

Surfing the Wave of Change Worksheet

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Lead The Way!

Change is a part of life and a part of business. Those organizations that don't or can't change will be swept away by the "wave" of change. Leaders who don't actively plan for and lead their organizations through change, will ultimately allow change to overwhelm. "Surfing the Wave of Change" is a three-step process for leading any organization through change.

Step 1: Survey the Environment *Look where the "waves" are breaking—find the clear path through*

What is the proposed action/change? _____

What is driving the change? _____

What is the desired end state? _____

List Internal Stakeholders (include anyone who can either enable or block change, or has an interest)

List External Stakeholders (incl customers, suppliers, investors, community partners, etc.)

Step 2: Make A Plan *Create a specific plan with milestones and intermediate decision points—don't forget measures to track your progress. Clearly identify criteria to satisfy each milestone and decision point.*

Task	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec	
Sample Task	→		□	→			△	→					☆

Make as many tasks as needed—color code Milestones, Decision Points, & Goal to track status. **Green** = "On Time", **Yellow** = "Behind", **Red** = "Needs Intervention"

Milestone □ Decision Point △ Goal ☆

Step 2: Make A Plan (continued)

Milestone: Marker of Progress

Decision Point: Action Required to Proceed

Goal: Stated Objective

Date	Milestones / Decision Points	Decision Authority	Forum Where It's Decided

What is the Criteria for Successfully Passing a Milestone / Decision Point?		
Milestone or Decision?	Event Name <i>(Ex. Decide to proceed to 35% design)</i>	Criteria <i>(Ex. "Proceed if architect agrees on cost estimate)</i>

Step 3: Execute the Plan *You can't surf sitting in the lineup! Execute your plan and adjust as you go—try to anticipate what could happen when you execute the initiative and look ahead. Key to anticipating possible "bumps" in the wave is to think, "What can happen next? What's possible?"*

Potential Interruptions or Inhibitors *(anything that could negatively impact schedule, cost, morale, etc.)*

1. _____
2. _____
3. _____
4. _____
5. _____

Potential Accelerators *(anything that could positively impact schedule, cost, morale, etc.)*

1. _____
2. _____
3. _____
4. _____
5. _____

**A final note: while you're "Riding the Wave of Change" don't forget to start thinking about the *next* round of change!
There's always another wave behind this one!**

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