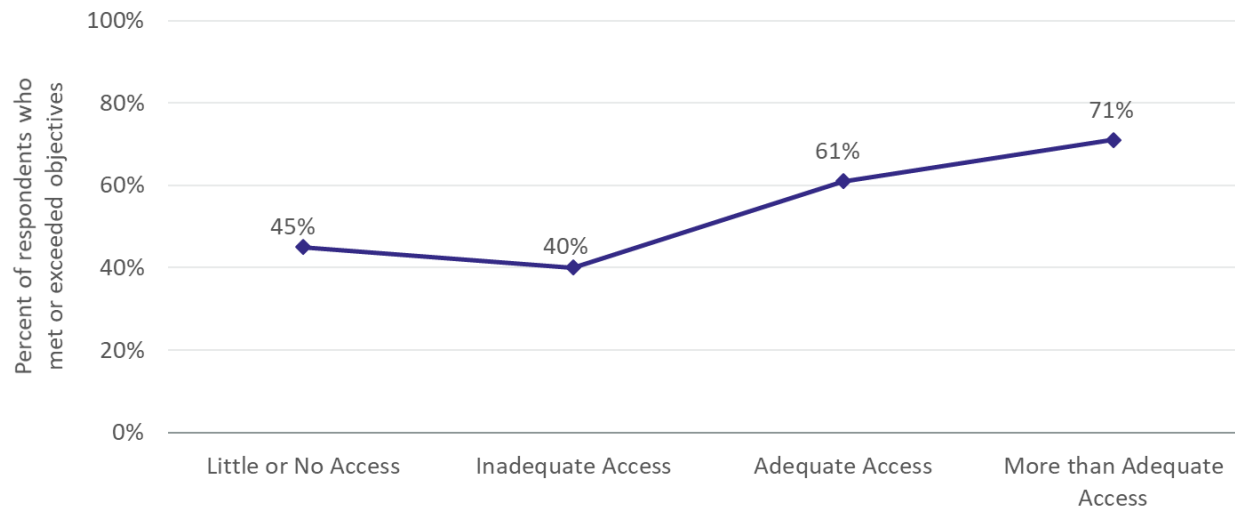
CHANGE MANAGEMENT - 70% Failure Rate?

According to McKinsey & Company, 70 percent of change programs fail to achieve their goals, largely due to employee resistance and lack of management support.



CHANGE MANAGEMENT - SPONSORSHIP

Correlation of sponsor access to meeting project objectives



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.

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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?



CURRENT

C	C	C	C
C	C	C	C
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C	C	C	C
C	C	C	C

TRANSITION

T	T	T	T
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FUTURE

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	F		F



CHANGE MANAGEMENT - RESULTS


Correlation of change management effectiveness with meeting objectives



Prosci 2020 Benchmarking Data from 2007, 2009, 2011, 2013, 2015, 2017, 2019



CHANGE MANAGEMENT



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**.





CHANGE MANAGEMENT - ADKAR

- **A**wareness of the need to change
- **D**esire to support the change
- **K**nowledge needed to support this change
- **A**bility to implement the required skills and behaviors
- **R**einforcements to sustain the change

ADKAR Team Score

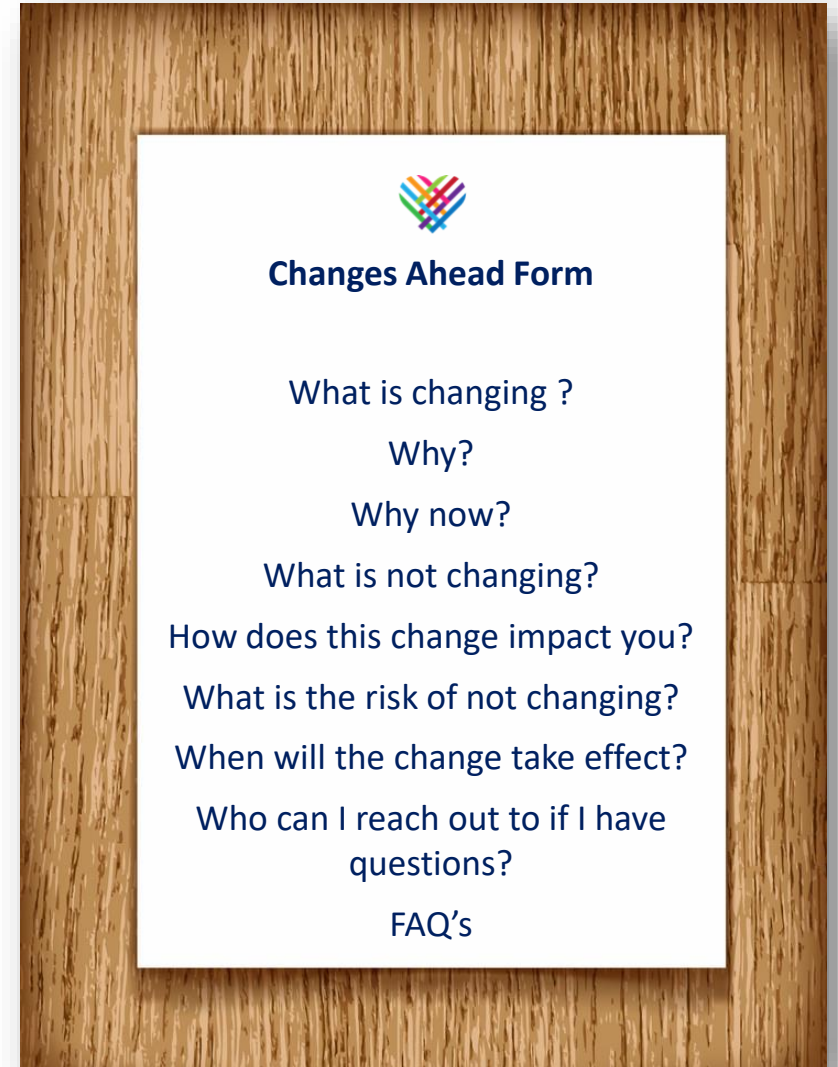
	A	D	K	A	R	Barrier Point
Melissa	1	2	4	2	2	Awareness
Carol	4	1	3	3	3	Desire
Susie	3	3	3	3	3	Awareness
Bill	4	4	3	2	1	Knowledge
Ray	4	4	4	4	4	N/A
Tanya	2	5	3	3	3	Awareness




BARRIER POINT: AWARENESS

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.

A graphic of a white rectangular card with rounded corners, placed on a light brown wooden surface. The card contains the 'Changes Ahead Form' with a list of questions and a link to FAQs. At the top of the card is a small, colorful logo consisting of several overlapping, curved lines in red, orange, yellow, green, and blue, forming a heart-like shape.


Changes Ahead Form

What is changing ?

Why?

Why now?

What is not changing?

How does this change impact you?

What is the risk of not changing?

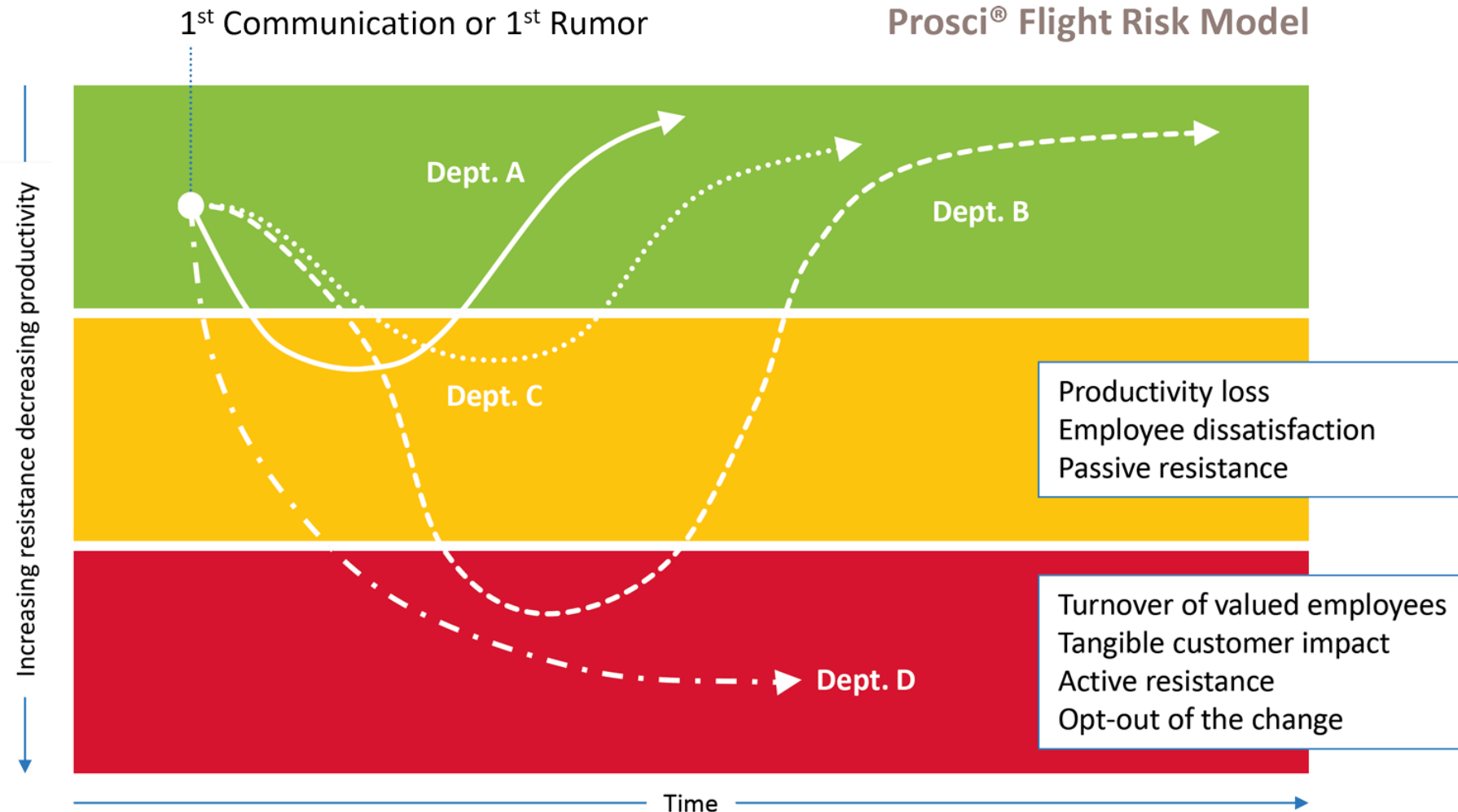
When will the change take effect?

Who can I reach out to if I have questions?

[FAQ's](#)



CHANGE MANAGEMENT - FLIGHT RISK



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

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



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



FINAL THOUGHTS

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?



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RESOURCES

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