



Coaching College's transformative, adaptive 2-day workshop on Change Management, facilitated by renowned expert Denise Archie. Join us to master the FLEX model, a proven framework for effectively driving and implementing change initiatives across any size organisations.

In this comprehensive workshop, we'll guide you through each step of the FLEX model, empowering you to successfully navigate the complexities of change.

Learning outcomes

1. **Change Case:** Assess the current situation of your organization and identify the need for change based on the 5 R's pillars.
2. **Define the Change:** Develop a robust project brief that outlines objectives, scope, deliverables, timelines, and budget.
3. **Identify Stakeholders:** Establish a centralised repository of project-related information and identify all key stakeholders.
4. **Establish a Change Charter:** Set up a charter of agreement that clearly defines roles, responsibilities, project governance, communication protocols, and success metrics.
5. **Set up Project Management Tools:** Develop comprehensive project management tools, such as reporting templates, cost estimates, budget templates, and change management forms.
6. **Launch the Change:** Define baseline processes, metrics, and goals that will measure the success of your change initiative.
7. **Evaluate Progress:** Establish regular monitoring procedures to ensure your change initiative stays on track and achieves desired outcomes.
8. **Execute the Final Plan:** Implement procedures to control the change initiative, ensuring adherence to the charter of agreement.

Don't miss this exclusive opportunity to gain expertise in Change Management. Register now for Coaching College's 2-day workshop, facilitated by industry expert Denise Archie. Embrace the FLEX model and empower your organisation with the skills and knowledge to navigate change successfully. Your path to a thriving and adaptive business starts here

FLEX



F - Formulate the Change

- 1. Develop a Change Case:** Assess the current situation, identify the need for change, and outline the benefits of the proposed change.
- 2. Define the Change:** Create a project brief that outlines the objectives, scope, deliverables, timelines, and budget for the change.
- 3. Identify Stakeholders:** Establish a repository of all project-related information and identify all stakeholders involved in the change initiative.
- 4. Build Relationships:** Establish open and honest communication channels to foster relationships with stakeholders and build trust.
- 5. Establish a Change Charter:** Set up a charter of agreement that defines roles and responsibilities, project governance, communication protocols, and success metrics.
- 6. Set up Project Management Tools:** Develop a human resource matrix, weekly reporting templates, cost estimate templates, budget templates, and change management form templates.



L - Launch the Change

- 1. Design Business as Usual (BAU):** Define the baseline processes, metrics, and goals that will be used to measure the success of the change initiative.
- 2. Identify Risks:** Identify and evaluate potential risks associated with the change initiative.
- 3. Develop a Contingency Plan:** Develop a contingency plan that outlines the actions to be taken if any risks materialize.
- 4. Build RASCI Chart:** Define roles and responsibilities for the change initiative using a Responsibility Assignment Matrix (RASCI).
- 5. Engage Stakeholders:** Establish regular touchpoints with stakeholders to keep them informed and engaged throughout the change initiative.
- 6. Execute the Plan:** Implement the change plan and ensure that all activities are carried out according to the project brief and charter of agreement.



E - Evaluate Progress

- 1. Monitor BAU, Agreements, and Risks:** Establish regular monitoring procedures to ensure that the change initiative is on track and meeting the desired outcomes.
- 2. Review and Adjust:** Analyse monitoring data to identify areas for improvement and make necessary adjustments to the change initiative



X - eXecute the Final Plan

- 1. Control BAU, Agreements, and Risks:** Establish procedures to control the change initiative and ensure that all parties are adhering to the charter of agreement.
- 2. Review and Adjust:** Analyse control data to identify areas for improvement and make necessary adjustments to the change initiative.

The FLEX Process ensures that change is effectively managed from start to finish, with the focus on communication, risk management, and stakeholder engagement. By using this methodology, organizations can achieve successful change outcomes and ensure that their business remains agile and responsive to changing market conditions.

1. **Formulate the Change Case:** Assess the current situation of the family-owned business and identify the need for change based on the 5 R's pillars. Outline the benefits of the proposed change, keeping in mind the long-term stability and success of the business.
2. **Define the Change:** Develop a project brief that outlines the objectives, scope, deliverables, timelines, and budget for the change. Ensure that the change aligns with the 5 R's pillars and is communicated clearly to all stakeholders.
3. **Identify Stakeholders:** Establish a repository of all project-related information and identify all stakeholders involved in the change initiative, including family members, employees, and external advisors.
4. **Build Relationships:** Establish open and honest communication channels to foster relationships with stakeholders and build trust. Use the Relationships pillar to guide the development of these communication channels.
5. **Establish a Change Charter:** Set up a charter of agreement that defines roles and responsibilities, project governance, communication protocols, and success metrics. Use the Recruit and Retain pillars to identify potential successors and key employees who should be involved in the change initiative.
6. **Set up Project Management Tools:** Develop project management tools such as a human resource matrix, weekly reporting templates, cost estimate templates, budget templates, and change management form templates. Use the Reskilling pillar to develop training programs and identify skill gaps that need to be addressed.
7. **Launch the Change:** Define baseline processes, metrics, and goals that will be used to measure the success of the change initiative. Identify and evaluate potential risks associated with the change initiative and develop a contingency plan that outlines the actions to be taken if any risks materialize. Use the Return-on-Investment pillar to guide the development of financial and strategic plans.
8. **Evaluate Progress:** Establish regular monitoring procedures to ensure that the change initiative is on track and meeting the desired outcomes. Analyse monitoring data to identify areas for improvement and make necessary adjustments to the change initiative.
9. **Execute the Final Plan:** Establish procedures to control the change initiative and ensure that all parties are adhering to the charter of agreement. Analyse control data to identify areas for improvement and make necessary adjustments to the change initiative.

By combining the FLEX model for change with the 5 R's pillars for leading a family-owned business, you can effectively manage change while ensuring the long-term stability and success of the business.

1. **Understand the current culture:** Before implementing any changes, it's important to understand the current culture of the organization. This includes the values, beliefs, and behaviors that are currently in place. Conducting a culture assessment can help identify any gaps that need to be addressed.
2. **Communicate the need for change:** It's important to communicate the need for change and the benefits that will result from it. This includes explaining how the change will impact employees and the organization as a whole. Make sure to provide clear and consistent messaging throughout the change process.
3. **Develop a plan:** Develop a detailed plan for how the change will be implemented. This includes identifying the resources needed, setting timelines and milestones, and assigning responsibilities.
4. **Engage employees:** Engage employees throughout the change process by soliciting their input and feedback. This helps to create a sense of ownership and buy-in for the change.
5. **Provide training and support:** Provide training and support to employees to help them develop the skills and knowledge needed to adapt to the change. This can include workshops, coaching, and mentoring.
6. **Reinforce the change:** Reinforce the change by recognizing and rewarding employees who demonstrate the desired behaviors. This helps to reinforce the new culture and ensure that the change sticks.
7. **Monitor and evaluate:** Monitor and evaluate the change to ensure that it is having the desired effect. This can include measuring employee engagement, tracking key performance indicators, and soliciting feedback from employees.