

Does your big change stand a chance?

Introducing the Envisian Power To Change Matrix™

Quickly predict whether your initiative is ready to move forward – or if you need to win over some more allies first

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About Envisian

LEADERS UNDER PRESSURE to bring about change in their organizations often fail or fall short – not because the changes aren't important or needed – but because they failed to evaluate and understand key indicators of support, resistance, power, and readiness. This new tool may be able to help.

It's no surprise that for every proposed change, you will encounter people both for *and* against your initiative. That part is predictable.

What's not so predictable is whether or not the change you are advocating has a reasonable likelihood of eventually being embraced and enacted – and if the time is right to move it forward.

We looked for a way to better assess the feasibility of enacting change. Our colleague, James W. Moss, Sr., introduced us to the Force Field Analysis, originally developed by American social psychologist Kurt Lewin and built around the premise that forces – including habits, customs, and attitudes – both drive and restrain change. Lewin's tool is commonly used in decision-making and contingency planning situations.

We then constructed a new Matrix designed to graphically depict two other critical aspects: support or resistance; and power. We hoped indications of readiness and timing might also emerge.

We then tested this new Matrix using several recent client projects involving significant change. The Matrix proved to be simple, easy to use, and intuitively understandable. We soon realized this new tool could be useful for any leader involved with change initiatives.

BOTTOM LINE FOR LEADERS

The Envisian Power To Change Matrix™ measures and plots two key factors: 1) support for or resistance to your proposed change; and 2) the level of power and influence key people hold over the future of that change. With a bit more interpretation, it's possible to determine whether the time has yet arrived to press forward with your change.

Remember – change is critical to keeping every business current and vital. But if you win over many people to your initiative, but NOT those who have the real power to approve and enact it – your change is probably dead.

Getting Started

Politicians and lobbyists have long known the importance of tallying their support before a vote or a major decision – and taking action to ensure success.

Whether you are in business or part of a non-profit, it's critical to line up solid support for important initiatives in advance.

Gathering support to gain approval and commitment from the right people usually requires doing your homework, including clearly identifying at least three things: 1) the value that will be produced by the change; 2) the people who will be helped (and perhaps hurt); 3) and the barriers that stand in the way of the effort succeeding.

By knowing these three things and communicating them clearly and effectively, you increase your chances of success in selling and implementing any important change.

Additional Resources

We'll be happy to send you a link to the following additional blank forms and instructions by email. You may print or copy them for your own use within your organization, but we ask that you do not use them for commercial purposes. Email cfrancis@envisian.com and ask for The Power To Change Matrix Extras.

- Key People List with Instructions
- Quick Self-Assessment Form for Teams and Team Members
- Matrix Forms & Instructions

Most organizations begin because of change – a change in the marketplace, a change in technology, or a change in consumers' needs and wants. Most new businesses tend to be adaptive and responsive to change. Over time, as businesses become mature, change can become inconvenient, threatening, and even fatal.

That's why one of the best indicators of a strong, intelligent, and well-run organization is its ability to respond and adapt to change.

This tool was created to help improve your chances of implementing important new changes in your business.

What This Matrix Does

This simple tool makes it fast and easy for leaders and teams to rapidly assess where they are in terms of buy-in and resistance for a major change initiative.

In minutes, you can better understand exactly where the key players are on each side – and whom you still need to win over.

The more effective you can become at analyzing and forecasting where your key people are in understanding and buying into major changes, the better leader you are likely to be.

Why It Matters So Much

In warfare, you have to know when your forces are in place and ready. If you launch too soon or too late, your risks are much higher, and your chances of success much lower.

So this Matrix is not simply about the two factors it directly measures – support and power – but it can give you insight into another important element: timing. Are you ready now, or should you sell a bit more and win support? Or is now not the right time at all?

Using the Matrix In Your Organization

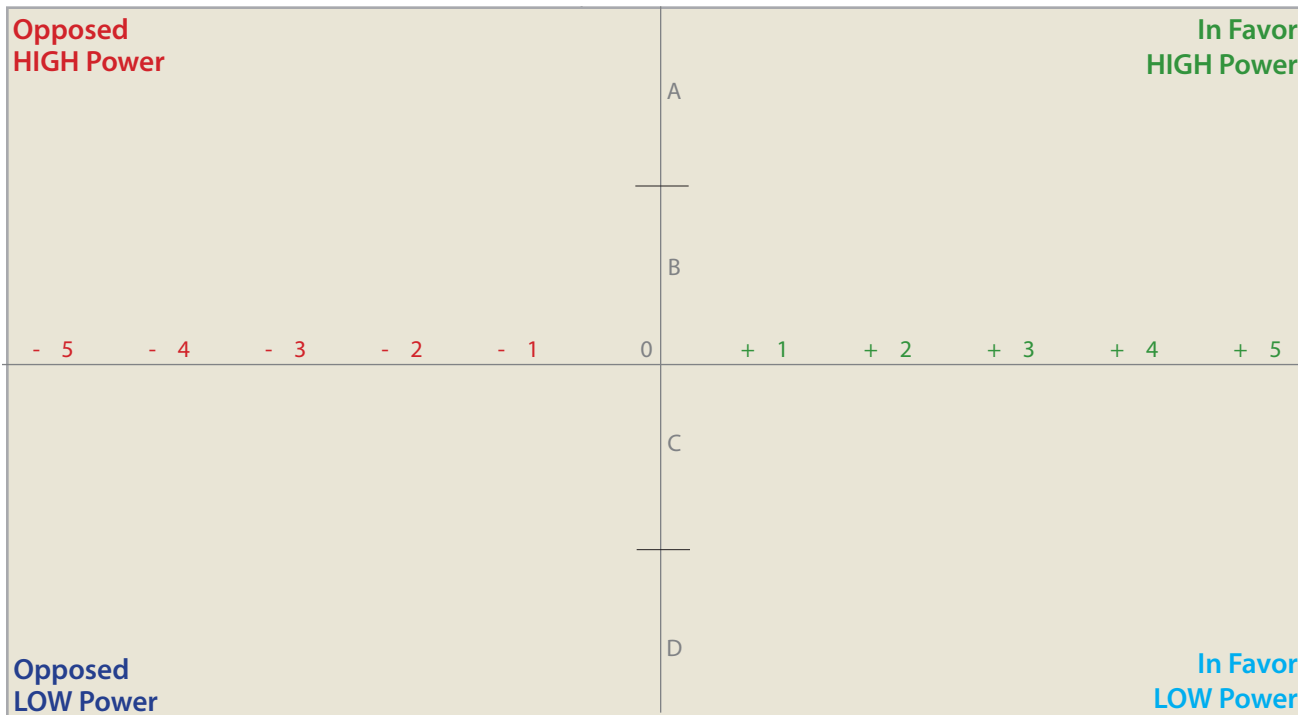
Change initiatives that are carefully crafted, well-reasoned, and sold on their merits – rather than simply as another way to cut costs – can be vital to an organization's future and well-being.

But too many change initiatives are driven by dictates from above, not by mandates from below. Often, impatience, indifference, or plain ignorance about the methods and importance of *selling* a change – not merely dictating change – can engender even more resistance and foot-dragging.

This Matrix isn't likely to solve all those problems, but it may help you better and more thoughtfully assess the hearts and minds of the people who can make or break your initiative. If the Matrix reveals that more selling is needed, take it as wise counsel and work on developing and explaining the benefits and value of the new changes.

Here are some of the situations where the Matrix may be useful:

- Changes in leadership or ownership
- Mergers | joint ventures | alliances
- Changes in company policy | benefits
- Cutbacks | restructurings
- New strategic directions
- Changes in major systems | procedures
- Opening new markets
- Offshore initiatives
- Re-branding
- Transitions
- Acquisitions



The Envisian Power To Change Matrix..

Two Methods For Using the Matrix

Whether you have just a minute or want to involve your entire team in a thorough process, the Matrix may give you the structure you need.

The One Minute Matrix

Write in the names of people critical to the success of your initiative. Place them based solely on **support** (those opposed on the left and in support on the right, undecideds along the center line) and either above the center line if they are high in **power** or below if they are lower in power.

Now – what are your immediate impressions? Is there a concentration on one side or the other? Too many low power people? Are there too many undecideds? Is it too soon to move forward – is more selling needed?

The Full Matrix

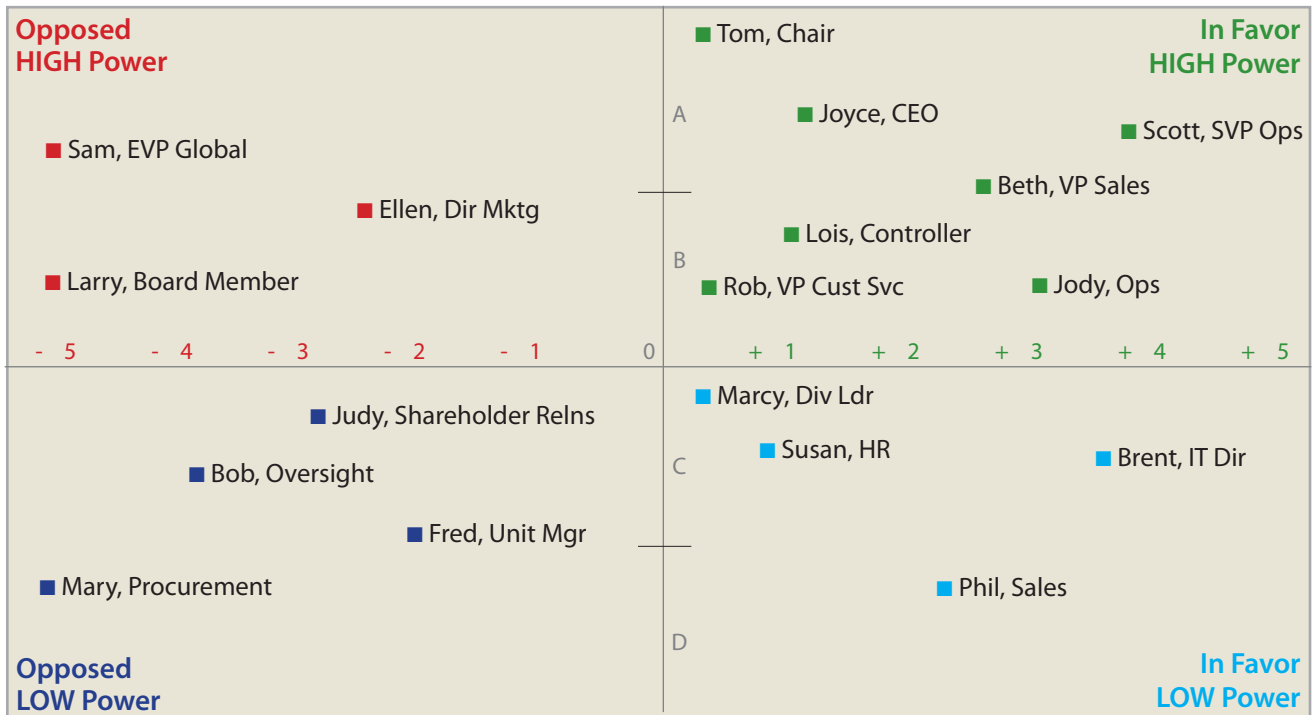
Identify all the people vital to enacting your initiative – obtaining approval, funding, and implementation. (Use the blank form available on our website.)

Next, rank each person’s likely level of support – for, against, or undecided (-5>+5) – and their relative level of power in the organization [high(A), medium (B), low(C), none(D)].

Make it a team effort. Involve your change team or department in listing vital people and assessing/ranking their likely support or resistance, and their level of power relative to the change. Use the -5 (totally opposed) to +5 (totally supportive) grid to help you. Here are some examples:

- *Tom says he’s on board, but is he committed enough to free up needed funds?* (+1 or +2, mildly in favor).
- *Mary says we can count on her for people, resources, and help with the Board.* (Probably a strong +5).
- *Frank is struggling. He likes the idea, but it will cut into his budget and distract some of his people.* (Likely -1 to -3?)

The idea here is to combine the knowledge of many people to gain a more three-dimensional view of the situation. By assembling several perspectives, your assessment of feasibility is far more likely to be correct.



The Envisian Power To Change Matrix..

Analysis

Interpretation: What Does The Matrix Reveal?

This sample Matrix enables multiple levels of analysis and interpretation.

Your first impressions may be all you need – or you may prefer a more carefully-compiled analysis.

Here are several important factors we have found that may be helpful in reaching your conclusions.

Once the key players are plotted, it may be apparent where you are right now with major support or resistance to your change initiative. But that may not be enough. Look closer at your matrix:

1. First Impressions. Is it immediately obvious if one side is stronger than the other? Are there too many unknowns in the middle? What is your gut instinct telling you? Don't be afraid to say, *We don't have enough support yet.*"

2. Power & Influence. Next, look at which power quadrants most of your support and resistance occupy, and who is in the middle. Obviously, the more high-powered people you have on the right side of the grid, the better chance you have of getting the change accepted and enacted. The more high-powered people you have on the left side, the harder time you will have making the change – at least now.

3. Levels of Resistance and Support. Positions within the quadrants are important, too. Those farther to the left or right usually have the strongest feelings and are likely to be the most entrenched in their positions.

Pay close attention to people in the upper left (*high power, strongly opposed*) and upper right (*high power, strongly in favor*) sections. Those are the people with the most power either to make or break the initiative.

Also, give thought to who is in the middle – either by choice or because they are pulled between agendas and loyalties. The undecideds may be your swing votes. You may choose to focus your selling time on this group.

4. Why are people where they are – and how flexible is their position? Once you have the big picture of who is where, it's critical to know *why* they are where they are – and if there's anything you need to do to change their minds. If they are resisters, can you convert them to supporters – or at least reduce their resistance? If they are already supporters, can you encourage them to be stronger, more vocal activists for the proposed change?

5. Readiness and timing – is it time yet to call for a vote or launch your new program? Ultimately, you have to decide when is the best time to proceed: now, later after more support is garnered, or perhaps never.

Making the Go or No Go Decision

At this point, you have all the basic information to estimate the current feasibility of the proposed change.

Opposed HIGH Power	In Favor HIGH Power
Opposed LOW Power	In Favor LOW Power

Quickly Assessing Where You Are

Looking at where you have the greatest concentration of people on your Matrix may give you your answer quickly. Here are four possible overall scenarios – although your situation will likely be more involved.

	High Power Support = High Feasibility
	Low Power Support = Moderate Feasibility
	Low Power Opposition = Moderate Feasibility
	Powerful Opposition = Low Feasibility

Ultimately, it's important to reach a stage where you make a decision, regardless of whether you have used the Matrix as a formal tool or simply as an informal guide.

At this stage, your choices are likely to fall into categories like these:

- **High feasibility** (go ahead ASAP)
- **Moderate feasibility** (go slow, build support, and wait for a better time)
- **Low feasibility** (forget about it, at least for now)

Here are some suggested ways to interpret what each category means. You may want to develop your own criteria outlining the specific people or departments your initiative may require in order to be approved, enacted, and eventually successful.

High Feasibility

The change has a high degree of feasibility if all or most of the major players strongly support the initiative, and most resistance is low level.

You'll still need to work on winning the resisters over to the change as you go forward (and perhaps keep an eye on them) so they don't create roadblocks or other obstacles during implementation, but right now their resistance is unlikely to kill the project.

Cautions

- Be wary if the support of your high-powered people is contingent on changeable factors (i.e. *I think this is a great idea so long as interest rates hold...*) particularly if those factors are outside of your control.
- Try to determine if there is a potential resister with a lot of power who is off your radar screen – a silent partner, a spouse of a lead executive with influence, or an “Aunt Mary” in a non-profit who isn't on the Board but was a founder or is the major donor to the organization.

Moderate Feasibility

The change might be feasible if some power players are highly supportive and are able to either convert the high-powered fence-sitters or resisters into becoming supporters, or defuse their resistance to the point where they won't be a major obstacle. Either way, there is some work to do before this change has a good chance of succeeding.

Cautions

- When you have a mixed reaction to the proposed change, be aware of the difference between agreement and buy-in. Agreement occurs on an intellectual or conceptual level, but doesn't promise active support. (*Great idea, Bob. Let me know how it turns out.*) Buy-in occurs on an emotional level, and often brings active support and follow-through – both of which are critical for changes to take hold and succeed. (*We have to do this. How can I help make it happen?*)

Low Feasibility

The change is probably not feasible at this time if all or most of your support comes from low-power people, and you have significant resistance from the power players in your organization.

Cautions

- Try to determine if the resistance is to the change itself or to the way it was presented. Perhaps more information, a different approach, or even a different presenter might salvage the idea.
- If you think your initiative really has value to the organization, don't give up. Things can change. Many major changes have to be introduced multiple times.
- Keep developing your rationale for the change. Focus on the value and payoffs for each of your key constituencies. Be persistent. Remember, with a good strategy and more effort, you may be able to change the current balance.

Looking Ahead

Predictable Points of Resistance

Let's assume you've decided that your analysis of your Matrix indicates moderate to high feasibility – and you want to move ahead.

Is your job over? Will everything turn out fine?

Not likely, say the experts. Here are five critical points when the change can run into trouble – and even fail.

By anticipating these critical times – and others unique to your organization – you can increase your likelihood of implementing and maintaining a successful change.

When implementing any change, there are relatively predictable points at which you will encounter spikes or increases in resistance – which might even threaten the entire future of the new initiative.

We believe that it's smart to anticipate these potential danger points and be prepared for them. Here are some of the more common points:

1. When the idea is first proposed.

This is often perceived as the whiplash effect. There is often a strong and vocal resistance from those with either the most change-resistant personalities or the biggest investment in maintaining the status quo.

This kind of resistance is often reactive, and can have little or nothing to do with the real merits of the proposed idea.

2. At the point of implementation.

Things are all in place. You're just about ready to launch the new initiative and suddenly the plug gets pulled. Someone got cold feet. Or perhaps someone in leadership was harboring misgivings or was in denial that the change would actually be implemented – and they stepped in at the last minute and killed the project before it really began.

Is there anyone on your list of critical players that has the power – or perhaps the propensity – to kill a project at this stage? If so, continuing to sell the merits of the project may be warranted even after it is formally approved.

3. When pushback comes from outside.

If your change will affect customers, vendors, or others outside your company, there is likely to be criticism, questions, or worse. It's very predictable, usually from a small number of people, and preparing your people for it usually helps you get through it.

4. Six months into a successful change implementation.

Things are rolling along pretty well, the change seems to be taking hold and working, but a backlash starts to build to dump the whole thing and go back to the way things used to be.

This resistance arises from people who were uncomfortable with the change from the beginning and expected it to fail by now, or people who have been (*or will be*) greatly impacted by the change in terms of work load, job functions, additional responsibilities, and other factors.

5. When the change agent leaves.

When the person primarily responsible for initiating, implementing, and monitoring the change leaves, the resistance often gains new life.

Without the champion of the change, critics sometimes feel it is safe to emerge. Unless new leaders are prepared to intervene, the initiative can lose steam and the organization may revert to its old ways.

The Mixed Messages of Change

Fear of change immobilizes many. Uncertainty many more.

Reprinted from the Envisian Blog

I HAD THE PRIVILEGE NOT LONG AGO of working with a remarkable organization – one which has accomplished much. But it was struggling – torn between its past mission and a newer, more focused, and perhaps more compelling future.

The leaders were searching for a new message about their organization – one that encompassed their strengths but which could open new doors. One that would draw in many new people to their cause. As participants. As sponsors. As donors. All constituencies that a non-profit must attract to succeed. They asked us to develop some new options for them.

I heard all the right things. And we went to work.

After many interviews and much research, ideas and concepts began to form. Eventually one of these new concepts began to stand out from the rest. We refined it and researched it to see who was using it. No one was. Based on everything we had heard and seen, we thought it fit this organization remarkably well – including their past work but signaling a bold new direction.

So we tried the new concept on some of the pivotal leaders and got positive feedback: *Intriguing. Different. I like it. That's great! It could work...*

There was soon more encouraging feedback. There were questions and some hesitancy, too, but the concept seemed to grow on people – even though it was significantly different from what they had.

At the Board meeting, the younger members seemed very excited by the change. But the older members (several of whom were the organization's founders and had most of the financial power), were very quiet.

The meeting concluded without a decision and in the months that followed those with the real power eventually prevailed.

There would be no change.

I thought about it for a long time. Had we failed to give them something that would connect and resonate with people on many levels – but that was unique enough in their field to set them apart? Something that would resonate with the media and major foundations who might want to help fund new initiatives?

Our tests, our gut instincts, and the feedback from several on the Board said the new concept was on target. As further validation, a few weeks later the CEO of a huge corporate player in their field discussed the subject in *Time Magazine* in language surprisingly similar to that which we'd proposed.

But none of that mattered. We had been told, *Give us a change – a big change.* And we gave it to them.

But when it came time for a decision, it was uncomfortable, unsettling – at least for a few with the most power. Despite the talk about wanting change, when change was offered, those with the real power said no.

Disappointing? Of course – perhaps most because of the lost opportunity to engage and motivate people in new and exciting ways about an important cause.

Resistance to change is often like that.

If we had this Matrix back then, could we have better assessed where we were with the people who really mattered in advance – and perhaps have achieved a better outcome? Absolutely.

– Carl Francis

The Power To Change Matrix..

is one of a series of new strategic tools for business and non-profit leaders developed by Envisian Incorporated.

As a leader, this Matrix might be valuable in developing your strategy for rolling out major changes, introducing new ideas and innovations, and directing transitions.

This Matrix is available in booklet and electronic formats with blank forms for team use. It is also available in other individual and group formats, such as:

- Real Progress Sessions for teams and leaders
- Coaching sessions for leaders
- Group talks

For a free printed copy or additional information, please call Carl Francis at 610.640.4600x1 or email cfrancis@envisian.com.



Carl Francis, CEO

A leading strategist, instructor, and thought leader, Carl is a respected consultant and life-

long entrepreneur. He has advised hundreds of businesses, non-profits, governmental agencies, and civic and political organizations. He is also an Adjunct Professor at Drexel's LeBow College of Business.

About Envisian

Envisian is a strategic consulting firm based in Malvern, Pennsylvania which helps clients make real progress in strengthening market presence, strategy, branding, transitions, and other critical areas. We also create strategy and coaching sessions for leaders and teams. To learn more or to receive updates from Envisian by email, visit envisian.com.

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