

# LEADING **FORWARD**

*Lead through Transition,  
Equip Yourself & Inspire Others*



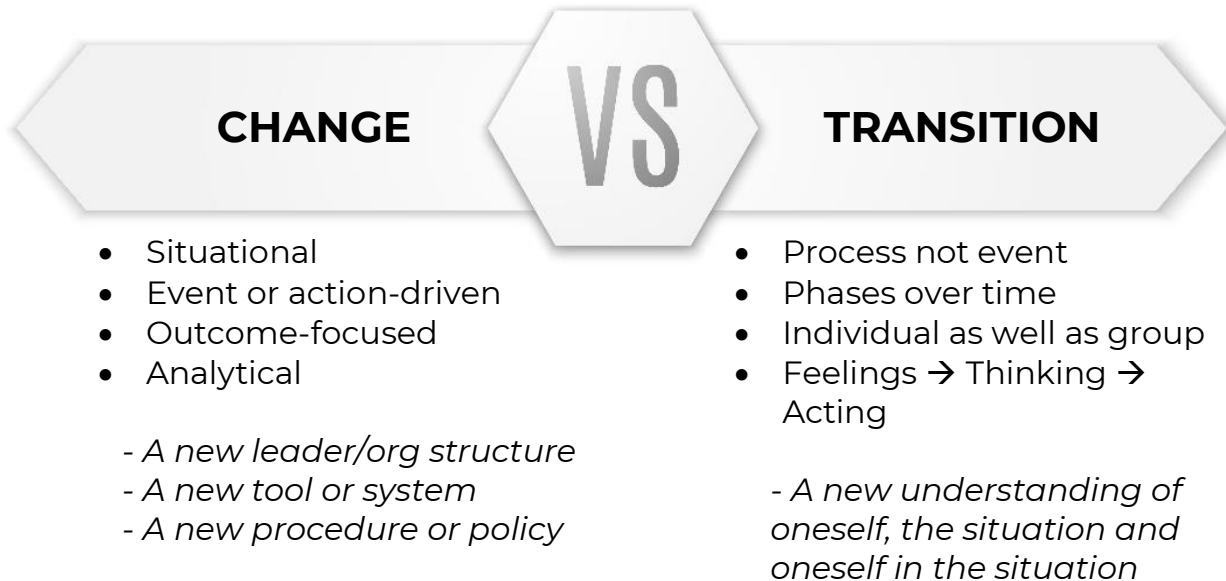
## **GET IN TOUCH**

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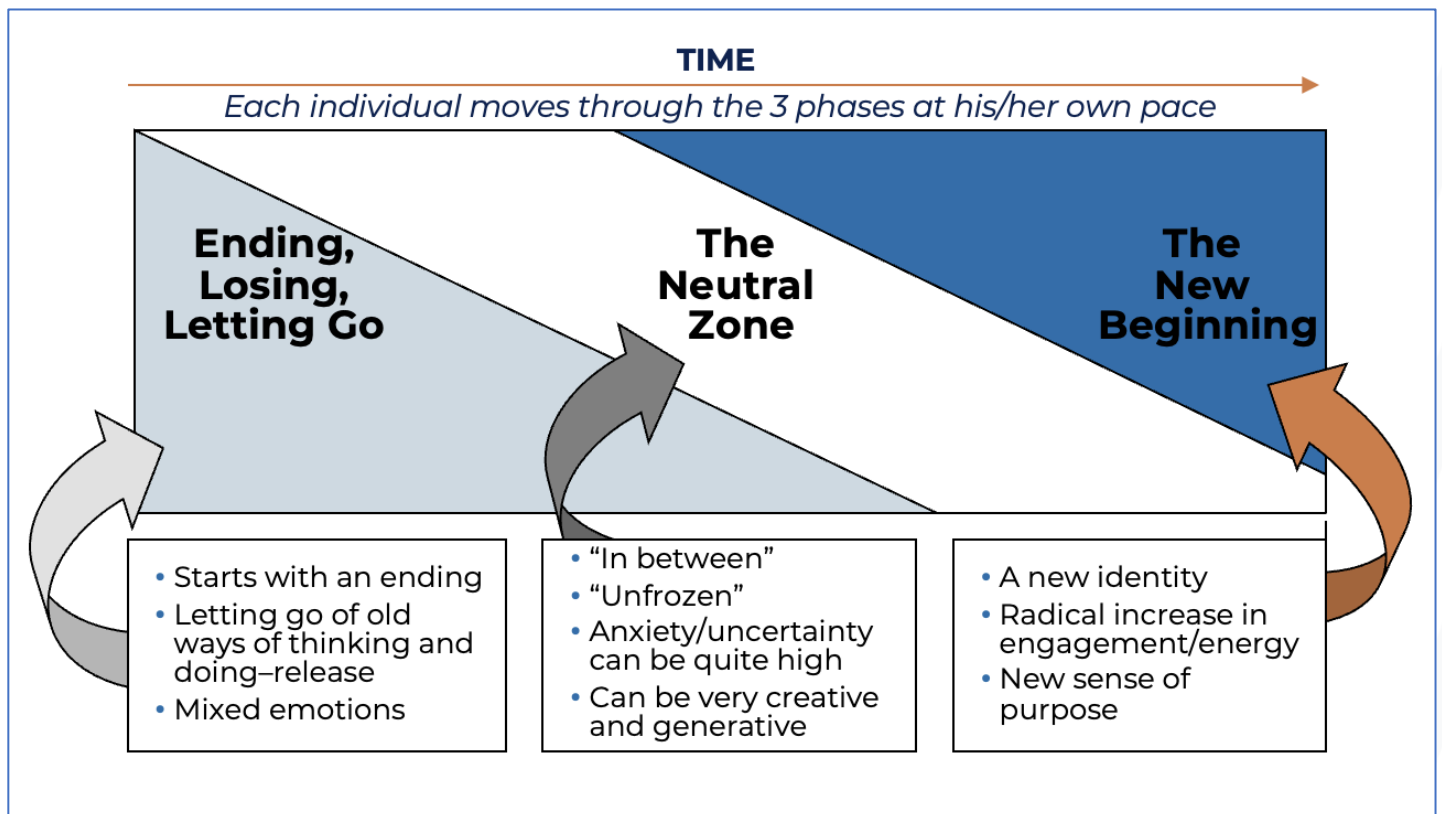
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## Change vs. Transition

Think of transition as the state that change puts people into. View the characteristics of both Change and Transition below.



## Bridge's Transition Model



## What is Resistance?

It's the transition, not the change that people often resist.

- ✓ Loss of their identity and their world
- ✓ Disorientation of the neutral zone
- ✓ Risk of failing in a new beginning

## Change-Resistant Language & Behavior

What language or behavior you have heard within your team?

During the <b>Ending, Letting Go</b>	During <b>The Neutral Zone</b>
<p>Language</p> <ul style="list-style-type: none"><li>• “Whose idea was this anyway?”</li><li>• “Why can’t things stay how they are?”</li><li>• “They don’t know what they’re doing.”</li><li>• “We’ve tried this before and it bombed.”</li></ul> <p>Behavior</p> <ul style="list-style-type: none"><li>• Challenge and complain</li><li>• Shoot down ideas</li><li>• Withdraw, overreact, lose perspective</li><li>• Blame and finger-pointing</li><li>• Ask questions/need details</li><li>• Get angry, sad, depressed or self-absorbed</li></ul>	<p>Language</p> <ul style="list-style-type: none"><li>• “This is a mess; we are so disorganized.”</li><li>• “Tell me, again, why we are doing this?”</li><li>• “Sometimes I just feel lost.”</li><li>• “No one knows what anyone else is doing.”</li></ul> <p>Behavior</p> <ul style="list-style-type: none"><li>• Frustration, confusion, uncertainty</li><li>• Bargain</li><li>• Seek out structure and order</li><li>• Get involved</li><li>• Look for new rules</li><li>• Think of new ideas and options</li><li>• Desire to learn</li></ul>

## Actions for Leaders to Manage Transitions

<p><b>Ending</b></p>	<ul style="list-style-type: none"> <li>• Describe the change and why it must happen (the 1-min. elevator speech). Include the vision (what it will look like).</li> <li>• Appeal to the head and the heart. Describe the threat and opportunity.</li> <li>• Provide the details of the change, ensure that someone is responsible for each detail; establish timelines.</li> <li>• Consider who is going to have to let go of what (endings), including the leader.</li> <li>• Take steps to help people respectfully let go of the past.</li> <li>• Listen and address concerns.</li> <li>• Provide a stream of information. Accept grieving. Recognize efforts to protect people's interests while they are giving up the status quo.</li> </ul>
<p><b>Ending &amp; Neutral Zone</b></p>	<ul style="list-style-type: none"> <li>• Involve people in ownership of the changes (from planning through inception and beyond).</li> <li>• Build a coalition for the change (early supporters, advocates).</li> <li>• Help people through the neutral zone with communication (rather than simple information). Communicate:             <ul style="list-style-type: none"> <li>○ The <i>purpose</i>: Why we are doing this</li> <li>○ The <i>picture</i>: What it will look and feel like when we reach our goal</li> <li>○ The <i>plan</i>: Step-by-step, how we will get there</li> <li>○ Their <i>part</i>: What they can and need to do to help us move forward</li> </ul> </li> <li>• Create temporary solutions to the temporary problems.</li> <li>• Find a way to create early wins. Identify and celebrate them.</li> <li>• Provide time for people to change. This is where the creativity occurs.</li> <li>• Stay connected and communicate. Distance will be interpreted as abandonment.</li> </ul>
<p><b>New Beginnings</b></p>	<ul style="list-style-type: none"> <li>• Help people launch the new beginning by articulating the new attitudes and behaviors needed to make the change work. Model, provide practice in and reward those behaviors and attitudes.</li> <li>• Set standards for performance and hold to them.</li> <li>• Find people doing the right things. Publicly reward them.</li> <li>• Monitor results. Identify and communicate progress.</li> <li>• Celebrate successes.</li> </ul>

# Effective Communication – What & Who

Help people through the neutral zone with communication (rather than simple information). Include the following in your communications:



Each level of leader is responsible for a different action when it comes to effectively communicating with your team. View the table below to learn more about the different responsibilities and supportive behaviors.





**Key Takeaways**

# Effective Communication



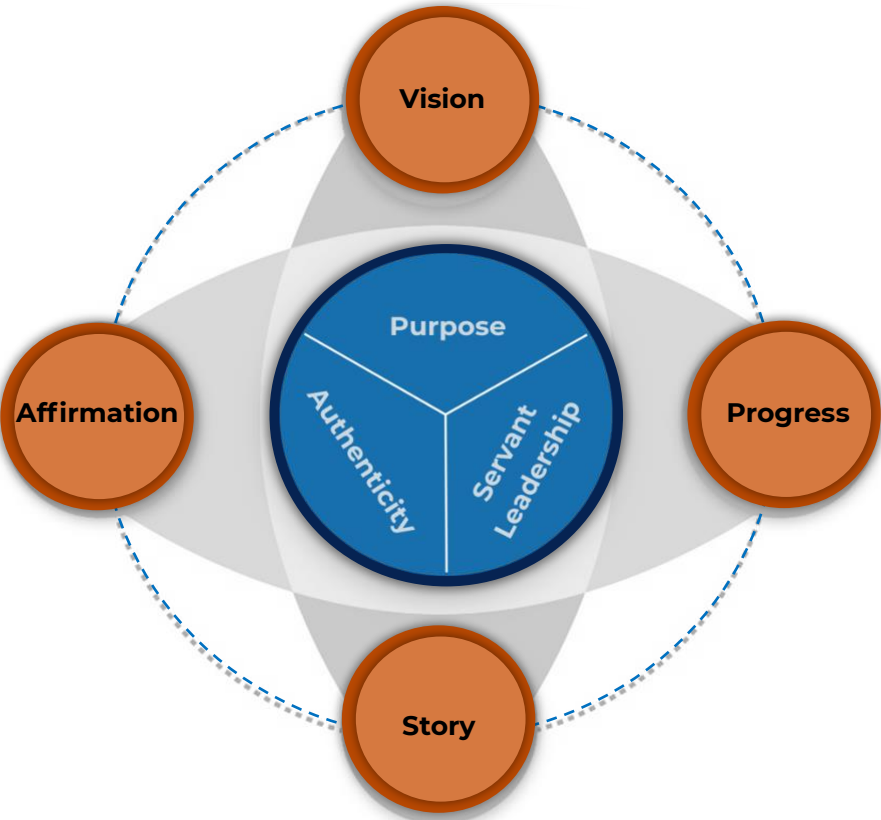
## Communication Checklist

As you're going through changes and transitions, utilize this checklist to ensure you're prepared to communicate with your teams.

- What is really driving the change?
- What would happen if we didn't change?
- What will we become through the change?
- How does the change fit with or grow out of the past?
- What kinds of secondary changes are likely to occur?
- What's in it for me?
- What kind of assistance will we provide affected individuals/groups?

# The 7 Drivers of Inspiration

Validated behavioral model proven to drive higher levels of workforce performance and customer advocacy.



# Personal Card Sort Activity



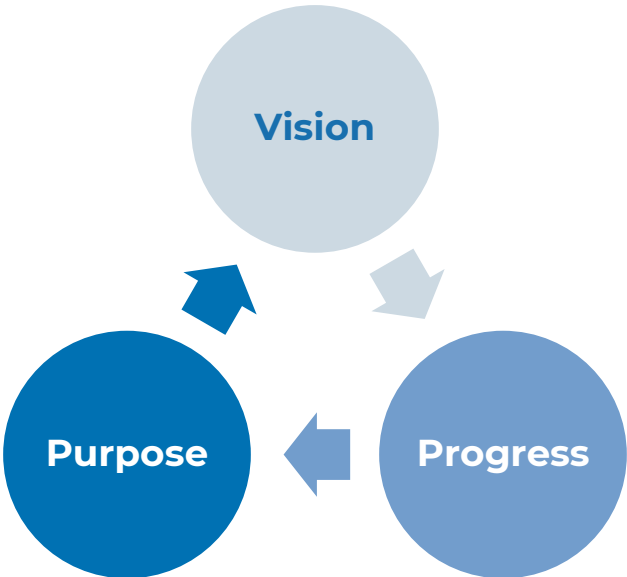
**Instructions:** Review the “7 Drivers of Inspiration” Personal Card Sort deck. Identify your proficiency (strong, competent, or weak) with each of the drivers. Based on your proficiency, determine what drivers you will focus on for your development.

STRONG		COMPETENT		WEAK		
<b>VISION</b> What success looks like and how we become best in class	<b>PURPOSE</b> Why we exist and why we serve	<b>PROGRESS</b> Steps toward our vision, guided by our values	<b>SERVANT LEADERSHIP</b> Using your assets to help others achieve success	<b>AUTHENTICITY</b> Being transparent, vulnerable and teachable	<b>AFFIRMATION</b> Visibly noticing, naming and nurturing others' talents	<b>STORY</b> How we connect people to our purpose



**Personal Card Sort Activity**  
 Revisit your proficiency from time to time. Be sure to share out what you are personally working on with your team to show your authenticity and hold yourself more accountable.

# The Activation Triangle



**Vision**  
*What does success look like?  
 What are we compelled to achieve?*

**Purpose**  
*Why are we doing this?*

**Progress**  
*What past successes are we proud of and what future success milestones do we want?  
 How can we get there?*



# The Activation Triangle Activity



## Frame Your Initiative Exercise

It's important to acknowledge progress with your team. Use the following as a template and complete with new initiatives. When finished, share out with your team.



**Instructions:** Think of a current initiative that you are rolling out or supporting and identify the Vision, Purpose and Progress. Capture your responses in the spaces provided below.

### VISION

### PURPOSE

### PROGRESS (PAST)

### PROGRESS (FUTURE)



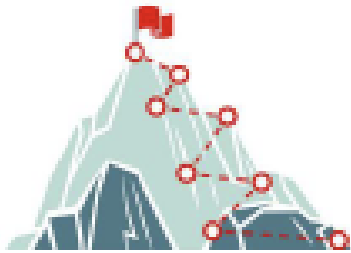
### Key Takeaways



# Progress

## Key Ingredients

- ⇒ Catalytic Events
- ⇒ Small Steps
- ⇒ Visible Milestones
- ⇒ Encouragement
- ⇒ Creative Problem Solving
- ⇒ Collegial Support
- ⇒ Needed Resources



## Principles & Practices

- ⇒ Getting early wins establishes clear momentum
- ⇒ Establish a clear rhythm of milestones in alignment with the pace of change
- ⇒ Deal with setbacks transparently and amplify lessons learned
- ⇒ Make people accountable to each other's success
- ⇒ Be aware of the symbolic message of your actions and decisions
- ⇒ Cut off roots to the past
- ⇒ Build the future into the now



## Key Takeaways

# Authenticity: Where Are You? Self-Assessment



**Instructions:** Using the rating scale below, circle where you see yourself in terms of your authenticity.

## TRANSPARENT



I'm reserved in sharing information about myself

I will share information about myself if I feel safe in the situation

I am very comfortable sharing information about myself

## VULNERABLE



I prefer keeping mistakes and uncertainties private

I'm OK telling others I'm unsure or made a mistake as long as it won't matter much

I readily admit mistakes and uncertainties

## TEACHABLE



I'm pretty sure I know how best to proceed

I'm open to doing something different as long as others are willing to do the same

I seek out feedback and feel like I always have something to learn



### Key Takeaways

# Defining Moment Story



**Instructions:** Share a defining moment story with a table partner and consider the following questions as you share your story. Then reflect on how transparent, vulnerable and teachable you were and review the principles and best practices.

## Step 1: Pair and Share

### Discuss

- What was the situation?
- What were you trying to accomplish?
- What happened that got in the way?
- How was the situation resolved?
- What did you learn? How were you changed?

### Story Ideas

- Difficult performance situation
- Something you were sure you were right about but you ended up being wrong
- Huge assumption you made that ended up being wrong
- Difficult life situation you emerged stronger from

## Step 2: Reflect

### Transparent

*Ask: How much do I share about what is going on?*

### Vulnerable

*Ask: How much do I share about how I feel?*

### Teachable

*Ask: How do I separate real concerns from “change noise”?*

### Principles and Practices

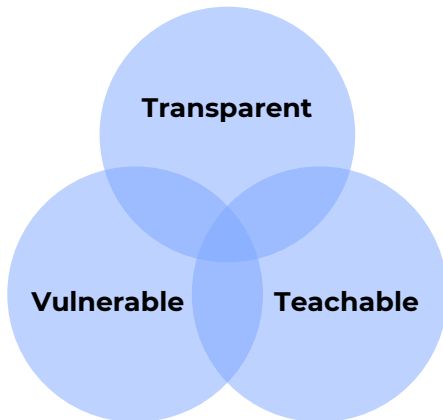
<ul style="list-style-type: none"> <li>• Silence is NOT Golden</li> <li>• Share what you know</li> <li>• Share what is unknown or being worked on</li> <li>• Share when you think you know more</li> </ul>	<ul style="list-style-type: none"> <li>• Share the struggle</li> <li>• Share similar experiences and their impact on you</li> <li>• Manage your emotions vs. the other way around</li> <li>• Take “what’s being done to me” out of the conversation</li> <li>• Empathy is important, commiserating is unproductive</li> </ul>	<ul style="list-style-type: none"> <li>• Dig deeper</li> <li>• Ask specific questions about concerns – what, why, impact, who else?</li> <li>• Help separate data from assumptions, from conclusions</li> </ul>
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### Share this activity with your team!

Replicate this same activity with your broader team to help them understand authenticity and how to be more transparent, vulnerable and teachable.

# Operationalize Authenticity



## The need for authenticity is amplified:

- When leading change
- When aligning vision and direction
- When tracking progress
- When building your team
- When collaborating across boundaries
- When managing difficult relationships

### INDIVIDUAL

- Start 1-1 sessions with "relationship check-in"
- Make "status updates" about learning and "feed forward"
- Share the personal struggle

### TEAM

- Use TVT as your leadership team operating model
- Use the defining moment story to deepen understanding and practice TVT

### FUNCTIONS OR VERTICALS

- Town Hall meeting no-spin zone
- Schedule regular "reverse coaching" sessions with HiPos
- Regularly publish stories aligned with strategy using GSSL format (Goal, Struggles, Successes, Lessons)



### Key Takeaways

# Operationalize Authenticity



## Leveraging Feed Forward

As you're going through your next coaching session, utilize this list of questions below to ensure you are embracing authenticity.

1. Where are we going? Where should we be going?
2. Where is your part of the business going? Where should you be going?
3. Here is where I see your part of the business doing well. What do you think you are doing well?
4. Here are some suggestions where I think your part of the business could improve. Where do you think you could improve?
5. If you were the coach, where would you coach yourself to improve?
6. How can I help?
7. What suggestions do you have for me that would make me a better manager to you?



## Key Takeaways

## Assets Inventory Activity



**Instructions:** Identify your assets that you can share with another team member as well as needs for you or your team. Capture both on the cards provided.

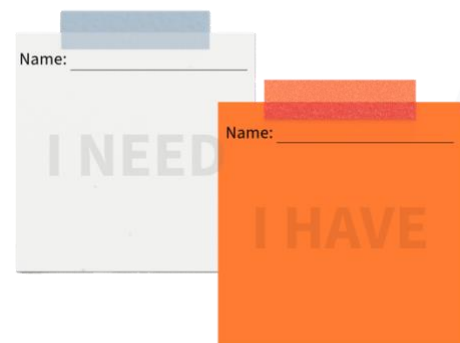
### Step 1: Assets Inventory

What do you consider some of your key assets? Consider your key skills, experience, budget, relationship capital, or other items.

#### CURRENT ASSETS

### Step 2: Personal or Team Needs Activity

1. Think about a need – something you or your team could use to meet or exceed your goals. Then think about an asset you or your team possess (a “have”) that could help others succeed.
2. Write down one “I need” item on a white index card and one “I have” item on a yellow index card. Be sure to include your name.
3. During breaks, look at the flip charts and see if there is something you can contribute to someone else or if there is something you need.
4. If you see a need you can meet, grab the card and connect with the person after the meeting. If you see a “have” that would be beneficial to you, then write down the person’s name and, again, connect with them after the meeting.
5. Connect ... Explore ... SERVE!



#### Share this activity with your team!

Replicate this same activity with your broader team to help them understand Servant Leadership.

# Servant Leadership

## Principles and Practices

- Amp up the volume on teamwork
- Encourage people to find ways to support each other
- Actively connect people that will embody collaboration
- Invent reasons for people to work more together



## Affirmation

Affirmation is defined as a willingness to overtly express and receive appreciation for specific character traits or performance of an individual.

- Someone who is affirmative will openly express appreciation for a job well done and might be described as appreciative and expressive.
- For leaders, it also involves seeing things in others they may not see in themselves.

NOTICE – NAME – NURTURE

## Principles and Practices

- Name and recognize people's strengths.
- Recognize specific progress toward the future.
- Amp up the volume on the team appreciating each other's progress and contributions.
- Be explicit about skill shifts required and how people can get there.
- Coach and delegate to build competence and confidence.



## Appreciation: Good, Better, Best



## Appreciation Exercise



**Instructions:** Think of a person in the room and identify a strength you see that this person demonstrates that you appreciate. Write it on a round sticker. Give the sticker to the person and, as you do, be specific with what you appreciated and the impact it had. Repeat for as many people as you can in the time allotted.



### Share this activity with your team!

Replicate this same activity with your broader team to help them understand recognition and appreciation.



### Key Takeaways

# Operational Affirmation



## The need for affirmation is amplified:

- When articulating individual value
- When leading change
- When planning development
- When seeking role or project fit
- When optimizing team performance

### INDIVIDUAL

- Big Deal eCard, Notecard or Awards
- Development/Stretch assignments
- Career development conversations & Learning opportunities
- Weekly personal appreciation – written or verbal

### TEAM

- Appreciation name tag activity (Repeat Quarterly)
- Team interests/strengths inventory and leverage plan (Update Quarterly)
- Team behavior commitment process (Set and Bi-Weekly Check-In)
- Re-energize team intervention through appreciation exercise

### FUNCTIONS OR VERTICALS

- “Spotlight” segment during Town Hall meetings
- Peer appreciation process (Big Deal) – connect to values/initiatives
- Team contribution videos as part of new associate awareness and cross-team collaboration



### Big Deal Notecard

In follow up to this activity, use the Big Deal Notecards to recognize your associates and practice operationalizing Affirmation!



### Key Takeaways

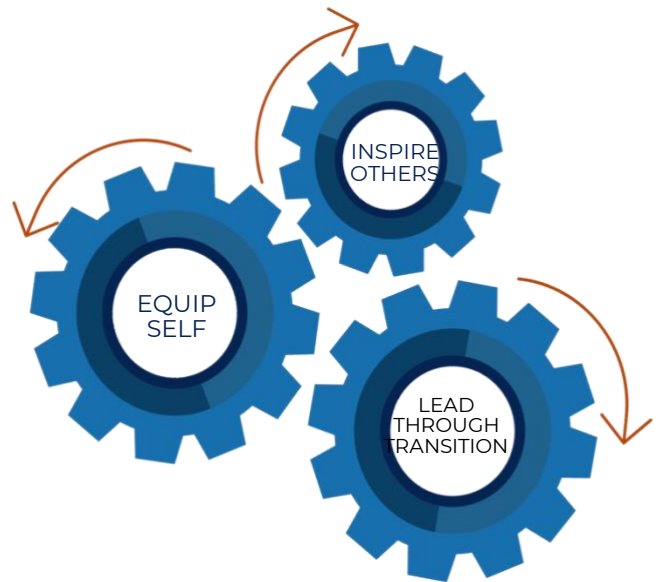
## Takeaways

### Lead Through Transition

- Each associate has their own, unique, transition journey.
- **Communications are critical** to shepherd associates through transition.
- Help your team understand **Purpose, Picture** (what success looks like), the **Plan**, and their **Part**.

### Equip Self & Inspire Others

- Use the **7 Drivers of Inspiration** (Vision, Progress, Story, Affirmation, Purpose, Authenticity, Servant Leadership) to **inspire your team** to achieve the outcome we want.
- Flex the skills and knowledge from today to **help associates move forward together** and feel personally connected.



## Tools for You & Your Team

### Lead Through Transition

- ⇒ Leverage Communication Tools
- ⇒ Identify where your team members are at on **Bridge's Transition Model** and identify actions to guide them

### Equip Self

- ⇒ **Personal Card Sort:** What do you commit to focusing on first?
- ⇒ Review the **Asset Cards**
- ⇒ Review the **Leader Discussion Guide**

### Inspire Others

- Flex your skills and take tools back to your teams:
- ⇒ Repeat activities (ex: **Story Moment, Appreciation Name Tag**)
  - ⇒ Talk through the **Leader Discussion Guide** in 1-1s or Teams
  - ⇒ Write a **Big Deal Manager Notecard**