



# Strategic Change Leadership

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# Session Objectives

- Conduct an environmental scan and consider the implications for medical education
- Examine an integrative model for planning and implementing strategic change
- Explore the role you play as a leader in managing institutional change
- Learn strategies to work effectively with people in transition
- Prepare to exercise leadership in implementing change in your institutions/organizations

# Agenda Overview

- Overview: Agenda and Objectives
- Introductory Exercise/Discussion
- An Integrative Model of Strategic Change
  - Lessons from Experience: a Practitioner's View
- Leadership Dimensions of Change Management
  - The Role of Leaders
- Working With People in Transition
  - An Exercise: Experiences with Change
  - Managing Resistance
- Next Actions – Application Discussion

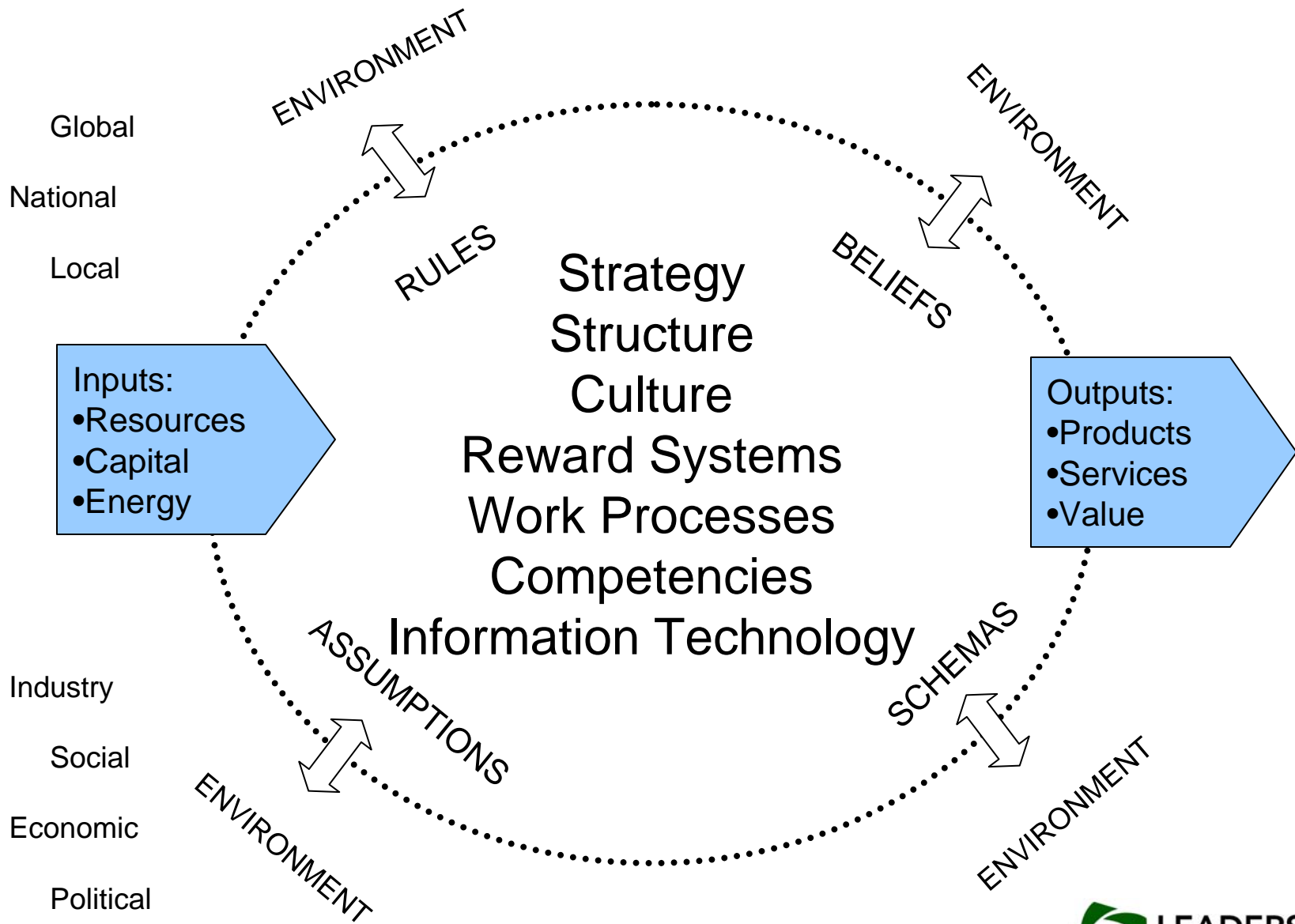
# An Environmental Scan

What have been some of the changes in the last 5-7 years:

- In the world?
- In the USA?
- In the Healthcare environment?
- In Osteopathic Medicine?

What are the implications for osteopathic medical education?

# AN OPEN SYSTEM PERSPECTIVE



# An Integrative Model Of Organizational Change

- Practitioner's approach – learned in the trenches
- Emphasizes concrete actions
- Designed as a roadmap and diagnostic tool
- Builds on and integrates ideas from a variety of perspectives and grounded theory
- Emphasis: things that work or increase the likelihood of sustainable success
- It approximates the reality of change – attempts to make a non-linear process linear

# Overview: An Integrative Model of Organizational Change

- **Phase I:** Analyze and Prepare
- **Phase II:** Develop and Communicate a Vision for the Future
- **Phase III:** Lead the Transition and Implementation
- **Phase IV:** Evaluate Progress and Actively Adapt

# Phase I: Analyze & Prepare

- Conduct an environmental analysis
- Assess business and organizational performance: strategy, finance, markets, people, products/services and technology
- Do a SWOT analysis
- Identify leverage points for effective strategic action – what will move us quickly to alignment?
- Conduct a comprehensive and rigorous stakeholder analysis - identify potential “winners and losers” & varied interests and perspectives

# Phase I: Analyze & Prepare

- Anticipate barriers to change and organizational learning
- Explore organizational blind spots:
  - data which people are not yet able or ready to see
  - defensive routines (system limiting - spoken or unspoken - rules, beliefs and/or assumptions) that can be the Achilles' heel of the change effort

# Phase II: Develop & Communicate Vision For The Future

- Build readiness for change.
  - Get clear about and communicate openly about all of the reasons for the change
- Describe the probable (if we do nothing) and desirable futures from the perspective of
  - the business and
  - the impact on individuals in the organization
- Articulate a clear vision for the future
- Help people articulate a picture of their own future in the “new” organization or model

# Phase II: Develop & Communicate A Vision For The Future

- Work to generate enthusiasm and commitment at every level
- Avoid blaming the past
- Analyze and respond to the communication needs of every group of stakeholders – avoid creating “in” and “out” groups

# Phase III: Lead the Transition and Implementation

- Develop and communicate a transition plan:
  - goals, long and short-term measures of success, sequence of events, timetable, milestones and clear accountability
- Celebrate small wins - early in the game
- Expect a dip in productivity and manage stakeholders expectations accordingly
- Anticipate a period of chaos and confusion
- Make friends with resistance - allow it to surface and deal openly with it

# Phase III: Lead the Transition and Implementation

- Recognize that resistance is about fear and loss  
- not power
- Avoid the temptation to return to the old status-quo or to rescue people from the confusion of learning new roles, systems and procedures
- Provide opportunities for practice and integration  
- help people to learn to experience themselves as competent in a new way

# Phase III: Lead the Transition and Implementation

- Align or re-align:
  - Organizational structures
  - Work processes or technology
  - Formal and informal reward systems and
  - Leadership

With the desired future.

# Phase IV: Evaluate Progress And Actively Adapt

- Accept that change is continuous
- Encourage the mastery of change as a criterion for success in the organization
- Evaluate progress against objectives
- Recognize and reward change leaders
- Maintain continuous feedback loops with the environment and key stakeholder groups
- Involve microcosm groups in fine-tuning future change objectives and redesigning organizational structures and processes

# Stakeholder Analysis

- Identify stakeholders
  - Describe their readiness level for this change
- List Stakeholder Interests/Perspectives
  - How will this group or individual will experience the change (+/-, “a win”, “a loss”)
- What are the key communication messages you want to send to each stakeholder group about your change?
  - This may be the first time this group or person is hearing about this change.
  - Consider how the WIFM principle is operating within this group
  - Are there any individuals in the stakeholder group that require special care or handling: thought leaders, key employees, VIPs, etc.?
- What actions can you take to increase support for this change with this stakeholder group?
  - Maximize support and commitment; increase the win or decrease the loss?

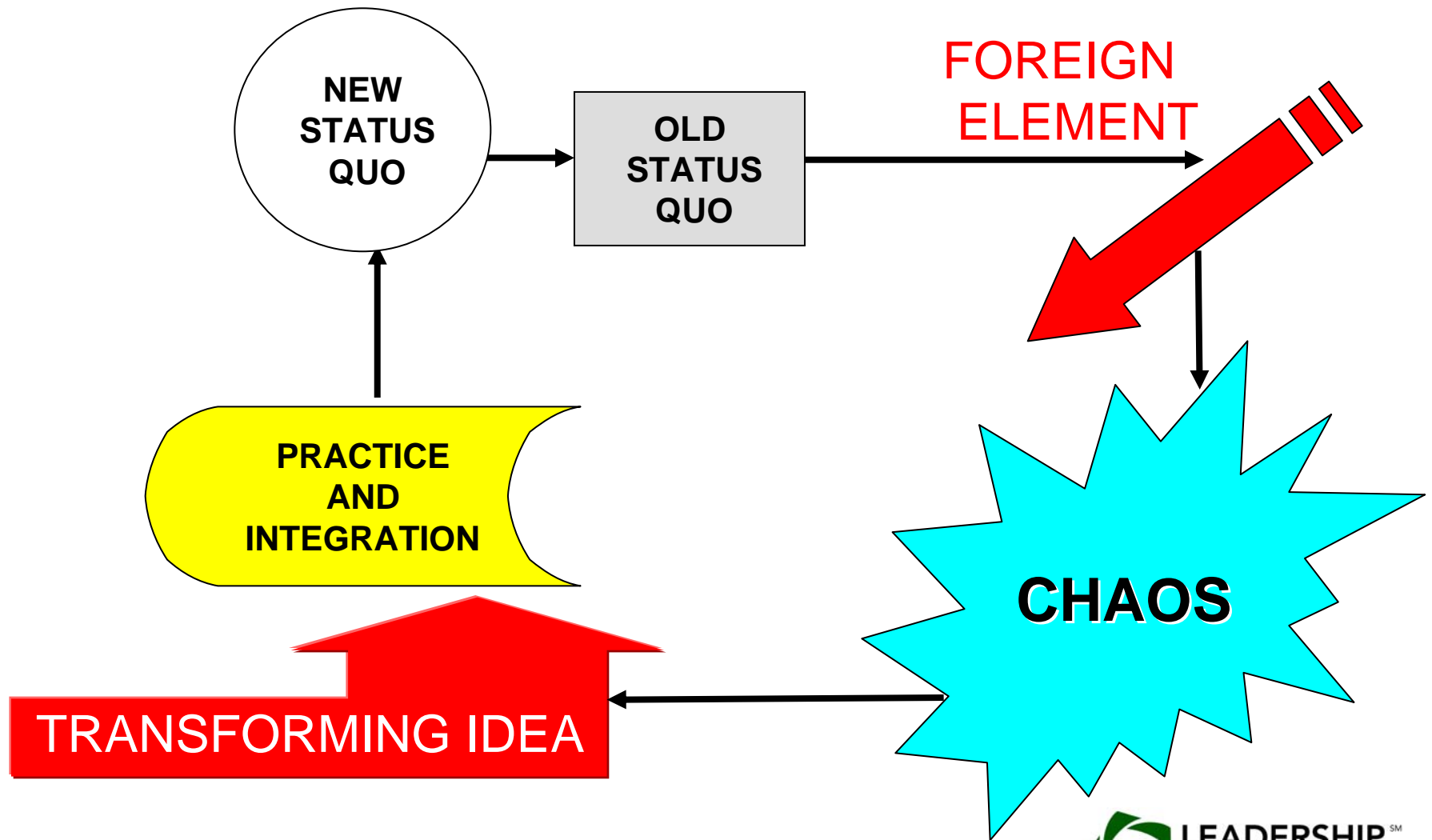
# Leadership Dimensions

- Vision and invitation
- Balance challenge with support
- Working with the power shifts
- Constructive conflict management
- Building motivation and commitment
- Aligning the reward systems
  - Formal (compensation, incentives)
  - Informal (heroes and symbols)

# Experiences With Change

- Recall significant experiences with change. What do you remember about:
  - The time before the change?
  - What happened during the change?
  - Your experience after the change?
- What kinds of things helped you move through the change?
- What hindered movement or kept you stuck?

# The Satir Change Model



# Transforming Ideas In Organizational Change

- **SELF:** Capabilities, degree of “fit” with the new status quo, personal purpose, self-concept, confidence, personal power and the ability to make choices
- **OTHERS:** roles and responsibilities, trust teamwork, connections with others and the nature of working relationships
- **CONTEXT:** vision, goals, mission environment and level of safety to change

# Resistance To Change

- Resistance is about fear and loss
- You cannot reason, legislate or communicate your way out of resistance
- Make friends with the resistance - it is the pathway to transformation
- Deal with your own resistance first
- Create enough safety to explore the fear and the actual or perceived loss underneath the resistance
- Allow it to surface and deal with it directly
- Listen support, and guide problem-solving

# Resistance To Change

- People resist change because of:
  - real or perceived loss of control, power, status, security, personal plans for the future, fear of the unknown
  - lack of information and involvement
  - threats to what they know or believe
  - threats to self-esteem or confidence
  - disruption of routines, excessive pressure to conform, negative past experiences with change, fear
  - a lack of trust in leadership

# Strategies For Working With Resistance

- Surface the resistance
  - Build safety. Listen. Ask questions.
- Honor the resistance
  - Confirm understanding. Empathize.
- Explore the resistance
  - Identify the needs under the resistance
  - Look for alternative ways to meet them
  - Engage the person in finding solutions
  - Develop action plans and follow up
- Invite the person to the table

# Creating Safety

- Listen, listen and listen carefully
- Build trust
- Tell the truth about the reality of change
- Be consistent with your expectations
- Encourage discussion
- Be visible and accessible
- Provide support balanced with challenge to help people solve their own problems
- Support people in making choices on their own behalf

# Change

- Change always involves:
  - going against the grain of the familiar, revising outdated rules, beliefs and assumptions.
  - making new choices to act on your own behalf.
- You will move forward and backwards in the cycle of change, as will everyone around you.
- Psychological safety is an essential condition in producing an inner-shift.

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