Testbuilder : Tests that Develop

Unit Monitors & **Time Outs** (Journal Entries)

Ah Ha! Sheet (Personal Development & Action Planning)
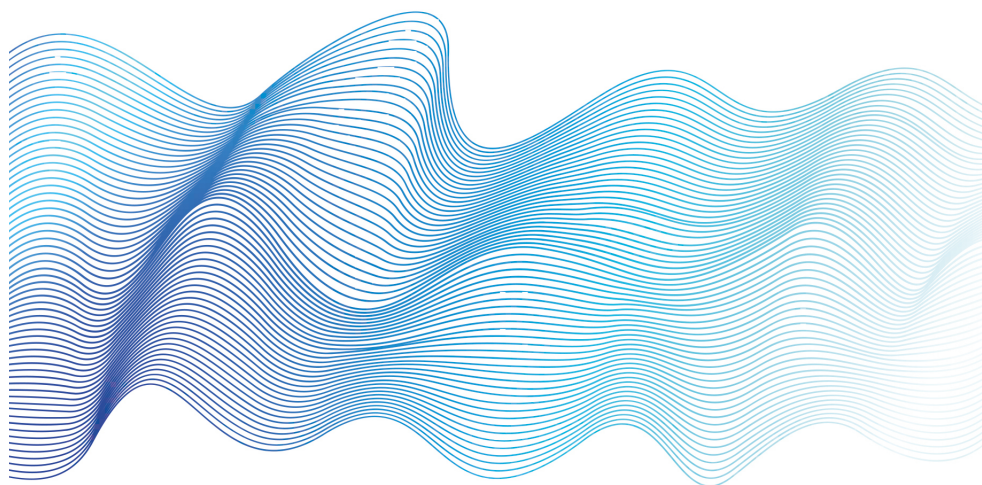
Progress Tracker (Answer Sheet)

Individualized
Learning Record

LEADING POSITIVE ORGANIZATIONAL CHANGE

Energize – Redesign – Gel

BART TKACZYK

Introduction

Leading **Positive** Organizational Change : Energize-Redesign-Gel

Welcome!

Individualized Learning Record, comprised of *Testbuilder* - tests that develop chapter by chapter *(Unit Monitors 1, 2* and 3*), Time Outs 1-3 (Journal Entries 1-15), Ah Ha Sheet (Personal Development & Action Planning),* and *Progress Tracker,* is an integral part of **Leading Positive Organizational Change: Energize - Redesign - Gel** (Routledge, 2021), systematically reinforcing, extending and consolidating work done with the book: **www.routledge.com/9780367608767**.

To further build confidence, improve performance and increase competence, *Unit Monitors 1-3* provide extra practice on leading positive organizational change, and encourage you to take responsibility for your own learning by enabling you to identify what you have learned and its relevance to your daily practice.

Time Outs - Journal Entries encourage you to pause for a moment, reflect and write about your own feelings and thoughts. Through writing in your journal, you develop your awareness of your own beliefs and attitudes. Most importantly, it is especially beneficial to re-visit journal entries to actually see how your thoughts have evolved or themes have reoccurred over time. *Tip*: If you have never kept a journal before, focus on expressing your ideas in any way you can, reflecting on how you are developing.

Finally, structure your continuing professional Development Plan (use the *Ah Ha! Sheet*), and review your progress (use *Progress Tracker*).

Let's get started.

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Unit Monitor 1

Leading **Positive** Organizational Change : Energize-Redesign-Gel

Test yourself: True or false?

- *Read through the statements below and decide if they are True (**T**) or False (**F**).*

- *If necessary, refer back to **Chapter 1** of the book to see if you were right.*

- ***Correct** the false statements.*

1. Executive leadership teams are thrown into VUCA chaos – characterized by volatility, uncertainty, clarity, and adaptability (think: epidemics and pandemics, extreme weather events, paradigm shifts, fiscal crises, new ways of doing business and working, or disruptive innovation). **T / F**

2. Study after study after study have indicated that the failure rate of organizational change efforts is abnormally high – around 70% – irrespective of whether they are driven by M&A, TQM, BPR, IT, de-layering, downsizing, or culture change efforts. **T / F**

3. Transformations fail. One major factor is change fatigue. Published statistics state that 61% of all enterprises undergo three or more changes a year, while some 26% have the ill pleasure to endure six or more change efforts. Beyond this horror, 45% opine that more change will be coming; yet 48% firmly believe the pace of change is too rapid and the results are unpredictable. **T / F**

4. Of note, only 17% of all respondents rate their business entities as highly competent in managing change initiatives. Add to this that only 30% of all polled enterprises have professional change management teams. **T / F**

5. Nielsen research shows that 51% of millennials would pay extra for sustainable products, and 49% of them prefer to work for a sustainable company. **T / F**

6. SDGs stand for Sustainable Development Goals. **T / F**

7. According to the Human Mortality Database, the majority of kids born in affluent countries today can expect to live to be more than a 100. **T / F**

8. Edelman research suggests that citizens seem to trust business more than government, worldwide. Evidently, 51% of the general population believe it is critically important for CEOs to respond to turbulent times and take the lead on change instead of waiting for government to impose it. **T / F**

9. Research by MIT SMR Connections and SAS shows that AI implementation is transforming organizational culture and processes and creating new mandates for CEOs, CIOs, and other tech leaders. Specifically, 63% of the respondents expect AI/machine learning to drive dramatic or significant change, somewhat ahead of the cloud and well ahead of Internet-of-Things or blockchain. **T / F**

10. With no crystal-clear strategic direction, most companies (57%), in the digital economy, are not ready for a digital future. **T / F**

11. In September of 2015, the Environmental Protection Agency realized that numerous Volkswagen cars offered for sale in the US had computer software in diesel engines that could detect when they were being tested, adjusting the performance suitably to boost results. **T / F**

12. The coronavirus disease (COVID-19) will change how we shop, study, and travel, as well as how we do business, for years. For instance, organizations will have to develop trust-based cultures with their staff. Remote working will become a lot more strategic and so in-person meetings will become less important. Enterprises will have to be able to learn how to move faster, acting in more agile ways. Supply chain strategy will be rewritten. Physical components of offices, buildings, and public spaces will be redesigned so that indoor spaces drive performance and productivity too. **T / F**

13. Global research (built upon the responses of 505 leaders occupying managerial positions or higher) indicates that while 99% of all respondents hold the belief that some or all of their staff can work virtually on an as-needed, set-schedule or full-time basis, only 21% admit that the enterprise they lead offers learning and development programs for staff to adapt to such an environment. **T / F**

14. Juniper Networks dropped forced annual performance reviews and applied the notion of frequent "conversation days." The intent was to discuss personal development, goals, and holdbacks in a non-confrontational manner. **T / F**

15. When launching a restructuring by way of downsizing, cost-cutting through downsizing in the longer term may be a poor decision and a financially costly change effort. Research has shown that while share prices go up on the announcement of downsizing, after two years, the shares lose their value. **T / F**

16. Re mergers, a favorable outcome is only achieved by 30%. In surveys conducted in recent years, the percentage of enterprises that failed to achieve the goals of the merger reached 83%. **T / F**

17. Research suggests that the acquirer's risk-taking actions and recognition of merger synergies affect the price offered for the M&A deal while the target organization's perception of synergies is much less relevant (if at all) and their optimistic behavior is most useful, when the acquirer sees high synergies found in the potential M&A deal. **T / F**

18. *Freeze - Rebalance - Unfreeze* was authored by Kurt Lewin. **T / F**

19. *Unfreeze - Move - Freeze* was authored by Karl Weick. **T / F**

20. *Energize - Redesign - Gel* (*ERG*) was authored by Bart Tkaczyk. **T / F**

21. Positive Organizational Scholarship, a sub-field in the area of management and organization studies, primarily focuses on the study of especially the positive outcomes, processes, and attributes of enterprises and their members. **T / F**

22. "Positive energizers" are employees who energize the workplace and stimulate progress or put forward team initiatives. Such individuals are described as being more engaged, proactive, trustworthy, and unselfish. **T / F**

23. "De-energizers" / "negative energizers" are employees who stifle workplace initiatives and belittle their fellow workers. Such individuals are seen to be critical, inflexible, selfish, and unreliable. **T / F**

24. Organizational network analysis has discovered that a "positive energizer" is five times more likely to be successful than someone at the center of the "influence" or "information" network. **T / F**

25. SOAR stands for *strengths-obstacles-aspirations-results.* **T / F**

26. "Psychological capital" (PsyCap) is comprised of optimism, worry, confidence, and resiliency. These all are positively oriented psychological capacities that can be measured, developed, and effectively managed for performance improvement. **T / F**

27. Design-driven companies such as Apple, Coca-Cola, Ford, Herman-Miller, IBM, Intuit, Newell-Rubbermaid, Nike, P&G, Starbucks, Starwood, Steelcase, Target, Walt Disney, and Whirlpool have outperformed the Standard & Poor's 500, a stock market index of 500 large publicly traded companies, by an extraordinary 371%. **T / F**

28. "Strategic agility" is the ability to remain flexible in facing new developments, to continuingly adjust the organization's strategic direction, and to develop original ways to create value. **T / F**

29. "Super-flexibility" is about the dialectical capacity of withstanding while transforming. It means deciding what to keep and how to stay the course on the one hand, and thinking about where and how to make swift and sudden changes to capitalize on new realities, on the other hand. **T / F**

30. "Gelling," in terms of dynamic organizational capability, implies bringing about a "semi-solid" state. A state such as this is solid enough to ensure that the newly "crystalized" status quo is safe from regression to old behaviors and performances, while it simultaneously enables examination and positive modification. **T / F**

Time Out 1

Challenges & trends in leading positive organizational change

• *Pause for a moment, and reflect in writing on the topics in* **Chapter 1**…

Journal entry 1: How confident do you feel about leading and executing change?

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Journal entry 2: How have your beliefs about leading organizational change changed after reading Chapter 1?

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Journal entry 3: Write down three areas of change leadership that you'd like to improve for yourself and explain why.

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Unit Monitor 2

Leading **Positive** Organizational Change : Energize-Redesign-Gel

Test yourself: True or false?

• *Read through the statements below and decide if they are True (**T**) or False (**F**).*

• *If necessary, refer back to **Chapter 2** of the book to see if you were right.*

• ***Correct** the false statements.*

1. Strategic organizational learning is the heart of any productive activity – it is the trending form of labor. **T / F**

2. Over the long run, superior organizational performance does not rely on superior organizational learning. **T / F**

3. Team-focused coaching, grounded in dialogic Organization Development (OD) and behavioral science, is not an ideal method for accelerating and sustaining change. **T / F**

4. Coaching task-performing executive leadership teams for change management differs from coaching individuals. **T / F**

5. Making use of generative coaching conversations around change issues helps enterprises to strategize more openly, and to create new awareness, behaviors, possibilities, and outcomes – to collaboratively create that new future. **T / F**

6. Rather than train people, a coach energizes and equips talented and resourceful coachees to develop themselves and to maximize their own potential. **T / F**

7. A competent executive team coach will dynamically try and mix different coaching approaches: motivational, educational, consultative, and strategy-related coaching. **T / F**

8. Stanford University and the Miles Group polled +200 CEOs, board directors, and senior executives of North American private and public enterprises. Those at the CEO level who responded held positive opinions toward coaching. Besides, almost all stated that they liked the process of being coached. Yet, two-thirds of them were not currently receiving leadership outside advice. **T / F**

9. Research by the Association for Talent Development found that coaching boosts communication (69%), engagement (65%), skills-to-performance transfer (63%), and productivity (61%). **T / F**

10. Research by the Human Capital Institute and the International Coach Federation demonstrates that coaching-related activities are rated the most helpful in achieving the goals of change management efforts. For instance, 67% indicated that team coaching with a professional coach practitioner helped achieve the goals of the change management program, as opposed to, say, web-based training or e-learning, which was reported as very and extremely helpful by 34% only. **T / F**

11. Besides, it has been shown that among enterprises with a strong coaching culture, 61% are also classified as high-performing organizations. **T / F**

12. A strong coaching culture is correlated with most of the indicators of a high-performing organization, including success in customer satisfaction, shareholder value, financial gains, labor productivity, and large-scale strategic change. **T / F**

13. Using coaching to develop leaders to lead an agile culture is correlated with respondents' greater confidence in employees' abilities to plan for change. **T / F**

14. Enterprises with a high innovation intensity would select directors with a PhD degree, as holding a doctorate reflects experience in research. **T / F**

15. A Harvard Business School/Hay Group research program that studied senior teams around the globe concluded that effective teams could significantly contribute to their enterprises, yet only one in five were extremely good, while one-third were mediocre, and 42% were poor. **T / F**

16. The stages of team development are commonly as follows: forming, performing, storming, norming, and adjourning. **T / F**

17. For teams to be effective, they need to have a positive working climate where the team members can work – and work with pleasure. Enjoying being around the colleagues is one indication of your team being effective. **T / F**

18. Team charter can be a powerful introduction to team coaching. Plus, the charter can be crucial if the team goes off-track or becomes dysfunctional. **T / F**

19. Getting from dilemma to solution calls for creative responses within a team coaching methodology built on three principles: (1) team charter; (2) a cycle of energizing, redesigning, and gelling (ERG); and (3) a dialogic approach to learning. **T / F**

20. Change strategizing treated as a social act, ERG is a social technology that enables more stimulating team change conversations and organizational thriving – in particular, through the power of cultivating creative collaboration, collective reflection, and collective dialogue. **T / F**

Time Out 2

Teamwork & coaching teams

• *Pause for a moment, and reflect in writing on the topics in **Chapter 2**…*

Journal entry 4: Write about yourself in a team that you belong to. How do you relate to the team? How does the integration in the team relate to the team's stage of development and its team members' roles and responsibilities?

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Journal entry 5: How have your beliefs about (team) coaching changed after reading Chapter 2?

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Journal entry 6: How would you approach team-centered coaching differently now?

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Unit Monitor 3

Leading **Positive** Organizational Change : Energize-Redesign-Gel

Test yourself: True or false?

- *Read through the statements below and decide if they are True (**T**) or False (**F**).*

- *If necessary, refer back to **Chapter 3** of the book to see if you were right.*

- ***Correct** the false statements.*

1. A thorough, systematic diagnostic organization development (OD) allied with an effective dialogic OD can create a powerhouse change process. **T / F**

2. Any results-driven human resource development (HRD) consultancy effort starts with appreciating the three core domains of strategically integrated HRD: organizational learning, organizational performance, and organizational change. **T / F**

3. To yield the reliable intel vital to support strategic HR and OD decisions, consultants need to juggle a strong grounding in scientific research techniques with their creative application. **T / F**

4. Consulting, one of the world's newest professions, exploded onto the business scene in the US in the 1930s, in Western Europe in the 1950s, and in Central and Eastern Europe in the 1990s. **T / F**

5. ALM Intelligence, a US-based analyst firm, estimates the global management consulting market to be worth about $240 billion, while the European Federation of Management Consultancies Associations estimates the market value at nearly $280 billion. Source Global Research, a UK-based analyst firm, provides a more conservative estimate at $120 billion. **T / F**

6. The foundation of consultancy is the co-creation of value so that the client's condition and performance are enhanced. **T / F**

7. The consultant's behavior should be guided by ethical decision-making, integrity, and adherence to a code of professional conduct. **T / F**

8. The intricate client-consultant system can be made simpler by grouping the various entities into three categories: *those who know*, *those who care*, and *those who can*. **T / F**

9. An engagement in which consultants do less telling and more asking and acknowledging creates a high-quality partnership that is more balanced and sociologically equitable. **T / F**

10. Social capital is the best means for importing external advice and knowledge into a firm. Developing organizational social capital requires grasping hold of the knowledge and information found in a firm's human assets and in its (in)formal/social networks with outsiders (customers, affiliates, and connected employees of other firms or of the government). **T / F**

11. OD is a process of planned and emerging interventions utilizing behavioral and organizational science principles to change a system and improve its effectiveness, conducted in accordance with values of humanism, participation, choice, and development so that the organization and its members learn and develop. **T / F**

12. Research shows that top-performance organizations are three times more likely to have a learning culture. **T / F**

13. ROI measures the financial results of a learning program and is calculated as the net benefit (benefits – costs) divided by the program costs, multiplied by 100 to convert it to a percent. **T / F**

14. Organization design is more than another "reorg" – it is part and parcel of the strategy of OD. **T / F**

15. When one does strategy separately from design, one will eventually end up with a great deal of mis-alignment. **T / F**

Time Out 3

Consulting & the way ahead

• *Pause for a moment, and reflect in writing on the topics in **Chapter 3**…*

   Journal entry 7: How have your beliefs about consulting changed after reading Chapter 3?
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Journal entry 8: How would you approach consulting differently now?

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Journal entry 9: How well prepared do you feel to lead positive organizational change?

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Journal entry 10: How your ideas about leading and executing positive strategic change changed since you began the book? How would you approach a change effort differently now?

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Journal entry 11: By now you have probably had a chance to sample quite a few activities from this book and the ToolBox. What are your impressions of the book?

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Journal entry 12: Think back about the types of tasks you have experienced in the ToolBox. Which of these do you prefer/enjoy most about leading change? Why? Explain.

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Journal entry 13: How does doing these tasks with a team help you become a better organizational change leader/organization development advisor?

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Journal entry 14: How important is having a change strategy for your organization? Write about the three most vital elements for you in an organizational renewal strategy. Explain why these particular parts of a strategy are so important.

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Journal entry 15: What remaining questions or concerns do you have about leading change? What more would you like to learn about leading it, now that you have completed the book?

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Ah Ha! Sheet

Personal Development & Action Planning

- *Write* down the most significant insights and perspectives that you picked from this book. These Ah Ha's are the practical ideas and tools that you're most likely to remember and put into practice when you return to work. Identify the strengths, passions, motives, and methods that will help you transfer your learning from this book to your workplace. What are five specific actions you will take in the next week, next month, next quarter?

Insights/ perspectives	Motive to be achieved/ Strength to be utilized/ Passion to be fulfilled	Specific actions to take	Required resources	Timeline	Major challenges/ barriers	Strategies for overcoming the barriers	Evidence of progress
1							
2							
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NOTES:

Progress Tracker

Answer Sheet

• **Choose** the best answer – circle the letter **T** (True) or **F** (False) below.

	Unit Monitor 1 Before reading Ch 1	Unit Monitor 1 After reading Ch 1	Unit Monitor 2 Before reading Ch 2	Unit Monitor 2 After reading Ch 2	Unit Monitor 3 Before reading Ch 3	Unit Monitor 3 After reading Ch 3
1	T / F	T / F	T / F	T / F	T / F	T / F
2	T / F	T / F	T / F	T / F	T / F	T / F
3	T / F	T / F	T / F	T / F	T / F	T / F
4	T / F	T / F	T / F	T / F	T / F	T / F
5	T / F	T / F	T / F	T / F	T / F	T / F
6	T / F	T / F	T / F	T / F	T / F	T / F
7	T / F	T / F	T / F	T / F	T / F	T / F
8	T / F	T / F	T / F	T / F	T / F	T / F
9	T / F	T / F	T / F	T / F	T / F	T / F
10	T / F	T / F	T / F	T / F	T / F	T / F
11	T / F	T / F	T / F	T / F	T / F	T / F
12	T / F	T / F	T / F	T / F	T / F	T / F
13	T / F	T / F	T / F	T / F	T / F	T / F
14	T / F	T / F	T / F	T / F	T / F	T / F
15	T / F	T / F	T / F	T / F	T / F	T / F
16	T / F	T / F	T / F	T / F		
17	T / F	T / F	T / F	T / F		
18	T / F	T / F	T / F	T / F		
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20	T / F	T / F	T / F	T / F		
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26	T / F	T / F				
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29	T / F	T / F				
30	T / F	T / F				

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