

How does your organization move fast to reduce costs and/or reorganize, but stay connected and aligned at the same time? What helps leaders keep people inspired and engaged vs. frozen or resistant in times of change? How can you best increase your odds of successful change implementation?

Linkage's proven expertise and tools can help you find the answers and solutions to these questions.

### The Linkage Approach to Organizational Change and Transition

In these times, organizations need to respond and adapt quickly to current challenges and opportunities while also focusing strategically on the future. They need to concentrate on developing leaders at every level to drive today's change effort while also building future change agility and resilience. At Linkage, we understand that successful change depends upon not only an effective strategy or process, but also on the people implementing change.

Our strategic approach to change focuses on both the organizational change process and your employees' ability to embrace change and successfully "transition" to a new state of change. Numerous studies have shown that as many as 80% of change efforts fail, not because of flawed strategy or process, but because of employee resistance to change. Linkage's approach to change is built upon a deep understanding of this reality. We offer a powerful team-based change process with proven transitions tools to help engage your work force in successful implementation. Our consultant's have a proven track record of helping organizations from around the world improve their change management success rates and lower their cost of implementation.

### What's different about our strategic change and transitions services and programs?

Linkage's change and transitions practice has evolved over more than 20 years of working with organizations to save millions of dollars, develop new business ideas, and improve the functioning of organizations or teams. Our goal as your partner is to share this approach fully and transfer the capability to you. We do this in multiple ways.

- We partner with your senior leadership team to clarify the business case for change and the variables that are critical to success. This includes helping you examine the desired success measures, and gaining alignment on change priorities.
- We provide a proven and participative process, **The Agenda for Change™**, which involves your people at all levels in proactively driving and aligning the strategy you need to succeed. **The Agenda for Change™** will successfully launch new change initiatives, as well as accelerate those currently underway within your organization.
- We are your partner, offering tools and programs which build your organization's internal capability to move forward. Organizational learning occurs throughout each phase of our collaborative work.
- We provide you with best practices in managing both the organizational and the human side of change. Through an exclusive partnership with William Bridges, renowned author of *Managing Transitions*, Linkage offers a proven suite of "Transition" training which improves change implementation success rates by focusing on the personal side of change.



# STRATEGIC CHANGE AND TRANSITION SERVICES



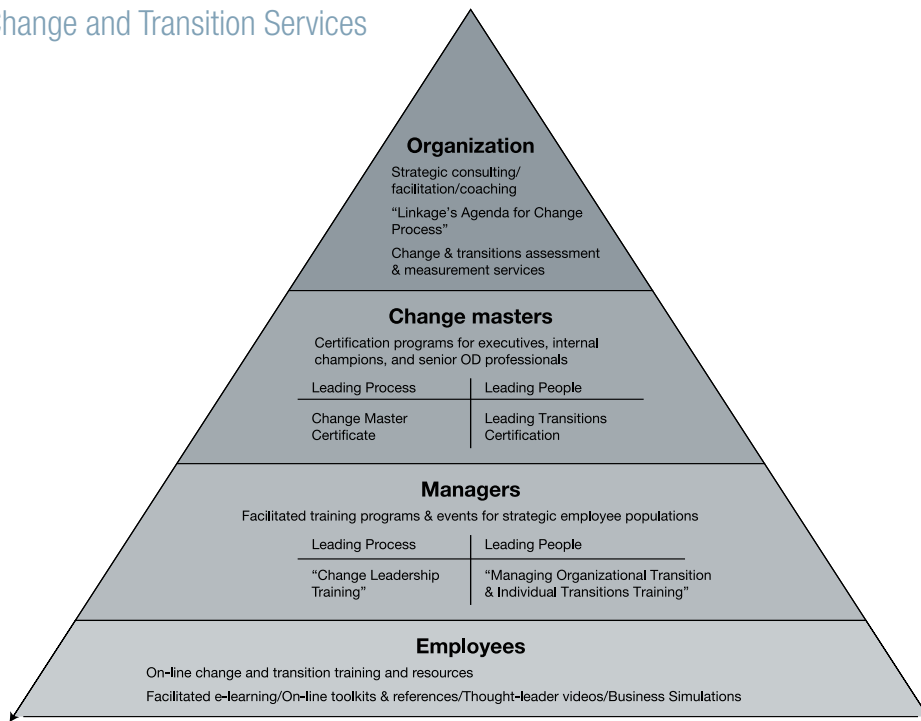
Linkage's hallmark is our ability to help you drive effective and lasting change through your people. We help you complete transitions by equipping your leaders with the tools and know-how to address all aspects of the change process. With our comprehensive and consultative approach, we help you convert your strategic plan into reality and mobilize your work force to support desired results.

## Linkage helps leaders address the following types of change or business challenges:

- Driving down targeted costs while creating greater efficiency and effectiveness
- Finding or implementing new innovation opportunities for growth
- Refocusing your approach to engaging customers or potential new market segments
- Facilitating large scale technology or process changes
- Re-organizing a business or organization
- Implementing a successful merger or acquisition

Our solutions offer a comprehensive approach including a defined process for organizational change, key support and a proven methodology for internal change champions, and a supporting curriculum for managers and individual contributors.

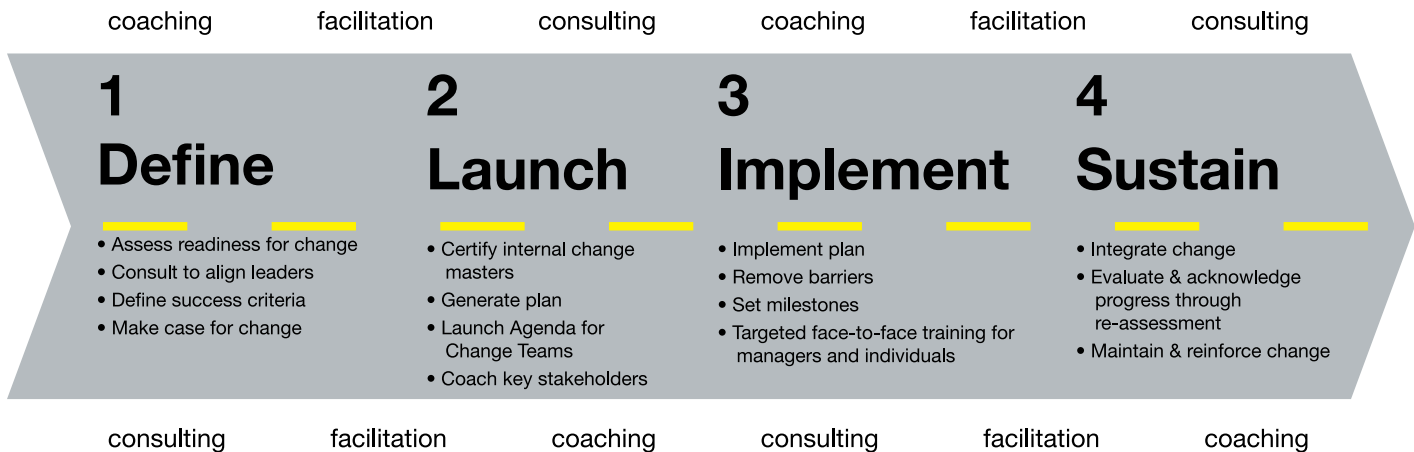
## Linkage's Change and Transition Services



Linkage facilitated a successful change and transition process which allowed our organization to identify and cut almost \$28 million in costs and transform our team and organization for a successful acquisition.

**Lin Coughlin // President, DWS, Scudder Investments**

## LINKAGE'S CHANGE AND TRANSITION ROADMAP



### 1 Define

#### Consult and Partner with Your Senior Team

Linkage's best practice approach to implementing large-scale change is called the The Agenda for Change™. This in-depth change approach and methodology uses cross-functional, action learning teams and a proven process and tools to help you lead change effectively in your organization.

Using this process, Linkage expert consultants partner with leadership or change teams to help them succeed in driving change and building change resilience within their organizations. In the first phase, we typically work with your team offsite to clearly understand and outline the change initiative. This working session is essential in educating the overall team of their role in the change process, clarifying the business case for change, defining criteria for success, and understanding the variables that will make change effective. This session also includes examining team capacity and gaining alignment on change prioritization. Based on this planning session, Linkage will design and customize a

change and transition approach and implementation plan that is right for your organization.

#### Complete a Strategic Change and Transitions Assessment

In order to better understand your organization's readiness and potential barriers to change, we recommend conducting a formal assessment or survey of your organization. This often includes formal interviews of key stakeholders and can include the rollout of organizational surveys or assessments. Organizations often choose our proprietary employee assessment, OCTRA (Organizational Change and Transition Readiness Assessment), the Denison Organizational Culture Survey™, or a custom assessment designed for their organization's needs. Linkage's OCTRA assessment, developed in partnership with William Bridges & Associates, is used to assess your organization's overall capacity to tackle a specific change and provide you with recommendations on how to best move forward. The Denison Organizational Culture Survey™ is a best-practice tool within the industry that can be utilized to measure the organization's culture

before, during, and after the change has been rolled-out. Finally, Linkage assessment and measurement experts will work with you to design a custom survey and assessment tailored to your organizations specific needs.

### 2 Launch

#### Certify Internal Change and Transitions Champions

One of Linkage's consulting differentiators is our commitment to partnering with clients to build internal capacity and transfer knowledge effectively. To this end, Linkage offers clients the option of certifying internal change or organizational development teams as internal Change Masters (using our Agenda for Change tools) and/or facilitators of "Transitions" training based on the William Bridges' model. Linkage offers two comprehensive Train-The-Trainer programs to develop internal change and transitions champions:

- *Change Master Certificate*
- *Leading Organizational Transition: Train-The-Trainer Program*

# STRATEGIC CHANGE AND TRANSITION SERVICES

## Change and Transitions Coaching Services

Linkage's change and transitions coaching practice provides targeted coaching that helps leaders gain enhanced personal awareness and equips them with insights, strategies, and skills to meet the challenges required in driving change and leading through transition. Coaching is often used for two critical populations during the change process. We help increase change success rates dramatically by coaching key change champions driving the change process within the organization and also help key stakeholders personally affected by change.

In our change and transitions coaching we:

- Use **clear measurements** to track change and its impact on performance
- Provide **tools and techniques** so that coaching happens “on the playing field”
- Respect **confidentiality** while also connecting back to the key people around the coachee
- Impart wisdom but insist upon **action**

## 3 Implement

### Change and Transitions Training and Tools for Managers and Employees

Linkage offers a full suite of development training and tools for upper and mid-level managers and individual contributors alike to help support your organization's change efforts. We offer highly participative learning sessions focused on critical elements of the change process as well as on-line resources and e-learning training options.

- **Face-to-face facilitated training:** Linkage draws upon its curriculum of over 62 highly-evaluated training programs to customize the ideal employee training and development strategy for your organization's needs. Some of the most popular training modules include communicating effectively during change, motivating others during change, removing barriers to change, and celebrating success based on *Linkage's Change Leadership* program. *Change Leadership* paired with *Managing Organizational Transition* and *Individual Transition* training programs provide optimal preparedness for addressing change from all perspectives.



I will use the tools and concepts learned during the session in all of my projects that pertain to change.

**Nancy Pommenville // AVP, Manager Training and Development, BJs Wholesale Club**

Excellent! Content, Structure—it was great, very practical and useful going back to “real world” work environment.

**Stephanie Briggs // Employee Development Specialist, Washington Gas, Leading Organizational Transition Attendee**

- **e-Enabled Change & Transitions tools:** Linkage works with clients to provide your employees access to change and transition resources and training. This is achieved by offering change and transition knowledge and reference portals, toolkits, and facilitated e-learning training.

## 4 Sustain

### Evaluating and Monitoring Change Implementation Success

Linkage consultants and our assessment team work with your leaders early on and throughout the process to identify appropriate success and performance measures for implementation success. Throughout the change and transition process, we will track key change and transitions performance metrics and provide an appropriate dashboard for your team to use to monitor progress and to measure success.

## LINKAGE CHANGE CASE STUDY

### Transition Management Training Smooths Acquisition at Albertson's

#### The Challenge

In September of 2005 Albertson's, a national supermarket chain, announced that it was exploring ways to increase shareholder value—and that one of those ways might be to sell the company.

Like everyone else at Albertson's, Terri Hughes, Director of Organizational Change, knew change was coming, even if she didn't know exactly what form it might take. She was determined that Albertson's would handle that change—and help employees handle that change—more effectively than it had in the past.

"In 1999, Albertson's acquired American Stores, a chain half as large as Albertson's," says Hughes. "We did nothing to manage the change, nothing to help employees cope. The result was a disaster. I knew that whatever changes were in store, we had to do a better job this time."

Hughes's first step was to position formal change management to Albertson's senior leadership as a way for them to leave a lasting legacy with the company, whether or not they survived the upcoming changes. Senior leadership agreed; they also wanted to get programs in place right away, before lingering, unresolved feelings from the American Stores acquisition could resurface.

#### Managing change and transition

Hughes researched a number of formal organizational change management models including the Kotter 8-Step Model for change, which lays out a program for making change happen. They also wanted to address how to help managers deal with their employees' emotional response to change.

Then Hughes found an article by William and Susan Bridges entitled "Leading Transition: A New Model for Change." The article stressed the importance of distinguishing between change, which is the external difference a company tries to implement, and transition, which is the internal, emotional reorientation people have to make before the change can work.

Hughes contacted the Bridges and learned that their intellectual property was available through Linkage. Soon afterward she met with Linkage to talk about rolling out Linkage's Bridges-based Transition Management program at Albertson's.

#### The Linkage Solution

The fundamental premise of Linkage's Transition Management program is that for employees to make the transition required for change, they have to be led through three necessary stages: *Endings*, in which people formally let go of the way things used to be, and the way they used to be; the *Neutral Zone*, a kind of middle stage where people find the energy to tackle what's coming next; and *New Beginnings*, where people embrace the change, and move on to begin behaving in the new ways necessary to effect the change. A pilot session with some key Albertson's middle managers was a hit—and proved Hughes' concerns were right on target.

Encouraged, sessions for senior leadership at Shaws, which Albertson's had acquired 18 months earlier—were next. The leadership really took to the concepts, and decided their employees needed to go through a formal endings ceremony—so they staged a New Orleans-style funeral, complete with a Jazz band and a casket. The intention was to bury the old, to let go, and to have some fun doing it.

All of the above took place before any changes had been announced. It wasn't until a month after the "funeral" that Albertson's announced it was being acquired—and not by a single entity. With pilot sessions well underway, Hughes stepped up workshops with Albertson's training staff with help from Linkage. And she lost no time promoting the Transition Management program to SuperValu's senior management.

"The response was very positive," she says. "Once the acquisition agreement had been hammered out, SuperValu formed groups to incorporate our transition workshops across the company."

#### Widespread adoption; surprising results

At the time this story went to press, Albertson's and SuperValu had put between 3,000 and 4,000 trainers and managers through the Linkage's Transition Management program. Feedback from managers and employees has been excellent. "We get lots of comments from people about being more equipped to handle the change," says Hughes.

While it's early to attribute any bottom-line impact to the program, Hughes and SuperValu have measured at least one positive result: Higher-than-expected employee retention. Hughes expects continued results from the training, and expects it to become a permanent part of SuperValu's training curriculum. "This might not have been necessary 20 years ago," she says. "But today I think Transition Management has to be a regular part of any company's leadership training program."

## >> LINKAGE'S CHANGE AND TRANSITIONS TRAINING PROGRAMS

Comprehensive curriculum options available

### Linkage's Change Master Certificate

Designed for seasoned OD consultants, we'll certify you to implement Linkage's **Agenda for Change™**, a tools-based approach that utilizes cross-functional teams to roll-out large-scale change initiatives including cost reduction, mergers and acquisitions and the integration of new technology and systems.

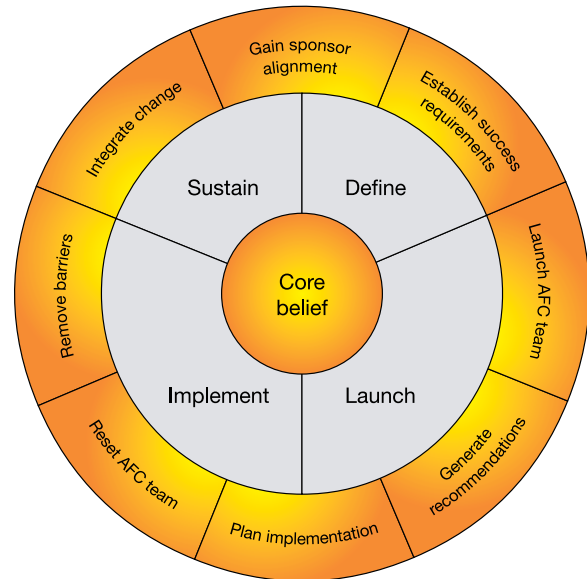
The program examines the **Agenda for Change™** model, key tools, and how to apply these concepts to different types of organizational change. This is a highly interactive program with case studies and hands-on application planning using participant's own real life change initiatives. This approach will successfully integrate with current change initiatives already underway in your organization. After completion of this program, participants will be certified to use the **Agenda for Change™** to guide their organization's change initiatives. All Linkage facilitators are senior change agents with an average of 15 years of consulting experience.

### Leading Organizational Transition: Train-The-Trainer Program

A Train-The-Trainer program, offered in exclusive partnership with William Bridges & Associates, to certify HR and OD professionals in facilitating key programs for managers and individual contributors.

We offer a proven system that addresses the human side of change for managers and individual contributors. For over three decades, William Bridges applied his highly-acclaimed **Three-Phase Transition Model** to guide individuals and organizations through difficult changes. This model has stood the test of time and has provided individuals and organizations across sectors with a framework and tools for successfully embracing change. Your facilitators will learn how to facilitate two workshops after completion of this program, *Managing Organizational Transition* and *Individual Transition in Organizations*. This approach is highly effective in communicating a consistent language across the organization.

### Agenda for Change™ model



### Change Leadership

A skill-building program that provides key tools and a step-by-step process for leaders responsible for driving change within their organization; appropriate for managers and leaders at all levels.

Participants will learn how to master change leadership through the application of best-practice tools and techniques to create effective change within their teams, divisions, and organizations. They'll apply Linkage's **Blueprint For Change™** to a real-life change initiative, in addition to learning how to communicate the organization's change message with clarity to gain greater commitment. Participants will learn powerful techniques to countering resistance and removing obstacles within their change initiative.



I always count on Linkage for great learning experiences. I wasn't disappointed. This is such a valuable and affirming learning experience!

**Betty Wade Perry // Organization Development, City of Virginia Beach**

## Comprehensive curriculum options available

### Managing Organizational Transition

*An in-depth learning session, offered in exclusive partnership with William Bridges & Associates, designed for managers who are responsible for implementing and facilitating change within their organization.*

This program will equip managers in facilitating their employees successfully through the challenges of transition, whether in the context of a merger, downsizing, or other organizational change. They'll receive the skills necessary to guide their employees smoothly through the change process. This program is often paired with *Change Leadership* to equip your management team on the change process and helping employees work through the personal impact of change.

*All of these options are available for public and onsite delivery.*

### SPECIAL COMPREHENSIVE CERTIFICATE OFFERING—THE CHANGE LEADERSHIP CERTIFICATE PROGRAM

*A curriculum designed to advance OD and HR professionals, as well as leaders' proficiency in leading change.*

Linkage's *Change Leadership Certificate Program* is a comprehensive curriculum with several levels (Green, Brown Belt) depending upon your role within the organization. Linkage will equip participants in the *Certificate Program* with an in-depth, focused curriculum designed to effectively execute key change initiatives within your organization.

### Individual Transition in Organizations

*An in-depth learning session, offered in exclusive partnership with William Bridges & Associates, designed for individual contributors across the organization that are facing change.*

This program will help individual contributors navigate through the significant changes they are facing through activities and skill practice. Participants learn critical skills required to renew personal creativity and commitment, so that the organization can implement its change successfully.

Linkage's *Change Leadership Certificate Program* offers several levels, including Green Belt and Brown Belt levels as public enrollment workshops to address the varying degrees of proficiency required to effectively execute key change initiatives within your organization.

- **Green Belt**—Designed for management/director-level professionals, the Green Belt is geared toward building your skills in leading successful change within your team or business function
- **Brown Belt**—Designed for today's OD/HR practitioner, the Brown Belt equips you to guide your organization through change initiatives spanning one or more business functions through the application of Linkage's **Agenda for Change™** process

### Benefits & outcomes

- Learn to use and apply practical change and transition tools
- Earn enhanced credibility as a change leader who delivers results
- Participate in quarterly tele-conference calls to share best practices

## >> LINKAGE'S CHANGE AND TRANSITION ASSESSMENTS

### Key assessments to measure change



#### Organizational Change and Transition Readiness Assessment (OCTRA)

*Linkage's proprietary assessment, developed in partnership with William Bridges & Associates, is designed to examine your organization's baseline resilience and willingness to tackle a specific change.*

Key factors examined include your employee's understanding of the change and level of buy-in to the change, the level of trust they have with their leaders, the extent to which the workforce is engaged and committed, and the level of support the employees feel they have during the change. A comprehensive summary, including open-ended comments, will be provided with various cuts of the data by business unit and region. This information is highly valuable during the initial stages of embarking on the change initiative. Based on the results, we can provide your team with the tools needed to help successfully implement the change.



#### The Denison Organizational Culture Survey™

*Offered in partnership with Denison Consulting, this industry-noted instrument developed by Daniel Denison and William Neale, enables organizations to identify specific strengths and weaknesses that research has shown to impact key business.*

*The Denison Organizational Culture Survey™ is what many regard as the world's best organizational and leadership diagnostics. The diagnostic survey allows organizations to align culture and leadership to accelerate the achievement of their goals. They benchmark your organization's scores against the global database in four key areas: *Mission, Consistency, Involvement, and Adaptability*. Accurately diagnosing your organization's specific areas of strengths and weaknesses is the first step in the change process which directs the individual, team, or organization towards specific targets of action. The survey builds accountability into the change process by enabling individuals and organizations to track and monitor their progress towards desired improvement goals.*



The hard part of change is to get your people to accept it, buy into it, and rally around it. And that's where Linkage's processes and tools really help make a difference.

**Managing Director and COO, David L. Babson & Company, Inc. (a member of the MassMutual Financial Group)**