

Before you launch a change: Agree on goals and first steps

Adaptive module

~20 min

Nearly nine out of ten major transformations fall short of their ambitions (Bain & Company), not for lack of skill or resources, but because they were not scoped before launch. This module focuses on that preparatory stage: team scoping around three questions (where are we, where are we going, where do we start), carried out jointly by managers and team members, with all stakeholders' interests in mind.

— LEARNING OBJECTIVES

- 01 Recognize why so many transformations fail for lack of scoping, and protect that time from urgent demands.
- 02 Draw up an honest assessment: what works, what gets stuck, and what is changing around you.
- 03 Define a desired state that satisfies the people you serve, the team, and senior management.
- 04 Map out the first steps: a small step this week, three-month milestones, and indicators to track progress.

— WHO IT'S FOR

Managers who lead a change, and team members who want to take part in scoping it rather than discover it along the way.

- **Prerequisite:** none

— HOW THE MODULE WORKS

Self-paced, with practice tailored to each learner.

- 1 **Self-assessment:** on 9 dimensions, to gauge current habits and guide the practice.
- 2 **Expert video:** 10 minutes, with 3 pauses for reflection.
- 3 **Practice scenarios:** the first 2 chosen from the self-assessment, then 16 optional ones. Every answer gets feedback: what it leads to, and one way to improve.
- 4 **Dated commitment:** one action to try, written by the learner or picked from the suggestions.
- 5 **Memo to download:** key takeaways, questions, commitment, personal notes and checklists.

— ASSESSMENT AND COMPLETION

Pass mark: 80%

The score takes into account your answers to the practice scenarios, your commitment and, where relevant, any additional learning activities. Passing requires a commitment and a score of at least 80%.

METHODS & MODELS

- Scoping the change in 3 steps × 3 sub-questions (current state, desired state, first steps) – Afthonios principle, inspired by Beckhard & Harris's transition model (1977)
- Stakeholder analysis (the people you serve / team / senior management) – inspired by stakeholder theory (R. E. Freeman, 1984)
- First small step, 3-month milestones, and tracked indicators – inspired by "small wins" (K. Weick, 1984) and short-term wins (Kotter, 1996)
- Afthonios method: a 1-hour team assessment, "what works / what isn't working / what's changing around us" – echoing Appreciative Inquiry (Cooperrider & Srivastva)

SOURCES & REFERENCES

- Bain & Company, 2024: about 88% of business transformations fall short of their original ambitions (survey of more than 400 executives)
- Beckhard & Harris, Organizational Transitions, 1977 – transition model (current state / future state / transition)
- Kotter, 1996 – short-term wins (quick wins)
- R. E. Freeman, 1984 – stakeholder theory