Workshop:
How and When to Pivot Your Strategy

In this workshop you will:
1. Learn how to respond to unanticipated events that impact your organization
2. Distinguish between events that require a strategy shift vs a change in approach
3. Explore change management tools and approaches to help staff navigate change proactively

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3-4pm EST/12-1pm PST
Start with a clear strategy
Can it be anticipated?
Case Study –
An organization that does **NOT** need to pivot right now
When events CANNOT be anticipated…

- COVID
- Significant policy changes
- Sudden shifts in laws and power: Executive orders
- Natural disasters
- Comms crisis: attack, negative/bad association (being connected to a bad apple/story)

- Merger
- Cyber attack
- You don’t receive a bid you were counting on
- Sporadic acts of violence
- Unanticipated external tragedy
- Emergency response
- Economic recession* (depending on circumstances, this may be anticipated or not)
Case Study – An organization that needs to **pivot** its strategy
How do I know if I need to pivot?

Screening Questions

1. Is this something that hits the core of your organization, and you must respond to it?

2. Are you uniquely positioned to address this?

3. Is this best addressed by your organization or could you collaborate with others instead?

4. Does this require an immediate response?

5. Do you have the capacity to take this on, or can you develop the capacity to do so?
Actions to take if you are pivoting

- Hold an Impromptu Strategy Session.
- Conduct a Rapid Assessment.
- Communicate Often.
- Connect to Core Work.
Approaches for anticipating significant shifts

1. Rapid response

   - Monitor: Designate someone for media monitoring
   - Escalate: Raise potential issues for response to director of comm or similar
   - Action: Address with CEO or executive director to determine if situation warrants a response

   Establish a Rapid Response Communication Committee

   - Define agency’s position on the issue
   - The issue has a DIRECT impact on our organization or the communities we serve
     - Issue an ACTION-ORIENTED Response
       - Acknowledge the agency’s role as it relates to the issue
       - Outline action steps that will be taken
     - Disseminate to:
       - Staff
       - Board
       - Social media channels
       - Website
       - Enewsletter
   - The issue has an INDIRECT impact on our organization or the communities we serve
     - Issue an EMPATHETIC Response
       - Frame and contextualize the communities impacted
     - Disseminate to:
       - Social media channels
       - Website
       - Enewsletter

2. Scenario building

   - Increasing importance
     - 1. Most important AND Less uncertain
     - 2. More important AND More uncertain
     - 3. Less important AND Less uncertain
     - 4. Less important AND More uncertain

   - Increasing uncertainty of happening
Share in the chat:
What are the consequences of BAD change management?
## How can I bring staff and other stakeholders along?

### Building Blocks of Individual Change – ADKAR

<table>
<thead>
<tr>
<th>ADKAR element</th>
<th>Definition</th>
<th>What you hear</th>
<th>Triggers for building</th>
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<tbody>
<tr>
<td><strong>A</strong> Awareness</td>
<td>Of the need for change</td>
<td>“I understand why...”</td>
<td>Why? Why now? What if we don’t?</td>
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<td><strong>D</strong> Desire</td>
<td>To participate and support the change</td>
<td>“I have decided to...”</td>
<td>WIIFM Personal motivators Organizational motivators</td>
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<td><strong>K</strong> Knowledge</td>
<td>On how to change</td>
<td>“I know how to...”</td>
<td>Within context (after A&amp;D) Need to know during Need to know after</td>
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<td><strong>A</strong> Ability</td>
<td>To implement required skills and behaviors</td>
<td>“I am able to...”</td>
<td>Size of the K-A gaps Barriers/capacity Practice/coaching</td>
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<td><strong>R</strong> Reinforcement</td>
<td>To sustain the change</td>
<td>“I will continue to...”</td>
<td>Mechanisms Measurements Sustainment</td>
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Source: ProSci
### 10 Aspects of Change Management

#### Yesterday-Tomorrow Analysis of the 10 Aspects

<table>
<thead>
<tr>
<th>Yesterday (before the change)</th>
<th>Aspect</th>
<th>Tomorrow (after the change)</th>
<th>Degree (0-5)</th>
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<td>Processes</td>
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<td>Job Roles</td>
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<td>Critical Behaviors</td>
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<td>Mindset/Attitudes/Beliefs</td>
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<td>Reporting Structure</td>
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<td>Location</td>
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Source: ProSci
Kotter’s 8-Step Change Model

1. **Create a sense of urgency**
2. **Build a large, powerful coalition**
3. **Develop a vision for change**
4. **Communicate the vision**
5. **Remove obstacles**
6. **Generate short-term wins**
7. **Build on wins**
8. **Embed changes into culture**

Start → Finish
Closing Takeaways

1. It’s more common to change your **approach** than to change your actual strategy.

2. Regularly **forecasting** and preparing for potential changes in the landscape is helpful for weathering surprises.

3. Being intentional about **change management processes** will help make pivots more effective.

4. Don’t underestimate the power of **WHY** for helping people navigate change.