



Change StyleTM Indicator

Improve Change Effectiveness

A. Sample

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PENUMBRA
TALENT MANAGEMENT SOLUTIONS



Introduction

Introduction to Change

Change is a natural and powerful force, a constant and continuing phenomenon. Change may occur in regular, predictable cycles, such as the changing of the seasons. It may erupt abruptly and unexpectedly, as does an earthquake. Or it may develop as an anticipated but highly unpredictable event, such as a revolution.

Change can create a crisis, and change may be the solution to a crisis. Just as the nature of change is varied, so are human responses. Some people are frustrated and disoriented by changes that confront them. Others find the prospect of uncertainty invigorating. One thing is for certain, everyone thinks their response is justified.

Change Preferences

Regardless of how we experience change or how we feel about it, change is here to stay. By understanding our change preferences and the preferences of others we can become better able to lead, manage, and assist others through the inevitable changes in our lives and organizations. Understanding the human response to change may be a leader's greatest challenge and most valuable resource. Conflict as well as innovation are the by-product of this tension.

Our research shows that people demonstrate one of three preferences when creating or reacting to change. The Change Style Indicator® (CSI) measures your preferred style when faced with change. Your score on this instrument will place you on a change style continuum ranging from a **Conservator** style to an **Originator** style, with the **Pragmatist** style occupying the middle range of the continuum. The three styles

represent distinct approaches and preferences when responding to change.

Your CSI score does not indicate your effectiveness at using your preferred change style. Your responses and behaviors are influenced by, but not limited by, personal preference. Awareness of change preference allows you to choose from a range of responses for any given situation. There is no right or wrong, "better" or "worse" style or preferred place to be on the continuum. The key is in understanding your preference and knowing when to adapt your preferred style for the situation in order to be most effective.

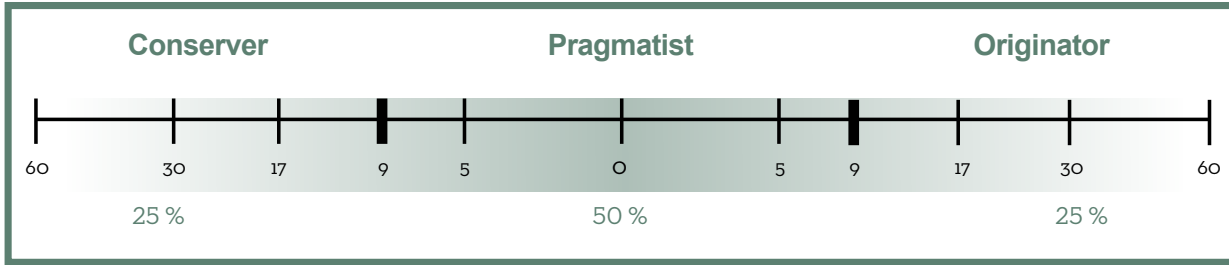
Why Change Preferences Matter

By understanding these change style preferences you are better able to:

- ▶ manage your response to change and its consequences, both as a leader and a support person,
- ▶ understand the sources of emotion and conflict associated with change,
- ▶ recognize and optimize the contributions that each change style offers to your team and organization,
- ▶ increase productivity through more effective response to these change style differences,
- ▶ respond to others in a way that enhances collaboration and encourages innovation.

The information presented in this style guide can help you improve as a leader and a team member. Through greater self-awareness and knowledge of your change preference, you can increase the flexibility and effectiveness of your response to change, while also better understanding the reactions of others.

CHANGE PREFERENCES



The CSI is designed to capture your preferred style in approaching change. The results of the CSI place you on a continuum ranging from a Conservator style to an Originator style with the Pragmatist style occupying the middle of the continuum. The closer you are to one end of this continuum, the stronger the preference for a Conservator or Originator approach to change. The closer to the center of the continuum, the stronger the preference for the Pragmatist style.

CONSERVATORS prefer the known to the unknown. The goal of a Conservator is to improve effectiveness by more efficiently utilizing resources – people, technology, knowledge and capital. Conservators prefer change that is gradual and incremental. The Conservator style advocates for continuous improvement while minimizing chaos and uncertainty. Conservators prefer to work within existing rules and policies.

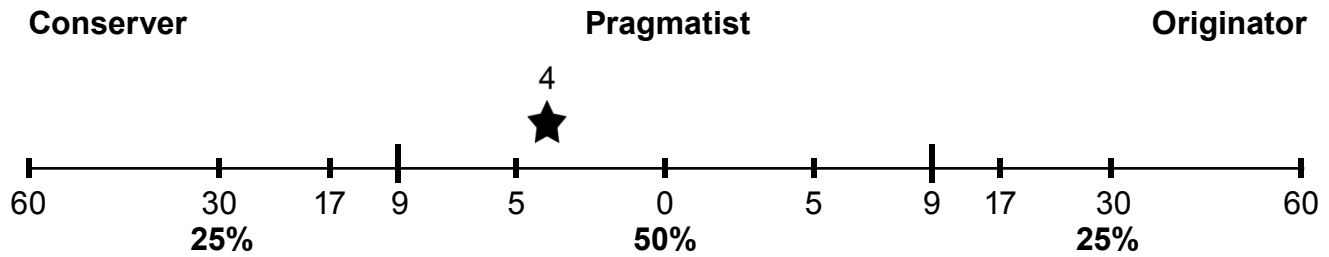
PRAGMATISTS prefer to explore the current situation in an objective manner. They are likely to advocate for change that is reflective of the demands and constraints of the current circumstance, regardless of the impact on existing rules, policy and structure. Pragmatists prefer change that is functional. While they are able to see multiple perspectives, they are most interested in what will work and seems most practical. However, the more a Pragmatist score moves toward either the Conservator or Originator side of the continuum, the more they will express a change style reflective of that orientation.

ORIGINATORS prefer a faster and more radical approach to change. The preference of Originators is significant and expansive change, which occurs quickly. The preference of an Originator is to challenge existing rules, politics and structures, resulting in fast, fundamentally different, even disruptive changes. Originators typically challenge the status quo.

A note on scoring:

The Pragmatist style is defined, for purposes of this assessment tool, as the middle 50% of the general population, with Conservators and Originators each occupying 25% of the population at either end of the continuum. Thus, Pragmatist scores will fall in the range of 9-0 or 0-9, whereas Conservator and Originator scores are always above 9 with the direction of the score indicating preferred style.

CHANGE STYLE PREFERENCE



As a **pragmatist with conservator tendencies**, you prefer change that addresses specific, real problems and prefer to avoid change that seems to be only for "the sake of change." You are practical, reasonable and flexible in your approach to change. You are open to new ways of doing things but not too quick to commit. You may serve as a mediator and prefer a "middle-of-the-road" approach.

Your strengths: You are highly involved in your work and you are team oriented. You value the coordination of efforts among team members and cross-functional teams. You like to set goals and objectives and the ones you set are reasonable and practical. You readily share information with appropriate people and value opportunities for you and those around you to learn new skills.

Your potential challenges: You may "over focus" on the present, disregarding past and future implications. You may be hesitant to commit to a course of action, waiting to see how others decide. You may find it difficult to reach consensus when diverse views are being presented.

CONSERVER CHANGE STYLE PREFERENCE

CONSERVER

People with a Conserver preference may appear disciplined, detailed, deliberate, and organized. They know the rules, regulations, and policies of their domain and prefer change that adheres to them. For the Conserver, rules and regulations have inherent value, for without them the world would have no order, resulting in chaos.

Conservers like to protect and preserve the resources of their organizations. They prefer thoughtful and well-reasoned change. Conservers understand the mechanics of getting things done and can use that knowledge to facilitate change they believe to be in the best interest of their team or existing organizational culture.

When Facing Change

- ▶ Prefer change that maintains the integrity of the current structure
- ▶ May operate from conventional assumptions
- ▶ Enjoy predictability
- ▶ May appear cautious and inflexible
- ▶ May focus on details and the routine

When Contributing to the Organization

- ▶ Get things done on schedule
- ▶ Work well within organizational structure and constraints
- ▶ Attend to detail and factual information
- ▶ Demonstrate strong follow-through skills
- ▶ Encourage and adhere to proven processes
- ▶ Protect and manage the organization's resources
- ▶ Handle day-to-day operations with efficiency

When Leading

- ▶ Lead through reliable, stable, and consistent behavior
- ▶ Reward following the norms while getting the job done
- ▶ Attend to practical organizational needs
- ▶ Expect organizational policies, procedures, and rules to be followed
- ▶ Promote the traditional values of the organization

When Supporting Innovation

- ▶ Skilled at taking a new idea or concept
- ▶ Skilled at taking ideas and creating a plan for implementation
- ▶ Attend to detail and will follow through until implementation is completed
- ▶ Ensure desired results are obtained

When Collaborating

- ▶ Resist decisions that create chaos
- ▶ Encourage building on what is already working
- ▶ Focus on agreed upon goals and objectives

PRAGMATIST CHANGE STYLE PREFERENCE

PRAGMATIST

People with a Pragmatist preference may appear reasonable, practical, agreeable, and flexible. Pragmatists tend to solve problems in ways that emphasize practical, workable outcomes. They understand and respect rules and policies but are not overly constrained by them. Pragmatists may appear more team oriented than either Conservers or Originators.

While Conservers and Originators are working to preserve or challenge the status quo, Pragmatists are exploring the most effective means of addressing a problem regardless of the effect on the status quo. If goals can be met by working within existing structure, that will be their first choice; it's faster. If fine-tuning does not work, they are comfortable with bigger change. Pragmatists typically can see both sides of an argument and often serve as mediators or "bridges" between Conservers and Originators.

When Facing Change

- ▶ Prefer change that emphasizes workable outcomes
 - ▶ Are more focused on results than structure
 - ▶ Are open to both sides of an argument
 - ▶ Operate as mediators and catalysts on a team
 - ▶ May take more of a middle-of-the-road approach
- Appear more team-oriented

When Contributing to the Organization

- ▶ Get things done in spite of rules, not because of them
- ▶ Negotiate and encourage cooperation and compromise to get problems solved
- ▶ Take a realistic and practical approach
- ▶ Draw people together around a common purpose
- ▶ Organize ideas into action plans
- ▶ Promote practical organizational structure

When Leading

- ▶ Facilitate problem solving among people
- ▶ Adapt past experiences to solve current problems
- ▶ Build cooperation rather than expecting it
- ▶ Use a facilitative approach to manage projects
- ▶ Encourage the organization to have congruence between values and actions

When Supporting Innovation

- ▶ Skilled at taking a new idea or concept and bringing it into reality, making it tangible and concrete
- ▶ Bridge long-range goals with short-term demands
- ▶ Able to keep others focused and moving toward the end goal

When Collaborating

- ▶ Serve as bridgers between diverse positions and opinions
- ▶ Encourage building upon multiple perspectives
- ▶ Focus on consensus

ORIGINATOR CHANGE STYLE PREFERENCE

ORIGINATOR

People with an Originator preference may appear unconventional, spontaneous and lacking organization. They frequently attempt to solve problems in ways that challenge existing structure. Tradition and history are of less value than future possibilities.

Originators prefer quick and expansive change. They are divergent thinkers and often generate many new ideas. Originators do not enjoy repetitive tasks and will look for a new or different way to do a job, whether needed or not. Originators are often described as risk-takers and may be viewed as the quintessential change agent. They will readily challenge the status quo and may even view the status quo as the problem.

When Facing Change

- ▶ Prefer change that challenges current structure
- ▶ Will challenge accepted assumptions
- ▶ Enjoy risk and uncertainty
- ▶ May appear impractical and sometimes miss important details
- ▶ May appear more future than past-oriented
- ▶ Can treat accepted policies and procedures with little regard

When Contributing to the Organization

- ▶ Push the organization to see the big picture
- ▶ Provide future-oriented perspectives for the organization
- ▶ Support and encourage risk-taking behavior
- ▶ Promote new ideas, projects and activities
- ▶ Enjoy complex problems
- ▶ Think conceptually

When Leading

- ▶ Serve as catalysts for big change
- ▶ Can be energetic and enthusiastic
- ▶ Provide long-range perspective
- ▶ Conceptualize and design new processes that reorganize the whole system
- ▶ Like to be in charge of the start-up phase

When Supporting Innovation

- ▶ Not afraid to challenge the status quo
- ▶ Encourage exploration of new and alternative ideas
- ▶ Can present possibilities that others do not imagine
- ▶ Produce many divergent ideas

When Collaborating

- ▶ Encourage out-of-the-box thinking
- ▶ Initiate enthusiasm and excitement
- ▶ Focus on initiating new tasks

POTENTIAL PITFALLS OF EACH STYLE

Our change styles can be a source of strength and effectiveness. However, as with any strength, when overused can become a derailer. Below are some common challenges faced by people with each of the three styles.

Potential Pitfalls of CONSERVERS

- ▶ May be rigid in thought and action
- ▶ May discourage innovation by promoting existing ideas, policies and procedures
- ▶ May not see beyond the present details to understand the broader context
- ▶ May delay completion of tasks because of perfectionism
- ▶ May delay action by overly reflecting on a situation
- ▶ May appear unyielding and set in their ways
- ▶ May over-focus on irrelevant details and inconsistencies

Potential Pitfalls of PRAGMATISTS

- ▶ May over-focus on building consensus
- ▶ May not adequately identify and promote personal ideas and priorities
- ▶ May try to please too many people at the same time
- ▶ May be indecisive and take too long to make decisions
- ▶ May appear to flip flop on an issue
- ▶ May be too easily swayed
- ▶ May negotiate compromise that is too “middle of the road”

Potential Pitfalls of ORIGINATORS

- ▶ May create chaos and lack of discipline
- ▶ May not adjust their vision to the practical constraints of the situation
- ▶ May become lost in theory, ignoring or forgetting current realities
- ▶ May not adapt well to new policies and procedures
- ▶ May underestimate the short-term impact of change on the organization and other people
- ▶ May overlook relevant details
- ▶ May not understand the value of engaging everyone needed for implementation
- ▶ May move on to new ideas or projects without completing those already started

COMMON PERCEPTIONS

In addition to the general characteristics of each of the change style types, it is helpful to explore the common perceptions often held by one change style toward another. These perceptions can reveal sources of conflict and play a significant role in efforts to improve not only individual but team behavior.

CONSERVERS see **ORIGINATORS** as:

- ▶ Divisive
- ▶ Impulsive
- ▶ Lacking appreciation of proven ways of getting things done
- ▶ Starting but not finishing projects
- ▶ Not interested in follow-through
- ▶ Wanting change for the sake of change
- ▶ Not understanding how things get done

ORIGINATORS see **CONSERVERS** as:

- ▶ Stubborn
- ▶ Bureaucratic
- ▶ Yielding to authority
- ▶ Unaware of competitive demands
- ▶ Supporting the status quo
- ▶ Lacking new ideas
- ▶ Unwilling to move quickly

Strong ORIGINATORS and CONSERVERS see **PRAGMATISTS** as:

- ▶ Compromising
- ▶ Mediating
- ▶ Indecisive
- ▶ Noncommittal
- ▶ Easily influenced
- ▶ Hiding behind team needs

TIPS FOR INCREASING FLEXIBILITY AND MAXIMIZING EFFECTIVENESS

General Tips for All Change Preferences

- ▶ Ask lots of questions and listen to the answers.
- ▶ Consult with a person you believe to have a style different from yours before proceeding.
- ▶ Make efforts to understand the perspectives of styles other than yours.
- ▶ Write down your biggest concern and then have someone with the most different style write down how they might respond.
- ▶ Step back and be aware of your initial reaction in a situation, especially when you are aware of responding emotionally.
- ▶ Emotional reactions can be a good indicator that your response to a situation is related to more than the facts at hand

If you are a CONSERVER:

- ▶ Consider at least three alternatives before making a decision.
- ▶ Wait a night, day, or week (depending upon time-line) before making/announcing a decision.
- ▶ Think of big picture consequences of actions. Ask others to explain them or provide input if necessary.
- ▶ Find someone you suspect is an Originator and ask for his/her perspective.
- ▶ When time is critical, identify no more than three or four criteria for deciding who should be included in framing your decision.
- ▶ Develop tools and strategies for exploring and understanding long-term consequences of change – think five years.
- ▶ Find someone who is willing to play devil's advocate with your proposed solutions/ ideas.
Write a list of advantages for taking a more Originator type approach in a given situation.

- ▶ Avoid using committees for decision-making and problem solving unless they are really needed. To decide which issues are appropriate for a committee, develop a list of three to four criteria against which the decision can be referenced; then select.

If you are a PRAGMATIST;

- ▶ Identify a strong Conserver and a strong Originator and solicit their opinions.
- ▶ Ask “Why” questions to Conservers.
- ▶ Ask “What’s stopping you” questions to Originators.
- ▶ Specify a period of time to consider alternatives, after which you commit to a solution.
- ▶ Imagine the consequences of your decision in a year, five years, or ten years.
- ▶ Imagine the consequences of your decision on someone you care about.
- ▶ When dealing with strong Conservers or Originators, ask exploratory questions about emotional responses to a situation –questions such as:
 - How do you feel about this?
 - How would you like for others to feel?
- ▶ Create a list of all the potential solutions or actions which could be taken (best ideas from the Conservers and Originators, as well as your own). Next, identify no more than five criteria for assessing each item. Apply each of the criteria to each of the solutions using the scale below. Then prioritize the potential solutions based on the points received:
 - 0=unacceptable
 - 1=marginally acceptable
 - 2=satisfactory
 - 3=excellent
- ▶ Be willing for some not to be totally satisfied

If you are an ORIGINATOR:

- ▶ Wait a day before taking action.
- ▶ Find someone you suspect is a Conserver and ask for his/her perspective.
- ▶ Identify and try to understand at least five facts related to the situation, problem or decision.
- ▶ Explore and understand three things that are working well with the current situation.
- ▶ Explore the history and sequence of events leading to the current situation.
- ▶ Attempt to clearly understand the impact of the decision or action on at least two other people.
- ▶ Find someone who is willing to play devil's advocate over a given topic or decision.
- ▶ Write a list of advantages for taking a more Conserver-type approach.
- ▶ Learn when to give up on an impractical idea.
- ▶ Set realistic priorities and time-lines.
- ▶ Make a list of relevant facts and details.
- ▶ Ask a Conserver or Pragmatist to critique these
- ▶ Assess the availability of resources before proceeding.
- ▶ Learn to screen activities rather than attempting to do everything that appeals to you. Make a list of activities, then prioritize and rank order them. A good way to do this is to read the entire list and then imagine you can do less than the total number on that list. Decide which item you will give up. Continue this process until you identify your top priority.
- ▶ Focus on your desired outcome. Create a visual image of the outcome you desire and envision. When the details and follow through become difficult, look at the picture and see the desired end result and outcome. Returning frequently to the original vision can provide energy and motivation to carry through with the details that implementation demands.
- ▶ As early as possible, include individuals who are good at implementation.
- ▶ Remember the real work is in the implementation

TIPS FOR WORKING WITH CHANGE PREFERENCES

CONSERVERS

Preferred Work Environment

- ▶ Steady and consistent pace is rewarded
- ▶ Time and space for reflection
- ▶ Stable, structured, orderly and predictable
- ▶ Successes are acknowledged and rewarded
- ▶ Clearly defined processes

Communication Tips

- ▶ Know the relevant details
- ▶ Don't start by presenting the big picture
- ▶ Pick one angle and build from there
- ▶ Present basic information and ask what else is needed
- ▶ Let them guide you with what they need to know
- ▶ Ask about anticipated obstacles

PRAGMATISTS

Preferred Work Environment

- ▶ Flexible and adaptive
- ▶ Hands-on experiences are encouraged
- ▶ Harmonious and participative atmosphere
- ▶ Constructive people who focus on the situation at hand
- ▶ Adaptive structure that is responsive to the needs of the moment
- ▶ Group oriented problem solving

Communication Tips

- ▶ Speak in terms of outcomes
- ▶ Talk about consequences of continuing down the same path
- ▶ Ask for recommendations for practical first steps
- ▶ Ask about problems and barriers to implementation
- ▶ Talk about the consequences of taking too long to act

ORIGINATORS

Preferred Work Environment

- ▶ Low attention to detail
- ▶ People working independently on challenging new problems
- ▶ Change and risk oriented
- ▶ Unbureaucratic, unconstrained by rules and policy
- ▶ Focus on future planning

Communication Tips

- ▶ Talk about the future, ask what they would like to see happen.
- ▶ Ask for ideas
- ▶ Ask what is working that they would not want changed.
- ▶ Talk about the connection between the change and future effectiveness.
- ▶ Ask about barriers to implementation.
- ▶ Ask whose support is needed for successful implementation