



ATD Tulsa: Translating Your Learning and Talent Management Skills to Change Management - Transcript

Katie McLaughlin 3:52

While we're getting settled and waiting for that clock to switch over, I want to invite anybody who would like to join us on video. I'm sure these are things you're regularly telling folks that you are training. So don't be shy. It's going to be a pretty interactive session. I hope that you end up getting a lot out of it. Sharing my screen now. Let's see. We're also going to do some polls today and in the spirit of what we had what we shared earlier about the capability matrix, and the three of the main things that I think you'll see apparent in our conversation today are: emotional intelligence, change management, and then consulting and business partnerships, change management.

Of course, it is a very holistic topic. We're gonna touch on other capabilities. Then you'll see that on a number of slides. I have a little QR code. I've got some free resources to continue your learning. I'll reference that throughout. There's a few videos. There's some job aids, things like that. I really want to support this community and want to say thank you to the Tulsa board for having me here.

My name is Katie McLaughlin, and I am the Founder, Chief Strategist at McLaughlin Method. I live in Seattle, Washington just for some context. It's really fun that we now can do all of this when we're on different coasts.

Okay, just getting all the screens organized. A little bit about me. You don't have to read all of this, but I'm going to share this slide deck later. I have spent a long time in facilitation and coaching roles, formerly as a director of training and enablement, but then moved into change management consulting from there and now I have my own business training that I was involved in one to Horizon awards. I've done the whole gambit of everything related to training and learning related in my career. I would love to connect with you on LinkedIn, feel free to do so.

So just a little bit about the kind of my business and why I have a business and don't work directly for a company anymore. I'm focused on building happier and healthier workplaces. My



goal is to do that even more holistically than I felt like I was able to do in some of my direct learning roles and working to create programs that are always focused on transformation for lasting cultural change. The wildcard is that I use theater as one of my primary facilitation techniques, so don't be afraid. But we are going to do a little bit of things today. Just to kind of get in our bodies and experience something new.

So what do I mean by theater? If we think about this image, there's three very distinct images, static images that people are creating. And each of them tells a story, and if we were able to see their face, we would also get more emotion out of those images. The technique that I primarily use in theater is creating images. It's called Image theater. We use that a lot to think about emotions. Here's a little bit of what it looks like when you're doing a program with me. That upper right is what things are going to look like a little bit today. I encourage you if that makes you feel a little squirmy, just take it. Don't be afraid. We're also used to being on Zoom in this very specific way. We're breaking the wall today. Feel free to move around and do different things and I'll give you some prompts later. But getting on to our agenda for today. Of course we're going to talk about what is change management, just as a kind of refresher and hopefully a fresh perspective on what change management means. I know that when I first stepped into my first change management role, it was a bit scary. I didn't really feel super confident that I had the skills to step into change management. But once I started to dig into it, I realized that I had way more transferable skills from my learning background into change management. My hope is that you walk away with some of that same feeling that you have more skills than you thought you did that will be applicable.

Katie McLaughlin 8:32

We'll talk specifically about the role of a change manager whether that's specifically taking on a position that is a change management role or if you're the Change Manager of a specific project or initiative. We'll talk about the skills needed. And then, even if you're not the head of change management, on an initiative, we'll talk about your role in L&D as a part of change because many of you may just be filling in a particular role within change management. Most importantly, I always like to help people know how to leverage existing data and intel. You already have to improve the efforts that you're doing so you don't feel like you have to completely learn something new or invent tons more data. There's a lot that you already have available to you.

Okay, so we're gonna create our first image, I encourage you to move around. I know you're there. I can see your videos. Even if I can't see your videos. I encourage you to come on to the video. It's not gonna be scary, I promise. And if you're worried about what this is going to look like in the recording, I'm pretty sure that the way the recording comes out is that it's just me. So just for some clarification, whenever I've seen a recording of a presentation I've done it's just me on video and then the presentation itself so don't be afraid. When we create an image, it's all about conveying an emotion or a feeling or our actual kind of state of being in a larger than life



way. That way we can communicate more than just saying that it feels scary, or I feel icky or whatever those words are. Talking about emotions can feel icky, scary, confusing, like you don't have the right words. But if you look at this image of me on screen, you can see there are probably some words that come to mind when you see this image and I bet many of us would have different words that we would use to describe that image and all of those could be true. But the goal here is really to empathize with each other, build a sense of emotional intelligence and recognize some of those emotions, both in ourselves and in each other.

So are you guys ready? To play a little bit? I believe in you. It'll be okay. To get your bodies warm, I encourage you to raise your arms up in the air. Don't be afraid we never do that on Zoom. Cool! Get super close to your camera, if you can. Just don't be afraid. Then get really far away from your camera. I happened to be standing so I can get pretty far away. These are things we don't normally do on Zoom. But that's one of the fun things you can play with to convey a different emotion. Your prompt is creating an image that is larger than life of how you feel about taking on change management roles. There are no right answers. There are no wrong answers. This is about your personal experience. I'm going to give a three to one action and we're all going to create something at the same time.

All right. Ready? So create a larger than life image of how you feel about taking on change management roles. 3...2...1 action! Shake it off. Lots of different feelings. Thank you all for doing that. Maybe you learned a little bit about yourself, tuck that away, as we're going throughout this presentation. Now that you have a little bit of that feeling I'm gonna put a poll up in your Zoom poll, so you should see that now. And now I want you to put some words to that. Essentially, not a specific descriptor, but rating yourself on your confidence level and then also how you feel your skills align to change management.

Katie McLaughlin 12:57

I believe you can even do the poll if you're on your phone. So just a couple more participants that we're looking for.

Katie McLaughlin 13:10

Potentially it's looking for me to respond, but I'm not allowed to. Just final seconds if you want to respond to the poll before I share those results. All right. Let's do it. So it's pretty spread out in terms of confidence or a feeling of readiness. I'm really glad to see that many of you see that some of your skills already have some alignment. Hopefully you can see the results. Andrea, is that Can you all see them? Okay, perfect. It is not always clear as a presenter of what folks can see and what you can't. My goal is that by the end of this session, many of you will change this towards the positive, that you'll feel a little more empowered, a little more enabled to exercise and use those skills.



All right, so stop sharing. Got it. Great, thank you for participating in that. So what is change management? First of all, change is disruptive. We've all collectively experienced a lot of change in our lives just societally. And then how that trickles down into our jobs and our lives. But ultimately, with change management, and when we're executing changes in business in our roles, the goal is to kind of get everybody onto this orange airplane. Where we're all kind of swimming in that same direction instead of going in a million different directions. If we think about when we hear that we need to change, many of us might create an image of, I don't want to do that. Or some of us might be like, yes, change, tired of the old way. I want you to answer in the chat, please. How would you define change management?

Katie McLaughlin 15:34

There's no wrong answers.

Katie McLaughlin 15:41

Cool, thank you, Andrea. Coordinating and guiding the process of organizational change, step to changing behavior or processes. Thank you for your honesty Dr. Fatima, creating a better, more effective way to manage who I think this is Bruce, as opposed to Ben Graham, but it's kind of a fun nickname. The art of making any change successful? Any other contributions accepting and embracing change leading change?

Katie McLaughlin 16:39

Cool! So we talk when we're talking about change management and not quote unquote, just training, , we're going to be focusing on because why are we making changes? Who needs to change? What and how is it changing? Along with that comes a need for integrated change messaging, in all training and communications. We're gonna get into more of what change messaging means. But if you're already starting to see some tiny little connections here to things that you do when you are designing training, that's not that's not unintentional. We are concerned with many of these things, and we may not put them into these words. But this is really the core of what we need to first start thinking about when we think about change management. The other way to think about change management is that with every change, there's going to be a dip in performance and not impact any kind of category that could also be listed as performance on that kind of up and down access axis. So with any change, like I said, there's a dip in performance, there's an impact, and the goal is managing change. Is that we've reduced how far down we go in that impact and the amount of time that it's going to take to get to a place of integrating those changes into everyday life? This is an important message when you engage with business leaders about what is the role of change management, but we are going to be talking about how we can start to actually accelerate that. I saw in the chat: Yes, we will be sending along the slides afterwards. Then when you see the little QR code in the corner at some point, scan that because I'm going to provide some job aids to help carry some of these things forward. Again, I'd like to encourage you to answer in the chat. What do you think the role



is of a change manager for a project or initiative? Potentially that's different from defining what change management is. What's the role? What do you do?

Katie McLaughlin 19:20

Thank you, Scott, for sharing the why. Andrea said keeping the team or moving forward on an action plan. Robin said its communicator and facilitator helped me stay on target. Jeremy: Champion of Change. I love that word. Linda, making sure everyone has the resources they need to navigate the change, Jennifer, understanding and managing the emotions related to change. And Bruce getting all stakeholders on the same page. Chantal helped create early buy-in to identify early adopters.

The answer is all of those things. So I'm so glad to hear you already have that alignment. That's great. I do think it's important that we call out some specific duties. Here are some specific actions. One of the first things that you can do is to advocate for the need to manage change, making the business case. So connecting the impact if we go back to that slide with the dip in impact, the better we manage this change, the faster we get to performance to realize the investment that we made in those changes. Ultimately it's going to really decrease that resistance to change which perpetuates the issues with adoption that we're going to have. You're also going to create a change management plan. That was very clear in the different chat contributions as well. And that's specifically articulating how we are going to support the changes. And then a little bit I'm going to talk about what that change management should be defining and including, you're also going to be the one that's going to educate leaders on the sources of support for change management and why they're needed. So the big difference, I would say, with change management and training is that we have to uplevel our advocacy, the way that we engage with leaders and the way that we define why people need support. It's not just that they need behavior reinforcement, but that they need emotional support for the safety of knowing that just because their role is changing, doesn't mean it's because maybe they did a bad thing. Or that it's just to perpetuate the company's success but that there is a connection to making their lives day to day easier, giving them the opportunity to work on more meaningful things. It's also as the company's more successful, then each of us as individuals have more opportunities to grow, more opportunities to get better benefits and better pay. So finding those kinds of connection points and understanding who people will receive the best support from. You're also gonna be the one that gathers the resources to complete that plan. If you've ever been in roles, like I've been in, you're making the plan, you're the resource or the advocate, you're doing all the things right. But if we have the ability to gather other resources, whether that's other folks on our team, whether that's subject matter experts, those should always be on your change management team. Maybe you're able to bring in interns or hire some contractors or whatever that might be. Also part of resources would be creating and educating change champions on how to be kind of a peer advocate for people who are making changes. And then of course, like we said in the chat, you're going to be managing that change, managing the plan,



the quality and sharing alignment and then continuing to make sure that all the activities are executed including that leadership reinforcement, including the champion coaching and alignment. I should clarify that. Feel free to ask questions in the chat. To clarify something I might have said you're also welcome to drop in any scenarios or things like that, that we can dig into in more detail in the q&a portion. My goal is to be done. If you start to just Google 'change management', you're going to discover that there is hope. I'm just going to be really pretty in my animations. I forgot but there's a million 'change management' frameworks. And it can get really overwhelming.

Katie McLaughlin 24:08

I want to encourage you, and maybe you've even done some of this education too and instructional design, There are a ton of instructional design frameworks. Everyone thinks that these different things are right, or the way to manage change. I'm really model agnostic, because the more that I dive into any of these models, even just reading them at their basics, you're not doing extensive research. You can see that there's value and little nuggets that you can take from the different models that might help you either in advocating for change. They might help you as you're crafting your change plan and post change support, etc.

I will make sure that with this slide deck that there is a link out to where I got all these screenshots from. There was a really amazing article that had all 10 of these different frameworks in one article so you can see and then dig into the different ones. The big challenge with some of these frameworks is that many of them focus on this left side. What is the business impact? And thinking about it from the Executive Business Leader mindset, and not enough of them actually focus on the individual change perspective. I believe that is the way, especially as training professionals, can make the biggest difference in that change because it's people who have to change, people who change the organization. So these are two frameworks that I really love. The Kubler Ross model is the one that I've trained on for a number of years. This one on the left, the three levels of resistance was when it was in that article. But 10 things when I was trying to come up with examples of different frameworks and it is a newer one to me and I really love it because it's very basic, and all accurate in terms of what's going on. But the Kubler Ross model I think, takes it a step further. As soon as we hear that there's a change we have that sense of shock and almost immediate resistance. That is our natural response. Psychologically, neurologically, even physically to change. It is a huge resistance to our gut response. And the goal is that through all of our change initiatives, we help people move along this emotional curve faster, because that supports their productivity and their performance and their adoption of the changes. I know I'm running a little short on time right now based on my personal timing, expectations. You'll see I've got little theater masks in the corner. These are different ways that we could start to experiment with those images. How would we start to recognize when somebody is in a sense of shock? They might be right or there might be big shock images they might create. A sense of denial could even be created by an image like this. Nope, not gonna do



it. Not going to do it. And then it's important that leaders start to learn how to identify where people are at in this change cycle, because that's where we get better at coaching. That's where we get better at creating and fast tracking that individual alignment and that individual adaptation of changes. So I came up with my own framework, because this helped me to create a tactical change management plan. Many of these frameworks focus a lot on theory, and like one of the elements is to create a plan, or one of the elements is to train people. And so this slide is going to come up a few more times. So if you're trying to write it all down, don't worry. It's coming back like three or four more times. But I'll go through each item real fast. We need to have integrated and impactful change messaging. So what language are you using to describe that why and create the buy in and I say integrated because it should be present throughout every every session, every communication the way your leaders coach and messaging that change champions use the messaging that executives use when they're announcing a change or advocating for a change, because we all know the power of repetition, And so use that when it comes to things like buying

Katie McLaughlin 28:46

We have to identify comprehensive audiences. I don't think that is a shocker to anybody in this call. We need to have a training plan. And that training plan should include all these things in the middle. We have to consider our training approach and what activities we're going to use. That should all be informed by the audience and their needs, and of course the substance of what is changing, incorporating delivery best practices. When encountering change management we are going to be continually pushed to limit the amount of training. We're all going to be continually pushed to make it the presentation focused on removing role plays. So we need to focus on those delivery best practices. One of the big places that I see learning professionals struggle is when thinking about development. And especially when it comes to change management initiatives, Mary and I were talking before about how like when it's a systems, change management project, things are constantly being built while you are building your training. And so you need to get used to building training in an iterative way. Start with that, , 10,000-30,000 feet view, then go down to the next piece, then go down to the next piece because it won't be until you get really close that you can have people playing in a system and we can't wait until the system is ready to do all these activities. communication plan and strategies: who's communicating when the communication is happening? What's included? We talked briefly about that system of support. Who are all those advocates needed? And then I think oftentimes, most importantly, is that like, Go Live user readiness. Do they know when they're going live, what going live means and then that enablement afterwards? How are you providing that continued retention, related training, adoption coaching, etc. So, take a deep breath, because I know that was a lot. I know I need to take a deep breath so now let's get down to the skills how do we do this? And I hope that as you've been kind of seeing this, where our goal is that we're kind of triangulating on what this really means and what it looks like and and how we take our skills and apply them. So I'm going to bring back up that little model for a



second. I'm interested to hear in the chat if there are any specific skills that you can already identify that would be needed to craft and kind of deliver any of these elements of the kind of tactical framework.

Katie McLaughlin 31:44

There are no wrong answers here. Bonus points if you want to try to use learning objective language as a challenge for yourself. It doesn't have to be exhaustive; you could even just drop in one or two skill ideas.

Katie McLaughlin 32:08

I'm curious if you have answered that question at the top? So what skills are needed to craft and deliver any of these components of this change management? Framework? Thanks for asking Jeremy. Some great questions here. Communication, humility, emotional intelligence. Accountability. How to hold people accountable. What actions does it take? facilitation skills? Keep in mind that facilitation is more than just conveying information. It's always good for us to remind ourselves of that. We need to define a defined document and track the message over time. Absolutely. Yep. I highly recommend that people have a document that defines the messaging. And sometimes you have to have a messaging document for each of those audiences, because they're going to need different things. And just because we know doesn't mean we all know and can articulate the same message well, like so many, so many agreements and stars for that. One. You're absolutely right. Listening. Maybe as part of those audiences, we have to go out and interview folks. Maybe that's where we use some of those change champions to introduce the changes, test some messaging and listen to what their reactions are. Ideally, we're engaged really early in the process of creating change, because then we can even encourage folks, let's do focus groups. We get some early feedback from the users on is this actually meeting some of their needs? Time management, system of support. I would even expand that to the point that we need to know how to craft and how to identify advocates, how to advocate or connect with people in a system of support and get them on board. Those are all embedded in that. employee feedback, results of pulse surveys. We are going to be talking about my favorite survey a little later. You're absolutely right, Jeremy that the support system is almost always the biggest fall down when change occurs. Especially because the people who are involved in making the changes and are often so entrenched in their lives, this is old news. They also might come from depending on the tenor, or culture at your organization. They might also come from the perspective of you having to change. And that doesn't really create anybody's willingness or motivation to create changes other than from a place of fear. And when we act out of fear, we're not being genuine, we're not engaged. We don't feel appreciated. I think, as we all know, and have followed a lot of the trends over the years that that's what people are demanding now. Empathy, absolutely. And take empathy another step further. It's not just about you feeling something, but it's about you taking that feeling. And using that to inform your strategies using that to inform the choices that you make,



in how you communicate who you work with, the sensitivity that you use, but then also empathy goes in that other direction we talked about earlier of recognizing where somebody is at on this emotional curve, and identifying what they might need, consensus building, yes. And not all departments buy into the change, Often we're making a change for, say, the sales department and we're not it's having all this trickle down effect for the customer support or the product departments or educators or whatever that might be I know a number of you are in government, so feel free to translate the corporate speak to, to your your world. Awesome. I'm curious about maybe a show of hands or a little emoji or something. How many of you feel like you have some of these skills? You're already using them. You can feel free? You can already put your hand up. I can see you Yeah, and use your thumbs, etc. So yeah, a little bit totally. Yeah. Awesome. So good. I hope you are already starting to feel a little bit more positive thinking about things like, okay, are we feeling a little better since the beginning of this session?

Katie McLaughlin 36:58

You've probably been doing this without even realizing it and without naming it as such. That was my big aha moment. When I first stepped into a change management role, I was like, "Oh, I know this. I just have to follow all the best practices." It's also about shifting some of that language because we have to change the manner in which we advocate and in the spirit of being blunt and direct and transparent here. Leaders think that change management is better than training. It is more in their sphere of knowledge that change management may not be optional, but training is. I think we may have all experienced that in some role with this, feeling that training is optional, and none of us agree with that Or we wouldn't be in the professions we're in. But leaning more on this notion of change management can help support you in meeting your role goals, and in being that advocate for people feeling prepared to do their work. As I've described before, you don't need an entirely new skill set, or to learn all these complicated frameworks to do change management. So I just like to put that out there. And I'm gonna give you an example of this as an example of an instructional design framework. And I know for transparency sake, I was not formally educated in instructional design. I built my career through ATT events and ATD training and a variety of other sources and being scrappy and doing a ton of online research from reputable sources. So I am not an expert in instructional design frameworks, but I know that, , I've had success and all these things, even if I couldn't tell you before this, before I was creating this presentation that it was Robert Gagne who had this particular framework. So now, if you're even remotely familiar with this framework, you would have just kind of observed it on screen. Let's change that. To the nine events of change. So gaining the students' attention, that's all about buying in motivation, interest, willingness to show up instead of just informing them of the object of objectives, because sometimes we can learn to speak around objectives, and it may not be our business objectives, and it may not connect to them. So what's the reason for them? What's the goal for them after they engage in these changes? This stimulus recall is all about context. I think that any of you who have created any kind of training, you all know that context is king. If they don't have the right context, they're



going to feel lost through all of this. Then we've got some typical things like learning modalities, looking at coaching practical applications, all of those things are absolutely embedded in change management. I would even leave steps eight and nine, just as they are because of step eight: assessing performance that's looking at adoption, like data that would inform whether people are adopting, that's having conversations with leaders and hearing where the resistance points are, and then also enhancing that retention. So do you need to create new job aids? Do you need to have those refresher training sessions? Do leaders need to have one on one coaching sessions? Those are probably all things you might already be doing, but they're super essential when it comes to change management. I already feel like we've talked about the LMDS role, but I just want to articulate that many of you might be in a scenario where somebody else is the Change Manager, leading change. You may have somebody in your organization who is the director of change management. You might bring in a change management consultant, but you are still going to be tapped as an individual to participate.

Katie McLaughlin 41:29

Of course, there's the typical things that we're all familiar with—designing, developing, delivering training, assessments, doing performance coaching, providing on the job tools, those are some of the standard training things that we're expecting we're going to be engaged in. I encourage you then to expand your thinking of the L&D role and change and for you to really focus on being that change and advocating for all these pieces that we've talked about. Applying those principles of instructional design, incorporating change related messaging, and all of your programming, even if the change lead is not creating that change messaging. You do your own work, and make your trainings really effective by creating that buy-in, rally those leaders, rally those managers you already have established relationships with. Use those relationships, and then advocate for people who need to change, AKA your training participants. There's an awesome question in the chat, which I am going to hold until the Q&A section, because I think that's worth a really good conversation. I also want to kind of bring back the needs analysis skills that we all have and have developed. And I put NEAP Analysis Plus because this is where you can start to incorporate some things that are not just traditional learning needs analysis, and most of those are at the bottom of this list. How does the group respond, what support is needed? Can we provide those who can provide that best support? Again, this will be shared afterwards and then help your support timeline creation. Going back to that example I gave of how a lot of leaders are the people making the change are going to try to fast track your timeline. Ideally, people need at least four to six weeks to absorb some kind of change frequently depending on how major the changes. I advocate that leaving super early messaging is not exactly what is happening. You're going to click here. That's not what they need at that point. They need to know when and what is changing. We're in trouble implementing a new system. And then why. Because the goal is that we're not trying to just get it done in a hurry. Be that advocate when things are moving too fast. Where do we need to speed up? Maybe we're lingering too far on something and then adding the kind of different messaging and everything to



these are some other ways to think about, the theories essentially behind change management. With that change messaging, we're talking about their attitudes, what motivates them to change. We might be used to living mostly in this readiness and enablement section here on the left. But expanding and stepping into these other spaces will help our readiness efforts and will help our enablement efforts and can continue to help you be seen as somebody who can support change management efforts.

This is where I'm going to bring in some new tools that you may not have thought about. Incorporating into the way that you say craft, change messaging or the way that you craft a training or change management plan. We mentioned earlier about listening or interviews or focus groups or doing your own pulse surveys, etc. But those are all new actions that you have to dedicate time to create, craft, run, etc. I'm going to talk about what I think is the most underutilized piece of data that we already have. Before we do that, I'm just really curious. Is there any sharing in the chat? Is there a big change that your organization is facing? Or if you're in a newer role, I know a few of you are, feel free to share a recent change that your organization went through. I'm just looking for a little context on how this might all get applied.

Katie McLaughlin 46:32

Systems order entry systems. Acquisition. Lots of kids. Moving to a new location. These are not necessarily like job chains like day to day I'm using a new I'm doing the job. It can just be those emotional, physical changes. new learning management system. Two separate systems that are company wide usage. Awesome. That's a lot. New President, different business expectations. That's a kind of cultural change where maybe they don't need system training or a walkthrough. But that's really going to be more on that coaching side, and support improving systems, shifting from in person to virtual to hybrid. Absolutely a lot of like expectation setting I think also in a lot of these areas. I love engagement surveys. I will share that it was not until I had moved into a director of training and development role that I finally saw the inside of an engagement survey. I think that that is like the biggest disservice that learning professionals are given in your organization. I think that the engagement survey is the single best point of data that we already have that we are hiding from ourselves from the rest of the organization. I'll get into why.

Have any of you actually seen the behind the scenes data from an engagement survey? Feel free to use the little raised hand or I think there's little thumbs down or maybe even a sad face. I don't know what's available anymore. They're always changing it. Just a refresher on what an engagement survey is, depending on different organizations, not everyone does an engagement survey or has everyone has very different questions. It's not super standardized. But essentially, there's a statement, and then you were asked to rate that statement, usually on a scale of strongly disagree to strongly agree. You'll see I have some examples here on screen. That's essentially what an engagement survey is. You get that data in aggregate forms. It's not always anonymous, it is not attributable to an individual. If you are working with a good engagement



survey provider, they don't even let you see groupings of data or they don't want you to splice the data in certain ways if the team is too small, because the goal is not to root out who gave these scores, It's to learn what else our team needs and what is the perception because perception is everything. For example, my manager follows through on commitments. That's the first example. And if 50% of our employees, our team, our department, either agree or strongly disagree or strongly agree, agree and strongly agree with that, half of the company thinks their manager follows through on the commitments and most companies tend to focus on that positive side. But the inverse is that half our company thinks their manager doesn't follow through on commitments. That is something we can all impact and change. I see that as a nugget towards "Okay, I need to work on some leadership training". What does follow through on commitments mean? What are ways that you can articulate and show as a leader that you are following through or say, you didn't follow through on this and just want to acknowledge that? These little bits of Intel can be so useful in your day-to-day job to help you see where some of those gaps are, and start to articulate some strategies.

Katie McLaughlin 51:13

The way that these questions can help you change is that they can reveal beliefs that people have that you want them to keep. You can reinforce those desired behaviors, those desired attitudes about change. Some examples that might be high scoring could be phrasing like this: "My manager keeps me informed. My manager genuinely cares about my well being, training and change can affect people's well being." It's important that a leader in that support role also says I care about you and I want to know how I can help support you. I'm excited for the value of change that can become a change message. I know that as a team, you are excited about change. I believe that change is going to be required. I know that you all agree that we're going to have to go through some change but that doesn't make it easy. Those are some examples of how you take some of this language and turn that into some change messaging. Low scoring items help you to identify a belief that they don't have and point to areas where you need to make some improvements or you could incorporate as part of the change messaging so that way you get more of that buy-in. Some examples: People would believe that other departments don't collaborate well with us to get the job done. The way that could turn into a change message is this system or this initiative or this new office? This is all about increasing the ways that we can collaborate building more collaborative spaces. Here's evidence of how we have already collaborated, as we've thought about articulating, creating this change. And again, slides will be coming to you so you can see examples of this. I've got those free guides that you can get from the QR code that are going to break these down and give you more of those change management messaging examples.

Next, I want you to encourage me to use the intel you already have about the people who are making the changes. Regardless of how long you've been in our organization, you are going to start to get to know who these people are. You're going to know what they care about and what



matters to them. And we all know that it can be overwhelming to take on things and it's easy for us to underplay our own skills and our own impact. I think this is going to be a really good teaser into that question that Andrew asked and a good discussion here. But keep in mind that a lot of things about who these people are, what they already know. And that will support you as you create thoughtful plans as you help to advocate for what they need in order to support change.

Cool, so we've now kind of reached the end of the content. We've talked about change management. We've talked about the role of a change manager and the skills that are needed to manage change. L&D is rolling change and the existing data and intel that you can start to leverage. I want you to take a moment to reflect a little bit of where you feel you stand now that you have gone through this session and hopefully learned a ton but also hopefully made a bunch of connections between things that you already know. That way, hopefully you feel more confident and more ready and feel like you have more skills than maybe you had identified before. So that said I'm going to put up another poll in a moment. You should see that now, or momentarily, and I want you to answer these questions now. After this session. How would you rate yourself?

Katie McLaughlin 55:59

For those of you who have already answered while you're waiting, I want to take a moment and be right down even on a piece of paper in front of you. And then also share in chat what is one action that you can commit to in the next week to improve your answers to these questions to improve your confidence, your readiness or your skills. Physically writing things down is shown to actually boost retention, if you did not already know that, so I encourage you to write it down in a place that is not just the chat, maybe even physically in a notebook on a sticky note and I'm gonna go ahead and share those poll results as well.

Katie McLaughlin 56:56

I'm excited to see that many of you are feeling more confident and feel more ready. And that was really my goal. I really feel the empowerment as training professionals and as learning professionals and people in the workplace. We need more of that. And so that's really one of my primary things that I try to do whenever I'm doing a session like this. Think about that one action that you could take to improve your confidence, readiness or skills. And Andrea and Jeremy, I'd be interested in hearing more either in chat or feel free to come off chat and share with your voice. What that means to you how will looking deeper into different change management models will support you as you build confidence, build your skills and reflect on how I can be a better advocate for change participants.

Katie McLaughlin 58:06

I would encourage you as part of that reflection to write things down, define some actions or some language that you could try to articulate. Chantal, are you better at leveraging existing



relationships? Yes. So send out Chantel. I would encourage you to even further define what it does better mean? Are you going to reach out to some existing relationships? Just to kind of keep them warm? Are you going to create a list for yourself of who you want to leverage? What does it mean for you to leverage those existing relationships?

Katie McLaughlin 59:03

So Jeremy, I would like to thank you for expanding. I would like to have a framework that will help my team and navigate our employees through all of the changes and find the weak spots. I love that. And I would encourage you to not be afraid to do what I did.

Fine, Andrea, also, thank you for expanding on. I've been somewhat familiar with the Kubler Ross model, and I think understanding it on a deeper level will help me approach employees with empathy rather than judgment during the change management process. Yes, I love that it sounds great. Cool. Something that I created for myself that I will have to dig back out, was looking at those transition points in the Kubler Ross model, all those different emotions and pull in.

Katie McLaughlin 1:00:12

So going back to this slide, what was happening, those junctures and what I would see how I would know, someone was at one of these different junctures. If you just search for the Kubler Ross model, you will find other forms where people have added in the type of support that someone is needing at each stage. There's some examples out there that I think might help you along that. Leverage your resources. You don't have to recreate the wheel. But that said, the wheel might not be what you need.

Thank you all for sharing. Is there anybody else who would like to share something that you would like to do?

Katie McLaughlin 1:01:16

Thank you, for all of you have shared great stuff. If you couldn't figure out by how I was responding, that I'm always a coach, and always got to encourage us to take something a little bit deeper. When I learned how to write effective learning objectives, I found that that really helped me to focus on what actions I could take and what actions I was expecting somebody else to observe. So feel free to apply that about crafting good learning objectives towards your goal setting on your commitments. I also like to encourage all learning professionals to get more engaged in the budgeting process. If you run on a standard fiscal year budget, 2023 is coming. It is usually heavily crafted during October and November, if you are not aware of that. Find out who is responsible for your budget for your department. Because you can be an advocate here, do you have the resources to support this level? Of holistic change? Does your team or the company as a whole need better manager training? The answer to that is probably yes. Do you



have enough resources? Funding to do not only events for change management, but to ensure that things can contribute towards systemic change?

Andrea, I love that you and your supervisor have been working on the budget all week. It's not fun, but this is a great time to practice those advocacy skills. Keep in mind that you don't have to be only requesting a headcount. You can request to bring in an expert to help you on a short-term basis to help boost the organization and craft that changes management plans coach you coach leaders. That's often sometimes more affordable or accessible than hiring a new headcount. Keep that in mind that there's nothing wrong with asking for more of those experts who and I would advocate that you bring on an expert that is going to be your partner, rather than someone who's going to step on your toes. I think we've all experienced that. If you've worked with an outside consultant, sometimes you get in that latter bucket and make sure that it's somebody who will support you and where you'll all be aligned. Here are some snapshots of some of the free resources that I have out there as we're going along in our kind of Q&A process. I do also have a slide that brings up this change messaging.

Example: A little bit on full screen so if that's something we want to dig into in our Q&A, we certainly can, but you can access that via this QR code. I'll send that off to you via email and include a couple of different videos, digging into the psychology and perspectives that are involved in change beyond just some of that tactical work.

I want to say thank you for having me. Again, my name is Katie McLaughlin, and my business is McLaughlin Method and I'm focused on helping thriving teams to get results. I would like to open it up to a Q & A. And I'm going to go ahead and stop sharing. We can all kind of see each other. I'd encourage you to. You're welcome to put questions in the chat, but we know we have time and a small enough group here that if folks want to share aloud and come off mute. Or use the raise hand feature, would be happy to do so. I'm going to scroll back up to Andrew's question if I can find it.

Katie McLaughlin 1:05:28

I'm just gonna put that back in the chat just so you can all see it. This was Andrew's question and at least one other person I think agreed. What I found is that the buy-in to my skills as a change manager from leaders is difficult to gain because I don't have formal training or certification even though I have done all these things for years as an L&D professional, and can show how it translates and aligns. How do you overcome that? Well, I actually would be interested to hear. I want to also give opportunities for you all to connect with each other because you are your ongoing support system. I want to hear from others. Have you encountered this maybe not even in the change management pathway and what are some things that you have found that have supported you? And thank you for this great question, Andrew. Feel free to come off mute, offer suggestions, and compassion. What have you.



Katie McLaughlin 1:06:41

Don't be shy. Thank you, you're welcome.

Katie McLaughlin 1:07:19

Any thoughts from the room but feel free to chime in? I agree with you that it's probably all of those things. In order to start changing perception, we also have to start changing our actions. I found that some of the most helpful things for people to even just kind of understand what is training is that it's more than just I get in a room with a PowerPoint or I convey content. I found that the more I got connected in the business, the more people trusted that I knew what they were talking about, I think most of us were surprised when I first went to my first national at the conference that I went to, and I met a lot of folks who didn't feel like they needed to know the business. That was really surprising to me because I think that is your best tool for not only building better training, but also for being incredible in your organization. Many of the big walls that can come between us and the other members of the business are them feeling like we're out of touch, that we don't know what their needs are or who they are. or what have you. Whenever there's a company announcement, whenever there is a company all hands, pay close attention, start to practice these things, identifying where there's going to be change, challenges, where there's a learning opportunity, and starting to advocate for some of those incremental ongoing changes can be a huge uplift for your profiles, essentially. This is a big perception game that you're alluding to Andrew, and I would say that it does require champions. I remember at one of the organizations that I was at, that I was in a meeting and I was trying to advocate for not only change but because I have a systems and strategic mindset, I was also calling out flaws in their perspective and their approach to a solution. I definitely had someone call me out as, "Oh, you're just training." There are some people who it's going to take more of that time to change their perception. And we have to do the hard work to engage with them, connect with them, provide them value, Be that source, be that resource for them. There's no quick fix, unfortunately for changing that perception, but it is about taking that consistent action carving out time to attend team meetings, getting a virtual coffee or a physical coffee with different folks.

Jennifer shared, "I transitioned from an industry role to training and it has helped me greatly in L&D." Connecting with those still in the roles because the business has gained a lot of trust even if you haven't done that same transition, I would encourage you even in the trainings, where you're doing onboarding, or kind of an introductory training, make connections with each of those individuals, those entry level folks and new folks to the business. They could be very quick advocates for you on their team and you could continue to build those relationships. Sometimes it's easier to build a new relationship that is to shift an existing one. So start with something that's incremental and easy where you can and then continue to build up to those hard things.

Learn more about McLaughlin Method here - <https://linktr.ee/mclaughlinmethod>



I'm sorry, Andrew, that there is no magic fairy dust about changing that perception. Something that you could also consider, I'm just spitballing what I know which is ideation. I'll often just still be thinking about a problem as things go on. But as you're sitting in a team meeting, as you are having some of these one on ones with managers, you could ask, "Hey, I thought it was so good that you were conveying X message or reinforcing this message at your team meeting."

Katie McLaughlin 1:12:39

I'd love to offer an idea that I had based off of, what you shared or how your team seemed to react. It's always good to ask before giving feedback. And then if they say yes, you could say, "Hey, I think it would be even stronger if you reminded them how this connects to the thing we shared last month, or how this connects to their day to day.", starting to be that tiny advocate and using little bits of change messaging. Your day-to-day can help people to see the value that you provide.

Linda, I saw that you came up. Do you have a question or a conversation topic for us?

Katie McLaughlin 1:16:43

I think that's a great perspective. Linda. John, there's so many wonderful models out there that can help us to articulate those points. John Kotter is great, too. Most of these folks who have created a model do have certification programs. Of course when they want to charge you some money, ATD also has a change management certificate as well which I have seen is more affordable than, say, perhaps the pro sign change management certification which followed the ADD model which I had on screen before. That said, I also don't think it would hurt for any of you to create some kind of presentation or have a formal conversation with your leaders to show your change management knowledge. Pull some industry data of the impact of change and how it affects productivity, how it affects retention of employees, Those numbers speak that language,

That was something Linda added to, speaking their language to advocate what they as leaders care about. And Linda, I completely agree with what you're saying about inclusionary language. Incorporating and understanding where your biases and challenges are in the way that you speak and unpacking that and addressing that I really do think that change management is a great forum for skewing our messaging inclusively. So, thank you for calling that out.

It's all interconnected. That is another way that you could even help to advocate for your engagement here with change management is to say, I know we have these DEI goals. And here's how, when we better engage in change management practices, we can boost not only our engagement scores. Right now you have that nugget of data, you can help boost those. Then you can also help boost your DEI goals as well. I popped the link in the chat in case you



didn't grab the QR code for the free resources. Please connect with me on LinkedIn. I'm happy to continue this conversation. And again, thank you so much for having me here today.