

# Lean Change Agent

What is it about



# Lean Change Foundations



## Lean Change Ecosystem

Lean Change is an approach to change inspired by Lean, Agile, Lean Startup and Organizational Development.

Its Ecosystem is a collection of elements that can be used to

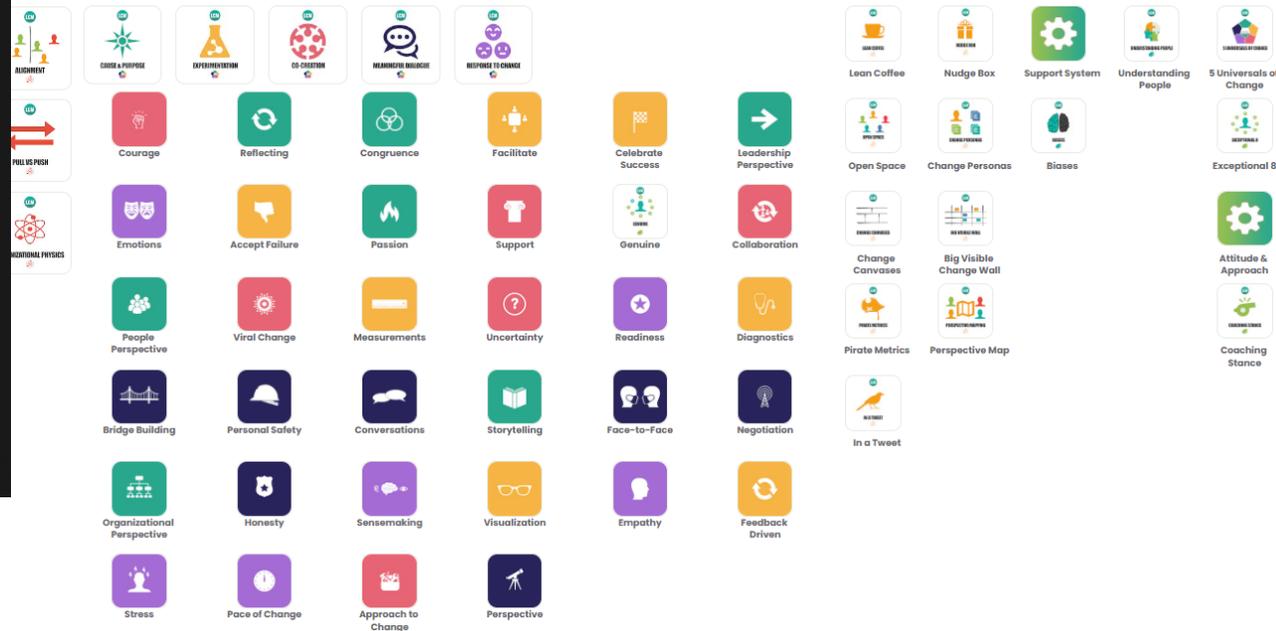
- Create your own change framework
- Complement an existing framework
- Give modern impulses to each of the elements of a traditional change strategy

Why does change fail?

Check out the Periodic Table of Change. <https://leanchange.org/elements-of-change>  
Which elements could you use in each of the traditional main elements of a change strategy?

LCM Elements

- Clear Vision
- Comms Plan
- Resistance Management
- Progress Indicators
- Impact Assessment
- Training and Development
- Implementation Plan





# Lean Change Foundations



## Lean Change Engine

When we start with change there's much we don't know yet.

We need to learn how people and the organization respond to the change.

Their responses affect the Status Quo we're trying to change.

The Lean Change Engine is the core of our approach to change activity:

- We collect **Insights** – what we **DO** know, at this point in time.
- We define **Options** – everything we can think of as **next action** to take, based on the insights we have.
- We **Prioritize** the Options – To find the cost/value balance, **visually!**

The Lean Change Engine is the ever repeating cycle of gathering insights, defining options, and prioritization and selecting experiments.  
Use the change determined through the Storytelling Canvas "So we want to..."  
It's a fun way to create understanding and actions related to the change. It provides you as well with the necessary inputs and a first shot at priorities for the Big Visible Wall.  
We'll explore how the engine works through the Hot Seat exercise

Ask questions to clarify the problem to the change "owner". Take your notes in sticky notes and place them here. Group the insights in a conversation with the group.

Review the insights collected. Within a timebox, throw out ideas about "things we can do to make this change happen". There is no debating the ideas, and the change "owner" cannot respond to them.

Take one of the Options that is actionable and ask the change owner how valuable it might be (how much positive impact may this have on making the change happen). Then ask how much it would cost (Cost is \$\$\$, effort, and uncertainty. IE: if the Option requires you to get 200 people in a room, it's costly).

There are three major factors to consider when assessing your Options:

- Cost: What's the effort or investment needed to make this Option viable?
- Value: What's the benefit? Does it outweigh the cost?
- Level of Disruption: How disruptive would this Option be in the organization? Often this is a gut-feel notion, and hard to quantify.

The diagram shows three sections: 'INSIGHTS' (a 2x4 grid), 'OPTIONS' (a 2x4 grid), and 'EXPERIMENT PRIORITIES' (a 2x2 matrix with 'Cost' on the y-axis and 'Value' on the x-axis). The quadrants are labeled: 'Necessary Evils' (top-left), 'Uncertainty' (top-right), 'Quick Wins' (bottom-left), and 'High Impact' (bottom-right). The axes are marked with '++' at the top and '++' at the right, and '--' at the bottom and left.

Your Change Challenge

Visualizing the Option priorities helps to:

- Identify **Quick Wins**, that may provide social proof that the change is good to people in doubt.
- Generate **Alignment** through Dialogue about the cost and added value of the actions we can take.



# Lean Change Foundations



## The 5 Universals of Change

Over the past 8 years thousands of Change Agents worldwide have told us what they need to be successful in Change. Their feedback is summarized in 5 Universals that form the Lean Change Philosophy: a more humanistic, and modern approach to change that considers:



Since 2014 we've traveled to over 12 countries, worked with countless organizations and trained thousands of change agents from agile coaches, to HR people, change managers, leaders and employees.

We uncovered 5 universal patterns that when given the right attention at the right time, help us move organizational change in a positive direction.

- Cause & Purpose over Urgency for Change
- Co-Creation over Getting Buy-in
- Experimentation over Executing Tasks
- Response to Change over Resistance to Change
- Meaningful Dialogue over Broadcasting Communications



Cause & Purpose over Urgency for Change  
 Meaningful Dialogue over Broadcasting Communication  
 Experimentation over Executing Tasks in a Plan  
 Co-creation over Getting Buy-in  
 Be open to Responses to Change over Fighting Resistance



Each Universal comes with its philosophies. You can find short videos for each here:

- Cause & Purpose - <https://www.youtube.com/watch?v=u-hTbbkIA3U>
- Meaningful Dialogue - <https://www.youtube.com/watch?v=dBSr4DsFhz0>
- Co-Creation - <https://www.youtube.com/watch?v=Y7X5yYliAa8>
- Experimentation - <https://www.youtube.com/watch?v=TKURZtK67k>
- Response to Change - <https://www.youtube.com/watch?v=dvGwCvUyBIA>

What will happen if we focus on "Urgency" for change? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		What will change when we focus on the "Why" of the change? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
What will happen if we only broadcast information? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		What will change by a dialogue with the impacted people? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
What will happen if we have to sell the change? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		What will change by inviting people to co-create the change? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
What will happen if we focus on activity execution? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		What will change by running experiments? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
What will happen if we focus on blaming the resistance? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		What will change by getting curious and not furious? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



For each Universal: Place some stickies in the left side with your experiences on Change. Watch the video. Place some stickies in the right side.



# Lean Change Foundations



## Modern Change Agents

Skill is important but there are certain intangible qualities that make change agents exceptional. Traditional change management has undervalued our own humanity in favor of tools, templates and shallow models. Exceptional change agents are well-rounded, focusing on the relentless pursuit of meaningful change.

The traits of exceptional change agents include 8 intangible qualities:

- Openness
- Congruence
- Agreeableness
- Grit
- Curiosity
- Social Intelligence
- Resourcefulness
- Genuine

Take a few stickies. What are the characteristics of an exceptional Change Agent? Put only 1 characteristic on 1 sticky

Where are the characteristics needed or most valuable in the competency profile? Drag the stickies from above to the relevant section below.

The traits of Exceptional change agents- the Exceptional 8. Click in the image to have a reference for each or pick up the corresponding slides from the event hub.

SCAVENGER HUNT: In pairs, triads or whatever, do a scavenger hunt for an example and information about each of the Exceptional 8 elements on your phones/computers. Which of these traits do you recognize in yourself, example?



# Lean Change Practitioner



## Storytelling Canvas

This is the Storytelling Canvas. It's best used for shoving people out of their comfort zone. It's also WAY more fun than the stodgy, boring Strategic Canvas. This is based on the elements of the Hero's Journey. This is a real-time, living artefact that helps you 'communicate' your change to a broad audience. A canvas is never 'finished', it should be revised regularly.

Describe how things used to work.

Describe what that felt like, how customers acted, what morale was like etc.

What's the trigger for this change?

What happened as a result of that trigger?

Describe the change.

**IN THE PAST...**

**AND WE LIKED IT BECAUSE...**

**BUT THEN ONE DAY...**

**AND BECAUSE OF THAT...**

**SO WE WANT TO...**

**Helpful tips**

- Draw a comic strip
- Break people into teams, have each team generate one section of the canvas and then try to stitch your story together
- Act out a play!

When we define the **Cause & Purpose** of Change we help people better understand why a change is needed and why now.

We use the **Storytelling Canvas** to create **meaningful dialogue**.

The three main components are:

- Respect the past – Don't 'blame' the Status Quo. We got where we are doing what we did, so we did something good, because here we are...
- What is happening that makes what we used to do is not relevant anymore. Where do we see and feel the impacts?
- What is the actual thing we want to change. And what not...

Using this format, visualizing it, opening it up for dialogue helps to create better understanding and consequently more positive responses to change.



# Lean Change Practitioner



YOUR Strategic/Team/Dynamic one page Canvas

The challenge with change canvases is not to see them as a generalized tool, but an adaptive tool. A canvas can be adapted to capture answers to questions that are important to you, for your change, in your context and are therefore key to alignment

*Knowing what we know now about the change.*  
The question is: What would the Change Canvas look like that you'll create for this change? Start from the blocks of the Team Canvas below, adjust questions, add/delete blocks as you seem fit for the challenge.  
(bonus exercise - draw a change canvas for your own change, and show it to the group)

**Team Vision**

Where do we want to be in 6 months?      How is this change impacting that?

**What is supporting the change?**      **What is holding back the change?**

**What help do we need and from whom?**

**What's our plan?**  
What experiments can we do to contribute to the overall change strategy?

**Prepare**  
Experiments being planned

**Introduce**  
Experiments in progress

**Review**  
Experiments being reviewed against expected outcomes

Cost ↑  
Value →

Canvases are useful for several reasons:

- **They promote transparency** – nothing to hide, all we know, all we are doing is visible. This makes a Canvas a great means for communication and planning
- **They promote dialogue** – though we may start from a ‘template’, a canvas is not a ‘fill-in-the-checkboxes’ tool. Depending on what the context of the change needs, the organizational norms are, the people worry about we customize a template or build a completely new one.
- **They promote alignment** – Between the Change Strategy (Canvas) and the Teams (Canvas) implementing the change. A Canvas is a living document. As we learn we adjust our canvas with new information and new actions to take. Working visually allows to be in sync with other teams and the strategy continuously.



# Lean Change Practitioner



## The Minimum Viable Change Process

Watch this video

Your Minimum Viable Change Process

The video thumbnail shows a play button over a graphic with the text 'MINIMUM VIABLE CHANGE PROCESS IN 2 MINUTES' and 'LEAN CHANGE ENGINE'. The canvas screenshot shows a grid with columns for 'PROPOSE', 'TEST', 'LEARN', and 'ACT', and rows for 'PROPOSE', 'TEST', 'LEARN', and 'ACT'. The grid cells are colored in a gradient from blue to red. To the right of the grid are icons for 'LEAN CHANGE ENGINE', 'LEAN CHANGE', and 'MINIMUM VIABLE CHANGE PROCESS'.

We **don't** work to implement a Minimum Viable Change.

Lean Change is about defining the most **lightweight** change process that works for you in the current context (which may vary per change initiative), a **Minimum Viable Change Process**

In such process:

- The Lean Change Engine drives change forward through a continuous loop of exploration and action.
- Canvases ensure understanding of the change, transparency, co-creation and dialogue.
- We take decisions on what to pivot/pause/pursue based on what we learn from our activities and experiments



# Lean Change Practitioner



## The role of Experiments

When we start with change there's much we don't know yet.

We need to learn how people and the organization respond to the change. We run experiments to learn.

Experiments are the last element of the Lean Change Engine.

At the beginning of a change initiative, we run more experiments, and take some actions.

As we learn, we get a better understanding of the change and how people and the organization is responding to it.

We then reduce the number of experiments and increase the number of actions.

**EXPERIMENTS**

Where do experiments fit (uncertainty), and why do we work with experimentation, especially at the beginning of our change or transformation initiative?

Some explanation, an Experiment template, example and practice

**Activities** provide little learning, normally the cause-effect relation is clear.

**Hacks** have the goal to disrupt, launching us in high uncertainty.

**Experiments** help us to learn, to gain insights about the uncertainties we're facing, especially at the beginning of our change or transformation initiative.

**High Uncertainty**

- Hacks:** Extreme uncertainty, high impact, quick to implement. Cannot know the relationship between cause and effect in advance.
- Experiments:** Mid uncertainty, mid impact, mid-term. May be unable to know the relationship between cause and effect.
- Activities:** Low uncertainty, low impact, low-term. Cause and effect relationship is obvious.

**Low Uncertainty**

We define our first experiments using a simple template (blue panel). Once we gain confidence in our experimentation ability, we often leave the template behind.

Of course, any other template can be used.

In the second panel (white), you can see an example of how an experiment may read using the template.

**Now it is up to you.**

Grab one of the options you've defined before, and prioritize to be turned into an experiment.

Use the template -->

We hypothesize that by	
we will	
which contributes to	
as measured by	

**Helpful tips**

- Start with more Experiments and less Activity, that'll change naturally once we better understand our change
- Use hacks sporadically and only in case your change is stuck, or moving too slow

**EXPERIMENTS**

Where do experiments fit (uncertainty), and why do we work with experimentation, especially at the beginning of our change or transformation initiative?

The Canvas in the exercise is designed by Virtually Agile and [can be downloaded here](#)

**The Scientists**  
Who is carrying out the experiment?  
What are our roles & responsibilities?

**The Problem**  
What is the problem we need to solve?  
Why do we need to experiment with something new?

**The Outcome**  
What are our desired outcomes?  
What are we hoping to achieve through the experiment?

**The Hypothesis**  
What's our hypothesis? What do we think may happen?  
IF, BY, WILL, BECAUSE

**The Results**  
How will we know our hypothesis is true?  
How will we know our hypothesis is false?

**The People**  
Who will be affected by our experiment?  
Who do we need to engage and involve?

**The Litmus Test**  
What's our single decisive factor?  
What metrics, data or KPI's do we need to measure?

**The Trials**  
When will we measure results? How often?  
What are the next steps to bring this experiment to life?

**Helpful tips**

- Start with more Experiments and less Activity, that'll change naturally once we better understand our change
- Use hacks sporadically and only in case your change is stuck, or moving too slow



# Lean Change Practitioner



## And if that doesn't work....?

If our change gets stuck.

If we tried with actions, dialogue, experiments, being curious about people's responses.

If we searched, researched, and tried to solve the issues.

And nothing changes...

Then we HACK the change.

Change (or Culture) hacking we apply to find those ideas and approaches to our change we hadn't thought of till now.

It enables thinking in extremes to then bring it back to reality.

Ah... and normally generates a lot of fun!

**LCM** This exercise is useful when your change is stuck or when you identify a "crack" or some dysfunction that others in the organization don't see. A 'hack' exposes the dysfunction to the system so it can self-correct, or identifies a disruptive option to get your change 'unstuck'.

There are 3 zones:

- **Green:** Safe zone. Think of this as a gentle nudge or jiggle
- **Yellow:** Gentle Disruption: Think of this as a kick in the organizational ass
- **Red:** Polish your Resume Zone: Stuff that is highly disruptive and might destroy your credibility or get you fired.

Re-use your change challenges, work from the canvas creation session, and the experiments creation session where possible/available.

- Divide the group in subgroups. Each subgroup has a problem Owner, who will explain the problem in her/his group. Place key info on stickies in the White center of the diagram (10 min).
- In sub groups, bring over the options and experiments identified in the Hot Seat exercise and/or write down activities to expose the problem you want to fix (the changes we used for the Hot Seat and Canvas exercises, and plot these stickies on the corresponding circle (short timebox of 10 min)
- Swap the result with another group
- The second group will try to 'break the machine' (try to come up only with Red Zone hacks, another 10 min)

**Debrief Questions**

- What is this like for the person who had the problem?
- Was it better or worse to get input from people with less context than your table group?
- Groups: what was different between working on your group's problem versus having someone from another table bring a problem that you had little context about?

Underlying Models

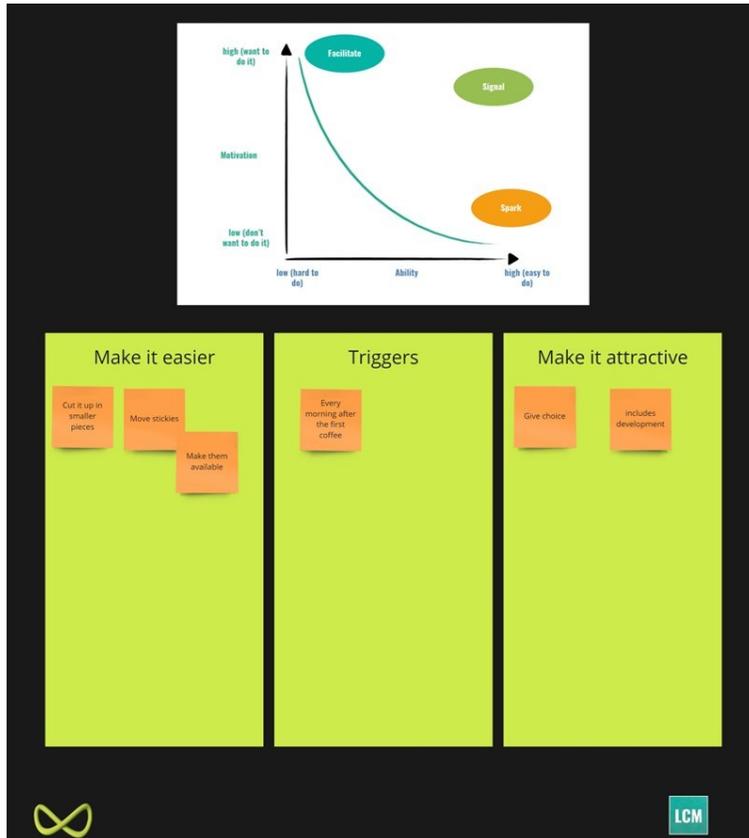
- [www.bizculturehackers.com](http://www.bizculturehackers.com)

The diagram consists of three concentric circles on a black background. The innermost circle is green and labeled 'Safe Zone Activities'. The middle circle is yellow and labeled 'Learning Zone Experiments'. The outermost circle is red and labeled 'Disruption Zone Hacks'. In the center of these circles is a white circle containing the text 'The Change Org. Norms'.



# Lean Change Practitioner

Identifying the right time, motivation and ability for change



We believe people are what makes change happen and we, Change Agents, can only help people with that.

If we want change to be successful, we can:

- Increase people's motivation by making it more attractive to participate
- Make it easier to participate and execute the change
- Help people to find the right moment for the change

When these three elements come together (the BJ Fogg model) change happens because:

- People **CAN** do it
- People **WANT** to do it
- People know **WHEN** to do it

## Bonus Material