



The Magic List

Secrets of Successful Organizational Change

What is it that makes change work in an organization? You might be surprised how simple it is, and how many people miss the mark entirely by not knowing about one rarely-used practice. In fifteen minutes, you may very well be astounded by what you learn from this story of successful change.

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ONE

“Gloria. This is Hank.”

“Hey, long time. How’re you doing?”

“I’ve had better days. I was hoping that you might have time for coffee.”

“You need some drive-by coaching?”

“Either that or last rites, not sure which.”

“Then this might be a two cup conversation. . . Let me see if I can juggle some things. . . How’s 3 to 4 today?”

“I’ll be there. And, Gloria, thanks.”

Hank looked at his watch. It was only 9:30. Six and a half long hours to wait until he could see his old mentor. He was in a daze and distracted. He gave a short report on a conference call but he couldn’t remember a thing he had said. He was worried. His mind wandered a lot. Then he started to worry about his career choice. Maybe it was time to just give up on this management thing. Take up taxidermy and make his mom proud.

At 3:30 he drove over to Gloria’s new office. It’s the first time he’d seen her since she left the company about a year ago. He shook his head and muttered, “It’s been way too long.”

“Hank, come on in.” Her office looked great. Lots of light. Clean lines. Space. She was moving up. After just a couple of minutes talking about families, Gloria interrupted their scintillating discussion on the vagaries of youth soccer leagues.

”So, given the way you sounded on the phone, I sort of expected you to look real bad.”

He laughed. “Looks are deceiving.” He paused, looked down. This was going to be hard, but he trusted Gloria, so no sense holding back. “Here’s the deal. I held my monthly staff meeting early this morning and everything blew up in my face. It couldn’t have gone worse if I had planned it.”

“So, how’d it blow up?”

“We went through the usual stuff. Regional updates, yada yada yada. . .”

“Oh, be still my heart. I live for regional updates.”

“Well, you know, that usual stuff went OK, it was a typical staff meeting.”

“By that, you mean boring?”

“Oh, man, was it. But I’d go back to boring in a heartbeat.” Hank took a sip of water and continued. “Then, I introduced a new corporate software initiative. It’s called ErpTalk 3000. It’s one of those massive enterprise wide systems. Good stuff on paper, and it might end up being good for the company. Who knows? But it’s big and confusing.”

Gloria interrupted, “Sounds like you’re not all that enthralled with it yourself.”

“Yeah, you’re right. You remember the one we did three years ago? The wounds are still fresh. I like the idea of what these software systems can do, but give me a break. We’re working Upton Sinclair hours as it is, and we’re still behind on a lot of projects. . .”



"Hank, I still haven't heard what blew up."

"Well, I was trying to avoid getting to that. But here goes. I was into my presentation on corporate's new pet project, trying to act excited about it. . ."

". . . One of your Death by PowerPoint epic presentations?"

"Yeah, I just can't get away from slides. So, I was talking about the goals of the project. Timelines. Etc. Etc. And then I said that corporate decided that we would be the first group to install ErpTalk 3000. It was like someone had sucked the air out of the room. Everything went silent really fast. I asked what was up. I got nothing. I may as well have asked Mount Rushmore. So what could I do? I went to the next slide, of course. I got through that one. And then Reggie – you remember Reggie?"

Gloria rolled her eyes. "Oh, yeah. That guy brings joy wherever he goes."

"Right. Well, he speaks up in his grating Fran Drescher voice. 'I don't like it. This is one of the dumbest ideas you guys have come up with in a long time.'"

Gloria shook her head. "I can hear his dulcet tones now. Then what?"

"Others started to chime in. Even the Chicago office started complaining – and they never complain. The next hour was – or it seemed like an hour – was like a hockey game. . ."

"And you were the puck."

"Oh, you were there, huh?. . . It was pretty bad. We're supposed to get started on this thing and people are angry. And some of the quieter people in our group got very quiet. Even out in the hall, after the meeting, those people wouldn't talk to me about it."



Then Hank was silent. He looked down at his phone, just for something to do. Gloria decided to change the tone. “I know this is uncomfortable. . .”

“You think?”

“Hank, I get it. I truly do. I know you want to hang it all up. Move to Aruba or something. We’ve all had those moments.”

Hank replied, “You never seemed to have those crap moments.”

“Yeah, I do. In fact, if I recall correctly, you were in some of those meetings. It goes with the territory.”

“Maybe.”

“No. Sorry to interrupt you, but no maybe. This happens to all of us.” Gloria paused for affect and said, “You never outgrow it. It’s just too easy to stick your foot way up in your mouth, and before you know it. . .”

Hank nodded. “I’ll take your word for it. But look, I’ve got to talk to the corporate suits by the end of the week and tell them that we’re good to go.”

“They want that in four days. Sounds about right.”

“In fairness to them, they want to know that we’re ready to get started. But I don’t know what to tell them. I have no idea how to get people to go along with this thing.”

Gloria thought for a moment. “Hank, I don’t think you’re going to get them to go along.”

Hank acted like he was about to stand up, “Well, thanks for your time. You’ve been a great help.”

THE LIST

She laughed. “What I’m saying is that you can’t push this onto people and expect results. You got that data during the phone call this morning. These people don’t want Corporate Softsoap 4200.”

“ErpTalk 3000.”

“Oh, that’s much better. . . Hank, it is what it is. So let’s start there. Why *don’t* they want ErpTalk 3000?”

Hank thought for a moment. “I don’t know. They got very angry but except for a lot of ‘here we go again’ comments, I don’t really know what’s bothering them.”

“Yeah, Hank, you do, at least a little bit. You just told me that even you, great manager that you are, have your doubts about it. If you’ve got doubts, I’ll bet some of them do too.”

She took out a pad and pen and wrote “the list” at the top. “Let me make a list of what might be on their minds.”

Hank was skeptical, but said, “OK, Gloria, I’ll play. I’m sure they have doubts.”

“Alright, what else?” Gloria put down her pen and sat quietly. It was clear that she was not going to be the one to come up with all the items on this list.

After a minute or so, Hank said, “It’ll take them away from their real work.”

Gloria added that to the list.

Hank snapped his fingers. “They usually don’t like it when corporate tells them what to do. . . and right now they see me as the voice of corporate. I think that one might be pretty important.”

“These are good, Hank. What else?”

THE LIST

- * Doubts ~~them~~ and me
- * Too busy already
- * Don't need more distractions
- * Corporate doesn't think out initiatives and/or follow-through with them

Hank shook his head. "You know, Gloria, I'm not sure what else."

Gloria glanced at the list. "This is a start. They've got doubts about the project. You've got doubts. They are way too busy already; this will be a distraction. Right? . . . they don't like corporate initiatives. Why not?"

"I guess for the same reason I don't like them. They often aren't well-thought out. Corporate will move onto something else way before we ever see any results from ErpTalk."

"Good, let me add that. Anything else?" Hank shook his head.

"Like I said, this is a good start, but you need a lot more items on this list." She handed him the list she just wrote. "I'm going to give you an assignment. OK?"

Hank was still a bit skeptical. "Yeah, anything you think might help."

"By Wednesday afternoon, I want you to find out what's on their list. These are the things that don't get talked about in meetings, but are the reasons why people support – or oppose – a big new project. You need to know what the things are that are getting in the way for them – as well as things that they might like about ErpSpeak or whatever it's called. You need to know what's on the list."

"Makes sense. I'll let you know how it goes."

"Call anytime." Gloria turns back to her computer and then notices a piece of paper. "Hey, Hank, don't forget your list."

THREE

The phone interrupted Gloria's work on her own big project. "Speak to me."

"It's Hank. You said call anytime."

"Well, yeah, I did. But you've only been gone for fifteen minutes. What's up?" She laughed.

Hank said, "I know, sorry to call so soon, but I got thinking. Nobody's going to tell me what's on their so-called list. I might as well have a bell around my neck warning people. . ."

". . . Well, you're right. It would be nice if you could just ask people what's on their minds and they'd tell you, but very few managers can inspire that level of trust."

"C'mon, Gloria, people talk straight to you."

"Yes and no. I do think people feel pretty free to talk directly to me, but still there are things that are just too risky to say out loud to their boss. Could be they don't trust me on something, or they are concerned they will look bad in front of their colleagues. Or maybe they want to look like a good team player so that they don't ruin their chances for good assignments. There could be lots of reasons why people want to keep their lists to themselves."

Hank asked, "What do you suggest? I thought maybe a survey, but that would take forever. . ."

"Not necessarily, Hank. We could create a survey in five minutes that would do the job."

"Yeah, right. . . You're serious, aren't you?. . . Let me pull over so I can pay attention."

Gloria turned to her computer and typed in a web address. As she did this she

Four Survey Questions

- Is there a need for [insert change initiative here]?
- What's your reaction to talk about making this change?
- To what extent do the people you report to have what it takes to plan and implement a major change like this?
- Anything else you'd like to add?



said, “I’ll send you a link as soon as we finish. By the way, there are lots of free or really inexpensive survey tools on the Internet. I’ll send you the name of the one I use. It really is easy.”

Gloria began, “I usually limit surveys to four questions. You can wordsmith this later, but let’s see if my approach works for you. First question, “Is there a need for a new software system like *ErpTalk?* . . . And then I leave space for a narrative answer. I don’t like one to five scales, ’cause at the end all you’ve got are a bunch of numbers. Narrative gives you more data. And I think you’ll find that the information is much richer. Juicy, in fact. . . Does this make sense?”

“Yeah, so far.”

She turned back to the computer. “All right then, second question. ‘What’s your reaction to talk about making this change?’ Third question: ‘To what extent do the people you report to have what it takes to plan and implement a major change like this?’”

Hank shook his head. “I don’t think I’m going to like the answer to that one.”

“Well, maybe not. But you never know until you ask. Final question: ‘Anything else you’d like to add?’ That’s it.”

Hank is underwhelmed. “Really, that’s it? That’s awfully short. I want to know what they understand and what they don’t. I need specifics. If they are having a negative reaction, I want to know why and where it comes from. I’ll bet I could come up with twenty to thirty more questions. And I need to know. . .”

Gloria interrupted him. “I’m sure you’ve got lots of questions. My suggestion is – don’t ask them. If you ask a lot of questions, you just invite superficial responses. Who’s got time to fill out narrative comments on twenty to thirty questions? I sure don’t. If you ask a lot of questions, you’ll tend to get little snippets of information: ‘yes’ ‘no’ ‘not sure’ ‘could be better’ – and that doesn’t tell you anything. . . . But the bigger problem is that the response rate goes way

Survey Instructions

- * Tell them the results are anonymous
- * One sentence about why the results are important to me
- * Indicate it will take five minutes or less to complete
- * Give a deadline when responses are needed

down. And when the response rate is low, it's much harder to trust the information on the list."

Hank nodded his head in agreement, and then realized that Gloria couldn't see him. So he said, "OK. I'll give it a try."

"Good." And then Gloria remembered something else. "You might want to write these four things down:

1. Be sure to tell people that the survey results are anonymous.
2. Explain in one sentence why knowing the results is important to you.
3. Say that it will take five minutes or less for them to complete the survey.
4. Give them a date when you need their responses.

In this case, you need the results yesterday, right? And actually, a tight deadline like this helps. People know they can't let it sit in their inboxes for a week so they tend to do it to get it just out of the way."

"This sounds pretty good. By the way, Gloria, that took less than five minutes to create. You're going to put a lot of human resource vendors out of business."

She laughed. "Call me as soon as you get the results, and we can talk about them."

FOUR

Hank sent out the survey to the managers in his department, which included his six direct reports and thirty mid-level managers. He was tempted to send it to his entire team, but was concerned that he would be getting more data than he could use. He asked for their responses by the end of business on Wednesday. In the meantime, he set up another meeting with Gloria so they could go over the results as soon as he got them.

They met for an early dinner on Wednesday night. He handed her a copy of the survey results. Here is a short version of the responses.

Question 1: Is there a need for a new software system like ErpTalk 3000?

I guess we need better ways to communicate, especially between departments.

I've been here for thirty-three years. We've got a good system. It works just fine.

Why in the world are they thinking about something like this? I'll bet that vendor is cozy with headquarters.

It does take us a long time to do some simple transactions. I understand that we waste a lot of hours doing things that could be done with a few keystrokes. Not to mention the value of having a common reference point across the company so that our data made sense to other departments and vice versa.

I think we do need to update our computer systems, but why now? Nobody's complaining that I can hear, and we are all super busy.



Question 2: What's your reaction to talk about making this change?

Been there, done that.

Money is tight, why are we wasting it on a system that nobody needs?

Flavor of the month. What will it be next month?

I'm paddling as fast as I can right now. I don't know if I can learn all the things I'll need in order to handle this new software.

Sounds like a synonym for downsizing.

It's about time. Our old systems don't talk to each other. And we waste a lot of time trying to cobble together programs that were never designed to speak to each other.

Time to update my resume.

Question 3: To what extent do the people you report to have what it takes to plan and implement a major change like this?

I trust Hank and his team, but the corporate suits are another thing. They'll talk a big game today and six months from now they'll have moved on and taken their budgets with them.

They're nice people, but they lack backbone. If corporate says jump, they ask, "How high?"

Our leaders are trying to oversee way too many projects as it is. This will be an add-on to an already busy schedule.

“The handwriting was on the wall, but we thought it was a forgery.”

- Executive at Harley Davidson referring to the old days when their reputation was diminishing

They will confuse dumping with delegating, and we'll be the fall guys for this project.

I'm concerned that our senior management team will salute and take orders without questions, and they will then expect us to do the same. It seems like our leaders don't particularly want our input.

Question 4: Anything else you'd like to add?

Thanks for asking. I hope you get something you can use.

I feel like I am on a treadmill (along with everyone else in our department), that good ideas get mixed with bad ones, and there is no way to put all that hamster energy into projects that might do us some good.

Nothing else to add.

As Gloria read through the survey, she nodded and smiled, and even chuckled from time to time.

“Hank, this is great. Nice work.”

Hank said, “What are you talking about? This is awful. And yet, you're smiling. You're a sick person; you know that, don't you?”

Gloria laughed. “Yeah, maybe. I've been called worse. . . Look, I know the results are hard to take. It isn't the prettiest picture. But, people are telling you things that you didn't know. Right?”

“Yeah, but...”

“But see, that's exactly what you need. These people are telling you what you need to know about leading this change.”



“They’re saying they need new leaders is what they’re saying.”

“That’s one option, but they’re probably stuck with all of you for now. . . Seriously, you can use these results as the foundation for your change management strategy.”

Hank interrupted her. “ErpTalk has its own change management plan. And it looks extensive.”

“Yeah, I’ve seen those. But you need to look at the plan closely. Does it address any of the items on the list? You’ve got to have a “people” part of the plan just like you have a technical and financial part. If you forget people – if you forget the list – you’re toast.”

Hank said, “Gloria, if you saw the ErpTalk plan, you’d realize that just doing it will take more time than we’ve got.”

“I get that. But let me ask you a question. If you didn’t know what was on this list from your team, how would you have led the change?”

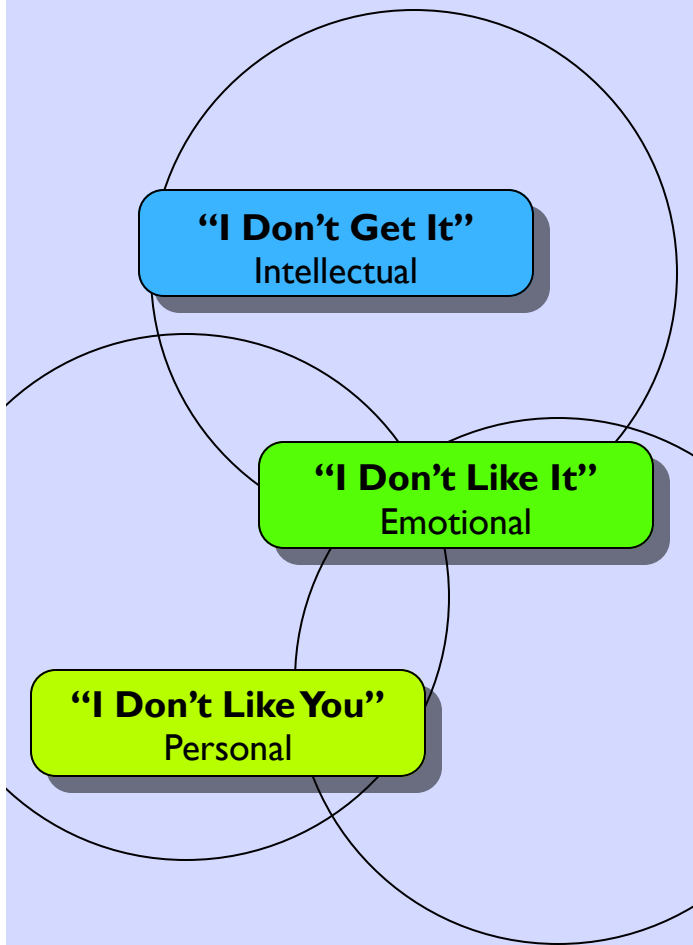
Hank thought for a moment. “Good question. I would have started like I did on Monday. That was real hit. . . And then I would have had a couple of meetings to go over the ErpTalk 3000 plan in detail. I probably would ask the ErpTalk consultants to handle those meetings. . .”

Gloria interrupted, “. . . And then you would have made assignments. Probably put together some task forces to plan various parts of the new software system. Have them work closely with the consultants. . .”

“. . . And had a feedback loop so that I knew where things stood.”

“That’s a pretty common approach to change, right? Problem is there are lots of times when that plan doesn’t work.”

3 Levels of Resistance



Adapted from "Beyond the Wall of Resistance"
by Rick Maurer

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"Agreed."

Gloria pointed to the survey list. "How successful do you think that strategy would have been?"

"It would have started OK. People would have saluted. They'd go to meetings. They'd say all the right things. . ."

"But?"

Hank sighed. "But it would all be malicious compliance. There would be no real commitment. All show."

"Imagine you're a betting man, what are the odds on this software taking hold?"

"Slim to none. (chuckles) The odds are pretty low that this ErpTalk thing would ever result in much of anything."

Gloria said forcefully, "Hank, I think you are absolutely right. If nothing else, you know that your tried-and-true approach probably would be doomed to failure. That's a good thing to know. You've just saved yourself a lot of headaches."
"Well, OK, you're right. But I don't know what to do instead."

Gloria walked over to the white board and drew three intersecting circles. "For starters, let me give you a set of three lenses to use as you look at this list. These are the three major reasons why people resist or support a change.

Level 1. People don't get it.

Level 2. People don't like it. And get ready for this. . .

Level 3. People don't like you."

Hank laughed. Gloria continued. "Any of those can kill a change. But when they are all present together. . . What can I say? You've got to address those issues? I don't think you've got a choice."

I've learned from
my mistakes.
I'm sure I could
repeat them
exactly.

- Comedian Peter Cook
from the Frog and Peach
routine

“Of course. This’ll be easy.”

“No need to be snarky. The good news is that what you need in order to be successful is the opposite side of each of those items. People need to get it, like it, and trust you. . . So let’s look at the list. You’ll notice that the first three questions correspond with those three items.

Question 1 deals with understanding. You’ll notice that there is no value judgment in that question, so people can say ‘I get it’ or not.

Question 2 asks about emotional reactions. This is where fear and excitement come in.

And Question 3 addresses trust or the lack of it.”

Hank stops her. “Gloria, give me a few minutes.” Without waiting for her reply, Hank picked up the list and read it slowly. He began underlining certain sentences. He looked up at the three circles, and then added some exclamation points to his list. He looked at the circles again and then added some question marks and other symbols. Pretty soon, the list was marked up like a bad term paper.

He found that a lot of people seemed to understand why a new software system might be needed, while some others were in the dark, or simply disagreed that anything needed to be changed.

On question 2, he found that most people were afraid. They were afraid that they might lose their jobs. They might lose face (the “I’m an old dog and I can’t learn new tricks” refrain). There were concerns that scarce resources would be wasted on yet another poorly thought-out project.

And on Question 3, he saw some glimmers of hope. People seemed to trust him and his team to a certain extent. Although, there was a real concern that

Whatever it is, I'm against it.

- Sung by Groucho Marx

Hank might lack the tenacity to stick with this project. And even more important, lack the fortitude to say “no” when necessary. And, most surprising was the cynicism about the people he reported to at corporate offices.

Then he pulled out his smart phone and looked at some notes he had made yesterday. On Tuesday, he decided to have coffee with Joe. Every office he'd ever been in had a Joe. This Joe (or Jo) would tell it like it was, no matter what. Hank often thought that the Joes of the world didn't understand the phrase “career limiting moves.” The value of talking with Joe was that this guy would say things that no one else had the guts to say.

Most of Joe's comments fell into the “here we go again” category. He added those comments to the responses to Question 2 (Level 2 “I don't like it”). Joe did complain about parking spaces, but that's been part of his Hyde Park screed for the past forty years. Hank just ignored that part of the rant. There was a Level 3 “I don't like you” issue that Joe identified. Joe thought that corporate was smoking something and couldn't be trusted. Hank added this to the list of Level 3 concerns. He remembered that Gloria advised him not to edit comments, since there could be a tendency to homogenize the data. “They must be smoking something” could get lumped into an innocuous bullet point which might read, “Question some of the decisions made by senior leadership.” That was hardly the same thing.

He clicked to another page of notes he had made earlier this morning. At this bi-weekly skip-level meeting, he had decided to ask about their reactions to ErpTalk 3000. He sensed that this ad hoc group of seven didn't really get the importance. They didn't like the thought of another major project. And they never mentioned any of the Level 3 trust issues. Hank thought that might be good news, or perhaps that this group's willingness to be candid with him didn't extend to serious Level 3 issues. He added these notes to the survey list.

“Hey, Gloria, you can come back in now.”

Ways to Find Out What's on the List

- Conduct a 4-Question Survey
- Have Coffee with Joe (or Jo)
- Ask a few questions during a meeting with people who trust you



Gloria turned away from her computer. “That was really interesting. You just dove into that stuff. What happened?”

“That Level 2 and Level 3 stuff got my attention. Made me see just why my tried-and-true approach probably won’t work.” Hank explained what he had learned from the survey, from coffee with Joe, and from the ad hoc focus group.

He went on. “Oddly enough, this is actually helpful stuff. Who knew I’d get excited about being trashed?”

Gloria replied, “Life is wonderful that way. . . So, what’s making you ‘oddly excited’?”

Hank took a moment, and then said, “I see what I’ve got to address if I want to make this project go well. Somehow, I think I’ve got to take all three levels seriously, or else this ErpTalk stuff isn’t going anywhere.”

Gloria agreed. “You’re right. In fact, when Level 2 and 3 things are at play, the reptilian part of the brain takes over, and people can’t listen to timelines and benchmarks. Emotions trump reason every time.”

“So you are saying that I need to start with Level 3 – build trust?”

“Yes and no. Don’t go do some teambuilding stuff where you all hold hands, sing Kumbaya, and weep tenderly. That’s not what’s needed.”

Hank shrugged, as if to say, “Well then, what?”

“People need to know they can trust you, your team, and ‘the corporate suits.’ You can’t do that by singing and talking; you’ve got to demonstrate that this time really is different. . . My suggestion: make attention to Level 2 and Level 3 issues part of the overall strategy. But listen to me. Nothing new. No added

You can observe a lot, just by watchin'

- Yogi Berra, worldly philosopher and baseball player

meetings. Just make sure you attend to all three levels at every step – and with everyone who has a stake in this project.”

Hank was excited. “I think I’ve got it. So you’re saying to use those lenses to help us structure even those meetings that are part of the ErpTalk change plan.”

Gloria added, “And you may find that the ErpTalk one-size-fits-all change management plan may need tweaking. I do admit that you may need to add some time to those meetings or maybe even schedule some additional meetings. But, on the good side, you may find that many of their suggested ErpTalk steps might not be needed once you get going. Could happen.”

“This has been very helpful. Thanks.”

“I’ve got one more thing that might help you get started using the list, but I’m already running a little late. Could you call me at 7:30 tomorrow morning?”

“Yep.”

FIVE

Gloria picked up her phone. “You are punctual, 7:30 on the dot.”

Hank said, “I try. . . I gotta tell you something. I went through the ErpTalk plan last night. It is all Level 1 stuff. Data, details, and more data and details. Nothing about fear or excitement. Or trust. It’s amazing what’s missing.”

“Yeah, you’ll find that a lot. . . So, here’s what I wanted to add to your assignment. I suggest that we spend a few minutes debriefing that fateful meeting that prompted you to call me.”

Hank said, “Funny you should say that, I started doing that last night. And the first thing that jumped off the page at me was that I am the one who created this list. Those people didn’t come into that meeting all bent on trying to defy me. Me – Hank himself – I created that list. I invented my own resistance.”

“Well, you’re a powerful guy, Dr. Frankenstein. And yes, you did create the conditions that resulted in that list. But, the good news is that with a little forethought, you could have tweaked that meeting in a way that you would have been far less likely to get such strong negative reactions. I think you’re onto something.”

“Me too.”

“I encourage you to debrief every meeting associated with Erp-de-Derp 4900 using the three levels. It will give you a good and immediate feedback loop.” Hank laughed. “Yep, I thought of that. Great minds and all that.”

Gloria concluded, “Good luck with this project. And if you need help, operators are standing by.”

Hank used the list as he planned the next steps. He took Level 1 information, Level 2 emotions, and Level 3 trust issues into account. He got people engaged in the process. Encouraged them to rip into plans and improve them. He spread the leadership around so that there were many who felt like owners in this process.

He wondered about the people he reported to at corporate headquarters. He created a list on the level 1, 2, and 3 items that were working in his favor and working against him with regard to the ErpTalk project. He realized that his bosses were probably fearful of delegating too much responsibility to regions. He realized that the regional directors who were most successful kept their bosses in the loop and asked for the advice of senior leaders. Hank knew that he was not as strong on keeping his bosses up-to-speed about how things were going and that just invited greater scrutiny from them. He had to get over his cowboy spirit of doing everything himself. Time to put away his Hopalong Cassidy mug, and learn to collaborate. He realized that he needed to demonstrate that his group was worthy of their trust. Instead of blaming “the corporate suits,” he found ways to confound their expectations so that they would see him (and his team) differently.

Everything worked brilliantly. The project was a stunning success. Hank got promoted and now is a corporate suit. In fact, that’s his title.

(Hey, this is my story, so I can write whatever ending I want.)



FINAL THOUGHTS

The list is the foundation for my work with clients. I simply cannot advise a client on how to build support for change unless I (and they) know what's on the list. The reason the magic list works is that it is an inclusive, friendly, hands-on way to get team buy-in. And, as you just read, it's amazingly easy to use. The list has become a cornerstone in my work with clients.

I have seen many leaders improve the support and engagement (and overall success of the project) by taking the list seriously at every step in the life of a project.

The idea for the list came from a planning team. A fellow consultant invited me to teach my approach to building support for change to a planning team. A couple of hours into my presentation, someone interrupted me and told me that an upcoming meeting with key stakeholders on the new business process reengineering project was going to be a disaster. They asked me what they should do. I had no idea. All I knew was that they were worried. One even said, "It will be a blood bath." All eyes were on me pleading. Out of desperation, I suggested that each member of the planning team imagine a person who was coming to the meeting. "Think about what's going to be on their minds when they walk in the door." Then I wrote their responses on a flipchart. As the page started to fill up (and I was writing fairly small), I knew what to do.

I said, "Let's identify the Level 1 issues. I will underline them with the blue marker." There were a couple of Level 1 informational issues. "Let's identify the Level 2 emotional issues and I'll underline them with a brown marker." And finally, I underlined the Level 3 issues with a different colored marker. Someone said quite loudly, "That's it. That's why the bomb is going to drop." (Really, those were his words.) I asked why. He said, "We planned an eight-hour meeting to deal with Level 1 issues but people are coming with Level 2 and Level 3 concerns."

The List

Current system works fine

Flavor of the month

Need to upgrade, but why now?

Time to update my resume

They confuse dumping with delegating

Sounds like a synonym for downsizing

In six months they'll move onto something else

No backbone

People agreed, and someone asked if they could take the next hour to redesign that meeting so that it addressed all three levels. They did a great job, and the “bloodbath meeting” was anything but that. In fact, it went very well.

A key point here is that they didn’t stop the project. They didn’t schedule a bunch of new activities. They didn’t come up with some Machiavellian scheme to manipulate or pressure people. They simply redesigned what they had already planned based on what the list told them.

I hope you’ll give the list a try.

Rick Maurer

Now that you know what's on that list, what do you do? Listen to this free Podcast from Rick Maurer on ways to use the magic list effectively throughout the life of a change.

<http://rickmaurer.com/Landing-Pages/magic-list.htm>

NEXT STEPS

Helping people get team buy-in to organizational change is the foundation of my work. I'd love to talk with you about it. Sometimes people like to hire me to speak about my approach. Sometimes leaders call me to advise them in ways to build support for change. And sometimes people just like to tell me what they've done with my ideas, or what they plan to do. If any of those describe you, please pick up a phone and give me a call. I'd love to hear from you.

I do have a newsletter on tips for leading Change without Migraines™. It's free. Whether you call or not, please subscribe and see if the ideas are helpful to you. You'll find the link at the top of the home page on my website:
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ABOUT RICK MAURER



Rick Maurer is an advisor to leaders in large organizations on ways to plan and implement change successfully.

Many organizations and consulting firms have applied Rick's unique approach to leading change including Lockheed Martin, Bell Atlantic (Verizon), Rohm & Haas (Dow Chemical), The Urban Library Council, Tulane University Medical Center, Deloitte Consulting,

Department of National Defense and the Canadian Forces, The Washington Post, American Management Systems, AARP, FAA, Mount Sinai NYU Medical Center, Charles Schwab, Sandia National Labs, National GeoSpatial Intelligence Agency (NGA), the District of Columbia Public Schools, the International Monetary Fund, and many other corporations, non-profits, and government agencies.

In 2009, Rick created the popular Change Management Open Source Project, a free resource for people from around the world who are interested in leading change in organizations. www.facebook.com/rickmaureronchange

Since publication of the first edition of *Beyond the Wall of Resistance* in 1996, his opinion has been sought by *The Wall Street Journal*, *Fortune*, NBC Nightly News, CNBC, *The Washington Post*, *The New York Times*, *the Economist USA Today*, *The Globe and Mail*, *Industry Week*, *Fast Company*, and *Investors' Business Daily*.

A new edition of *Beyond the Wall of Resistance* was released in 2010. The new version addresses the question, Why do 70% of changes in organizations still fail?

In addition, Rick teaches at The Gestalt Institute of Cleveland. He is author of many books on leadership and change including *Why Don't You Want What I Want?* and *The Feedback Toolkit*. He is also a part-time jazz musician in the Washington, DC area.

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