



MANAGE CHANGE

LEVEL 4 PROJECT



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INTRODUCTION

Change, whether it affects an individual or an organization, presents challenges. Change management is an approach to assist stakeholders with transition in an organization. A well-thought-out plan for handling change gives affected individuals the opportunity to understand what is happening in their environment through direct communication and strong leadership.

In this project, you will learn how to establish a plan for implementing change, develop a communication plan for reaching all stakeholders affected by a change, recognize the major obstacles to success, and establish processes to overcome those obstacles.

YOUR ASSIGNMENT

For all assignment details and requirements, review the Project Checklist on page 12.



Purpose: The purpose of this project is to practice developing a change management plan.

Overview: Create a change management plan for a real or hypothetical situation. You may create a plan that is based on a past change or a future change that is happening in your personal, Toastmasters, or professional life. Share your change management plan with your club in a 5- to 7-minute speech. Your speech may be humorous, informational, or any other style that appeals to you. It is not a report on what you learned from the project, but an overview of your plan and how it will benefit you and the group the change affects.

Throughout this project you will see icons in the margins next to the text. These icons indicate additional resources available online.



Video: Sign in to Base Camp to watch a video that supports this project.



Interactive Activity: Sign in to Base Camp to complete an interactive activity.



Resource: Sign in to Base Camp to view this resource online.

ASSESS YOUR SKILLS

Evaluate your current skill level by rating each statement.



Select the appropriate number based on your skills today:

5
EXEMPLARY

4
EXCEL

3
ACCOMPLISHED

2
EMERGING

1
DEVELOPING

Pre-Project					Statement	Post-Project				
5	4	3	2	1	I know how to establish a plan for implementing change.	5	4	3	2	1
5	4	3	2	1	I am comfortable developing a communication plan for all stakeholders affected by change.	5	4	3	2	1
5	4	3	2	1	I recognize the biggest obstacles to success and establish processes to overcome them.	5	4	3	2	1
5	4	3	2	1	I recognize how this project applies to my life outside of Toastmasters.	5	4	3	2	1

COMPETENCIES

The following is a list of competencies that you will learn and practice in this project.

- Establish a plan for implementing change.
- Develop a communication plan for reaching all stakeholders affected by the change.
- Recognize major obstacles to success.
- Establish processes to overcome these obstacles.

WHY MANAGE CHANGE



Taking an organizational view of change is integral to the success of projects that affect a number of people. When change is planned and well-managed you save time, money, and build the confidence of every stakeholder. Handling change management from an organizational standpoint is an excellent way to meet objectives and ensure smooth transitions.

BENEFITS OF CHANGE MANAGEMENT

One of the greatest benefits of change management is that it allows all affected individuals to have a comprehensive understanding of why changes are being made. A well-designed plan can provide every stakeholder the opportunity to engage in the process. Allowing stakeholders to participate builds support as you move through each step of any proposed change.

Change management helps you to identify resistance early in the process. Resistance may appear as a lack of understanding, lack of acceptance, or an inability to see how the change can be sustained. Addressing these issues as soon as they surface can smooth each transition within a larger organizational change.

By managing change, you create momentum throughout an organization. When you give stakeholders consistent information regarding a change, they are more likely to behave in a way that supports your objectives. Good planning sets a precedent for future changes by demonstrating a commitment to a positive process that benefits everyone involved.

DESIGN YOUR PLAN

Change management begins with a plan. Start by identifying what outcome you wish to achieve as a result of all upcoming changes. You may use the Prepare for Change Worksheet on page 17 to develop some initial thoughts about your change management plan.



When you are reviewing a change that occurred in the past, for evaluation or for your assignment in this project, use the plan as if you are in the situation now. Your answers will likely be more thorough because you know the outcome, but taking the time to review a past change will help you successfully plan for future changes.

Analyze Circumstances

The first step in any change management plan is to identify the reason for the proposed change. Taking some time to look at and analyze the current circumstances in your organization will help you clarify the motivators for change. The following steps can help you assess the current situation:

- Make a list of the potential effects of the change on each individual stakeholder group.
- Describe for yourself or your leadership team how the situation will look in the near and distant future if nothing changes.

Know Your Objective

Once you have reviewed the current situation, look back at the outcome you defined. With the outcome in mind, set your objectives. Most changes have more than one objective. The larger the change, the longer and more complex your list of objectives is likely to be. Design your objectives by considering everything you wish to accomplish at each phase of implementing a change.

An example of a change that would benefit from a well-organized change management plan is the division of a large Toastmasters club into two smaller clubs that meet at different times or in different locations.

Consider Your Options

Your objectives in the example of dividing your club might include: move half of the members to a new location geographically closer to members who currently commute farthest, set a different time for the new club to meet in the same location to accommodate members with different schedules, or create two smaller clubs to provide more time slots for members to speak and more leadership opportunities within the clubs.

Collect and Analyze Data

Having well-organized data will help you provide supporting evidence for change. Some data you may consider collecting and analyzing includes the scope, or size, of the change and the timeline you envision for implementing the change.

Other information could include: a timeline showing when the change will be implemented, whether the change is permanent or temporary, if your first planned step is to make adjustments on a trial basis, or if the change will be implemented for a pre-determined amount of time.

In our example, you might propose that the club remains intact, but offer two different meeting times for a predetermined amount of time to test the effectiveness of dividing.

Choose Your Metrics

A metric is way of measuring data. There are a number of metrics that you can use to define change. Logistics is one metric you may use when making your decision. Potential logistical changes include a change of venue or a change of time.

Another type of metric is financial. In our example, the financial implications of the change include a higher or lower cost for using a new facility in a different location or changes in club dues. In an organization, those changes may include revisions in payroll or rent if the change involves moving locations and adding or reducing personnel.

MAKE COMMUNICATION A PART OF YOUR PLAN

An integral part of change management is communication. Be sure to plan steps for disseminating accurate information on a consistent basis. Creating and implementing a communication plan may be the best course of action.

In our example, club leadership may have been considering a change to the club size or location for a period of time before communicating their thoughts to the general club membership. It is important to recognize that even if the idea of the change is familiar to a small, core group of stakeholders, it is new to others. Design your communication plan with the knowledge that at least one person in the group will have no idea any change is coming.

Once you have decided what you will communicate, to whom, and when, it is time to share information. Communicate change in person whenever possible. This method is more tactful and sensitive than communicating change via telephone or email.

Every communication must have enough information, but not so much as to overwhelm. With each communication, include a set of clear, specific actions for stakeholders to accomplish. A well-organized outline of actions can make a transition easier for those impacted.

In the Toastmasters club example, your first action might be to communicate your club leadership's concern that the club has become too large to allow members to make speeches on a regular enough basis to meet their education goals. A specific action that could go with this communication would be to provide a survey to members and collect their opinions on the issue.

Use Write a Communication Plan on page 18 to organize your communication.



IMPLEMENT YOUR PLAN

CREATE A COMPELLING CHANGE VISION

A vision is a larger concept that you work toward without an end-date.

Create a compelling change vision to share with major stakeholders. They are invested in your project—both its completion and its success—and they deserve to know the course of action you intend to take.

When creating your vision, know your ideal outcome. This helps you to prioritize specific elements of the plan. When you are dealing with a larger group or organization, put together a change management team to help you design a smooth transition.

In the example of dividing a club, your vision may be to have two thriving clubs in a geographic area that will meet the needs of a broader spectrum of membership than the current club can accommodate.

ACKNOWLEDGE INDIVIDUAL DIFFERENCES IN COPING WITH TRANSITION

The process of transition is different for everyone. Even though each experience is unique, there are stages that most people move through as they cope with an organizational change. These stages generally include:

- Apprehension
- Excitement
- Fear
- Vulnerability
- Sadness
- Acquiescence

Different individuals reach these stages at different points in the change process and may face other emotions as well.



In this activity, place the steps of the change implementation process in the correct order. Find the answers at the bottom of page 9.

- Make communication a part of your plan.**
- Know your objective.**
- Analyze the current circumstances.**
- Collect and analyze data.**

PREPARE FOR POSSIBLE RESISTANCE TO CHANGE

Resistance to change is always a possibility. By assessing and preparing for negative reactions, you may be better able to resolve them quickly and positively.

Possible steps for addressing resistance include:

- Predict reasons for resistance.
- Include steps for addressing resistance in your plan.
- Give stakeholders opportunities to take ownership of aspects of the process.

To help you adjust your communication to reach each individual, understand the members of your stakeholder group and know that a particular personality may not accept the change.

For example, you may know that one member of your club has been walking to club meetings for the past five years because it is the perfect distance for her morning exercise. You understand that she has strong feelings about the club meetings staying in the current location and also know that the venue has been sold and will no longer be available for meetings. It would be important to address her resistance in your change management and communication plans.

Take steps to understand the current culture of the group and how the change could affect that culture.

If an individual shows strong opposition to the change, talk to her in private. Allow her to ask questions and voice concerns before you offer a response.

The same strategy is effective when a group of people is opposed to the change. Invite them to a meeting in a private location and allow ample time for questions and discussion before you offer a response.

Make a point of communicating directly with individuals and groups who show resistance. After you have allowed time for any questions and concerns to be expressed, review the reasons for the change.

1. Analyze the current circumstances; 2. Know your objective; 3. Collect and analyze data; 4. Make communication a part of your plan

When all the information you provide still does not help an individual or group move through the process of change, it may be necessary to negotiate.

When negotiations are necessary, research your position. Know why the change is required and how it may affect others. Maintain a clear view of the benefits of the change.

GIVE OWNERSHIP

Giving individuals ownership of the changes that affect them is an important step to building positive rapport around the idea of change. Take stakeholder input into account and implement it as appropriate. Keep the lines of communication open and continuously demonstrate the value of stakeholder input by implementing suggestions whenever possible. Give your stakeholders the opportunity to identify problems that affect them and allow them to offer solutions.

The greater the stakeholder ownership in the change process, the more successful your change implementation will be.

REVIEW AND APPLY

Before you complete the assignment, take a moment to read through the questions you see here. If you are not able to answer them comfortably, review the project.

- What is the value of planning when implementing change?
- Take a moment to review Write a Communication Plan. How will you use this resource to help you successfully implement a change?
- How will you plan for obstacles to the successful implementation of your change management plan?
- What strategies can you use to respond effectively to resistance?
- How might you use change management planning to improve different areas of your life?

COMPLETE YOUR ASSIGNMENT



Now that you have read through the project, plan and prepare your speech or report.

Review: Return to page 2 to review your assignment.

Organize: Use the Project Checklist on page 12 to review the steps and add your own. This will help you organize and prepare your assignment.



Schedule: Work with the vice president education to schedule your speech.

Prepare: Prepare for your evaluation. Review the evaluation resources on pages 14–16 and share all resources with your evaluator before your speech. You may choose to share your evaluation resources online.



PROJECT CHECKLIST

Manage Change

Purpose: The purpose of this project is to practice developing a change management plan.

Overview: Create a change management plan for a real or hypothetical situation. You may create a plan that is based on a past change or a future change that is happening in your personal, Toastmasters, or professional life. Share your change management plan with your club in a 5- to 7-minute speech. Your speech may be humorous, informational, or any other style that appeals to you. It is not a report on what you learned from the project, but an overview of your plan and how it will benefit you and the group the change affects.

This project includes:

- Creating a change management plan
- The Prepare for Change Worksheet
- The Write a Communication Plan resource
- A 5- to 7-minute speech

Below are tasks you will need to complete for this project. Please remember, your project is unique to you. You may alter the following list to incorporate any other tasks necessary for your project.

Select a major change from your personal, Toastmasters, or professional life that involved or will involve a number of people. (If you do not have a change of this nature, you may create a hypothetical situation.)

Create a plan for the change you have identified.

Schedule your speech with the vice president education.

Write a speech to share your change management plan. Be sure to describe the impact a plan would have had on the process of change and the impact both on you and others.

Rehearse your speech.

After you have completed all components of the assignment, including your speech, return to page 3 to rate your skills in the post-project section.

Additional Notes

EVALUATION FORM

Manage Change

Member Name _____ Date _____

Evaluator _____ Speech Length: 5 – 7 minutes

Speech Title _____

Purpose Statements

- The purpose of this project is for the member to practice developing a change management plan.
- The purpose of this speech is for the member to share some aspect of a change management plan.

Notes for the Evaluator

During the completion of this project, the member developed a change management plan about any real or hypothetical change in his or her past or a current change that affects a group that he or she is part of (including the Toastmasters club).

About this speech:

- The member will give specific information about the plan.
- The speech may be any type, including humorous. It should not be a report on the content of the “Manage Change” project.

General Comments

You excelled at:

You may want to work on:

To challenge yourself:

For the evaluator: In addition to your verbal evaluation, please complete this form.

5 EXEMPLARY	4 EXCELS	3 ACCOMPLISHED	2 EMERGING	1 DEVELOPING	
Clarity: Spoken language is clear and is easily understood					Comment:
5	4	3	2	1	
Vocal Variety: Uses tone, speed, and volume as tools					Comment:
5	4	3	2	1	
Eye Contact: Effectively uses eye contact to engage audience					Comment:
5	4	3	2	1	
Gestures: Uses physical gestures effectively					Comment:
5	4	3	2	1	
Audience Awareness: Demonstrates awareness of audience engagement and needs					Comment:
5	4	3	2	1	
Comfort Level: Appears comfortable with the audience					Comment:
5	4	3	2	1	
Interest: Engages audience with interesting, well-constructed content					Comment:
5	4	3	2	1	
Topic: Shares some aspect of plan for change					Comment:
5	4	3	2	1	
Focus: Identifies a change in personal or professional life that can benefit from planning					Comment:
5	4	3	2	1	

EVALUATION CRITERIA

Manage Change

This criteria lists the specific goals and expectations for the speech. Please review each level to help you complete the evaluation.

Clarity

- 5 – Is an exemplary public speaker who is always understood
- 4 – Excels at communicating using the spoken word
- 3 – Spoken language is clear and is easily understood
- 2 – Spoken language is somewhat unclear or challenging to understand
- 1 – Spoken language is unclear or not easily understood

Vocal Variety

- 5 – Uses the tools of tone, speed, and volume to perfection
- 4 – Excels at using tone, speed, and volume as tools
- 3 – Uses tone, speed, and volume as tools
- 2 – Use of tone, speed, and volume requires further practice
- 1 – Ineffective use of tone, speed, and volume

Eye Contact

- 5 – Uses eye contact to convey emotion and elicit response
- 4 – Uses eye contact to gauge audience reaction and response
- 3 – Effectively uses eye contact to engage audience
- 2 – Eye contact with audience needs improvement
- 1 – Makes little or no eye contact with audience

Gestures

- 5 – Fully integrates physical gestures with content to deliver an exemplary speech
- 4 – Uses physical gestures as a tool to enhance speech
- 3 – Uses physical gestures effectively
- 2 – Uses somewhat distracting or limited gestures
- 1 – Uses very distracting gestures or no gestures

Audience Awareness

- 5 – Engages audience completely and anticipates audience needs
- 4 – Is fully aware of audience engagement/needs and responds effectively
- 3 – Demonstrates awareness of audience engagement and needs
- 2 – Audience engagement or awareness of audience requires further practice

- 1 – Makes little or no attempt to engage audience or meet audience needs

Comfort Level

- 5 – Appears completely self-assured with the audience
- 4 – Appears fully at ease with the audience
- 3 – Appears comfortable with the audience
- 2 – Appears uncomfortable with the audience
- 1 – Appears highly uncomfortable with the audience

Interest

- 5 – Fully engages audience with exemplary, well-constructed content
- 4 – Engages audience with highly compelling, well-constructed content
- 3 – Engages audience with interesting, well-constructed content
- 2 – Content is interesting but not well-constructed or is well-constructed but not interesting
- 1 – Content is neither interesting nor well-constructed

Topic

- 5 – Delivers an exemplary speech about some aspect of plan for change
- 4 – Delivers a compelling speech about some aspect of plan for change
- 3 – Shares some aspect of plan for change
- 2 – Mentions some aspect of plan for change but does not fully address
- 1 – Speaks on a topic other than plan for change

Focus

- 5 – Presents a well-defined change in personal or professional life and gives concise benefits of planning
- 4 – Presented a well-defined change in personal or professional life that can benefit from planning
- 3 – Identifies a change in personal or professional life that can benefit from planning
- 2 – Needs to better identify change in a personal or professional life that can benefit from planning
- 1 – Is unclear on a change in personal or professional life that can benefit from planning

PREPARE FOR CHANGE WORKSHEET

Use this resource to begin formulating your plan for change. Focus on goals that are immediate and then look to define your medium- and long-term goals.

Change

Short-term Goals

Timeframe for short-term goals: _____

Goal	
Goal	
Goal	

Medium-term Goals

Timeframe for medium-term goals: _____

Goal	
Goal	
Goal	

Long-term Goals

Timeframe for long-term goals: _____

Goal	
Goal	
Goal	
Goal	

WRITE A COMMUNICATION PLAN

In the table below, answer the questions about the components of your communication plan. Be as specific as possible. Each column represents a different target audience, if you have more than one.

	How will your plan affect each target audience?		
	PRIMARY Is most affected by your message	SECONDARY Message heard through primary audience member or other unintentional source	TERTIARY Has little interest in, or access to, your message
Goals			
What are your goals? (Make sure your goals are specific, measurable, attainable, relevant, and timely.)			
Message			
What message do you need to communicate?			
Why are you communicating this message?			
What actions/attitudes do you hope others will adopt?			
How will each audience be affected by your message?			

How will your plan affect each target audience?			
	PRIMARY Is most affected by your message	SECONDARY Message heard through primary audience member or other unintentional source	TERTIARY Has little interest in, or access to, your message
Communication Channels			
Which communication channels do you intend to use? (Possible channels include in-person, online, marketing material, etc.)			
What communication mediums do you intend to utilize? (e.g., If you chose online communication, you might connect through email.)			
Timeline			
What are the milestones of your message and when should you reach them?			
How frequently do you expect to be in contact with your audience?			
Evaluation			
How will you evaluate your efforts?			



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