

The Hero's Sherpa: Your Guide Through Life's Challenges



Part 3. Plan the Journey

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PLAN THE JOURNEY

Overview

Man plans, and the gods laugh.

There is a lot that solid planning can do, and much that it cannot. Here are some of the key things that I have learned about change planning over the years I have been developing—and executing—change-related plans. Remember, you have your change story. You have early elements of preparation: you've inventoried your anchors; your resources, resource needs, and resource gaps; and the changes you will need to make. You have developed an initial set of milestones. All of these serve as input to your planning process.

Plan for What You Don't Want!

One of the big mistakes we often make when planning a change is that we often fail to think about what we don't want to happen. Sometimes we catch the absence of this planning when we come face-to-face with an "Oh, No!" And, sometimes we only discover it after the fact.

What do I mean by this? Let's go back to the earlier example of a career change that required the individual to work nights and weekends, something that was—in itself—a major change. When one goes from having nights and weekends free to working nights and weekends, it can cause a strain on personal relationships. If the individual in this example didn't want to have his/her family relationships suffer, then planning should take this into consideration. What is the conversation that has to be had? When should it take place? With whom? How frequently will night and weekend work take place? How will this affect completing the education required to make the career shift? All of these things factor into the planning.

Shifting for a moment to an organizational setting, perhaps the planning needs to take into account maintaining a certain staffing level, or not drawing capital reserves down below \$ X, or maintaining a minimum client/customer base.

The best way to plan for what you don't want is to ask the question, *What could happen that we don't want to happen?* Then plan in a way that ensures, or at least limits, the possibility of it occurring. Don't get carried away. You will never be able to think of, or plan for, every contingency; but you can significantly lower the likelihood of going off track by planning for what you don't want.

Plan for Results, and Plan to Keep a Focus on Your Desired Outcomes

All too often we are wooed into a change for the results that it promises. Then, the planning focuses not on the results, but on the “things” that need to be put in place. Several years ago I created an e-Book for a client. *Painting the Room Blue* communicated this concept simply. If all you want is a blue room, then just paint the room blue. But if what you are seeking to do is to create a calmer environment, or a more tranquil customer experience, etc...then painting the room blue may be necessary, but it is not sufficient.

What shifts in mindsets need to happen? What shifts in behaviors are required? What relationships (including but not limited to relationships with anchors) have to change, and in what ways?

Don't try to “cross every ‘t’ and dot every ‘i.’” If you do, you will be planning for years to come. Plan the near-term more deeply than the longer-term. Depending on the scope of the change, near-term may be four-six weeks, or six months, or a year. But remember, the further out you are planning, the more likely things will change and your plan will need to change. You already have the roadmap for your change, so you are not “blind to” or “ignoring” the full journey; you are acknowledging the reality that it will be filled with unexpected surprises, detours, and mistakes, and that detailed longer-range planning is likely filled with inaccuracies.

Plan for periodic status checks; even if this is a personal change, find someone beyond yourself who you will “report in to,” someone who can help you be accountable, if only to yourself.

Don't Overload.

One of the biggest mistakes that gets made when it comes to change is thinking that the importance of the change, or the risk of not changing, or the reward of changing will be enough to carry the change to a successful conclusion.

Wrong!

We each have a limited capacity for change. A limited capacity for all the change we are experiencing. It could be personal change. It could include professional change. There might be social changes—in our spiritual or religious institutions, in our communities, or nationally—that are having an effect on us. There aren't separate buckets inside of us in which to put each of these changes. They are cumulative.

And when we exceed our change capacity, every change suffers. When the proverbial “straw broke the camel's back,” it wasn't the last straw that fell to the ground; it was all of them, as well as the camel! So, one of the important steps to take when planning is to ask *What other change*

demands are there, either currently or in the foreseeable future? For each of these changes, determine how essential it is. If it is not essential, either put a halt to it, or be prepared to put a halt to it when change demand requires. If it is essential, there are several ways to reduce its change demand. You may intentionally decide to just put the key elements in place now (“paint the room blue”), while delaying the other elements of the change required for it to deliver its full benefit. You may choose to delay it; or you may extend the timeline.

Note, however, this monitoring of change demand and capacity is not “once and done.” Other demands will continue to come along. For this reason, it is important to plan on monitoring for symptoms of overload.

Plan to Put Things In Place.

It is likely that you don’t have everything in place that you will need to get you through a major change…whether it be at the personal or the organizational level.

Your change may require budget management that wasn’t needed before. It may call for a carefully laid out and managed calendar. It may call for reinforcing some anchors, while changing your relationship to (or cutting free) others. It may call for a physical relocation or physical alterations (e.g. the new career may call for the addition of a home office that is directly accessible to clients from outside the house). It may call for new sources of income. All of the “infrastructure” that you need to succeed with the change should be planned for.

…And Then the Hard Drive Failed

When I was blogging every week, I tried to post on Tuesdays. Sometimes I would write and store my posts online; sometimes, my work was kept on the desktop pc. That Tuesday morning started like most of my days. The plan was to do a final read and edit of the blog, post it to the website and LinkedIn, and then move on to a client project that had a tight deadline. But, when I went to the computer, the screen was blank, except for a bit of text that included the words “No boot device available.” Translation…*“The hard drive has failed.”*

As I sat writing a new post on Wednesday evening, I was working on my iPad. I knew there were options for getting it from the tablet to the internet; I would figure it out when the time came. Then I would need to figure out whether the drive could be saved, or whether I had lost it. The drive was backed up…*I thought.* The backup program was scheduled to run every night, but I rarely checked to confirm it had done its thing while I slumbered.

I have backed up my work for years. But sometimes, that doesn’t help either. In addition to coaching, I am a photographer. I store my photos on a four-drive RAID 5 external drive. RAID 5

means that as soon as the photograph is uploaded to the computer, it is stored in two different locations on different drives. Safe.

Then, a couple years ago, failure! Not one of the drives, which would have meant that the photos were safe because of the redundancy. It was a software failure. There were still more than eighty thousand photographs, times two. But, there was no file structure. No folders. No file names. No ability to access anything.

It took me over eight months to recover almost everything; the recovery software could not rescue files over a certain size. I am sure that as I viewed images one by one I missed retrieving some of them. And, I lost most of the data that was part of my indexing system. But, bottom line, I recovered from the crash. And now the photographs are stored on a new four drive RAID 5 that is then backed up to another one. Someday something may not go according to plan again. Perhaps I am better prepared...or maybe not.

I bring up the failure of drives and software because it is a reminder for me of an essential lesson when facing change. *There is an important place for planning when approaching and moving through change. But, things happen.* As the saying goes, "Man plans and the gods laugh."

The lesson is simple. Yes, plan. And then do it. Know that your plan is incomplete. Know that you will have to make some of it up as you go along. Know that you will make mistakes. Know that you can't, as one of my clients put it, "dot every 'i' and cross every 't.'" And even if you could find a way to do so, at some point your change will still go off course. If you are too dependent on the plan, you will too.

Plan, and then be prepared for the unexpected. It is inevitable. And, don't wait for every line of your plan to be written. The opportunity that you are pursuing may pass you by; the course you are attempting to correct will veer even further astray. Move forward. Someday the hard drive may crash; the software may fail. Or, it may not.

Rembrandt Didn't Paint By Numbers: Mastering the Art and Science of Change

Whether you are a professional change practitioner, or an individual attempting to more successfully navigate the changes in your life, it is important to understand both the science and the art of change. Rembrandt offers us a valuable role model in this regard. Known as one of the best artists ever, he was a master of his craft.

At the age of fourteen, Rembrandt van Rijn (Rembrandt of the Rhine) entered The University of Leiden. Nine months later he left the university to apprentice with a master painter, Jacob Isaacs Van Swanenburgh. In his book *How Rembrandt Reveals Your Beautiful Imperfect Self*,

Roger Housden writes that in the 1620's, "(an artist's) standing, despite the general popularity of painting, was not high. In general, he was still considered more of a master craftsman than someone with a unique artistic talent."¹

Swanenburgh was no great artist, but he would have taught Rembrandt to prepare a canvas and grind colors; he would have shown him the elementary principles of drawing, perspective, and anatomy. Pigments were ground with linseed oil on a large, flat stone—the grindstone—to make the paint. Rembrandt would have made white paint from white lead and chalk, blue from ground glass, and lacquers from insects or plants.

Rembrandt began his formal education by learning the science of his craft.

By the age of nineteen, with two apprenticeships behind him, Rembrandt set up his own studio, which he shared with another painter. Here he began to experiment, including his early work in etching, an artistic technique that was just beginning to emerge. For more than forty years, Rembrandt continued to seek mastery of his craft, learning—and often defining—the science of it as he developed in his artistry.

Rembrandt didn't paint by numbers.

This brief introduction to Rembrandt provides several lessons for those of us who are interested in learning to navigate change. First, just as Rembrandt learned about canvas and colors, perspective and anatomy, we need a firm grounding in science. The science of change is about applying a uniform set of things (patterns, risk, tools, etc.) in a standard way, each intended to consistently accomplish a very narrow range of outcomes. It involves staying within defined boundaries, preserving prescribed meaning, and leveraging known solutions. The benefit of the science of change is that it allows for "stability." When addressing challenges that are highly complex, volatile, and ambiguous, it is important to have access to means you can trust to create similar results most of the time. Applying the science of change also greatly simplifies the execution of less difficult changes.

Rembrandt became a master of his science. This provided him with a firm foundation, and one that he continued to develop and refine over his lifetime. However, it wasn't this mastery alone that led to the renown he claims today. Rembrandt also became a master artist. He experimented, creating self-portraits that reflected anger, worry, and laughter. According to Housden, "He was able to see the realities of the three-dimensional world, and was true to what he saw; but he could also see what the ordinary eye cannot: the spirit, the life of a person, or indeed of a landscape. With one eye, Rembrandt saw every physical detail; with the other, he saw with the eye of imagination." Rembrandt was a student of light and shadow—what is visible, and what is not. Wherever he went, he was observing, making sketches, capturing and

¹ *How Rembrandt Reveals Your Beautiful, Imperfect Self: Life Lessons from the Master.* Roger Housden, Harmony Books, New York, 2005.

expressing the visible and the invisible. It is these things that imbue his work with life, that raise his art from being technically superior to the level of masterpieces.

Likewise, we can be skilled technicians, masters of change science. As such, we may be successful in the implementation of many changes. However, strong—even masterful—technical ability is not enough to ensure success. We, too, need to be artists. Just as Rembrandt, we need to study human mindsets and behaviors. We need to keep one eye on “the realities of the three dimensional world,” and one on the spirit that is driving those realities. We need to be students of the light and the dark, the visible and the invisible. The art of change is about applying “creativity and intuitive judgment” to unique circumstances where multiple scenarios of success are likely to surface. It involves exploring new horizons, generating meaning in the moment, and fostering innovative responses. Science informs us, while art shapes our viewpoint. Both aspects are essential to properly address transformational challenges. The science is needed to establish a steady platform from which we can operate—providing trustworthy understanding, skill, tools, and so forth to select and deploy. The art is necessary so the items we select can be tailored to meet the particular demands of each contingency.

While Rembrandt proudly claimed his space in the history of art, it is also clear that he was a student of those who came before him. He was a collector of art, and art books. You can see his homage to past masters in the dress and poses of many of his self-portraits. In practicing the change craft, we too, need to be mindful of those who have come before us, of the science—and the art—that they have left for us, and from which we can learn.

Rembrandt’s struggles are legend. Three of his five children died in infancy, and a fourth died in his twenties. Rembrandt lost two wives. He suffered bankruptcy, losing his home and virtually all of his possessions. He suffered from melancholy, what we would now term depression. Yet through all of this, he prevailed. Through all of this, he grew in his science and art of his craft. His passion for making art never seemed to waiver. “All through his life, he was ‘making himself’ through the work of his art. Not deliberately, not self-consciously; but through a continual and dedicated working over and over of the same furrow he was given to plow, the furrow of art. Just so, we ‘make ourselves’ with our own form of dedication to a lifelong task, a relationship, or faith.” Hopefully, none of us will experience the suffering of Rembrandt. Nonetheless, we need to draw from his lesson of passion, commitment and relentless pursuit to the work if we are going to move toward change mastery.

Choices

It’s Your Choice: We don’t get to choose the hand we are dealt, we get to choose how to play it.

It’s your choice.

How do I choose?

I don't have a choice.

When it comes to choice, all too often we approach the situation with a fundamental misperception.

We think "choice" means selecting between good or bad, right or wrong, easy or difficult.

Sometimes it does.

But sometimes it doesn't.

Sometimes choice is between bad and bad, between right and right, between difficult and difficult. In the Old Testament we have the story of Abraham being commanded to offer his son Isaac as a sacrifice. In the more recent past, we have the work of fiction, *Sophie's Choice*, in which Sophie is forced to select which of her children is gassed to death in the concentration camp. Choices are not always good, or easy. But, there is still a choice.

Daryl Conner, one of my change mentors, tells the story of Andy Mochan, the Piper Alpha oil rig worker who jumped 150 feet into burning oil in the North Sea after the rig had exploded. When interviewed on Nightline, Andy stated that he had *chosen probable death over certain death*. Andy made a choice—not an easy one by any stretch of the imagination—and lived to tell his story. 166 of his fellow workers on the rig died.

Daryl uses this story as a metaphor for the resolve that we each need when we are facing difficult changes. In executing your change, it is likely that there will be choices that are easy to make along the way. These are the "good/bad," "right/wrong" kind. But there will also be agonizing, difficult choices to be made... ones for which you are ill-prepared, for which you want more time and/or information, ones for which you shudder at the possible consequences of any decision you make. These, too, are choices.

My grandparents taught me how to play Pinochle when I was very young. I have forgotten and re-learned the game more than once over the years. But there is one lesson that I learned back then and have never forgotten.

We don't get to choose the hand we are dealt. We always have a choice about how we play it.

Things You Need to Plan For...Besides the Change Itself

Advocate Power!

If you want to discuss something discretely, who do you talk to? Chances are, it is not the same person you talk to when you want to “spread the word.”

Advocates have tremendous power in supporting—or undermining—change, both at the personal and the organizational level. Millennials rely heavily on advocacy; for them, in many cases the power of their social network is significantly greater than the power of positional authority. Social movements—whether it be civil rights, women’s rights, gay rights, or any other—are all about advocacy. Lobbying carries advocacy into the halls of government.

While social movements and lobbyists are often highly successful in their advocacy, it is a resource that tends to be under-utilized in personal and organizational change. What would it take to make use of advocate power in these circumstances?

Successful advocacy begins with knowing who has influence with whom. Who talks? Who listens? We’re not referring to those that everyone seeks out for the latest gossip. Rather, we want to know who people talk to when they want insights into “what is really going on,” whether a pending change is a good idea or not, etc. This is something most of us are in touch with. I remember one client who told me, *If I need to bring my dad onboard, I start with my mother. She can influence him in ways I never can do. But, she also doesn’t really talk with a lot of people, so if I want to ‘spread the word’ in my family, I start with my cousin Jake. He talks with everyone, and they want to hear what he has to say.*

Some people are strong advocates across the board. Other people may be able to advocate on certain changes, but not on others, or with certain groups of people, but not others. Pay attention to this. You may need different advocates to help with different stakeholders affected by your change.

And what do you want them to advocate for?

Historically, many saw the role of advocates as seeking sponsorship of a change. “Mom, can you talk Dad into letting me stay out past curfew?” Or, “Honey, we really do need a new car, and this one...” Or, “If I can convince the boss to let us change how we execute this process we can free up time for some other things.”

But more and more, advocacy is about directly influencing people to make changes, whether personal, organizational, or social. By far the best book I have found on this topic is *Influencer*:

The New Science of Leading Change by Joseph Grenny, Kerry Patterson, David Maxfield, Ron McMillan, and Al Switzler (the authors of *Crucial Conversations*). According to the authors,

Influencers do three things better than others. They are clearer about the results they want to achieve and how they will measure them. They focus on a small number of vital behaviors that will help them achieve those results. They overdetermine change by amassing six sources of influence that both motivate and enable the vital behaviors.

The “six sources of influence” the authors reference take the form of a two-by-three matrix that addresses motivation and ability at the personal, social, and structural levels. They provide a number of case studies reflecting how the model has been successfully applied to personal change (e.g. in lowering school drop-out rates), organizational change (e.g. improving workplace safety), and social change (e.g. lowering poverty rates through micro-credit loans). Whenever possible, I advocate the use of their advocacy model. It works!

Big Changes Are Cathartic

Some changes are purely intellectual exercises. They make sense. We know how to achieve them. We get them done.

Big changes have an intellectual component...but they go much deeper.

Why?

At one level it is quite simple. They have the ability to (and quite often do) touch us to our very core.

Let's take a brief look at this phenomenon. While it may not make the experience of catharsis any less difficult, it may be helpful to both know to expect it, and to recognize that this is an unavoidable element of major change.

Change disrupts the status quo; big change disrupts it big time. The path is unclear, the outcomes are uncertain, the journey often uncomfortable. At the very least, it will intrude on our sense of safety and security (the second level in Maslow's hierarchy of needs). Some changes may hit us at even a more fundamental level, leaving us feeling that our very survival is at stake. Other big changes may undermine our ego or sense of self-worth. Or, they may bring about the creation, re-definition, or termination of relationships. They can leave us questioning our wisdom, our insights, and our dreams.

As if that isn't enough, very often the big changes in life—whether personal or professional—are about dismantling paradigms that we have invested significantly in creating and sustaining. Most likely, we envisioned them lasting forever (or at least for our lifetimes). It may be that the marriage or similar relationship that you have spent decades nurturing along with the home, the family, and the associated traditions are all about to fundamentally change. Or perhaps it is that the business in which you have invested days, nights, weekends (along with vacations and holidays) bringing to fruition...you have come to realize must dramatically change if it is to continue to survive.

If all this sounds like catharsis comes with “doom and gloom” (few people would be surprised about that), it is equally true with the positively perceived big changes you will face. While I go into this in more detail elsewhere, the reason we so eagerly launch into those changes, whether at work or at home, is that we are naive as to what they will be demanding of us if we are committed to long-term success. (Think “honeymoon” here...) The status quo is being equally disrupted. The old paradigms still need to be dismantled. The journey is no more certain, nor is the outcome.

So, positively perceived change or negative, if the change is big, the journey is going to be more than a “head trip.” It is going to require making significant shifts in ways of thinking, behaving, and perhaps even believing; it is going to require letting go of the old and affirming the new.

What does this mean for you and the others affected by your change?

First, anticipate and plan for catharsis; don't let it surprise you. It may be possible to create cathartic moments. Bachelor parties, wedding receptions, graduation ceremonies, funerals, and memorial services are examples of cathartic rituals at the personal level. Coaches often make space for catharsis for their clients (as do mental health professionals with their patients). One consulting firm that I know facilitates leadership workshops that are designed as catalysts for catharsis.

Second, acknowledge to yourself that catharsis is not just for the other people; it is part of your journey as well. Until you are ready to let the tears flow, find an appropriate outlet for the anger, perhaps laugh hysterically, mourn, and/or..., you will be unable to complete your change journey.

Celebrate!

When was the last time you celebrated?

Not a birthday bash, or a holiday party... An “I did it,” or “we did it” celebration.

When I was first writing this as a blog post, I noted that I celebrated the prior Saturday. I'm a morning person; I get up at 4:30 weekdays, 5:30 on the weekends. It's what my body and mind want, and it works for me. That Friday evening I had turned off the alarm clock, and found myself waking up at 6:30 the next morning...for me, a celebration!

What was I celebrating, what should you celebrate, how should we celebrate, and why is celebration so important?

I do a great deal of writing and editing, though most of it is on behalf of others. For years, my blog had been the only place in which my thinking was been shared with others in writing, and with my name attached. Then I submitted an article ("Change Success: The Big Secret") to a Wall Street-based e-zine, and it was accepted for publication. And so I celebrated!

Most of us spend much of our lives doing... We complete one thing and pick up the next thing in the pile, the next task in the plan, the next item on the list. We often fail to even see the milestone we are passing as we move toward the next. We create our change story, plan for the change, prepare for the journey, and move on through it, failing to acknowledge along the way what we (or we and others) are achieving. Check. Check. Check. Whether literal or figurative, we check things off as we complete them; and we keep on rolling along.

Celebration is a way to acknowledge our own accomplishments, and those of others. It is a way to acknowledge the significant achievements we can (and deserve to, and should) claim a long way.

Remember this old adage? It applies to each of us. "All work and no play makes (your name here) a dull (your sexual identity here)." Celebrations are a way to bring more balance to our lives, to take time away from the climb in order to "play."

Yes, there should be a huge celebration at the successful completion of that major change. This is the brass band, balloons and fireworks, noisemakers, dancing until dawn celebration.

But other, smaller celebrations along the way can serve to honor the steps you have taken, the progress you have made. They can re-energize you, and encourage you to continue on the journey.

Re-entering the world of publishing. Applying for that new job or promotion. Getting your first, or second, or one hundredth client. Telling your change story to someone for the first time. Each of these is worthy of celebration. They are milestones on the journey. They are accomplishments worthy of recognition; whomever has accomplished them deserves to be honored for that accomplishment, even when that person is you!

A while back I was reviewing a client's business plan. We began working together when he was unemployed and trying to determine where his professional life was going. Since then he had committed to, created, and launched a successful business. He took courses, formed a partnership, and secured clients. He launched his website, started social media marketing, and created his brand. He had a plan that looked one, two, three, and four years out. He had many reasons to celebrate. After reviewing his plan with him, he went back into it to identify future "celebration moments." Where are the celebration moments in your plan?

Don't forget to celebrate your mistakes! They offer important lessons, often with a high cost. Learn the lessons, and celebrate.

What comprises a celebration?

That's simple. Whatever you say is a celebration for you and others that are celebrating with you. What is important about a celebration is that it isn't part of your routine. For someone who strives for six hours of sleep a night, an extra hour or two can be a celebration. If I start setting my Saturday morning alarm for 6:30, it isn't a celebration anymore...It becomes "the way things are." Perhaps it is a massage, or a manicure and pedicure, or a special bottle of wine at dinner, or a walk on the beach, or "playing hooky" for an afternoon, or going to a museum or a play, or sitting down with a coloring book for an hour, or...

Celebrations are personal. If you are celebrating with a team, find out what is important to them, what it is that they find meaning—and acknowledgement—in. Not every celebration has to be "blow the roof off." Sometimes small, more intimate and personalized celebrations are even more affirming.

Communication Goes Both Ways

It seems so obvious...but it's not. Why are you having the conversation? All too often, the people engaged in a discussion go into it with different assumptions about the roles each are playing and what that means to the outcome.

The most common misunderstanding has to do with decision-making. *Why does she ask our opinion? She never listens to us when it really matters!* Chatter like this takes place thousands of times a day. It fosters resentment, raises resistance, and eats at credibility. It is also easily addressed on the front end. Be explicit about why you are engaging people in conversation.

I want your advice on a change that I am considering making. I will listen, and will weigh your input carefully...but it is my decision to make.

I have decided that we are moving forward with this change. I know that you have concerns, and it is important that we get them out on the table. I will work with you to figure out how we address them.

Right now it seems that each of us has our own priorities. The result is that we are working against one another, instead of supporting one another. We need to agree on what our priorities are as a couple.

In each of these examples, the purpose of the conversation is made clear. It may be to inform a decision, to help make a decision, or to explore what will get in the way of successfully executing a decision that has already been made. At the end of the day, there is no question, though. Participants understand the roles they are to play in the discussion.

People resist change, whether they perceive it as negative or positive. If you don't see resistance, either the change is being executed at a superficial level, or the resistance is underground.

Two-way communication—when done in an open and trusting environment—is a means of both surfacing and addressing resistance. Again, you have to be explicit about the purpose of the conversation, e.g. *There is no question that the change is being made. What I am seeking is your input on the best way to move it forward.*

There are a few keys to successfully engaging people in this type of conversation. First, you need to be open to hearing what others have to say. If you do it for appearance-sake, you are undermining yourself and the change. Second, people need to be able to trust you if they are to be truthful with you; recognize and value—don't shoot—the messenger. Third, you need to respond to what you hear, and the sooner, the better; when you respond, be as explicit as possible.

I hear your concern about the fact that you were not consulted on this decision. It was a highly personal one, and one that I had to make on my own. Now that it is made, I am open to working with you on how to carry it out.

I don't yet know which job offer I am going to take. That decision will be made within the next 5 days; as soon as it is, I will let you know.

If you are going to successfully move through a change, maintain two-way communication with those who will be making the journey with you. It will help make the navigation a lot more sure.

Enlist People in Your Change

Sometimes, communication isn't enough. Sometimes you need to enlist people to support your change.

Let's take a look at what it takes to enlist people.

The first step is to identify those you need to enlist; it isn't everyone. Because enlisting is time (and resource) intensive, you want to be selective.

At the personal change level, your focus may be exclusively on identifying the influencers. Begin with these questions: 1) Whose support do I need to make this change successful? 2) To whom will these people turn for guidance and direction related to this change? The people you identify in response to the second question are the people you need to enlist.

There are three principles that are critical to enlistment².

First, it is a dialogue. Begin by laying out the intent of the change. Here you may want to reference, or even tell, your change story. Allow, and encourage, clarifying questions. The more deeply people understand your change – where you are going and why – the more fully they will be able to commit to supporting you as you take the journey.

Second, it is face-to-face, eye-to-eye, heart-to-heart. This is not something that can be done long distance, through emails, on the phone.

Third, your focus is on building their understanding of, and commitment to, your change.

Once you have laid out the change, there are three questions that you want to ask. Their sequence is important, because it helps frame how people will respond to what you have told them.

First, ask *What do you like most about what I have told you?*

² The enlistment process as I describe it here is based on Conner Partners' enrollment process; while I have tailored it to address individuals, the fundamental principles and questions are the same.

Second, ask *What do you want to challenge?* Note that this is not “What don’t you like?” or “What would you change?” The question “What do you want to challenge?” makes clear that while you are open to hearing their voice, you are the decision-maker.

Third, ask *What else should I (we) consider as the change moves forward?*

Listen.

If you are not clear about what is being said, ask clarifying questions.

Listen.

Don’t judge. Don’t reject what is being offered.

Listen.

My recommendation is to give people time to reflect on what they have heard before you take the next step...which is enlisting them to take action in support of your change. Best is overnight...“Think about it over lunch” doesn’t give them enough time; “Let’s get back together next week” is more time than is needed. When you get back together, be open to any questions they might have, answer them, and then ask for their commitment to support you. Be specific about what you want them to do, how you want them to express/demonstrate their commitment.

If you are applying this to a personal change, most of your enlistment sessions will be one-on-one. Different people will bring different perspectives to the change; you want to be able to tailor your responses to their individual frames of reference. (There may be times when a couple, or a group of friends, or members of a team you are on are enlisted together. Don’t rule it out...though it is usually not the norm.)

Resistance is!

Resistance happens.

Whether you want to take this change journey or not, if it is a big change, you will find yourself resisting.

Whether it was your idea or not, if it is a big change, you will find yourself resisting.

Whether you see this as a negative change, or as a positive one, if it is a big change, you will find yourself resisting. Ditto for those around you who are affected by the change.

And, sometimes our strongest resistance (often expressed as “I can’t…”) arises with the changes that are most important to us.

The truth is, resistance happens. It is a part of the change journey.

While it can take many forms—from gossip to failing to acknowledge a change, from subterfuge to immobilization—at its root, resistance is the result of unwillingness and/or inability.

It is easy to understand resistance when you (and/or others) see the change as negative. But why do we resist changes that you initiate, that we think are good ideas…or even true imperatives? The answer is actually pretty simple. At some point we begin to resist because we find out what the cost of the change is really going to be. (The cost might be financial, but it is generally much more. It might include a cost in prestige, or in relationships that have anchored you for years, or time, or in having to let go of other things you want to do, or in paying attention to things that you really don’t want to pay attention to, etc.)

When I first began training in change many years ago, Daryl Conner provided important guidance that I still use today. *“The cost of the status quo must be significantly greater than the cost of the transition, or you will start the change journey but will not complete it.”*

With this in mind, it is critical that as you prepare for your change, you not only look at the opportunities that it offers if you are successful. You also need to be very honest with yourself and others about the cost of making the transition…and the cost of not doing so!

You may not have the skills or other resources that you discover you need if you are to be successful. Skill development may require training (if you need to do it yourself), or hiring others to perform the needed tasks. Either way, once again we are back to cost.

Finally, if you need other resources (whether that be equipment, or facilities, or software, or…), there will be a cost. Either you find, free up, or in some other way obtain those resources, or you redefine the change to something that is achievable with the resources that you do have.

There is one more important note about ability. Often you will hear, or you may even be the one saying, *“I can’t…”* Don’t take “I can’t” at face value! All too often, what it really means is, *“I won’t.”* *“I can’t”* is about ability. *“I won’t”* is about willingness. When faced with a really difficult task, *“I can’t do it.”* may actually be offered as the rationale for not having the courage to do it.

All too often, we see resistance as a sign of something going wrong. It isn't. Resistance during major change is inevitable. Something is going wrong if you don't see it, don't feel it. Either the change is not really moving forward, or the resistance is playing out underground.

Surfacing resistance, and being clear about the willingness and/or ability causes that underlie it, will help you to continue to move the change forward. Ignoring it, or treating it as a distraction, will leave you short of achieving the change you have set for yourself.

Stop!

STOP!

It's so easy to say. It's so hard to do. During change it's often missed, forgotten about, skipped over, avoided, or put on the back burner. Yet it's so critical to succeeding at your change.

Why is "stop" so important? It's simple. Nothing is infinite. Time. Money. Open-heartedness. Energy. Focus. Capacity to adapt to change. Everything has limits. And, unless you are in the unusual position of being blessed with everything that you need to achieve your change without putting anything else aside, you need to think about—and act on—STOP.

First, a brief history lesson.

One of the forefathers of change management was William Bridges. In 1991 Bridges published *Managing Transitions: Making the Most of Changes*. Among the topics he covered: "stops, starts, stays."

Without STOP, you may start, but it is unlikely you will achieve lasting success.

So, how do you decide what to stop during change?

First, it is important to know what you are going to need more of in order to succeed. For purposes of this example, let's say that your change is going to require time, focus, a financial investment, and ability to adapt to change. (Don't forget this last one—it is vitally important!)

Quantify them: let's say you will need 15 hours/week of absolute focus; virtually all of your adaptation capacity, given how big the change is; and to cut your discretionary spending by 25%.

Now you are going to have to decide where these things are going to come from. None is available in the hall closet or on the store shelf. So what do you stop to free them up?

Begin with the time-wasters; that's an easy one. Most of us have things we do, whether in our work lives or on our own time, that waste time. Perhaps you take public transportation, and spend 5 hours a week playing Sudoku during your commute. If that is 5 hours that you can invest in your change—and playing Sudoku is not a mental or spiritual practice—you are a third of the way there; but if it's that you can't invest the time in this change, keep Sudoku going. (You don't need more change.)

If the change is very big, chances are eliminating your time-wasters is not going to free all the time, focus, and financial resources that are needed; and, they don't free up any adaptation capacity. So, now you have to start looking at the important things that you are doing.

Begin by listing them all out. Perhaps you go out weekly with close friends. One of my clients refers to these people as his "heart friends;" they are the people who are there for him through thick and thin. You spend time every week reading; sometimes it is casual and relaxing, and at other times it is work-related. Then there is the weekly sports activity: softball in the summer, bowling fall through spring. Finally, there are the plans you have been developing to launch your own business. None of these are the big change you are preparing for as you consider your "stops," yet each of them is important.

Again, look at each one in terms of the resources you need to set free. Some of them require time, but not adaptation capacity; planning to launch your business has been burning adaptation capacity as well as time.

You may find something, or things, to stop that will free up the resources that you need. Or, perhaps, you just slow something down; for example, you may decide to move to every other week dining with heart friends, and talk with them about rotating hosting the dinners rather than going out. In this way you are freeing up some of the time, and some of the financial resources.

You may also need to put your business plans on hold. Right now, they are eating up adaptation capacity, and you have determined that you will need all of this you can muster.

What happens if you have squeezed all of the adaptation capacity, time, focus, and discretionary dollars you can out of the important things in your life, and it's still not enough?

Now it is time to get to the really tough choices. Do you make adjustments to the new change that you are trying to launch so that the resources you have freed up are enough? Do you cut back on the time that you spend with your family? Do you postpone the vacation that you have

been promising the family (and for which you have been planning together) over the past nine months? Do you set aside your spiritual practice to free up that time? Do you turn down the promotion that you have been offered that will increase your income, but demand additional adaptation capacity, time and focus?

If it is imperative that you succeed at this change, all of the above need to be on the table. If you can't find enough to stop in order to free up all of the things that you will need, then it is quite simple. Prepare to fail. You may get part of the way there; you may get most of the way. *But, no matter how important the change, no matter how much you believe in it, no matter what success means, if you don't have the resources and the adaptation capacity to succeed, success is not possible.*

Don't breathe too easily. If you have freed up what you need, you still can't rest easy. STOP is not "once and done." Now it is important to maintain vigilance. Things creep in. Perhaps a family member comes to you with a request for piano lessons, or a gym membership. Maybe the office moves, adding to your commute time (and eating up some of the time you have freed up for this change). Your mechanic is recommending that you replace the car, rather than the transmission. None of these has anything to do with the change that is your imperative; each of them puts it at risk.

Set aside time on a regular basis to consider whether you need to reassess your "stop" decisions again, whether you need to rethink your change, or whether you are still on track.

What's In Your Change Portfolio?

Unless you are actively involved in the field of project management, change management, or strategy, it is unlikely that you think in terms of a change portfolio. This is especially true when thinking about personal change.

Unfortunately, that puts your change effort at significant risk. Each of us has only so much capacity for change; when engaged in a really big change, it is easy to overload that capacity. When we are overloaded with change, nothing we are working on can be completed successfully. That's why change portfolio thinking is so important.

Let's begin by taking a minute to define what is meant by "change portfolio." Simply put, it is all of those things that need to shift in order to deliver the intended outcome of your change.

In *Create Your Change Story*, I referenced a key message from Simon Sinek and others... *Start with what's in your heart.* Creating the story and beginning the preparation work are important precursors to creating your change portfolio. Only when you know where you are going; what it

is going to be like once you get there; and the anchors that require some form of change, can you know what changes to include in your portfolio.

There are several ways you may go about identifying what is in your change portfolio at this point. The process may vary, depending on the scope of what you are trying to change. But however you approach it, I would suggest you factor in the following.

- What element(s) of the outcome does each of the changes contribute to?
- For each change that is identified, how difficult will it be to execute, how critical is it, and how much will it contribute to the outcome?
- If it is difficult and less-than-critical, can it be cut from the portfolio?
- If it is easy, and less-than-critical, can it be cut from the portfolio?
- When you look at all of the changes in the portfolio, will they deliver the outcomes you are seeking, or is something missing?

I recommend some form of white board/index cards/sticky notes process. And, I recommend having a bottle of aspirin nearby. This is one of those “Oh, S!*T” moments...when you begin to have some real in-depth understanding about what it will really take to succeed with the change.

The next question to ask yourself is, *What other changes are going on? Why?* Quite simply, each one eats up something: time, money, psychic energy, focus, the ability to adapt to change. As much as is possible, you should consider terminating, reducing in scope, or delaying them so that they don't interfere with the important change that you are addressing.

Now, come back to your portfolio. It may contain 10, 20, 30, or more changes. As I noted earlier, it is likely that it frightened you (and anyone engaged in the process of defining it with you) when you first worked through what is in the portfolio. Introducing the portfolio to others will be just as frightening. So, before you do, see if you can weave some of the changes together.

For example, perhaps your change is a major shift in career. You've identified a series of changes that you need to make related to preparing yourself for the new career (select a program of study, enroll in night school, complete the program, obtain employment, earn certification, etc.). There may be another set of changes related to financing this shift (reduce budgeted expenses by 15%, obtain a student loan, etc.). And, there may be others...

By weaving the related changes together, you can begin to focus on “the path to career readiness” and “laying the financial foundation.” While initiating your change portfolio at that aggregate a level is dangerous (you don't know what is really required for success), rolling things back up to that level once you have defined the portfolio makes it much more palatable.

Track Your Path to Success

How do you measure success? What are the milestones along the way that let you know that you are—or are not—making progress?

In *What's Your Story?* I spoke briefly about the distinction between “installation” and “realization.” Let’s begin by revisiting those distinctions. Throughout this section I will use the example of a major career change. You are leaving your financial services career on Wall Street to become an actor; it is a passion that has burned inside you as long as you can remember, and you are going to make your dream come true. Your intent is to feel secure in your ability to support yourself as an actor.

Installation is achieved when things are put in place. Installation metrics may include getting accepted to acting school; submitting your resignation; commencing training; completing your training; being selected for your first part; and completing your first acting assignment.

Realization is achieved when the promise of the change is fully delivered. Perhaps, for you, realization will be when you feel secure in your ability to support yourself as an actor…no more waiting tables, valet parking cars, or serving hors d’oeuvres at catered parties.

All too often, when we plan a major change for ourselves, we start with the passion that is in our heart as our desired future state, and then we plan as if installation will get us there. Unfortunately, installation only gets us installation; it doesn’t get us realization. Nor can you start thinking about “what else do I need to do” once you have achieved installation. It is important to plan on, and move toward, realization from the outset.

If it is a big change, start by thinking through and listing out all of the major adjustments you are going to have to make not only in what you do, but in how you think. Perhaps while on Wall Street the thinking was “eating out is convenient, and I can afford it.” It may still be just as convenient, but may be much less affordable as you work your way through acting school, auditions, and your early parts as an extra or a member of the chorus. So, not only will you have to change how you spend money, you most likely have to change how you think about money. You will also probably need to make changes in where you live; your wardrobe will most likely be different; how you spend your time—including both working and non-working time—will probably change, as might when you get up and when you go to bed. They call it “major change” for a reason!

What about the people in your life? The colleagues who used to drink martinis with you before dinner at the restaurant may be less excited about downing a shot after the final curtain call. The friends who loved getting invited to your beach house may find they have less excitement about a picnic in the park. And the family that worked and sacrificed to help you and your siblings

through college so you could have a better life...perhaps they will be less than enamored with your new-found enthusiasm for what they see as a less professional, less lucrative, and less secure career path.

We touched on this in *Anchors, Aweigh*, but it bears repeating here. In planning a major change, you are going to have to consider those around you. What role do they play in your life now? What role do they need to play in the transition? What role will they need to play when you achieve your desired future state? Which ones will be the same, which ones will be different, and which people will you need to end your relationship with in order to succeed?

Once you've listed all of the changes in thinking and behavior you can come up with, grab some sticky notes and a pen or pencil. Put each one on a separate piece of paper, and put it up on the wall (or white board, or closet door, or window). You may want to use different colors for mindsets and behaviors, or for different aspects of the change (e.g. leaving the old job; redefining relationships with people).

Now you can begin to group these together. Use your story to help you think this part through. Think of these groups as "work streams;" each stream consists of the changes that you have to make in order to achieve some aspect of your intent.

Let's go back to your intent. *I feel secure in my ability to support myself as an actor!*

Begin by defining your realization indicators. What will make you feel secure? Be specific; be sure it is measurable. You may already have some among the sticky notes you have posted; you might need to develop others. Write them sticky notes. Position them in a relative sequence within your work streams. In the example below, the first two of the bulleted indicators may be targeted for attainment near the end of the change, as you approach full realization. The third one you might decide to position earlier in the process.

These may be some of your metrics.

- I have \$X in the bank, of which \$Y has been made as an actor.
- For the past 18 months I have had a positive cash flow, all of it as an actor.
- I have re-framed my lifestyle so that I am comfortable in my studio apartment.
- I am entertaining family and/or friends at home at least once a month.
- Etc.

Now think through your installation indicators. Again, many of these may come from the sticky notes you have already developed. What do you have to put in place in order to achieve each of the realization indicators? For example, what will it take for you to move out of your three bedroom apartment and feel comfortable in a studio?

- I have identified the characteristics of a living space in which I can be comfortable (a more open plan vs. individual rooms, whether a view is needed, etc.).
- I have pared down my possessions so that I have what I can comfortably live with inside the new apartment.
- I have a plan in place for ensuring that I don't begin to clutter my space.
- I have defined the type of neighborhood in which I will be comfortable.
- I have found, leased, and moved into my new apartment.
- Etc.

Look at the sticky notes that you first put on the wall, and that have not become either realization or installation indicators, or changes that allow you to achieve those indicators. Ask yourself two questions.

- Have I identified an indicator that this contributes to achieving?
- If not, am I missing an indicator, or is this change unnecessary?

You should end up with a series of "work streams" made up of change projects or activities, as well as installation and realization indicators. Finally, review your work streams. If you achieve all of the indicators in each of the work streams, will you be able to look at yourself in the mirror and say, *I feel secure in my ability to support myself as an actor?*

Keep a record of what you have on the wall. It will change over time. You don't have all the answers now; you don't even know all the questions. Things will change around you. So, your indicators will have to change as well. Nonetheless, you are well on your way to planning, and preparing to launch a very big, and important, change in your life.

When is the Change Journey Done?

Most organizations (and many individuals) undertaking major change end their change journey way too early!

Why?

The simple answer is, improper planning. The root cause, however, is a little more complex.

Major changes promise some very specific results. We may plan on changing employers, or careers, to provide ourselves and our families a better life. We may choose to relocate for the same reason. We may enter into, or end, a long-term relationship, seeking "happily ever after." The reason these changes all-too-often fail to come to full fruition is that we confuse "installation" with "realization."

Achieving the types of outcomes that large-scale changes promise is referred to as “realizing the benefits” of the change. It is the promise of realization that underlies the decision to move forward, to invest the necessary resources to make the change happen.

Then, the planning process begins; though there may not be a formal “plan,” we call out in our minds (or create a check list) all the things that need to be put in place. All too often, this is where we stop...and why our changes don’t deliver on their promises. *We plan to install the components of the change, somehow believing that “if we build it, realization will come.”*

Planning cannot stop at installation. Nor should you plan to start working toward realization once installation is completed; doing so is more costly, and less likely to yield success.

Plan for realization from the outset. How do you and others significant to the success of the change have to think and act differently in order to achieve realization? How are you going to ensure those changes occur? What do you have to put in place to prepare yourself and others for the disruption that will occur during the transition? How will you effectively communicate both the “what” and the “how” of the change, the experience of the journey, and life in the future once realization is achieved? What is needed to ensure that the change progresses, that risks are surfaced early and mitigated, and that the integrity of the desired intent is maintained? Do you need to change some of the “foundation elements” that under-gird your personal life? This might include things like changing how time is allocated, family budgets, etc.

The change journey isn’t done once the honeymoon is over. A lot of work remains before the benefits can be fully realized. Don’t promise realization, and then fail to plan for it.

Additional learning to support you as you *Plan the Journey*

- *A Few Reminders: Key Change Principles (Create Your Change Story)*
- *All Change is Political (Prepare for the Journey)*
- *Are You Talking With the Right People? (Create Your Change Story)*
- *Do You Really Have to Make This Change? (Create Your Change Story)*
- *Don't Focus on Breaking Old Habits (Prepare for the Journey)*
- *Don't Just Leave! (Prepare for the Journey)*
- *Every Big Change Needs a Roadmap (Create Your Change Story)*
- *How Often Are You Present With Yourself? (Create Your Change Story)*
- *How Well Do Your Beliefs Serve You? (Prepare for the Journey)*
- *The Future Ain't What It Used to Be (Create Your Change Story)*
- *What Would Steve Do? (Prepare for the Journey)*
- *What's Your "Plan B"? (Prepare for the Journey)*
- *When Organizations "Just Leave" (Prepare for the Journey)*