

Managing & Leading Change

September 11, 2026

About me

James Egan & Company

Helping companies change for good

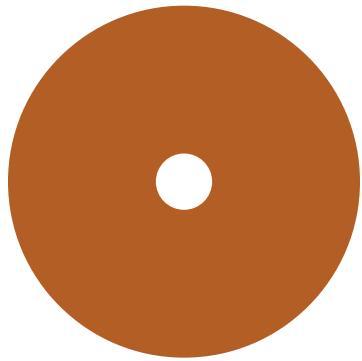
Human-centered organizational change that unites people, strengthens inclusive cultures, and improves business performance by inspiring:

- unified belief
- shared ownership
- personal accountability for working through change together, in a better way, for a greater good.



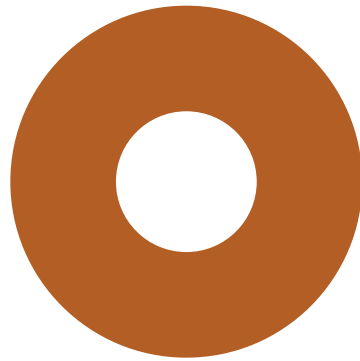
Managing & Leading Change

Widening the Aperture



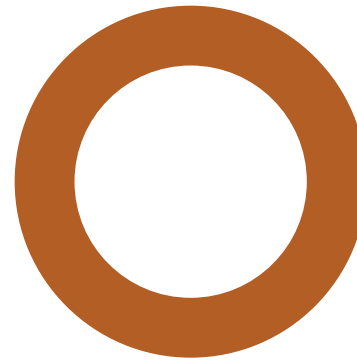
Self

My own reaction
and choices



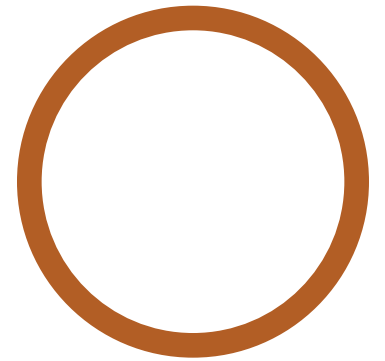
Advocate

Influencing peers,
no title required



Manager

Leading my team
through the change



Sponsor

Leading through visible
executive backing

Narrow focus

Wider perspective

Identify Two Change-Related “Projects”



Past Change

A past change you experienced
(personal or professional)

What happened? How did you react? What helped?



Current or Upcoming Change

Current or upcoming work-related
change initiative

What is changing? Who is affected? What is at stake?

Session Roadmap

Part 1: Your Authority & Influence

Part 2: Leading as an Advocate

Part 3: Manager & Change Sponsor

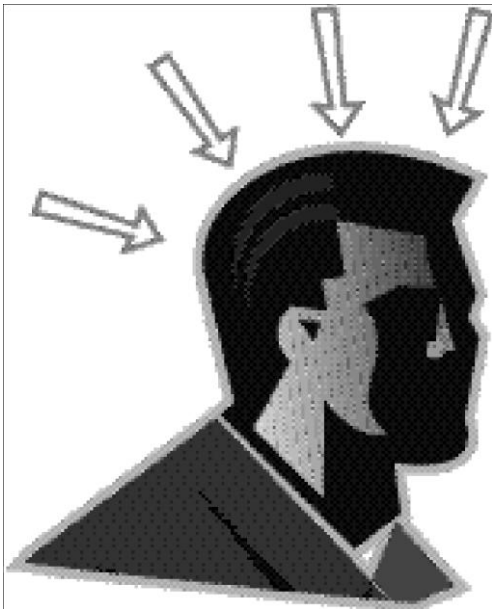
Closing: Taking Action



Change vs. Transition

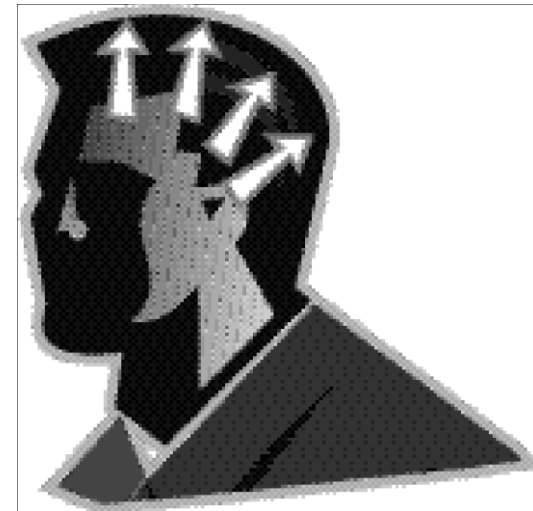
Change

COMES FROM 'OUTSIDE'
situational
external forces / decision



Transition

HAPPENS INSIDE
psychological
an individual's reaction to change



6-minute Exercise: Share Your Change Story



Past Change

A past change you experienced
(personal or professional)

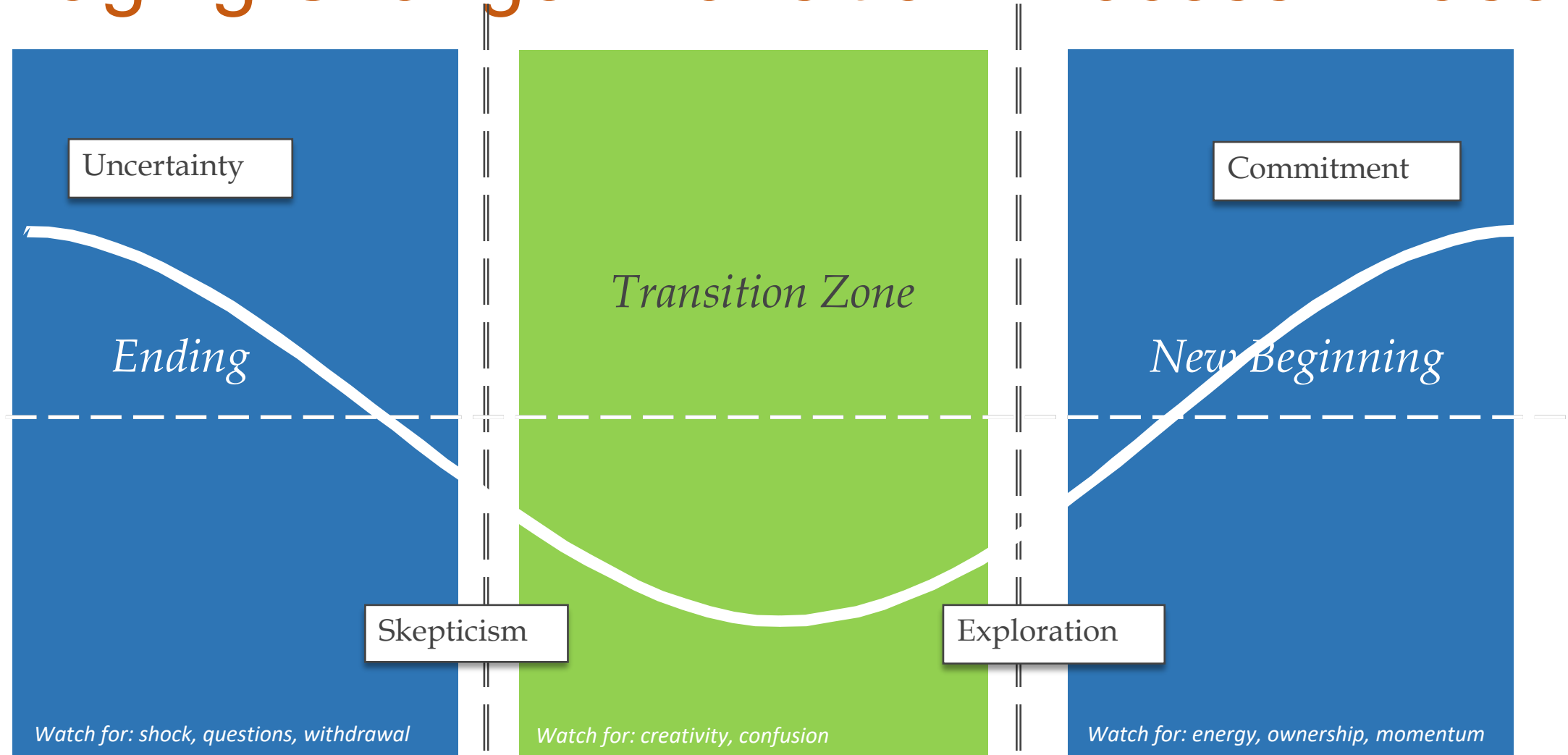
What happened? How did you react? What helped?

- Pair up and share your change story
 - What was the change?
 - How did you feel about it?
 - How did you get through it?
 - How do you feel about it now?
- Regroup and discuss

Individuals in Change: Guiding Principles

- Individuals React to Change Differently
- Resistance to Change is Normal but not always Logical
- An Individual's Adjustment to Change takes Time
- Change requires Individual Energy, Risk, and Emotional Investment

Managing Change: Transition Process Phases



Change Management - ADKAR



- Developed by Jeff Hiatt / Prosci – 1998
- Focuses on change at the individual level
- ADKAR model focuses on how to **create the right conditions** for those affected by change to eventually adopt the behaviors and new ways of working.

ADKAR is a diagnostic tool, not a checklist — people cannot build Ability if they lack Desire. Most leaders skip straight to Ability (training) and wonder why adoption doesn't follow.

How to Use ADKAR



Awareness → **Desire** → **Knowledge** → **Ability** → **Reinforcement**

Awareness

Create an understanding of the need to change – Why is change necessary? Why is it happening now? What is wrong with what we are doing today? What will happen if we don't change? What's in it for individuals?

Desire

Create the desire to support and participate in the change. Dependent on the nature of the change, credibility of the person leading the change, history – effective leading and influencing is needed to create desire.

Knowledge

Give knowledge so people can understand how to change and what to do – provide training and education – detailed understanding of new tasks and ways of working.

Ability

Provide the skills to implement change on a day to day basis. Involve subject matter experts, provide performance monitoring, training, feedback, development.

Reinforcement

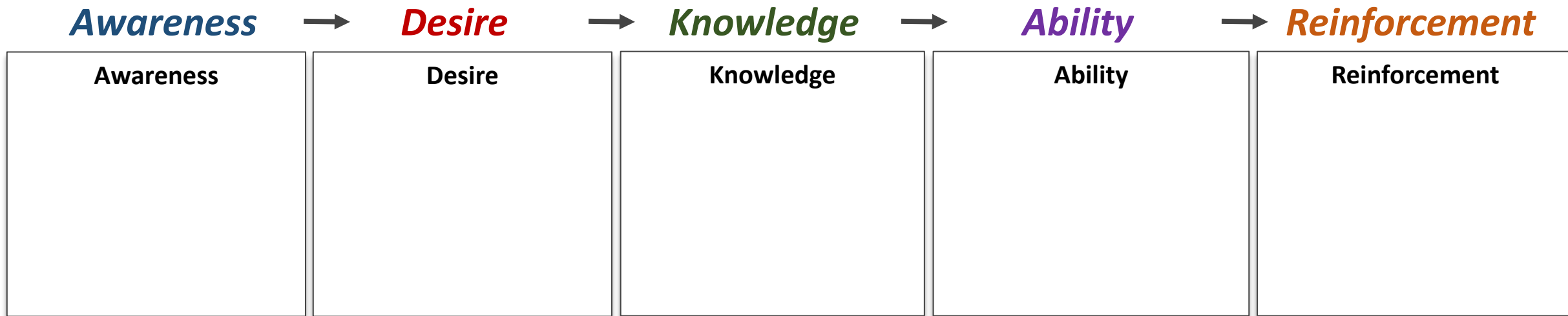
Create the ability and environment to sustaining the change and keep it going, keep the momentum moving forward – celebrations, recognition, rewards, etc.

5 minute Exercise:

What Would Have Helped You Through Change

Reflect on the personal change story you shared in your pair-up:

*What would have helped you transition more smoothly
(and perhaps more quickly) through the transition process?*



Exercise Part 1: A Current Change Initiative

Think of a change you're currently or will be navigating. Complete the following to identify what is changing, why, and what would help you (or your team) move through it.

Change – briefly describe the change you are trying to implement:

Awareness



Desire



Knowledge



Ability



Reinforcement

Awareness

What can you do to build awareness of the need to change?

Desire

What can you do to increase the desire to make the change happen?

Knowledge

What can you do to increase the knowledge of How to Change?

Ability

What can you do to build the skills and abilities?

Reinforcement

What can you do to reinforce and retain the change?

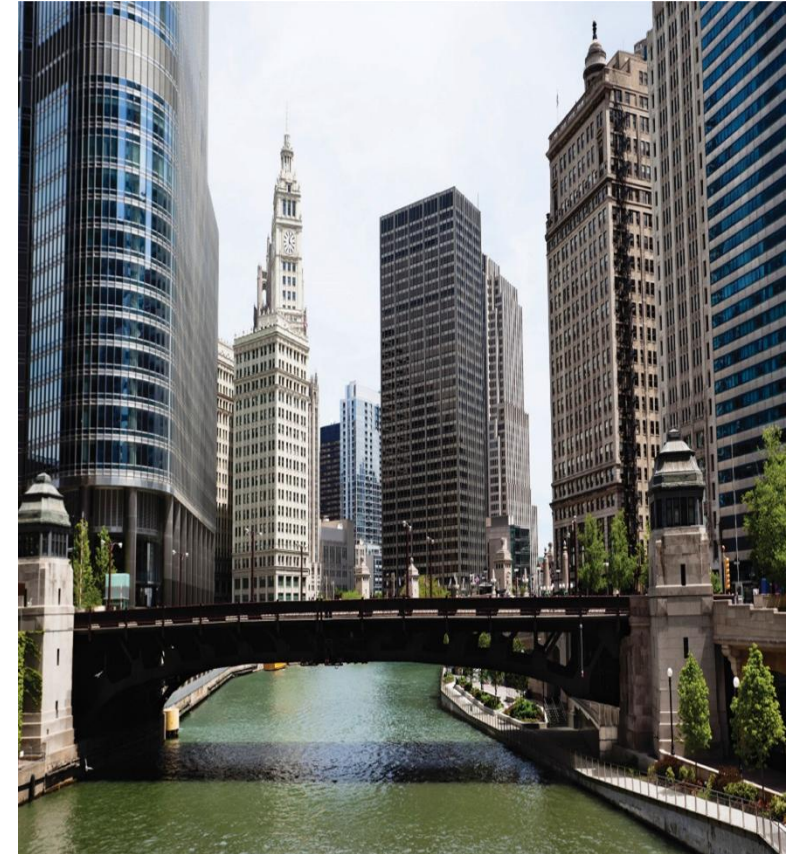
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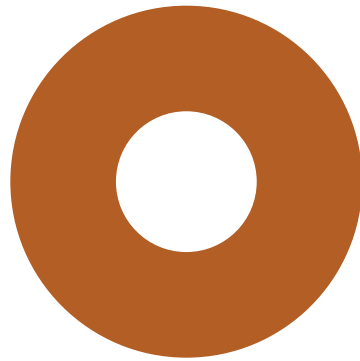
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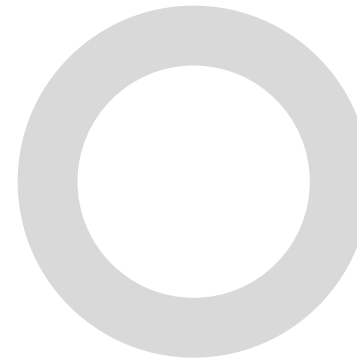
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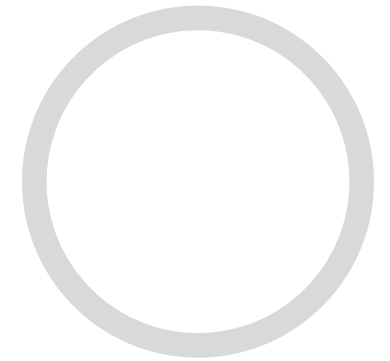
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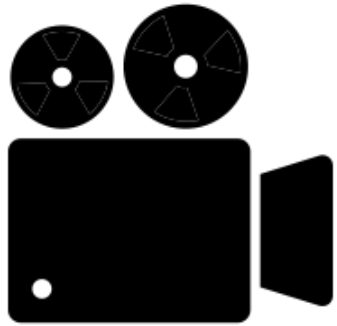


Sponsor

Visible executive backing

Narrow focus

Wider perspective



Video – Leadership Lessons from the Dancing Guy



Who are You and When?

- Lone Nut?
- First Follower?
- Early dancer?
- Late joiner?
- Still sitting in the grass?

Who Are Your First Followers?

- 20% of stakeholders drive 80% of the results in any change effort
- They're usually highly engaged peers with real influence on their teams
- Equip, coach, and encourage them — that's leading as an advocate

Persuasion Principles

6 Principles of Persuasion

1. **Reciprocity** Give first, and make it personal
2. **Scarcity** People want more of what's limited
3. **Authority** People follow credible, knowledgeable experts
4. **Consistency** Get a small public commitment first
5. **Liking** People say yes to people they like
6. **Consensus** Point to what others (like them) are doing



RECIPROCITY



SCARCITY



AUTHORITY



CONSISTENCY



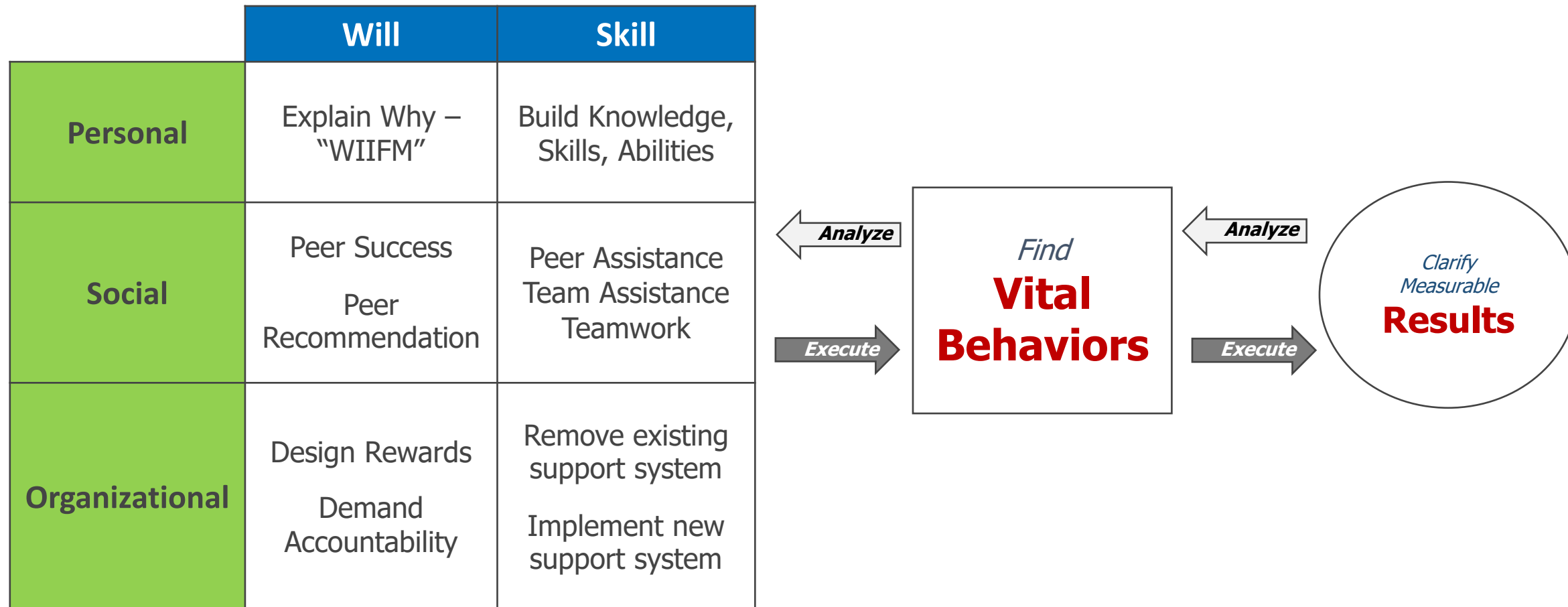
LIKING



CONSENSUS

Influencing Others to Support Change

Using Six Sources of Influence to manage change



Change Coaching: Will & Skill

Direct	low will, low skill	• set clear rules • quick wins • frequent check-ins
Guide	low will, high skill	• clarify expectations • coach through early mistakes
Delegate	high will, high skill	• hand off responsibility • check in at milestones
Inspire	high will, low skill	• connect to purpose • build competence • give feedback often

Exercise Part 2: A Current Change Initiative

Expand on your earlier ADKAR worksheet by incorporating the knowledge from Will & Skill and Persuasion Principles.

Change – briefly describe the change you are trying to implement:

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Desire



Knowledge



Ability



Reinforcement

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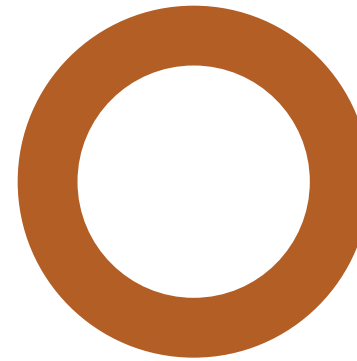
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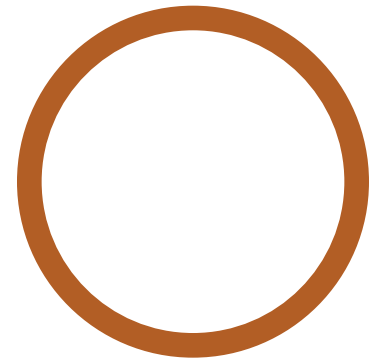
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Wider perspective

Over 75% of changes fail to reach their goals ... WHY?

1. Lack of buy-in that change is needed
2. Lack of active involvement from leaders to lead change
3. Failure to get the right people on board
4. Turf battles between departments, management, etc.
5. Change Capacity – too many projects and work

One of the **TOP** reasons why change fails

Lack of active involvement from leaders to lead change

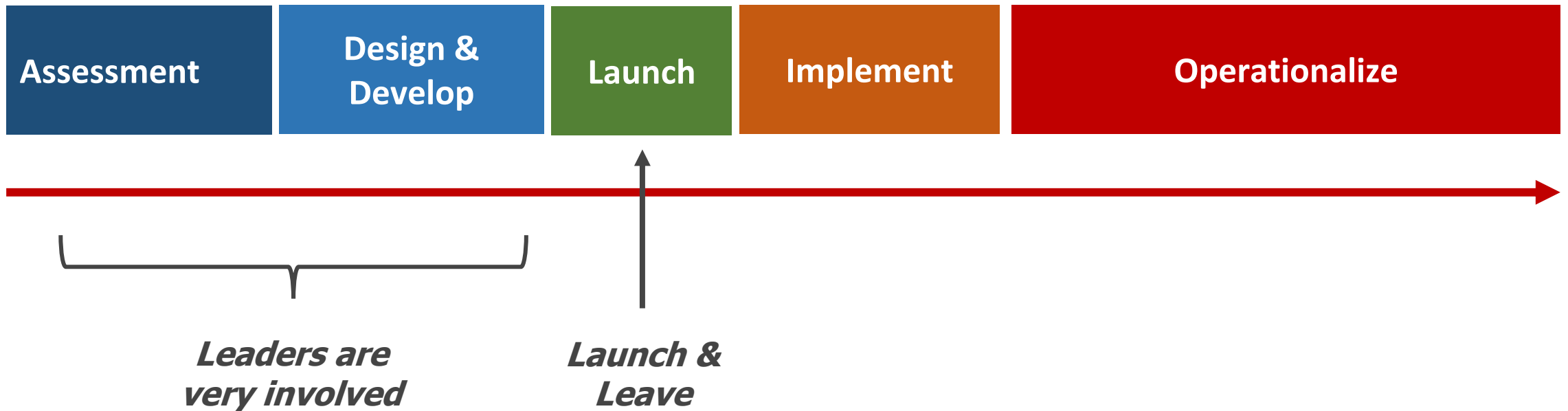
Why Leaders Don't Lead Change

- Fear of failure in front of colleagues
- “Change leadership — not my bag”
- Lack of detailed understanding of the change

What do you think?

Why do we as leaders have a hard time being the lone nut or the first follower?
What can we do to get better at actively leading from the front

Typical Phases in Change Project





What many leaders do when it comes to change: Launch & Leave.

Change leaders run the whole race — not just the starting gun.

Project Structure & Roles to Manage Change

Role	What They Do — Which One Are You On Your Current Change?
Sponsor Team	• Leaders with the authority and accountability for the change. They decide direction, plan, and resources.
Project Lead(s)	• Change agents who lead the project team in developing recommendations and driving day-to-day execution.
Change Consultant	• Internal (HR) or external experts who provide methodology, coaching, and support to leadership.
Project Team	• Change agents who develop recommendations for sponsors to review and decide on.
Ad-hoc Team	• Stakeholders looped in at specific points to give input, feedback, or specialized expertise.

Role	What They Do — Which One Are You On Your Current Change?
Leadership	
People Managers	
Team Members	

Best Practices of Leaders as Change Sponsor



Strategic



Resourcing



Alignment



Champion



Accountability

Strategic

Ensure the change aligns with the strategic direction of the business — make sure this is the right thing to work on, and scope and prioritize it accordingly.

Resourcing

Allocate the right resources — people, time, and budget — for the initiative to actually succeed.

Alignment

Stay actively involved to align stakeholders and enable the initiative to succeed — this can't be delegated away.

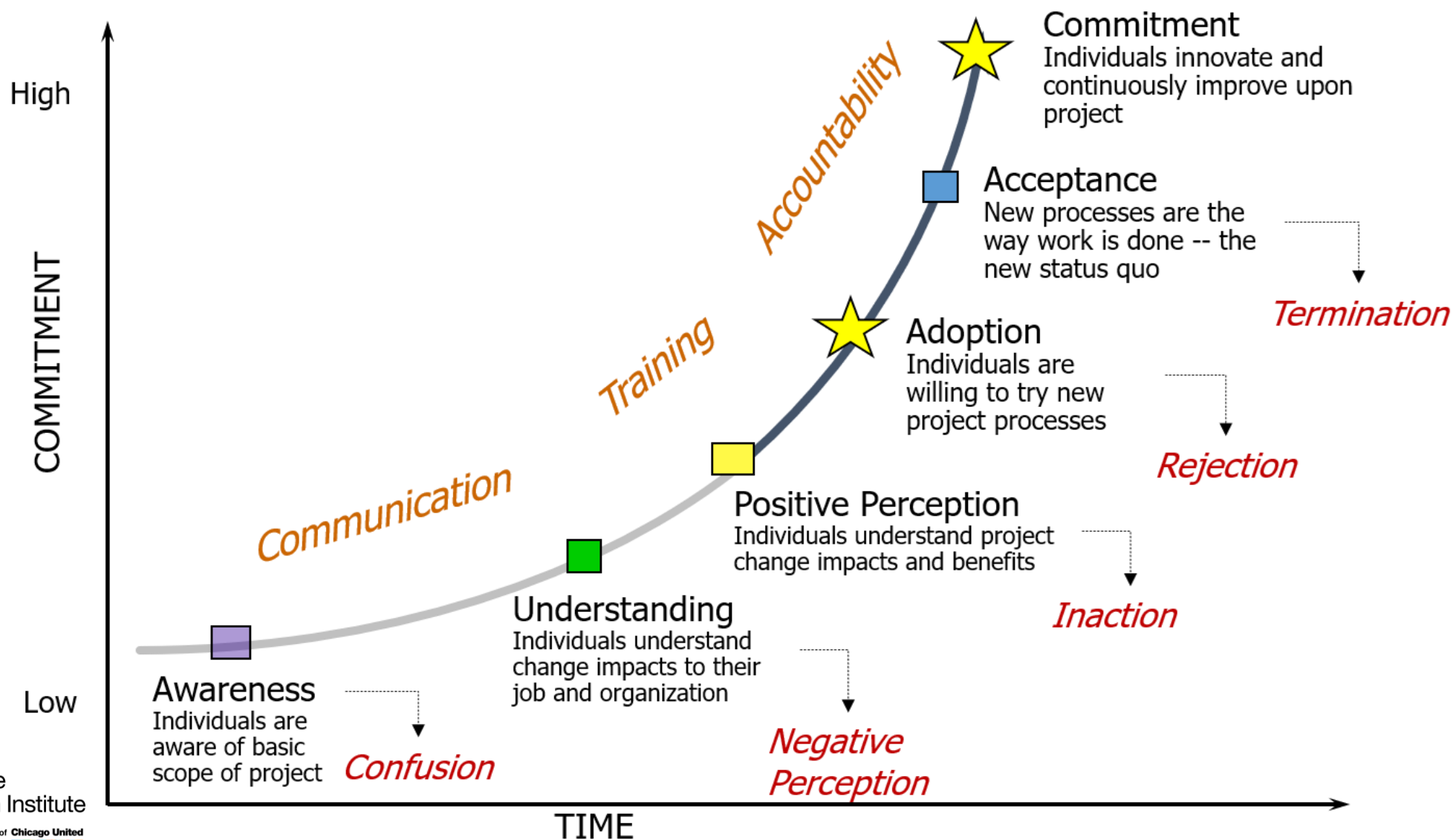
Champion

Lead the change effort by visibly championing the initiative with employees — be seen, not just informed.

Accountability & Reinforcement

Hold people accountable for change results, and celebrate wins with stakeholders and teams along the way.

Build stakeholder commitment moving them up the curve



Exercise Part 3: A Current Change Initiative

Expand on your earlier ADKAR worksheet by incorporating the knowledge gained from this session to help yourself and others move up the Change Curve

Change – briefly describe the change you are trying to implement:

Awareness



Desire



Knowledge



Ability



Reinforcement

Awareness

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What can you do to build the skills and abilities?

Reinforcement

What can you do to reinforce and retain the change?

Taking Personal Action To Lead Yourself and Others Through Change

- *What's one thing YOU will do differently, starting now?*
- *What's one thing you need from OTHERS to support you?*

*“Be the change you wish
to see in the world.”*

Thank You

*Want to keep building this muscle?
Reach out to me for further assistance anytime.*



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Managing Organizational Change and Personal Transitions

September 11, 2026

CII Case Study for Application (DRAFT)

Session: Change Management

Below is a short case study which builds on the concepts and examples presented in today's session. It builds on our dialogue about change management, resistance, and shared responsibility. As you read the case, think about what could be done differently as well as what you might implement in your own organization.

Scenario: Integrating AI into Talent Operations

At EFG industries, a rapidly growing tech enabled services company, HR leaders recently introduced a suite of AI assisted tools to streamline recruitment, employee coaching, and exit interviews. The goal was to reduce administrative tasks, improve consistency, and free HR Business Partners to focus on strategic workforce planning. The suite of offerings included an AI resume screening tool, a coaching assistant that would generate personalized development plans, and an automated exit interview questionnaire and analyzer that would flag trends and turnover.

Within the first month of implementation reactions across the organization were mixed. Recruiters appreciated the faster screening process but worried that AI might overlook some unconventional candidates who had historically excelled at EFG. Several managers were enthusiastic about the coaching assistant, yet they still felt a bit uneasy about relying on algorithm-generated feedback, especially when employees asked how recommendations were produced. Individual contributors express concerned that the AI generated development plans felt too generic and didn't fully reflect their aspirations. HR noticed that exit interview summaries highlighted themes that managers had not acknowledged in prior discussions and that this might lead to specific departments feeling exposed without the chance to provide more context.

A turning point came when an applicant posted, on Glassdoor, that EFG's AI screening tool rejected them within minutes, raising questions about fairness and bias. Additionally, employees began asking whether their coaching data was being stored securely and how it might influence future performance evaluations. HR leaders insisted that the tools were meant to augment and not replace human judgment, but this messaging was not reinforced consistently across departments. It was clear that trust was wavering. So now the organization was faced with a couple of critical questions: how to integrate AI in a way that strengthens versus erodes confidence and trust in HR processes, and how to help employees at all levels adapt to the change.

As a team talk through the questions below and be ready to share a couple of insights with the group at large in 10 minutes.

1. What forms of resistance to change are most visible in this scenario?
2. How could you embed more communication, training, and stakeholder involvement prior to rolling out this change?
3. How might EFG Industries create early “wins” that build confidence in the new AI assisted processes?
4. What three things can members of your cluster commit to when you leave today’s session to continue the conversation around change management and identify opportunities to enhance it within your organization?

Connecting the Dots

Key take-away messages from the case study:

- What forms of resistance to change are most visible in this scenario?
 - There was no trust in the change at multiple levels of the organization. You have to create trust to implement a change
 - You should see how change will impact people on a personal level when you implement it. It's hard to reach everyone in the organization at a personal level
 - There was a lack of a true implantation plan. There should have been an overall process for the change, how to adapt it, and what it looks like
 - There was no trust in the new system after it failed. There were concerns that the data was stored securely
 - People at different levels of the organization were concerned about how the change would impact their job Employees didn't have anywhere to go with their concerns

Connecting the Dots

Key take-away messages from the case study:

- What forms of resistance to change are most visible in this scenario (continued)?
 - The company should have talked about the reason for the change. Management should have explained that the new system won't replace you, but enhance your work
 - The AI generated development plans felt too generic. So, employees couldn't trust the work that the AI produced.
 - The employees had uncertainty about how the change will be adapted. They did not understand the why behind the change
 - Employees did not receive updates about the change. They did not have confidence in the change or knowledge about it
 - The company needs positive change advocates to help them implement the change and give the employees guidance

Connecting the Dots

Key take-away messages from the case study (continued):

- How could you embed more communication, training, and stakeholder involvement prior to rolling out this change?
 - You could have team members that are part of the change be more inclusive about information on the change with other employees
 - It would help to implement the change if you had a team analyzing it as it is happening
 - The company would create more involvement in the organization if they had volunteers from each department give feedback on how the change was going for them
 - It would help to implement the change if the company does one implementation at a time
 - The company should explain the reason for the change and the benefits of the change. They should be transparent throughout the change process

Connecting the Dots

Key take-away messages from the case study (continued):

- What things can members of your cluster commit to when you leave today's session
 - Emphasize the reason for the change and how it will benefit the employee
 - Create the desire to support and participate in the change
 - Acknowledge the positive impact the change will have
 - Celebrate the wins of the change process as it is happening
 - Think about who else needs to know about the change and who should be involved in the change process
 - Understand the way the change impacts individuals
 - Be transparent and empathetic about the change

Wrap-up and next steps

Submit survey responses for today, month 7 coaching, and end of program survey

Schedule monthly coaching meetings with your coaching partner

Look for opportunities to apply principles from today's session in your day-to-day

Connect with your coaching partner and ask about ways they can apply or have applied the session principles

Next session: IDI Assessments/Debriefs (Sept 9 - Oct 7)
& Thursday, October 29, 2026, Closing Reception

THANK YOU