



PARTICIPANT WORKBOOK

PURPOSE-DRIVEN LEADERSHIP:

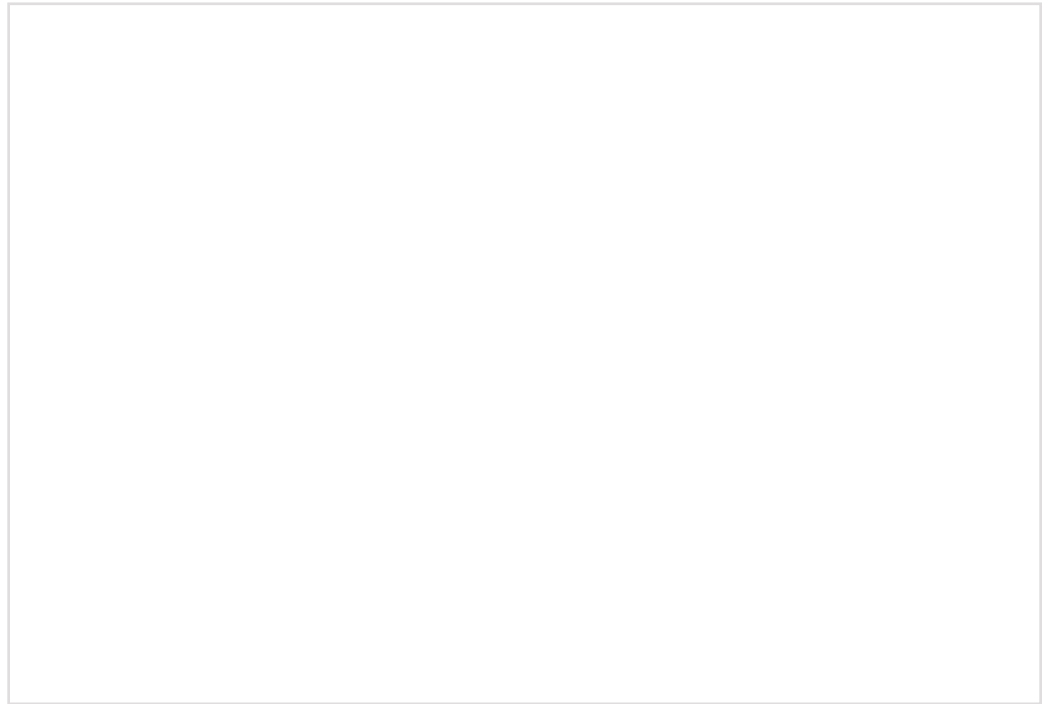
From Objectives to Outcomes in a Changing Environment



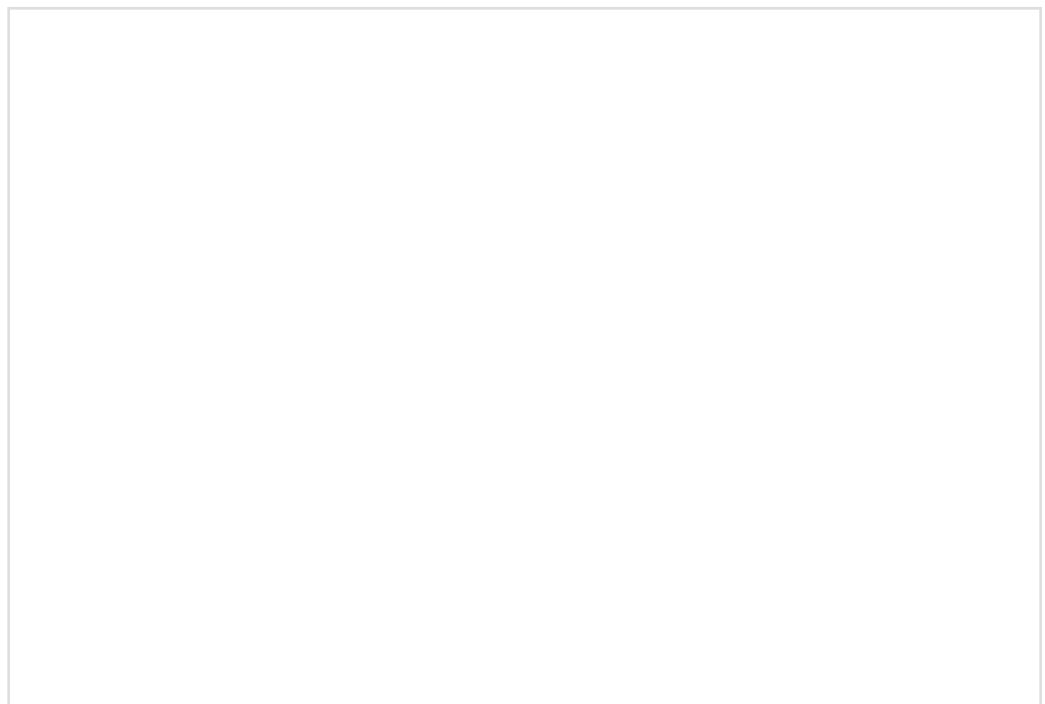
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STAR® MANAGER PROGRESS UPDATE



LEADERSHIP COMMITMENT



Performance Snapshot & OBR System

Why This Matters

Most leaders dread performance reviews.
Most team members dread them even more.
The Performance Snapshot is built on a different premise.

When it Goes Wrong

Marcus has been on the team for 11 months.

His manager David is busy. The annual review is due Friday. David glances at the rating scale, recalls a few recent moments, and assigns scores. He writes two generic development areas from a form dropdown.

On Thursday, David reads through the scores. Marcus nods. The meeting ends in 12 minutes.

Six months later, Marcus leaves — citing “no growth opportunity.”

Fill in the blanks for the reasons it went wrong.

- David completed a rating form — not a development conversation
- Preparation took 10 minutes; Marcus’ trust took years to erode
- No behavioral observations, just recalled impressions

- Marcus’s teammates had no input into the conversation
- Marcus himself had no voice — he just nodded and signed
- One-way verdict disguised as a conversation

- Development areas picked from a dropdown, not observed behavior
- “Communication” and “Initiative” — could apply to anyone
- No connection to role outcomes or team goals

- No specific actions, no completion dates
- No manager support commitment or follow-up plan
- Nothing changed — because nothing was asked to change

When it's Done Right

Tuesday, 2pm. Elena's Performance Snapshot

- Teammates share specific behavioral observations. Elena listens, then speaks last on strengths.
- For development, she goes first: "I avoid conflict in meetings. I want to change that."
- The culture conversation shifts the room — peers name specific ETHOS behaviors. Elena names her own growth area before anyone else could.

Three months later, she turns down a recruiter without a second thought.

Fill in the blanks for the reasons it worked.

- ETHOS behaviors named and grounded in real examples
- Culture discussed with the same rigor as outcomes
- Elena owned her cultural growth area — Alignment

- Elena spoke first on development areas
- She chose her own commitments with dates
- Growth was self-driven, not manager-assigned

- Actions had exact completion dates
- Manager committed specific support
- Check-in dates set before leaving the room

- Sarah used Copilot as her facilitation partner
- Preparation communicated Elena's growth was worth investing in
- Connected development to STAR® Manager concepts

The Retention Connection

Fill in the blanks.

- Peers name specific strengths — not just the manager
- The individual hears their impact from the people who work alongside them
- Validation from peers is qualitatively different from a manager's assessment

- Self-chosen commitments with specific completion dates
- Growth owned by the individual, not assigned by the manager
- Manager commits specific support and check-in rhythm

- OBRs connect individual behavior to the team's success
- Personal Impact - every person sees how their results move the numbers that matter
- Effort is tied to organizational value — explicit and personal

The Performance Snapshot: Three Core Areas

Fill in the blanks of the three core areas.

- Personal contribution to the team's Critical Metric
- Observed, not judged — it is what it is at that snapshot in time
- One forward-looking question only — no debate; listen and record

- 3–5 pre-agreed outcomes — not job duties, but deliverable results
- Connect individual performance to organizational value creation
- No surprises - if OBRs are clear from day one

- Alignment with ETHOS values
- Observable behaviors — not recited slogans
- Rated 0 | 1 | 2:
Not demonstrating |
Demonstrating |
Actively helping others live it

Four Pillars of an Excellent Snapshot

Fill in the blanks of the four pillars.

- No one develops in an unsafe environment
- Set norms before the first word of feedback
- Intervene immediately if the tone shifts

- Vague praise is forgettable; vague feedback is useless
- Observable actions with real dates show growth matters
- Always ask: "Give me a specific example"

- OBRs reviewed, behavioral observations ready
- Communicates: "I take your growth seriously"
- Use Copilot for pre-session setup

- One of three core evaluation areas
- Tied to ETHOS values with observable behaviors
- A team that never talks about culture slowly drifts from it

Copilot Chat Setup

Tool A — OBR Generator

- Open Copilot and start a new chat
- Paste the Appendix B prompt as your first message
- The AI is now configured — proceed with your request
- Start a new chat each time you use this tool

Tool B — Snapshot Coach

- Open Copilot and start a new chat
- Paste the Appendix C prompt as your first message
- Open a new chat for each person you snapshot
- Use the OBR Handoff Block to connect both tools

How the Snapshot Works

Phase 1: **Setup:** Confirm who, their OBRs, and KPI context

Phase 1.5: **Critical Metric:** Share plan vs. actual data; one forward-looking question only

Phase 2: **OBR Review:** Confirm shared understanding before feedback

Phase 3: **Strengths:** Team speaks first, individual speaks last

Phase 4: **Development:** Individual speaks first, team adds after

Phase 5: **Scoring:** OBRs: Individual first, team next, manager last (1–10)

Phase 6: **Culture / ETHOS:** Observable ETHOS behaviors;
rated 0 (not demonstrating), 1 (demonstrating), 2 (actively helping others live it)

Phase 7: **Summary:** Individual chooses 1–2 owned actions with dates

ACTIVITY



Practice Performance Snapshots

Work in your existing 3–4 person IFS project teams.

Each person takes a turn as facilitator — run a 15-minute Performance Snapshot using Copilot.

Use your OBRs from Session 3 (IFS Phase 1) — enter them directly into Copilot.

3 rounds × 15 minutes = ~45–60 minutes

NOTES:



Performance Snapshots Debrief

Focus on what you learned about facilitating — not on any individual's content.

Discussion Questions:

What surprised you about the self-assessment step?

Where did you struggle as a facilitator?

How did Copilot help keep the conversation on track?

NOTES:

Building Better OBRs

Outcome-focused language transforms how leaders define success.

Learn the OBR framework and practice building OBRs with Copilot.

Activity Language vs. Outcome Language

Activity-Focused (Weak)

- "Conduct monthly safety walks."
- "Hold weekly team meetings."
- "Submit monthly reports on time."

What you DO — not what success looks like

Outcome-Focused (Strong)

- "Achieve zero recordable incidents per quarter."
- "Improve team engagement scores by 15% within 6 months."
- "Reduce reporting errors to <2% per quarter."

Tip: Add "so that" to any activity.
The completion is usually the real OBR.

NOTES:

OBR Role Examples

An **Enabler/Key Activity** is a **category of strategic work** that a role is accountable for. It is the organizing label for a domain of responsibility – the strategic area someone *owns*.

Enabler / Key Activity	OBR (Outcome Based Responsibility)
<i>The domain you own</i>	<i>What success looks like within that domain</i>
Safety & Compliance	"Achieve zero recordable incidents per quarter, reducing direct and indirect safety costs by x%."
Supply Chain Reliability	"Reduce supplier-caused schedule delays to under 2% of program milestones per quarter."
Program Execution	"Deliver 100% of contracted program milestones on schedule with zero critical path deviations per quarter."

ACTIVITY



Create OBRs for IFS Phase 2

Use Copilot's OBR Generator to create OBRs for IFS Phase 2.

The AI guides you through outcome-focused language, KPI selection, and team-level connections.

Compare the manual Phase 1 OBRs with the AI-assisted Phase 2 OBRs – notice the difference.

Finish with a completed OBR Handoff Block – ready for your next Performance Snapshot.

~30 minutes



Debrief and Share OBRs

Share your newly created OBRs with the group.

Highlight strong outcome language — surface activity language disguised as outcomes.

Reinforce: well-written OBRs make Performance Snapshot conversations more effective.

Compare Phase 1 (manual) vs. Phase 2 (AI-assisted) — what improved?

NOTES:

Copilot: Strengths & Limits

What Copilot Does Well

- **Walks through all phases** in sequence — prevents skipping steps
- **Corrects activity-language** and shifts it to outcome-language
- **Surfaces rating gaps** and prompts exploration before judgment
- **Generates consistent written summaries** as development records
- **Scaffolds first-time managers** through the conversation structure

Irreplaceable Human Value

— managing energy, tangents, and group dynamics live

— addressing defensiveness or distress in real time

— all metrics, OBR history, etc. must come from you

— team history, relationship context, and organizational norms

— AI prompts for them but cannot verify them

The Retention Bottom Line

Why People Leave

- They don't feel seen — manager doesn't know how they show up
- They don't feel developed — nothing here helps them grow
- They don't believe their work matters — no connection to value

The Performance Snapshot addresses all three in a single conversation.

OBRs as Change Enablers

- Define what success looks like before the work begins
- Performance Snapshots create the accountability rhythm that sustains change
- Connect individual behavior to organizational value — the foundation of change that sticks

This is not performance administration. It is one of the most powerful retention levers a leader has.

OBRs & Performance Snapshots Drive Change

Change fails when expectations are unclear.

- OBRs define success before the work begins, removing ambiguity from the start.

Sustained change requires accountability rhythm.

- Quarterly Performance Snapshots create a structured checkpoint that prevents drift.

Resistance decreases when people understand why their work matters.

- Connecting individual OBRs to the team's Critical Metric makes change personal

Self-assessment drives ownership.

- When people rate themselves first, they engage with change rather than having it imposed on them.

Peer feedback builds collective buy-in.

- When the team speaks, change is no longer a manager's initiative; it belongs to the group.

Culture alignment reinforces change.

- ETHOS-based culture conversations ensure behavioral change accompanies process change.

Lead the Conversation that Develops Someone.

Leading Change that Sticks

A People-Centered Approach to Organizational Transformation

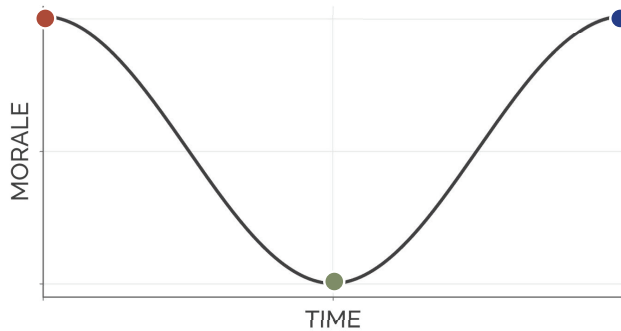
Change is Hard

Ending, Losing, Letting Go:

Optimism. Energy.
Confidence in what's ahead.

New Beginning:

Clarity. Alignment. Renewed
commitment and momentum.



"It isn't the changes that do you in, it's the transitions."

William Bridges
Managing Transitions

"In times of change, emotion will trump rational, logical thinking almost every time."

John McGuire
Center for Creative Leadership

Change is a Reality

- Lots of people have change fatigue.
- Complaining won't fix change.
- Change management is a critical leader skill set, not an event.
- Good news - you can learn this.

Cows run away from the storm while the buffalo charges toward it — and gets through it quicker. Whenever I'm confronted with a tough challenge, I do not prolong the torment. I become the buffalo.

Wilma Mankiller, first female Principal Chief of the Cherokee Nation

ACTIVITY



What is Change Management?

What is **Change Management**?

ACTIVITY



Best and Worst

INSTRUCTIONS

Think about a change you experienced at work that did not go well.

What went wrong?

Now think about a change that did go well.

What made it successful?

The Data: What Research Tells Us

of change management initiatives are **successful**.

The most common reason change efforts **fail** is:

Projects with **strong, visible support from middle managers** are more likely to succeed than those without it.

What percentage of employees said their **manager was a good communicator** during change?

Leader Involvement Matters

When leaders **don't support** change effectively:

- Employee resistance increases
- Morale and engagement decline
- Turnover rises
- Change fatigue grows

When leaders **support** change effectively:

- Faster adoption
- Higher morale and engagement
- Sustained results

You're not just a part of the change,
you're the key element to success.



Reflection

INSTRUCTIONS

Consider one current change your team is experiencing.

Where are you on the change journey, emotionally?

What are the **advantages** of being where you are? What are some **drawbacks**?

*You'll think you're a broken record long before
your team thinks you're being clear.*

People need to hear something **seven times**
before they hear it for the first time.

The Change Process



Are they informed of the need for change?

Do they understand the why, what's changing, and where we're going?

Informed looks and sounds like:

- "I know about the change and why it's happening"
- Can clearly restate elevator pitch in their own words.
- Asks thoughtful questions about timing or impact.

NOT Informed looks and sounds like:

- "I didn't know we were supposed to be doing this."
- "Wait, when did this change?"
- Appears surprised or confused when expectations come up.

Are they motivated to participate in this change?

Do they believe the change matters and are they willing to engage?

Motivated looks and sounds like:

- "This is cool, I'm excited!"
- Engages in conversations without excessive negativity.
- Tries to align personal work with the change.
- "I don't love it, but I understand why it matters and I'm on board."

NOT Motivated looks and sounds like:

- "This will never work", "I'm not doing that."
- "Why can't I keep doing things the same way?"
- Passive resistance, eye-rolling, silence, or overt sarcasm.
- "I don't like it but I'll do it anyway."

Do they have the knowledge to act on the change?

Do they know how to do what's being asked?

Knowledgeable looks & sounds like:

- Attends required training or reviews materials
- "I know what I'm supposed to do, I just need to practice it."
- Can explain new processes, tools, or resources when asked.

NOT knowledgeable looks & sounds like:

- "No one showed me how to do this."
- Asks questions they should know the answer to or have the resource for.
- Misses key steps or instructions repeatedly.

The Change Process



Are they competent enough to implement this change?

Can they execute the change with growing confidence?

Competent looks and sounds like:

- Demonstrates the skill through observable behavior.
- Uses new behaviors or tools consistently.
- Makes fewer mistakes & self-corrects.
- Has gained skills and ability to help others adapt to the change.

NOT competent looks & sounds like:

- Avoids using the new processes.
- "I'm not comfortable with doing this yet".
- Repeatedly asks to revisit training, coaching, shadowing, or other assistance.

Are their ongoing activities reinforcing this change?

Is the change sticking over time?

Sustaining looks and sounds like:

- New behaviors feel routine and expected.
- Helps others learn or troubleshoot.
- Gives feedback on progress of adopting the change.

NOT sustaining looks & sounds like:

- Reverts to old habits under pressure.
- "Do we really still have to do it this way?"
- Needs frequent reminders or reinforcement.

NOTES:



Start with You - Self-Reflection

INSTRUCTIONS

Revisit one change that you want to explore in the workshop and answer the questions. With your partner, share the change and your position.

Describe the change. What's changing and why is it needed? Who will be impacted? Is this a short term or long term change? Has this change started yet or are you in the middle of it?

How did you find out about this change? What was your initial reaction?

What will be the benefits if this change is wildly successful? Consider business factors and people factors

What is at risk if this change effort fails? Consider business factors and people factors.

Continued on next page>>



Start with You - (cont.)

How do you feel about this change?

- ☐ I am informed of the need for change.
- ☐ I understand the "why," what the change is, and where we are going.
- ☐ I am motivated to participate in this change.
- ☐ I believe the change matters and am willing to engage.
- ☐ I have the knowledge to act on the change.
- ☐ I know how to do what is being asked of me (or of my team).
- ☐ I am competent enough to implement this change.
- ☐ I am able to execute the skills or behaviors needed for this change with growing confidence.
- ☐ My ongoing activities reinforce this change.
- ☐ I am adopting and maintaining this change.

Based on your responses, **where are you in the change process?** (Informed, Motivated, Knowledgeable, Competent, Sustaining?)

Is there **anything in your way** regarding the change for you, personally (information, motivation, knowledge, etc)?

Looking back over your responses, **what are the implications for how you are showing up and leading this change?**



Your Response to Change, as a Leader

Identify your furthest right and furthest left PI factor, then check-mark which behaviors resonate with you most.

LOWEST	FACTOR	HIGHEST
☐ Supportive. Helpful. Accommodating. May be overly concerned with disrupting team. May not hold others accountable.	A Dominance	☐ Change is an opportunity to win, drive, take ownership. Holds others accountable. Undaunted by resistance.
☐ Factual about change. Asks good questions. May not be vocal/inclusive enough. May "decide and announce".	B Extraversion	☐ Expressive, clear, articulates change. Can be persuasive advocates. May be sensitive towards others' perceptions.
☐ Change is exciting, motivating. Acts quickly. May struggle to slow down, listen. Underestimates time needed for others.	C Patience	☐ Thoughtful listeners, will build consistency. 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	☐ Excellent at building and implementing structure. Comes up with back-up plans. Needs structure, details, guidelines.

What's one thing you want to **be more mindful of**, as a leader?



What Could You Do?

DISCUSSION:

How do you **identify where someone is in the change process**?

Observe the team climate.

Do individual check-ins.

Ask questions and listen.

What else?

NOTES:

5 Question Types



Investigative

Describe.... Share.... Help me understand...



Interpretive

What if...



Productive

Describe your next step.



Speculative

What happens if you do ____?



Subjective

How do you really feel about ____?



Powerful Questions: Brainstorm

DISCUSSION:

Brainstorm questions you could ask to **uncover your team's perspectives, concerns, and needs**.

Write down questions for each of the five categories.

Be prepared to share.

INVESTIGATIVE



SPECULATIVE



PRODUCTIVE



INTERPRETIVE



SUBJECTIVE





Case Study 1: Liz and John

SCENARIO:

Background: Oshkosh Bank is implementing new compliance procedures for loan processing following recent regulatory updates. All loan officers must now complete additional verification steps and use updated forms.

John, now an experienced commercial loan officer with 5 years at the bank, seems resistant and has been surprisingly vocal about his frustrations in team meetings. He's been inconsistent with following the new procedures and recently missed his second compliance deadline. Liz is frustrated with John's clear resistance and decides to have a conversation to get him on board.

The Conversation:

Liz: "John, I need to talk with you about the new compliance procedures. I noticed that you missed another compliance deadline. What is going on?"

John is feeling defensive. He has been doing this for years, and he has never missed deadline. These new procedures take so much longer than the old way.

John: "Yeah, I'm aware that I missed the deadline."

Liz: "You know these changes are required by regulation, right?"

John: "I get that."

Liz: "Good. And you understand that we don't have a choice here. This comes from the federal level."

John: "Sure."

Liz: "So do you agree that we all need to follow these procedures consistently?"

John: "I suppose."

Liz: "Then it's just a matter of building it into your routine, right? Have you found a way to be more disciplined about adding it to your normal workflow?"

John: [Getting irritated.] "Look, I've been doing loans here for years. I know how to be disciplined."

Liz: "I'm not questioning your experience, John. I'm just saying that change is hard for everyone, but we need to adapt. Can you commit to hitting all the deadlines going forward?"

John: "Fine. I'll get them done."

Liz: "Great. I'm glad we cleared this up. Let's check in again next week to see how it's going."

John leaves the meeting more frustrated than when he entered.



Case Study: Liz and John (cont.)

INSTRUCTIONS:

Notice the type of questions Liz asks and John's responses.

Identify **what stage of the process** John is stuck in.

How would you rate Liz's use of powerful questions?

How would you rate Liz's listening skills during this conversation?

What phase is John stuck in?

What recommendations do you have for Liz for next steps after this conversation?



Correct Your Work

INSTRUCTIONS

Review your question list on page 27.

Revise any questions based on what you learned from this case study.

Pick one of your questions you would suggest to Liz.

INVESTIGATIVE



SPECULATIVE



PRODUCTIVE



INTERPRETIVE



SUBJECTIVE





Case Study 2: Liz and Sarah

SCENARIO:

Background: Oshkosh Bank is implementing new compliance procedures for loan documentation following recent regulatory updates. All loan officers must now complete additional verification steps and use updated forms. Sarah, a senior relationship manager with 12 years at the bank, understands the procedures and has the skills to implement them, but her compliance with the new requirements has been inconsistent.

Liz learned from her encounter with John and decides to approach the conversation with Sarah differently.

The Conversation:

Liz: "Sarah, I wanted to talk about the new compliance procedures we rolled out last month. I'd like to understand how it's going from your perspective."

Sarah: "It's been ... an adjustment. I know they're important, I just feel like I'm still finding my rhythm with them. The procedures make sense, and I understand why we need them. It's just that they add about 30 or 40 minutes to each loan file, and I'm already pretty packed with client meetings."

Liz: "So it sounds like the time impact is affecting your schedule. What else are you noticing as you work with these new requirements?"

Sarah: "Honestly? I keep second-guessing myself. With the old process, I knew exactly what was needed. Now I keep double-checking everything because I'm afraid I'll miss something. Like ... Mrs. Chen has been working with me on her business expansion for months. If I mess up her paperwork ..."

Liz: "I can hear how much your client relationships mean to you. What's your biggest concern about how these changes might affect those relationships?"

Sarah: "That's exactly it. I built my reputation on being thorough and reliable. My clients trust me to handle their financial needs smoothly. I'm scared that while I'm learning this new process, I might let someone down. I want to do this right, both for compliance and for my clients."



Case Study: Liz and Sarah (cont.)

INSTRUCTIONS:

Notice the type of questions Liz asks and Sarah's responses.

Identify **what stage of the process** Sarah is stuck in.

How would you rate Liz's use of powerful questions?

How would you rate Liz's listening skills during this conversation?

What phase is Sarah stuck in?

What recommendations do you have for Liz for next steps after this conversation?



Correct Your Work

INSTRUCTIONS

Review your question list on page 27.

Revise any questions based on what you learned from this case study.

Pick one of your questions you would suggest to Liz.

INVESTIGATIVE



SPECULATIVE



PRODUCTIVE



INTERPRETIVE



SUBJECTIVE





Questions by Stage

IN YOUR GROUPS:

Brainstorm questions for each stage that will help you uncover what your team member needs to be able to move to the next stage.



INFORMED

MOTIVATED

KNOWLEDGEABLE

COMPETENT

SUSTAINING



Leading with Questions

BRAINSTORM:

You're not an answer vending-machine.

Lead with curiosity (learning, not judging).

Listening builds trust.

Discuss:

What if you don't know or have the answer?

What should you do or say?



Your Team's Response to Change

INSTRUCTIONS

Identify an employee's highest and lowest factor.

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.

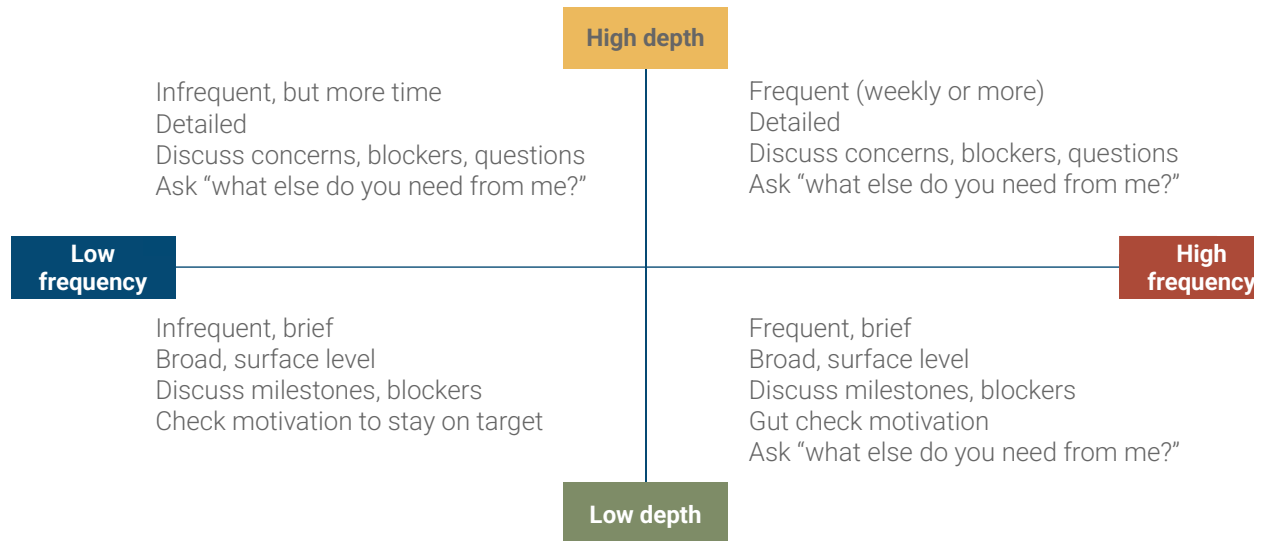
Using the table above, note **one strength and one challenge** that may be affecting their current response to the change you've been exploring in this workshop.

What They Need From You

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

NOTES

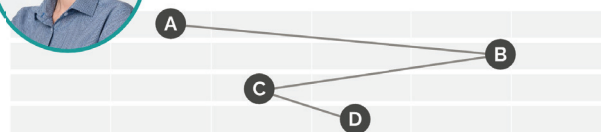
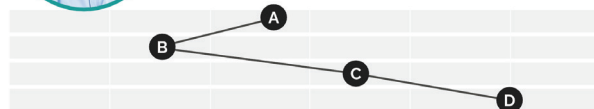
Frequency and Depth of Check-ins



NOTES



Liz, John, and Sarah Part 3



INSTRUCTIONS:

In your groups, discuss:

What is John's response to change, based on his two strongest factors?

What is Sarah's response to change, based on her two strongest factors?

Where might John or Sarah get stuck or bottlenecked, based on their PI?

How might Liz communicate and motivate John or Sarah, based on their strongest motivating needs?

What else might you suggest Liz do?

NOTES:

Am I Helping Them Change?



1. Do they know what is changing and why?
2. Are they willing and engaged with the change?
3. Do they have the knowledge needed to implement the change?
4. Have they practiced and fostered the ability to execute the change?
5. Have they established new habits and skills to ensure the change sticks?

Informed

Define the why

- What is the problem we are solving?
- What happens if we don't change?
- What evidence shows that we need to change?

Paint a clear vision for the future

- What will success look like?
- How will it benefit the team, customers, org?
- Equate the change to something familiar

Accept team input and questions

- What questions do you have?
- What concerns should we address?
- What ideas do you have?
- What support will you need?

Motivated

Communicate down and communicate up

- Inform your team what is happening and changing
- Voice your team's concerns and challenges to leadership

Model and advocate

- Speak positively about the change
- Be transparent and share your own challenges

Anticipate needs

- Get curious about concerns
- Speak to the "WIIFM"
- Recruit your change advocates

NOTES:



Build Your Pitch

INSTRUCTIONS:

Fill in the blanks to create your elevator pitch.

YOUR CHANGE

We are <action> to <result of action> because of <need for action>.

OPENING HOOK

Right now, <new need or requirement>. This means <need for change of behavior>.

**THE CHALLENGE/
OPPORTUNITY**

With, <new process> we'll be able to <need met>.
For our team, this means <ideal outcome>.

**THE SOLUTION/
VISION**

<Timing> we will <first step for new process>. I need <individual actions>.

**CALL TO ACTION/
NEXT STEPS**

EXAMPLE:

Oshkosh Bank is implementing new compliance procedures for loan processing. All loan officers must now complete additional verification steps and use updated forms.

We are implementing new compliance procedures to verify loan requests because of federal regulatory updates.

Right now, we are required to complete these verification steps. This means our team needs to implement the new forms into their daily routine.

With this new process, we'll be able to meet regulations and provide more security. For our team, this means fewer mistakes and better customer satisfaction.

Next week, we'll attend training on the new process/forms. I need you to confirm your availability for the training.



Deliver Your Pitch

INSTRUCTIONS:

With your partner, deliver the pitch you wrote.

Give your partner feedback:

Did the pitch cover the “why”?

Did the pitch cover “what’s in it for me” for the employee?

What did they do well and what could be better?

NOTES:

Am I Helping Them Change?

Knowledgeable

What kind of training is required?

Consider learning pace and style.

NOTES:

Competent

How will I provide practice?

How will I build confidence?

How will I provide resources?

NOTES:

Sustaining

Build systems and monitor them.

Create accountability.

Celebrate success and reward progress.

Address the “drift back” tendencies of old habits.

NOTES:



Knowledgeable & Competent

INSTRUCTIONS:

Revisit the same change you've been working on. Evaluate **what success looks like for the stages Knowledgeable and Competent**. Be as specific as possible.

The change is:

What kind of behavioral change is required?

What new knowledge or understanding is required?

How should performance shift during the change?

What does success look like?

What do my employees need to do to be competent?

What are the metrics for competency?



Conclusion/Wrap-up

INSTRUCTIONS

Answer the questions below and be ready to share with the group:

What **ONE most important action/commitment** will you will take?
WHEN will you take it and how will you know you've been successful?

Choose an **accountability partner**. Write their email address here.
Share your commitment with them and describe what would keep you accountable. Be prepared to share out loud.

Date of follow-up:

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*

LEADING CHANGE THAT STICKS Action Planner

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.*

Action

Questions I can ask:

My next step:

