

## Transformation success self-improvement worksheet

*Enhance your success through your own power of self-discovery, in only 20 minutes!*

This worksheet is for people **leading or being affected by** transformation activity in their workplace. It is formatted as a series of questions intended to deepen their insight. Improved clarity should help improve performance.

**Transformation leaders** should consider all questions. **Other people** may wish to omit those marked\*.

We recommend that you print a paper copy of this document and write directly onto it using a pen or pencil. Best results are achieved if you work through at pace without pausing for deep or prolonged thought. There are no right or wrong answers, and “don’t know” is also fine. You should not share this with anyone, unless you want to.

*We trust that you find this useful. We’d love to hear your feedback via our website.*

1. Today’s date:
2. What is the name of the transformation project?
3. Why is it happening?
4. What will be changing?
5. Who will be changing? Cover only briefly here, Q13 asks for more depth.
6. Is this **incremental** or **radical** change?
7. Is the prime motivation to **avoid a problem** or **embrace an opportunity**?
- \*8. What financial benefit is expected? \$
- \*9. What financial investment is required to achieve this benefit? \$
- \*10. What is the probability of success? %  
(FYI globally 3 out of 10 projects are delivered on time, budget and achieve their desired benefits).
- \*11. Calculate the **current probable value** of this project:

$$(\$ \text{ Q8} \times \text{ Q10} \%) - \$ \text{ Q9} = \$$$

\*12. The Harvard Professor John P. Kotter is internationally regarded as the foremost authority on the topics of leadership and change. In his evidence based view, there are **8 steps for successful large-scale change**. Please evaluate your project against them (tick one column per row):

	Going Great!	Neutral	Development opportunity
<b>Urgency</b> – people are encouraging each other to get on with it because things need to change			
<b>Guiding team</b> – a powerful enough group to guide the change exists and is working well together			
<b>Vision &amp; strategy</b> – the guiding team develops the right vision and strategy			
<b>Communication</b> – people are buying into the change as evidenced in their behaviour			
<b>Empowered action</b> – more people feel able to act, and do, on the vision			
<b>Short-term wins</b> – momentum is building a people try to fulfill the vision, while fewer and fewer resist change			
<b>No let up</b> – people make wave after wave of changes until the vision is fulfilled			
<b>Make it stick</b> – new and winning behaviour is continuing despite the pull of tradition, turnover of leaders, etc.			

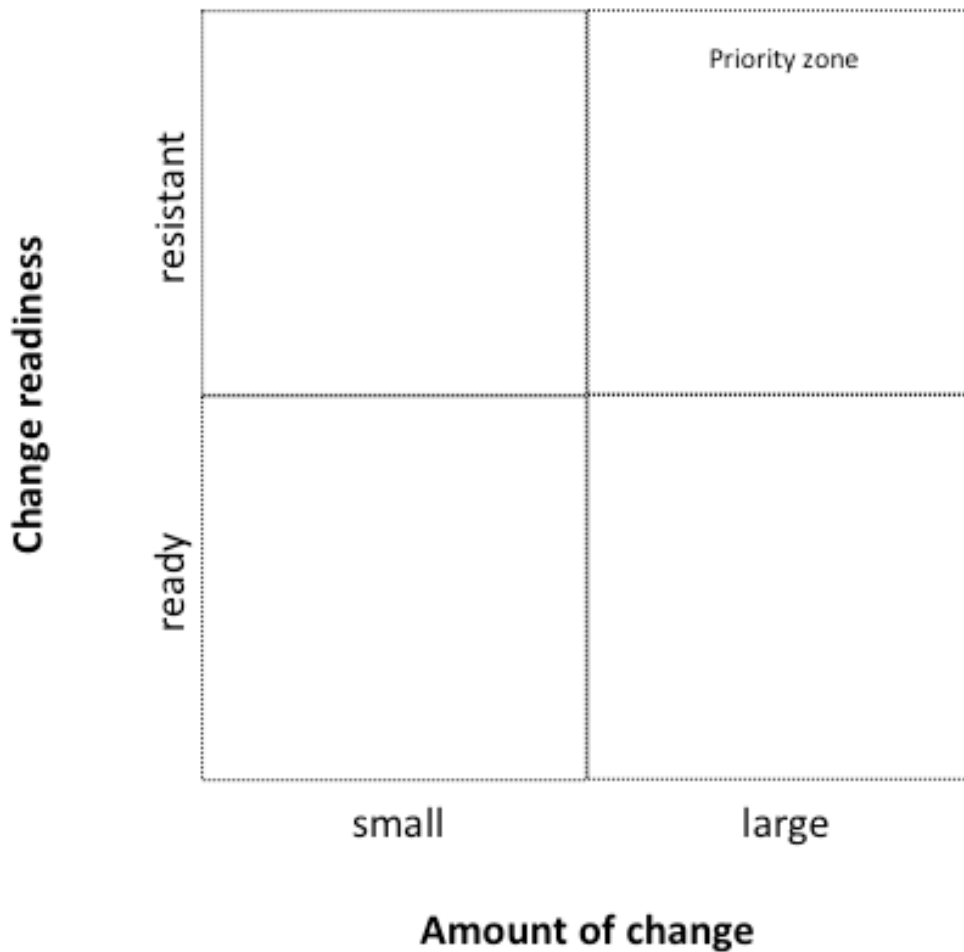
Kotter believes that **the core issue is always changing the behaviour of people**. The following questions address the people side of your project.

13. Who will be required to change their work as a result in this project? Include yourself.

Who / Group	Number of people	What is changing for them?
Me	1	
Total:		

**14. People risk assessment**

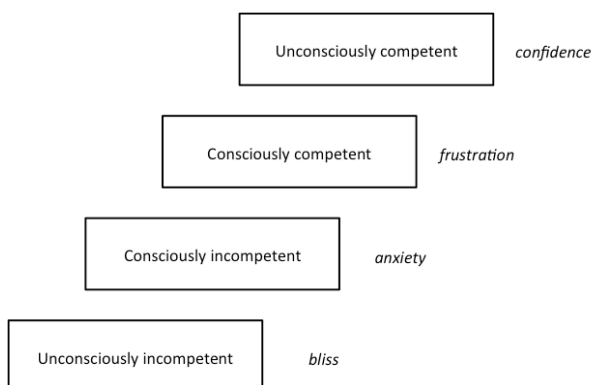
For each of the people or groups identified in 13, consider the **amount of change** they will experience during this transformation, and **their readiness** for it. Mark each on the 2x2 matrix below.



Those in the “priority zone” represent the highest risk to the transformation project. The following questions relate to that group only.

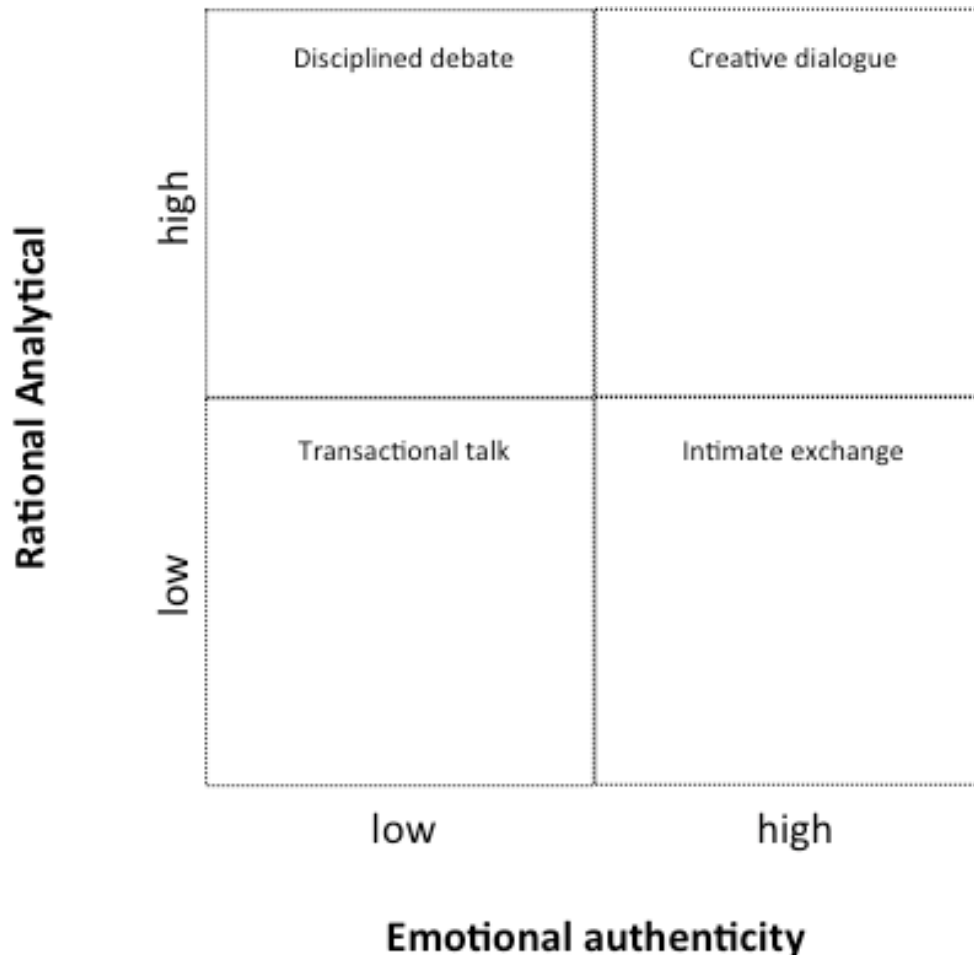
**15. Current capability to operate in the new world**

For each of the people or groups in the “priority zone”, consider their current ability to **operate as they will be required to in future** after the transformation. Mark each beside the appropriate stage below.



**16. Quality of current influence**

The quality of work conversations in an organization is a good indicator of its ability to influence people to change. For each of the people or groups in the “priority zone”, consider the **current quality of conversation** between them and the transformation leadership team. Mark each on the diagram below.



based on “Improving the quality of conversations” by Gratton & Ghoshal in Organisational Dynamics (2002)

**17. Strengths and development opportunities**

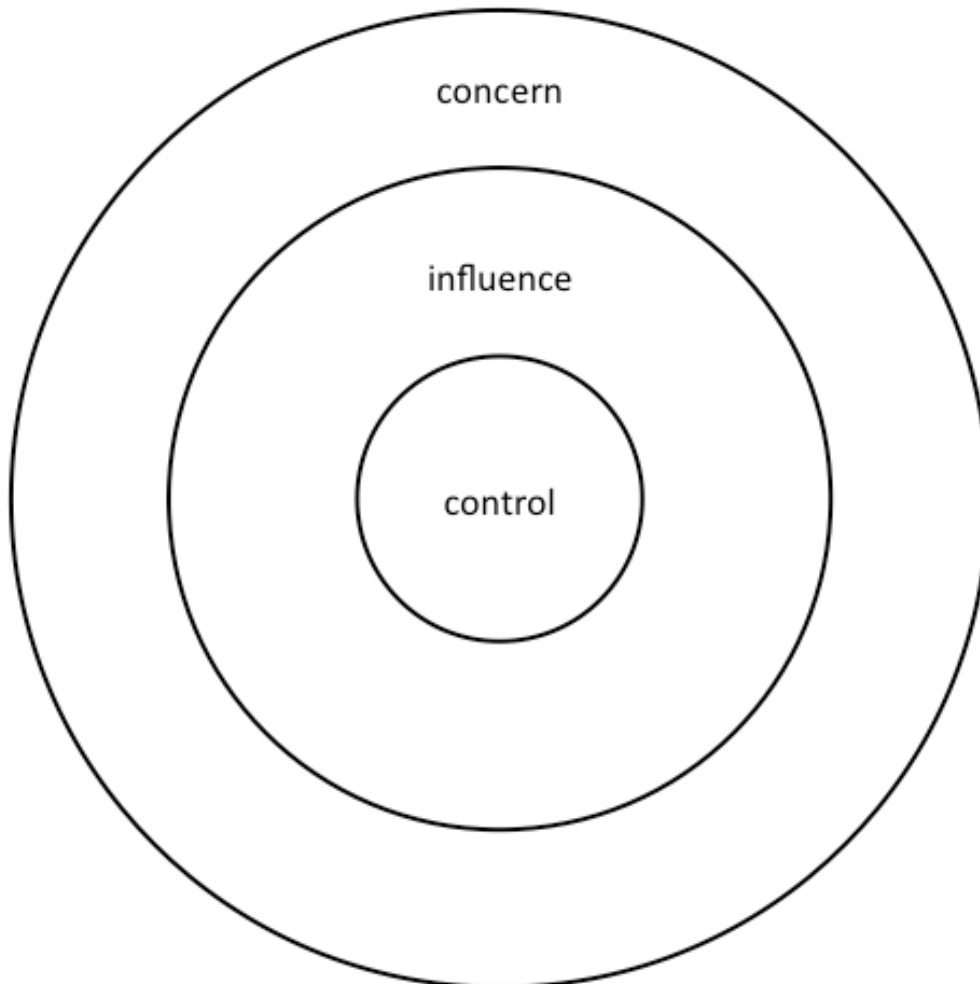
Based on your general knowledge, and your answers above, consider what is going well **for you** in the project, and what could go better. Capture below.

My strengths	My development opportunities

18. For each of **your development opportunities** identified in 17, consider which is

- Under your **direct control**; or
- **Influenced** by but not directly controlled by you; or
- **Neither** (you are concerned about the issue, but have no influence or control over it).

Mark on the diagram below



(based on "The 7 habits of highly effective people" by Stephen R. Covey (1989))

## 19. Action

Starting right now

- what **3** things are you going to **reduce** or **stop doing** to give you more quality time?
  - 1.
  - 2.
  - 3.
- What **1** thing are you going to **do more of** or **start doing** to improve your enjoyment and success?
  - 4.

We recommend that you review these actions in 7 days from now. Please diarise now!