

LEADING CHANGE THAT STICKS Action Planner

Employee Name:

Emotional

How do you believe this person feels about the change? *Consider their attitude, concerns, or energy level (positive or negative).*

What resistance (if any) might this person have and why? *How will the change impact their role, comfort zone, or workload?*

Estimate this person's emotional stage regarding this change.

Change Process

How aware is this person of the change and why it's important?
Have they received clear communication? Do they understand the "why"?

Do they have the knowledge and skills to implement the change?
Are you seeing evidence of competency and confidence in their new behaviors or habits?

Estimate where they are in the 5-step Change Process. *Informed, Motivated, Knowledgeable, Competent, Sustaining*

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Predictive Index®

What is their natural response to change from a PI lens? *Look at their two strongest factors.*

LOWEST	FACTOR	HIGHEST
Supportive. Helpful. May be overly concerned with disrupting team. May not voice disagreement/concerns.	A Dominance	Change is an opportunity to win, drive, take ownership. Undaunted by risk. Challenges - Could push back.
Factual about change. Analytical. Thoughtful. Asks good questions. May not be voice own ideas or opinions.	B Extraversion	Expressive about own opinions. Can be persuasive advocates. If not on board, can lobby against change.
Change is exciting, motivating. Acts quickly. May struggle to slow down and listen before acting.	C Patience	Skeptical about change. Needs time to process, understand why. Less productive under pressure.
Flexible, adaptable, big picture focus. Can take action without much clarity. May not pay enough attention to guardrails/details.	D Formality	Skeptical, wants to know details. Asks exacting questions. Excellent at building and implementing structure.

What do they need from you? *Look at their two strongest factors.*

LOWEST	FACTOR	HIGHEST
Clearly define how the change helps others. Reassure of your confidence in them. Encourage to share thoughts	A Dominance	Define outcomes , rewards for successfully implementing change and consequences for failing. Challenge them to "win".
Give facts, don't sugarcoat. Private time to think, absorb information. Space to ask questions.	B Extraversion	Opportunities to share their feelings, ideas out loud. Reminder they can increase their credibility by handling this change well.
Clear, concise direction on the action and timeline. Verbal summary to ensure understanding.	C Patience	Depth and clarity on why things are changing before the change occurs. Time to get ready for the change.
Clear outcomes and guardrails. Space to figure out "how" on their own (where appropriate).	D Formality	Depth of clarity , expectations, thorough training. Multiple progress checks to avoid mistakes. Written communication/processes

Based on the above PI Insights, what do they need from you, as their leader? *Will they need competition, reassurance, action, time to think, freedom, clarity of expectations?*

What is the frequency and depth of interactions this person needs? *High frequency, high depth, low frequency, low depth.*

Questions I can ask:

My next step:

Action