

O.D. Skills: A systematic approach to change, implementation, and evaluation

I. Entry into the Firm: Building credibility and a working platform

A. Marketing

1. Be aware of systems wanting and needing change
2. Match your skills with potential client profile
3. Convey qualifications clearly and concisely

B. Initial Contact

1. Quickly grasp the nature of the organization/system
2. Determine appropriate decision maker/process
3. Build trusting relationship (BUILD RAPPORT)
4. Contract psychologically for collaboration
5. Help client reflect on motivation
6. Clarify outcomes
7. Elevate realistic expectations
8. Conduct mini-assessment
9. Present theoretical foundations of change
10. Define boundary of systems to be changed
11. Articulate an initial change process to use
12. Explicate ethical boundaries
13. Confirm commitment of resources

II. Start Up

- A. Identify critical success factors
- B. Further clarify real issues
- C. Dramatize (confront and describe) natural tensions & discrepancies
- D. Be aware how one's biases influences interaction
- E. Link into organization culture/processes/structure
- F. Identify formal and informal power
- G. Clarify roles
- H. Seek out ways to deal effectively with resistance
- I. Help client trust the process - manage emotionally charged feelings
- J. Design and write the change process
- K. Begin to lay out full evaluation model

III. Assessment & Feedback

A. Assessment

1. Determine data collection process
2. Determine types/amount of data sought
3. Utilize appropriate mix of method/technology to ensure:
 - a. Efficiency (speed), objectivity, comparability, validity
4. Clarify boundaries for confidentiality
5. Select a process that will:
 - a. Facilitate openness
 - b. Discuss a common database
 - c. Represent the total system
6. Gather data:
 - a. Bring out existing dissatisfaction

- b. Identify future states
- c. Identify first steps of transition
- d. Reduce fear of being open
- e. Watch for new and deeper issues
- f. Suspend judgment
- g. Know when you have enough data
- h. Suppress hurtful comments

B. Focused Feedback

- 1. When appropriate, use statistical models
- 2. Recognize what is relevant or chaff
- 3. Prepare leadership for the truth
- 4. Involve participants so they begin to own what is really is
- 5. Synthesize into themes and factors
- 6. Create non-threatening atmosphere
- 7. Establish a non retaliation guideline
- 8. Know how data from different parts of the system impact each other
- 9. Recognize and facilitate complex emotional patterns

IV. Action/Intervention Planning

- A. Distill recommendations from the data
- B. Focus action that generates highest impact at lowest cost
- C. Consider creative alternatives
- D. Facilitate a participative decision making process
- E. Mentally rehearse adverse consequences and potential gains
- F. Obtain direction & commitment from leadership
- G. Co-create implementation plan that is:
 - 1. Rooted in the data
 - 2. Concrete, simple, and clear
 - 3. Logically sequenced
 - 4. Results oriented
 - 5. Measurable and rewarded

V. Intervention

- A. Reduce dependency upon consultant
- B. Instill responsibility for follow through
- C. Intervene at the right depth
- D. Pay attention to the timing of activities
- E. Facilitate concurrent interventions
- F. Help manage impact to related systems
- G. Be ready to re-design intervention or mindfully respond to new dynamics
- H. Convey that all will not be transformed to same degree

VI. Evaluation

- A. Integrate research with theory and practice
- B. Initiate on-going feedback in client-consultant relationship
- C. Choose method i.e. interviews, instruments, financial sheets, etc.

- D. Determine level i.e. reaction, learning, behavioral change, organizational impact, societal impact
- E. Be sure method is valid, reliable and practical
- F. Establish method to monitor change during and after intervention
- G. Use information to reinforce positive change and correct negative change and take next steps
- H. Link evaluation with expected outcomes

VII. Adoption

- A. Continue to transfer change skills to internal consultant so learning is continuous
- B. Maintain/increase change momentum
- C. Link change process to daily life of system
- D. Mobilize additional internal resources for self-learning
- E. Determine the domain that now is ready for special change focus
- F. Pay attention to slippage
- G. Move more away from project-driven change to strategy driven change
- H. Be sure customers and stakeholders are happy
- I. Plan renewal/reunion events

VIII. Separation

- A. Recognize when separation is desirable
- B. Process any left over relationship issues between consultant team and client.
- C. Ensure that learning will continue.
- D. Leave client satisfied and happy
- E. Plan for post-consultation contact
- F. Share learning

HABITS OF THE HEART

I. Self-Awareness

- A. Clarify personal values and boundaries
- B. Increase capacity to perform effectively in an atmosphere of ambiguity
- C. Be aware of the influences of cultural dynamics on interactions with others
- D. Increase personal capacity to perform effectively in the midst of chaos.
- E. Know and manage personal biases
- F. Develop mutually trusting relationships with others
- G. Stay focused on the purpose of the consultancy
- H. Learn to recognize and manage personal defensiveness
- I. Solicit feedback from others about your work and your impact on them
- J. Recognize when personal feelings have been aroused
- K. Remain physically and mentally healthy while under stress
- L. Resolve ethical issues with integrity
- M. Avoid getting personal needs met at the expense of the client (i.e.

financial, emotional, sexual).

N. Energize others

II. Other Core Habits of the Heart

- A. Continuously assess the real issues as they surface
- B. Collaborate with internal/external OD professionals
- C. Balance the needs of multiple relationships
- D. Work within the limits of your capabilities
- E. Communicate implications of systems theory
- F. Listen to others
- G. Pay attention to the spontaneous and informal
- H. Consistently maintain confidentiality
- I. Continuously improve your interpersonal skills
- J. Use the latest technology effectively
- K. Interpret cross-cultural influences in a helpful manner
- L. Utilize a solid conceptual framework based on research
- M. Use humor creatively and effectively
- N. Handle diversity and diverse situations skillfully
- O. Communicate directions clearly to large groups
- P. Facilitate small group (up to 70) interventions
- Q. Facilitate large group (70-2,000) interventions