OODA-Loop for Change Management

Orienting Yourself to Change

Instructions: Observe an upcoming change (or a current conflict) your team is experiencing. Write down your reflections on what you observe, how you are orienting to the change, the decisions that need to be made to positively impact your team, and how you plan to act.

Observe

- What is the purpose of the change?
- What does the change solve for?
- What are the mutual benefits of the change?

Orient

- How is your team positioned to respond to the change (Enthusiasm vs. Skepticism)?
- What are the risks and resource gaps with this change?
- What other data do you need to make the necessary decisions?

Decide

- How will you communicate the change to your team?
- How will you leverage the energy of your change Enthusiasts?
- How can you invite feedback and questions, for your Skeptics?

Act

- What are your direct next steps?
- Who is responsible for what, during this change cycle?
- How will you know you've been successful?

EXAMPLE: Orienting Yourself to Change

The change: This organization is rolling out a new CRM.

Observe

- What is the purpose of the change?

The new CRM has been chosen based on its ability to connect sales and marketing efforts into one system.

- What does the change solve for?

Solves for data inconsistencies.

- What are the mutual benefits of the change?

Centralized location of data, tasks, emailing, campaigns. Increased efficiency for operations, improved data tracking, automate repetitive tasks.

Orient

- How is your team positioned to respond to the change (Enthusiasm vs. Skepticism)?

Team is naturally adept at change but will be skeptical about a new software. Matt is a natural enthusiast and motivated to use new resources. Jerry may be a slow adopter.

- What are the risks and resource gaps with this change?

Risk of productivity drop during rollout. Resource needed: team onboarding lessons, manual/FAQ doc, top-down communication from CEO reinforcing optimism.

- What other data do you need to make the necessary decisions?

Determine timeline for rollout and expectations for system adoption.

Decide

- How will you communicate the change to your team?

Announcement at monthly all-hands, email follow up, 3 "onboarding" CRM 101 (Zoom) calls.

- How will you leverage the energy of your change Enthusiasts?

Give Matt early access and ask him to share positive feedback during 101 call.

- How can you invite feedback and questions, for your Skeptics?

Prepare FAQ, Schedule CRM Office Hours, direct follow up email to Jerry after launch.

Act

- What are your direct next steps?

Email Candice to determine timeline and confirm Matt can get early access. Prepare "benefits list/what's in it for me" for kick-off meeting.

- Who is responsible for what, during the change cycle?

Leadership team will send communications; Marketing team will write FAQ & lead onboarding; Operations team will facilitate data transfer pre-launch.

- How will you know you've been successful?

Success is 100% participation in onboarding calls. The launch is successful if the Sales and Marketing teams are relying on the CRM and inputting their own data within 3-months of launch. Progress check- review new data entries 1-month post-launch and conduct internal feedback interviews.