Ready. Set. CHANGE!™

Facilitator Resources

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VisionPoint® would like to acknowledge Marcey Uday-Riley, MSW, CPT, and IRI Consultants for their significant contribution to the development of this program.
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Suggestions for Prework

Assigning prework before the training session can help engage participants in the training session content even before they arrive. If you would like to include prework as part of the training session design, we have included some suggestions below for integrating prework into the training session.

Suggestion #1 (Highly recommended)

In preparation for conducting the half-day agenda, have participants complete the online Change Response Assessment before they attend the training session. About three to four weeks before the date of the training session, send a training session invitation to participants that includes instructions about completing the online assessment and the date by which you need participants to complete the assessment. The instructions should explain that the facilitator will bring the results of the assessment to the training session for which the participant is scheduled. An alternative is to encourage participants to print out their Change Response Profile report, and bring it with them to the training session; however, if you choose this alternative you will need to slightly alter the half-day agenda. About two weeks before the training session, access the assessment website, determine which participants have not completed the assessment and send them a reminder about the deadline for completing the assessment. If you have selected the option of participants printing and pre-reviewing their profile, you may want to print out copies of the Change Response Profile reports in case participants forget to bring them to the training session. These reports are an essential component to the learning. You may also want to consider in advance how you will deal with a participant who fails to complete an online assessment by the deadline date.
**Facilitator Note:** See the *Online Resources* for a sample profile report.

**Suggestion #2**
Ask participants to come prepared with examples of recent or current organizational changes, regardless of how large or small, and the impact of these changes on themselves and their coworkers. Refer to these examples in Step 3 and/or Step 4 of the two-hour or half-day agenda.

**Suggestion #3**
Provide participants with a list of responsibilities of all employees in understanding and adapting to organizational change. You can use the skills from the Pre-Test, which indicate what it takes to demonstrate change competence. Ask them to think of two to three indicators for each responsibility that would demonstrate that employees are meeting the responsibility. Provide an example of a responsibility and an indicator. Refer to these examples in Step 4 of the two-hour or half-day agenda.

**Suggestion #4**
Provide a copy of VisionPoint’s Perspective Paper, *Training at the Point-of-Change: Strategies for a Change-Responsive Workforce* (available as an Online Resource at www.visionpoint.com), as pre-reading material. During introductions, ask everyone to share what they found most interesting and what they’d like to learn more about.
A Note about Behavioral Styles

This program includes a review of behavioral styles in both the two-hour and half-day agenda options. The half-day workshop uses a Change Response Profile, based on The Change Response Assessment, to help participants better understand their responses to change, the responses of others to change and ways to adjust their behavior when interacting with others during times of change.

During the training, participants will learn about four distinct “styles” or patterns of behavior (i.e., the analytical style, the driver style, the expressive style and the amiable style), which are based on the work of David W. Merrill and Roger H. Reid in their book, Personal Styles and Effective Performance: Making Your Style Work for You (1981, Chilton Book Company).

These behavior styles (sometimes also called social styles) are based in Jungian psychology and were originally described in the book, Emotions of Normal People, by William Moulton Marston in 1928. Social styles are not inclusive of all the elements that make up our personality. Personality includes the elements of affect, behavior and cognition. Social styles only focus on one aspect of personality—directly observable visible behavior.

During the discussion of the different styles and the impact of the styles in the workplace, you may encounter participants who use the style names to “label” or stereotype people. If this happens, you will need to remind participants that no one exhibits a “pure” style (i.e., we can demonstrate a variety of behaviors but have a preference for certain behaviors or demonstrate certain patterns of behaviors more often than others) and that behavioral style patterns or preferences are only one part of who a person is.
SMART- START® Change Video Activity

Time it takes: 10 – 15 minutes
What it is about: Opening the session on a positive note

What you will need:
• Video – SMART-START® Change: Responding Better Together

How to do it:
1. Begin playing the SMART-START® video 15 minutes prior to the session start time. If you are using the DVD, set the control to automatically loop. If you are using the VHS, the video will repeat itself at least four times.
2. Turn the video off when you are ready to begin your session and explain that you will refer to it again later. After the participants have introduced themselves, you will use this activity as part of your introduction (either to conclude Step 1 or during Step 2).
3. Break the group into smaller groups of three to five people, and ask them to talk within their groups to answer the following three questions:
   • Why should we care about understanding and engaging with change in our workplace?
   • How does who we are impact how we see or experience change?
   • How do our reactions to change impact the ability of those around us to understand, respond to and engage with change?
4. Debrief the whole group by asking for volunteers to share any highlights from their small group discussion.

5. Transition into the next activity by summarizing participants’ responses and linking them to the responsibility we all have to prevent retaliation.

**Facilitator Note:** This activity may also be used as an energizer during and/or immediately following a break. If used in this manner, be sure to transition into the next activity by drawing a connection to what has been discussed so far and how the video relates to the next set of activities. Other activities to use with *SMART-START®* videos are available in VisionPoint’s *Beyond the Box* activity book available for purchase.
Optional Activity 1
Change Simulation

Time it takes: 45 – 60 minutes
What it is about: Experiencing various aspects of workplace change through a simulation

What you will need:
- A roll of adhesive tape for each team
- A set of 60 ruled (lined) index cards for each team consisting of three colors (i.e., 20 cards of one color, 20 cards of a second color and 20 cards of a third color)
- Handout #1 – House of Cards (page 51 of the Facilitator Resources)

How to do it:

[Facilitator Note: Consider using this activity before starting Step 5 in the half-day agenda.]

1. Introduce the activity. Say: To respond to and engage with organizational change effectively, it’s helpful to understand change and how we typically experience and react to it. So we’re going to do an activity that will help us think about various aspects of change in the workplace and how it affects us.

2. Distribute Handout #1 and ask: What does it mean when we compare something to a “house of cards”?  
   [Possible Responses: it’s fragile; it might collapse; it won’t last; it will come tumbling down]
Optional Activity 2  
Interpreting The Change Response Profile

Time it takes: 20 minutes
What it is about: Reviewing and discussing The Change Response Profile
What you will need:
- Handout #2 – Understanding My Behavior Style (page 53 of the Facilitator Resources)
- The Change Response Profile report for each participant in individual sealed envelopes to maintain confidentiality

[Facilitator Note: This activity requires the purchase and completion of online Change Response Assessments prior to your session. This exercise is already included in the half-day agenda and is presented here as an optional activity that may be added to the one-hour overview or two-hour agenda options.]

How to do it:

[Facilitator Note: It is important that you introduce the definitions of the four behavior styles prior to conducting this activity.]

1. Distribute Handout #2 and introduce the activity. Say: As part of the prework for this session, you completed an online assessment dealing with behavior styles. In just a minute, I’m going to distribute a personalized profile that was generated as the result of that assessment. Before I do, I’d like each of you to take five minutes to answer two questions:

1. Which of the four behavior styles we
Optional Activity 3
Adjusting Your Communication Style

Time it takes: 20 minutes
What it is about: Discussing how to adjust your communication style according to the other person’s preferred behavioral/communication style

What you will need:
• Handout #3 - Adjusting Your Communication Style (page 55 of the Facilitator Resources)

How to do it:

1. Introduce the activity. Say: Earlier we discussed that one way to share your needs and concerns about change appropriately during the Communicate step of The Change Response Strategy™ is to adjust your communication to the needs and communication style of the person you’re talking to. This action relates to the four different behavioral styles. You’ll need to modify your approach depending on whether you’re communicating with a person who has an analytical style, a driver style, an expressive style or an amiable style. Let’s practice how we can do that by using a case study.

2. Distribute Handout #3 and say: As you read the case study, imagine that you’re the person in the case study and think about...
Optional Activity 4
Applying The Change Response Strategy™: Manufacturing Case Study

Time it takes: 30 minutes
What it is about: Applying The Change Response Strategy™ to a change in a manufacturing setting
What you will need:
- Handout #4 – Manufacturing Case Study (page 57 of the Facilitator Resources)
- Handout #9 – Applying The Change Response Strategy™ (page 67 of the Facilitator Resources)

How to do it:

1. Introduce the case study. Say: You’ve really learned a lot about understanding and dealing with change today. Our next activity will allow you to apply what you’ve learned. You’re going to work in small groups to apply the entire Change Response Strategy™ to a case study.

2. Assign participants into groups of three or four (depending on class size). Once they are in groups, distribute Handout #4 and Handout #9 and say: Use the questions on these two pages to apply the strategy to the case study. Also, select a spokesperson who can summarize your work for the entire group. [Allow 15 minutes.]
Optional Activity 5  
Applying The Change Response Strategy™: Government Case Study

Time it takes: 30 minutes
What it is about: Applying The Change Response Strategy™ to a change in a government setting
What you will need:  
• Handout #5 – Government Case Study (page 59 of the Facilitator Resources)
• Handout #9 – Applying The Change Response Strategy™ (page 67 of the Facilitator Resources)
How to do it:

1. Introduce the case study. Say: You’ve really learned a lot about understanding and dealing with change today. Our next activity will allow you to apply what you’ve learned. You’re going to work in small groups to apply the entire Change Response Strategy™ to a case study.

2. Assign participants into groups of three or four (depending on class size). Once they are in groups, distribute Handout #5 and Handout #9 and say: Use the questions on these two pages to apply the strategy to the case study. Also, select a spokesperson who can summarize your work for the entire group. [Allow 15 minutes.]
Optional Activity 6
Applying The Change Response Strategy™: Financial Services Case Study

Time it takes: 30 minutes

What it is about: Applying The Change Response Strategy™ to a change in a financial services setting

What you will need:
- Handout #6 – Financial Services Case Study (page 61 of the Facilitator Resources)
- Handout #9 – Applying The Change Response Strategy™ (page 67 of the Facilitator Resources)

How to do it:
1. Introduce the case study. Say: You’ve really learned a lot about understanding and dealing with change today. Our next activity will allow you to apply what you’ve learned. You’re going to work in small groups to apply the entire Change Response Strategy™ to a case study.
2. Assign participants into groups of three or four (depending on class size). Once they are in groups, distribute Handout #6 and Handout #9 and say: Use the questions on these two pages to apply the strategy to the case study. Also, select a spokesperson who can summarize your work for the entire group. [Allow 15 minutes.]
Optional Activity 7
Applying The Change Response Strategy™: Retail Case Study

Time it takes: 30 minutes
What it is about: Applying The Change Response Strategy™ to a change in a retail setting
What you will need:
- Handout #7 – Retail Case Study (page 63 of the Facilitator Resources)
- Handout #9 – Applying The Change Response Strategy™ (page 67 of the Facilitator Resources)

How to do it:
1. Introduce the case study. Say: You’ve really learned a lot about understanding and dealing with change today. Our next activity will allow you to apply what you’ve learned. You’re going to work in small groups to apply the entire Change Response Strategy™ to a case study.
2. Assign participants into groups of three or four (depending on class size). Once they are in groups, distribute Handout #7 and Handout #9 and say: Use the questions on these two pages to apply the strategy to the case study. Also, select a spokesperson who can summarize your work for the entire group. [Allow 15 minutes.]
Optional Activity 8
Applying The Change Response Strategy™: Healthcare Case Study

Time it takes: 30 minutes
What it is about: Applying The Change Response Strategy™ to a change in a healthcare setting

What you will need:
- Handout #8 – Healthcare Case Study (page 65 of the Facilitator Resources)
- Handout #9 – Applying The Change Response Strategy™ (page 67 of the Facilitator Resources)

How to do it:

1. Introduce the case study. Say: You’ve really learned a lot about understanding and dealing with change today. Our next activity will allow you to apply what you’ve learned. You’re going to work in small groups to apply the entire Change Response Strategy™ to a case study.

2. Assign participants into groups of three or four (depending on class size). Once they are in groups, distribute Handout #8 and Handout #9 and say: Use the questions on these two pages to apply the strategy to the case study. Also, select a spokesperson who can summarize your work for the entire group. [Allow 15 minutes.]
DVD Additional Materials
Who, What, How and When

Additional materials are provided to help facilitators supplement a training plan and prepare for an effective training program. These materials may be used before, during or after a session.

Additional materials provided on the DVD for this program include:

<table>
<thead>
<tr>
<th>What it is</th>
<th>How to use it</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SMART-START® Change: Responding Better Together</strong> – A short video, ideal for kicking off or closing the training session</td>
<td>See optional <strong>SMART-START®</strong> activity for one way to use this video. Other activities are available in VisionPoint’s <em>Beyond the Box</em> activity book available for purchase.</td>
</tr>
<tr>
<td>Insights Interview – Marcey Uday-Riley, subject matter expert, addresses several key questions about change.</td>
<td>During a break or as follow-up training to provide insights on responding to change in the workplace.</td>
</tr>
<tr>
<td>Vignettes-only – Individual vignettes from the video, without the on-camera or voice-over narrator.</td>
<td>To quickly review an individual vignette.</td>
</tr>
</tbody>
</table>

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Handout #1 – House of Cards

Instructions: You and your team members must work together to design and build a house of cards for your customers. Your house will consist of index cards and must follow these specifications:

- The house must have two stories and a flat roof.
- Each story of the house must have two rooms.
- The design of the house must incorporate three colors.
- The house must not collapse under normal everyday conditions.

You have ten minutes to design your house using index cards (in three different colors) and adhesive tape as your construction materials. After ten minutes, you must start building your house.
Handout #2 - Understanding My Behavioral Style

Instructions: Answer the following questions.

Which of the four behavioral styles—amiable, analytic, expressive or driver—does your profile report indicate? In your own words, describe why this style best describes you.

Write down how a coworker who has worked with you for a while might describe your typical response to change? What would the coworker say you do that’s productive and counter-productive?
Handout #3 – Adjusting Your Communication Style

You are part of the administrative staff of a physician-owned, family medical practice. Because of the increasing administrative burden and costs of managing patient records, insurance claims, information requests, billings and other administrative tasks, the physicians recently decided to bill patients $25.00 each on an annual basis to cover the costs of managing their respective medical files and associated paperwork.

You have serious concerns about the consequences of putting this change into effect. You’re worried that many patients will become angry when they receive the bill and will call the office to express their feelings, which will take time and energy away from serving the needs of patients who are in the office and who call in. You’re also concerned that patients won’t pay this bill, and the office staff will have to spend time sending additional account statements and making follow-up calls to encourage patients to pay. In addition, you’ll have to separate out your Medicare patients in the billing process because you can’t charge them this fee. And you’re sure that some patients will be offended by the bill and decide to take their business elsewhere.

The bills haven’t gone out yet, so you decide to approach the managing partner of the practice to express your concerns. What would you say and do to adjust your communication style to express your concerns about the change if the partner exhibited a/an:

• analytical style?
Handout #4 - Manufacturing Case Study

Joseph (amiable/analytical style) works in a tube shop. He used to work on an assembly line for a tier-one supplier to an automaker where he was lifting, fitting, welding or screwing things in place. But now he works for one of his former employer’s suppliers and provides them with the tubing they need to meet the automaker’s needs. The plant where Joseph used to work closed down and after months of being nervous about how he was going to support his family, he got the job he has now.

Although he still works in manufacturing, these days it is more about monitoring the robots and other devices as they do the heavy lifting and cutting and shaping. He is responsible for ensuring that quality control is consistent at each step so that the customer can use the product his line produces.

He is proud of the technical skills he acquired as a result of a negotiated training opportunity shortly before his plant closed, and although he is looking forward to retiring in the next five or so years, he likes his work much more now than he ever did in the old days. There is only one thing that he is beginning to dislike about his job and that is the pesky customer who keeps sitting in the lobby of his shop each morning, waiting to tell him what he is doing wrong, how he has to do something different and do it yesterday.

Ralph (driver/expressive style) really isn’t a bad guy, but he is an engineer and has no patience with anything. If he would have given the boss the specs he wanted from the beginning, the tubing he wants now would be the way he wants it now. This is the fourth morning in the last ten days that Ralph is there. Ralph actually sits or paces in the lobby waiting for Joseph to get in at 5:30 in the morning. Each time Ralph comes in, he shows Joseph how some data has changed or been drawn incorrectly or doesn’t fit into the rest of the component that the automaker wants. He keeps showing the data and pushing as if it were Joseph’s fault the data was wrong.

Joseph knows that Ralph is the customer . . . but enough already! He has totally lost his patience and is about to tell Ralph that if he can’t get the specs right, he can either take his business elsewhere or pay double for each of the changes that are causing such frustration.
Handout #5 – Government Case Study

Carlos (amiable/analytical style) has been with the Department of Management and Budget for more than 15 years. His state suffers the typical and sometimes drastic ups and downs associated with both administration and economy changes. Carlos is considered easy going by his coworkers and his manager and just wants to do his job and do it well.

Carlos takes pride in knowing that the output from his work is either what his manager expects or better than expected. He reviews everything he submits several times to make sure it is error free. Occasionally, but not often, he will push back on his manager if the deadline is shorter than expected to make sure the team can create the best possible output. That is one of the reasons that he has become the team leader in his section.

The issue with Carlos is that lately the details of his job seem to change far too often. Initially the forms and documents he was required to prepare only changed every two or four years and then they were always predictable by the quarter and coded at the bottom so he would know which was the most recent. Carlos often refers to the finding from technical studies to validate his reports and the funding cycles on those were typically predictable.

Two times last month he was blindsided when the report he turned in referenced a study that was already outdated; he did not even know that a new study had been done. And last week he submitted his weekly summary on a form that apparently had been replaced the month before and no one told him. When he asked around his section, no one in his section even knew that the form had changed. Carlos is a good guy and he will do everything in his power to do a good job, but he is beginning to feel that he is powerless to do the kind of quality work that he is used to. And he is very uncomfortable reducing his personal standards.
Handout #6 - Financial Services Case Study

Keisha (expressive/amiable style) has worked as a Customer Service Representative for her bank for ten years. She loves her job, especially the aspect of building strong relationships with customers and helping them meet all of their financial needs. She takes personal pride in the fact that some of her customers wait in the lobby just to be helped by her and not another available representative.

Today, during an all-branch meeting, the District Manager announced a new partnership with a local grocery store chain that would enable the bank to open branches in five stores. The District Manager said that some experienced branch personnel would be relocated to the in-store branches in the next month so that the bank could get the branches open quickly. The decision about who would be asked to work in the in-store branches would be made by the District Manager together with the local Branch Managers.

Keisha was fuming by the time she got to her branch. She is sure that, if she has to work in one of the in-store branches, her hours will be longer, she will have to work on Saturdays and Sundays and she will lose the customer relationships she has so long enjoyed. She also cannot envision working in an environment where people will walk up to the bank with grocery carts and screaming children in tow. And she is concerned that the in-store experience will not support her career aspirations to become a Branch Manager someday.

On her lunch break Keisha expressed these feelings to Natalie (amiable/analytical style), a coworker, who at first did not have much to say and acted a little uncomfortable to be having this conversation. When Keisha asked Natalie how she felt about the situation, Natalie finally replied, “Well, it’s not all about you, you know.” Keisha threw the rest of her sandwich in the wastebasket and stormed out of the lunch room.
Handout #7 – Retail Case Study

Darren (expressive/driver style) has been a successful salesperson for a national furniture store chain for seven years. He likes his job and respects his company’s reputation for quality products and service. He is also proud of the fact that he always exceeds his monthly sales goal.

During a staff meeting today, the store manager announced a decision from corporate that the organization would evolve in the next six months from a chain of “furniture stores” into “design centers.” The design center concept would focus on helping customers create entire “living environments” that would include not only entire rooms of furniture but also accessories and drapes. This meant that the current sales staff would be considered “project managers” who would help customers envision the possibilities for their “living environments,” turn the vision into reality by working with customers to select colors, coordinating fabrics and appropriate accessories and manage the progress of the project from design through delivery of the goods.

Darren cannot see himself as a “project manager”—he is a successful salesperson who thrives on making as many sales as possible. He also cannot imagine that this will be good for business—won’t they actually lose customers who just want a sofa and not an entire “living environment”? And he wonders how the change will affect his commissions. Before he left work for the day, Darren stopped by the manager’s office to express his concerns, but the conversation did not go well. The manager stated that everyone who wanted to stay with the organization had to get on board with the new direction and that Darren needed to make a decision in the next few days about staying or leaving. Darren left his manager’s office wondering if he was ever really valued in the organization.
Handout #8 - Healthcare Case Study

Lisa (amiable/analytical style) is a nurse manager with a major healthcare system. She was involved with clinical care as a nurse in three departments during her 21-year career with the organization and was promoted to her current position 12 months ago. She feels she has the trust and respect of her staff because she used to be “one of them.”

A decision was recently made by the Chief Nursing Officer to move from having three eight-hour shifts every day to two 12-hour shifts in an effort to improve patient care. Worried about how her staff would take the news, Lisa reluctantly told her staff about the change. Many of them looked shocked and started complaining about childcare and transportation issues. Some just shrugged their shoulders and went back to the floor. A couple of nurses told Lisa privately that a 12-hour shift just would not work for their home situation at all and that they would probably have to look for work elsewhere.

Lisa is not sure she is up to this challenge. First, she dreads the thought of figuring out how to schedule people in 12-hour shifts—the current schedule is complicated enough, and she wants to be fair to her staff and accommodate their needs. She is also worried about the impact of the upset staff on patient care and the potential loss of qualified nurses.
Handout #9 - Applying The Change Response Strategy™

Instructions: Working with others in your group, practice applying The Change Response Strategy™ to the case study that your facilitator has given you by responding to the questions below.

- What is the magnitude of the change for the organization?

- What is the magnitude of the change for the employee(s)?

- In what ways do the reactions of the employee(s) in the case study affect the situation?

- What does/do the employee(s) need to move forward?
Handout #10 - Putting it all Together

Instructions: Read the scenario first and then work with your group to discuss how your style reacts and responds during the three steps of The Change Response Strategy™. Answer the questions on the following pages.

Scenario #1

You have just been informed there is a mandatory company meeting in 30 minutes. You have been told that the meeting will only last 15 minutes and that all employees must attend. Looking back over the last hour, you realize that the managers have been in a closed door meeting since the start of your shift.

At the meeting the CEO/President shares the following:

Our company is going through a rough time right now. Our costs have increased, and we have recently lost some key personnel. We are at a point where we either need to make a change or we risk keeping our doors open. We want you to know that we value each and every one of you, but we are going to ask you to make some changes. In an effort to cut our costs and keep everyone employed, we are making the choice to temporarily suspend contributions to employee 401k plans. We don't know how long the match will be suspended. Second, we are going to impose a mandatory one week unpaid vacation for each employee. Your department heads will meet with you to coordinate this vacation scheduling. We anticipate these changes to be short-lived and thank you for your understanding and cooperation. If you have any questions, please see HR.

You have just left the meeting.
Online Resources

VisionPoint’s website is host to the most up-to-date Program Resources, including program-specific tools like reproducible participant materials, self-study guides, facilitator answer guides, FAQs, session extenders, SMART-START® activities, case studies, video scripts and more.

Additional Trainer Resources include information and tools such as energizers, team builders, competency matrices, perspective papers, learning style guides and access to VisionPoint’s master trainers and TrainerSelect™ team.

Resources are updated periodically, so check back when preparing for a new training session.

To access Online Resources for this program, visit www.visionpoint.com. Login, select View Program Resources, then select the program title from the list. If you do not see this program title listed, please contact trainer@visionpoint.com.

If you have any questions about available resources, contact the TrainerTALK™ helpline at 800-300-8880 x302 or trainer@visionpoint.com.