Sense, Shape, Shift: Principles in Practice

NEAS-DoS National Conference
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Australia

WORKSHOP FACILITATOR:

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PROGRAM AGREEMENT

Sense Shape Shift: Leadership and Change Management Principles in Practice is a professional development program designed and facilitated by Dr. Sherene Suchy, director of the Australian based company DUO PLUS Individual and Organisational Change.

We are delighted to have an opportunity to work with NEAS in an area we are passionate about...empowering people and organisations to manage change effectively! We are happy to share knowledge, experience, expertise, and resources. In return we ask your agreement to honour two important principles:

Confidentiality What's said in the program stays in the program.

Copyright What's used in the program belongs to the designer.

Acknowledgment for material used to inspire the program has been noted and honoured. Please do not copy, reproduce, or use any of the material without acknowledgment to and written permission from Dr. Sherene Suchy.

We hope you enjoy the program and the resource material becomes a valuable part of your change management and leadership library.

Best wishes,

Dr. Sherene Suchy

Appendix 1: Facilitator Profile
WORKSHOP OVERVIEW

Plenary:
*Leading With Passion: Sense Shape Shift*

Workshop:
*Sense Shape Shift: Principles in Practice*

The *Plenary* session introduced research and insights about leading change with a focus on a director's four-fold leadership role: representing the organisation guided by passion, creating a context for others to give their best, ethical entrepreneurism, and nurturing trust relationships with key stakeholders. Based on the book *Leading With Passion*, audiences around the world have found the four roles inspiring, no matter which industry sector they work with (cultural, educational, business).

The *Workshop* provides an opportunity to put principles into practice through a series of exercises designed to explore change, challenges, and the leadership role.

*Sensing* change requires trust in one's own emotional intelligence or EQ. EQ is the ability to sense, understand and effectively apply the power and acumen of emotions as a source of human energy, information, trust, creativity, and influence.

*Shaping* change requires a willingness to use EQ and to embark on a journey of discovery using tried and tested tools for individual and organisational change.

*Shifting* through change is a process that takes time, requires benchmarks, and benefits from the use of milestones to celebrate growth and development along the way.

WORKSHOP OUTCOMES

- A deeper appreciation of current change challenges.
- Insight into change management with a model used to sense, shape, and shift organisations toward a shared vision.
- Consensus on the first steps to ensure organisational well being.
LEADING WITH PASSION:
EQ FOR OPTIMAL PERFORMANCE

PASSION

*Act from the Heart*

Building  Creating
Trusting  The Future
Relationships

*That Vision Thing*

*Social Capital*

Increasing  Under Pressure
Effectiveness

*Energy is the Bottom Line*

Appendix 2: EQ Scales and Competencies.
CHANGE MANAGEMENT FORUM

Invites:
- Personal and subjective experience of the story of change.
- Honesty about the practical demands of work.
- Respect for and honouring of all leadership roles.

Requires:
- Willingness
- Entering a deeper exploration
- Venturing into new territory
- Practicing alternative ways

Offers:
- An opportunity for each participant to share their experience of change.

Commits To:
1. A respectful space with deeper questions to honour….
   - Uncertainty
   - Paradox
   - Complexity
   - The unknown
   - Passion

Creates a Collaborative Process:
- Engaging in serious playful dialogue
- Bridging any gaps that may exist.
- Amplifying understanding and insight
- Valuing wisdom and experience of all participants
- Being a teacher and a learner
- Honouring collective expertise
DIAGNOSING:
SENSING THE NEED FOR GROWTH

Warning Signs:

- CEO power hoards
- Growth strategy out of whack
- Resources stretched
- Firefighting
- Nil strategic planning
- Out of date with market
- Excessive bureaucracy
- Leadership vacuum
- Nil integration
- History of complaint
- Resistance to change management team
- Excessive changes
- Industrial disputes
- Excessive sick leave
- Increasing number of accidents or incidents
- Inability to achieve goals and targets
- Difficulties with decision making
- Boredom and lack of interest overall
- Sense of impending doom or imaginary rivals
- Lack of energy and optimism about the future

1. ?
2. ?
3. ?

How painful is it? Very? Then it is time to change.
TOOLS FOR SENSING:
EVIDENCE FOR WHAT NEEDS TO CHANGE

Three Stages of Organisational Change:
- Future states - that vision thing - see it.
- Current state - measuring where you are now.
- Transition state - how to get from here to there.

Tools = A Few Basic Requirements:
- Clear vision and purpose.
- Flexible structures with appropriate linkages.
- Supportive systems and processes.
- External and internal customer orientation.
- Inter-unit cooperation.
- Focus on people.
- Strong committed shared leadership.

Tool = A Functional Analysis Questionnaire:
Should measure five factors supporting corporate objectives.
- People
- Marketing
- Finance
- Operations/service
- Business/corporate development

Tool = An Organisational Diagnosis Questionnaire:
Should measure eight indicators for impact profiling.
- Tasks
- Structure
- People/relationships
- Motivation
- Support
- Management/leadership
- Change Attitude
- Performance

Tool = Specific to Industry Sector²
DIAGNOSING ORGANISATIONAL CHANGE:  
*Weisbog’s Six Box Model*

**Purpose**
- Goals clearly stated and understood by staff.
- Appropriate strategies and long term planning.
- Long/short range goals reflect stakeholder needs.
- Strategies reflect critical assumptions about stakeholders.

**Structure**
- Responsive and able to provide quick solutions to customer problems.
- Flexible inter-unit boundaries to satisfying customer needs.
- Frequent use of team structures for problem solving.
- Appropriate stakeholder linkages at all levels.
- Able to monitor changing stakeholder needs.
- Marketing capability to search for/expand customer base.
- Commercial skills and orientation.
- Logical division of work tasks.

**Relationships/Communication**
- Cooperation between different parts of organisation.
- Synergy between internal and external communication.
- Frequent client communication about products/services.
- Use of wide range of communication strategies.
- Variety of methods to educate clients: how, where, what.

**Helpful Mechanisms**
- User friendly forms/documents for service delivery.
- Effective procedures to provide stakeholder services.
- Appropriate mechanisms for planning, accounting, IT, HR.
- Continual innovation for service delivery.
- Flexible internal service delivery to meet client needs.
- Cohesion and integration between all mechanisms.

**Rewards/Staff Development**
- Immediate feedback on behaviour not supporting client service.
- Climate that encourages innovation without fear of failure.
- Training and development in client service and team skills.
- Reinforcing staff who deliver excellent service.
- Integrated performance planning and coaching.
- Appropriate incentives for excellent client service.
Leadership

- Cohesive management team.
- Model appropriate behaviour and values.
- Promote shared leadership through empowerment.
- Focus on quality, service and client satisfaction.
- Act as coaches and mentors.
- Foster interdependence.
- Encourage staff to seek innovative approaches for improvement.
- Facilitate structures and processes.
- Collaborate and seek ways to create synergy.
- Empower staff to take on leadership roles.
- Respect, honour and leverage diversity.
- Develop cohesive top team with shared leadership at all levels.
- Build rich, engaging corporate purpose.
- Involve the organisation in bringing the purpose alive.
- Focus on people with a culture of communication, participation, teamwork, empowerment, and flexibility to experiment.
- Focus on processes, not structure, to understand internal and external client service satisfaction.
SENSING CULTURE AND CHANGE ISSUES:  
COLLECTING, ASSESSING, AND USING DATA

Warning! Don't ask unless you're prepared to do something!

Questionnaire Designs
- Quest for meaning
- Points of difficulty in language, time, assumptions
- Solutions to difficulties by involving respondents
- Cautions re: words, clauses, false finish, twists, distortion
- Use of scales and tipping points
- Coding for easier use of outcomes
- Statistical skills

Interviewing
- Reliability
- Embedded questions
- Personal versus anonymous
- Diaries and panels
- Time frames
- Open questions
- Contacting informants
- Question design
- Familiar woes
- Loading, bias, and other bug bears

Organisational Culture Survey - Real and Ideal Profiles:
- Conformity
- Responsibility
- Standards
- Rewards
- Organisational clarity
- Warmth/support
- Leadership
SHAPING CHANGE:  
WHAT ABOUT SERVICE?

Product and service characteristics valued by and important to customers:

- clear, reliable information
- creative ideas
- unique value-adds
- accuracy
- special features
- access
- human contact & connection
- flexibility
- best communication
- honesty
- options
- follow-through
- education
- aesthetics
- no-hassle service
- courteous service
- speed
- knowledge of consumer
- single-source service
- price
- sense of community

Product and service characteristics valued by and important to staff:

- ?
- ?
- ?

Measure emotional satisfaction -- Assess organisational empathy (EQ skill): ³

1. What do you do when staff or associates berate customers?
2. Do you ignore remarks or use the opportunity to discuss the role of the customer?
3. What cues do you send consumers that you care for them and want to listen?
4. What would you have to change in your organisation if consumers purchased only the 'experience' of visiting your organisation? What would make them keep coming back, if nothing tangible is received?
5. What is the impression your organisation creates with the service response?
6. What is the impression your survey tools create with customers?
7. Do you know how well your frontline staff listen to customers?
SENSE-SHAPE-SHIFT:
CONSUMER SERVICE

Sensing:
- Let's get clear on what your organisation is actually doing. Are you offering a product or a service?  
  Tick one: ___Product ___Service
- If it's offering a service, then what is it? What problem do you solve?
- If it's a product, then what is it?
- If your calling is to be of service, then what is your purpose?
- What does your organisation do best? How do you know?
- For example: Naturopaths heal. Consultants solve problems. Handymen do repairs.

Shaping:
Service is more complex than product. It's the factor that influences consumer choice so it's important to know…
- What you do.
- What you offer.
- How the service works.
- What consumers get for their investment.
- What the actual deliverable is that you give to the consumer.

Shifting:
1. Generate initial interest -- mail-outs, speaking, writing, seminars.
2. Book follow-up appointments -- discuss how you can be of service.
3. Initial meetings -- do a need analysis, get a briefing, do a diagnosis.
4. Action -- price, deadlines, terms, deposits, contracts.
5. Keep the relationship -- perform so the customer is satisfied.
# CREATING MEASURABLE OUTCOMES

<table>
<thead>
<tr>
<th>Sense</th>
<th>Shape</th>
<th>Shift</th>
<th>Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-3 Months</td>
<td>3-6 months</td>
<td>6-9 months</td>
<td>9-12 months</td>
</tr>
<tr>
<td>Diagnosis-Benchmark</td>
<td>Agreed Action</td>
<td>Key Performance Areas</td>
<td>Track-</td>
</tr>
<tr>
<td></td>
<td>Implementation</td>
<td>Monitor and Reward</td>
<td>Benchmark</td>
</tr>
</tbody>
</table>
ORGANISATIONAL TRANSFORMATION

*Using ‘Culture’ to Empower Change*

**Using Power and Position to Empower People:**
1. Model examples of fairness, integrity for others to follow
2. Clear directions when others are fearful and confused.
3. Authority to focus energy and resources for what’s important.
4. State expectations and requirements without threats/blame.
5. Be a mentor, guide, coach and support staff.
6. Reduce fear by being consistent and insist on doing what’s right.

**Using Systems and Roles/Structures to Empower People:**
1. Design jobs so people control the outcomes.
2. Keep it simple.
3. Involve people in creating their own rules and methods.
4. Invent systems that allow people to track their own results.
5. Create structures where info flows all directions.
6. Involve everyone in improving systems/procedures.

**Using Achievement to Empower People:**
1. Celebrate a victory.
2. Push decisions to a lower level.
3. Share the vision of excellence.
4. Together, create team missions and logos.
5. Bend and ignore rules to get a job done.
6. Champion staff ideas.
7. Recognize group achievement.
8. Share organisational secrets and insider information.

**Using Support to Empower People:**
1. Show trust in team member integrity and dedication.
2. Ask for help, acknowledge uncertainty.
3. Take time to listen to a personal problem.
4. Own up to any contributions to conflict or misunderstandings.
5. Bend and break rules to meet staff personal needs.
6. Share credit for achievement.
7. Promote a good ‘people’ person.
8. Lend another group a helping hand.
TAKEING ACTION:
AGREED FIRST STEPS

1. My five most important key result areas over the next 12 months are…

2. To achieve the results, my first step over the next 21 days is…

3. My next step over the next 60 days is…

4. My next step over the next 90 days is…

5. I’ll know when I’ve achieved the goal when…

6. My resources and support include…

7. I am confident I can exercise judgement and discretionary decision making because…

8. My sense of trust in the organisational environment is…
ENERGY FOR CHANGE:  
RESILIENCE UNDER PRESSURE

Intentionality and Goals:
- Create and maintain a work / life balance.
- Envision the change-- see it.
- Take calculated first steps toward the visualised goals.

In a Spot of Bother, Use the ICS or Instant Calming Sequence:  
- Breathing….continuity and smoothness
- Positive face…a slight smile influences the endocrine glands
- Balanced posture…practice spinal lift
- Release muscle tension…scan and let go of any tight areas
- Mental control…you are allowed to be calm, present, and fully in the here and now

Trigger Points
Finger pressure shiatzu and six-second release
- Forearms
- Base of skull
- Shoulders & neck

Interpersonal Connection
- Assertiveness: "When you do…I feel…and what I would like is…"
- Compliments: Catch people doing 'good'.

Eat, Drink, Meditate and Move for Energy
- Drink water
- Eat foods for alertness and calmness
- Meditate
- Stretch, walk and enjoy movement

Appendix 3: Increasing Resilience During Change
TURNING POINT

How can we increase our capacity to sense, shape, and participate in emerging futures we care most deeply about?

What principles do we need to put into practice to move beyond individual goals to collaborate with inclusive purpose and agreed action?

How can we integrate knowledge across disciplines to illuminate choices and inform actions?

*Have a creative, safe, thrilling, and successful change journey!*

*Dr. Sherene Suchy*
APPENDIX 1: FACILITATOR'S PROFILE

Dr. Sherene Suchy

Dr. Suchy has been facilitating individual and organisational change through her Australian based company DUO PLUS Pty Ltd since 1991 using emotional intelligence competencies to support successful change management. Sherene is an accredited EQ Map program instructor and coach through Essi-Systems in San Francisco. Sherene's work is based on over twenty-five years’ experience in corporate, government and non-profit organisations. This experience includes education, health, telecommunications, public utilities, architecture, banking and insurance, science, government, and cultural institutions such as museums. Her skill in change management developed as an expatriate (USA, Malaysia, Singapore) and through coaching over 400 managers and their families since 1994 as they prepare for international assignments.

Between 1994 and 2003, Sherene coached over forty managers a year through two graduate programs with the School of Management at the University of Technology Sydney: Effective People Management and Organisation Change and Adaptation. Both programs were enriched with a focus on emotional intelligence skills to sense, shape, and shift individual and organisational change.

Dr. Suchy was a practitioner from 1989-1998 in Career Path Appreciation, a technique that maps individual and organisation complexity, with the Brunel Institute of Organisation and Social Studies in London. Using this tool, she coached over 200 executives through organisational challenges in a variety of large organisations. The approach was incorporated into her doctoral research at the University of Western Sydney mapping change and leadership challenges in organisations experiencing radical shifts. One of the key outcomes was the importance of emotional intelligence skills or EQ to lead change successfully. EQ is now integrated into all coaching and development programs facilitated by Sherene: Leading With Passion: EQ Leadership Program © 1998, Change Agent Skills © 2001, and Shift Your Life © 2002.

Professional qualifications include a Bachelor of Social Work (Psychology), Graduate Diploma in Communication Management, Master of Art Administration, and a Ph.D. (Philosophy). Fully accredited in stress management training, conflict resolution, the Overseas Assignment Inventory, the Myers Briggs Type Indicator, and the EQ Map. Memberships include the Australian Association of Social Workers and the International Council of Museums (UNESCO). Publications include numerous journal articles, conference papers, and books such as Leading with Passion Museum: Change Management in the 21st Century Museum (2004), Museum Philosophy for the 21st Century (2006), and Family Memory Making: Treasuring Tangible and Intangible Heritage (TBA).
APPENDIX 2: EQ SCALES: CHANGE AND OPTIMAL PERFORMANCE

Increasing Effectiveness Under Pressure

- Life Pressures
- Life Satisfaction
- Emotional Self-Awareness
- Emotional Expression
- Resilience
- General Health
- Optimal Performance

Building Trusting Relationships

- Emotional Awareness of Others
- Interpersonal Connections
- Compassion
- Trust Radius
- Integrated Self
- Relationship Quotient

Creating the Future

- Intentionality
- Creativity
- Constructive Discontent
- Outlook
- Intuition
- Personal Power
- Quality of Life

NOTE:
Professional development programs using the EQ Map are available through DUO PLUS P/L facilitated by Dr. Sherene Suchy, an accredited trainer with Essi-Systems in the San Francisco. Programs range from one day workshops accompanied by a 21-day peer mentor process to the three month leadership development program, Leading With Passion © 1998 S. Suchy.
EQ MAP SCALES

Current Environment
1. Life Pressures
2. Life Satisfaction

Awareness
3. Emotional Self-Awareness
4. Emotional Expression
5. Emotional Awareness of Others

Competencies
6. Intentionality
7. Creativity
8. Resilience
9. Interpersonal Connections
10. Constructive Discontent

Values & Attitudes
11. Outlook
12. Compassion
13. Intuition
14. Trust Radius
15. Personal Power
16. Integrated Self

Outcomes
17. General Health
18. Quality of Life
19. Relationship Quotient
20. Optimal Performance
APPENDIX 3: INCREASING RESILIENCE DURING CHANGE:
MIND-FOOD-MOOD

Foods for Increased Alertness:
Snacks and meals low in fat with a small amount of protein-rich food promote faster thinking, greater energy, increased attention to detail, and quicker reaction speed.
- Baked and broiled skin-less chicken, turkey, or fish
- Bean and lentil salad
- Soups and casseroles
- Yogurt or cottage cheese with fruit
- Soy milk with fruit
- All vegetables
- All fruits
- Complex carbohydrates such as whole grain bread, bagel, rye crackers, whole grain side dish.

Foods for Increased Calmness:
Snacks and meals low in fat and protein and high in complex carbohydrates can help produce a calm, focused state of mind and relaxed emotions. Be wary of late afternoon snacks as can tend to make people sleepy.
- Whole grains eaten with fruit (rice, wheat, oatmeal, corn, buckwheat, barley)
- Pasta salad with fruit or vegetables
- Bagel, rye crackers with all-fruit preserve

Bottom Lines:
- Stay hydrated - drink water
- Avoid or reduce caffeine drinks, alcohol, sugar, artificial additives, and processed foods
ENDNOTES


ADDITIONAL RESOURCES


PROGRAM OUTCOMES

Name: ______________________________________________
Organisation / Role: ______________________________________________
Program: ______________________________________________
Date: ______________________________________________

Please take a moment to reflect on the program. Your feedback is welcome. It helps us plan the next successful program. Thank you!

1. I have a deeper appreciation of the following change challenges in my organisation…

2. The change management model provided an insight into…

3. As a leader of change, my first step to ensure organisational well being will be...

Please use this scale and respond to the following questions:

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very Good</th>
<th>Satisfactory</th>
<th>Needs Work</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

[ ] Program achieved its stated outcomes.
[ ] Sessions were well prepared.
[ ] Group process felt positive.
[ ] Opportunities for clarification were provided.
[ ] Facilitation style was engaging.
[ ] Program materials were useful.

What I would say to others about this program and may we use this as a testimonial? Circle: Yes or No