

CULTURE TRANSFORMATION TOOLKIT PRE-TRANSFORMATION PLANNING WORKSHEET



The following worksheet provides a “Personal Workshop.” Reflecting on, and then answering these key questions will move you well along the path to leading a culture change. In order for your company culture to change, having a clear understanding of where your culture stands today is a must. There has to be a reason for the organization to want to change the culture in some way, and the more clearly this reason can be articulated the easier it will be to change it. Once this worksheet is complete, you’ll have clarity on where your company culture stands today, as well as what needs to happen next and so be able to build a plan to make the change happen.

CURRENT CULTURE

Understanding an organization's current culture comes from the information which is gathered before the transformation begins. When this information is specific and rich with examples and illustrations, it's easier to pinpoint why the culture is the way it is and what behaviors need to be reflected in order to achieve the desired change. The information collected is not intended to find fault, or point fingers, but rather to identify the new and improved behaviors your organization seeks to adopt.

QUESTIONS TO CONSIDER	ANSWERS
What are the top 3 reasons you feel a culture transformation is necessary? Give examples and refer to the department/area if applicable.	
What defines your current culture now, with respect to the desired transformation?	
What words would your people use to describe your culture, in those areas that will be affected by the transformation?	
What behaviors are currently in evidence before the transformation?	
Which tools have you used to assess the current culture?	

DEFINING THE DESIRED END STATE

Defining and clarifying your desired culture will help the organization understand and foresee the benefits of the transformation. This section will help you create a line of sight to the end result, thereby increasing people's support of the efforts required to achieve that outcome.

QUESTIONS TO CONSIDER	ANSWERS
How will the outcome of the culture transformation fit in with overall company goals and strategy?	
What words would you like to be used to describe your culture after the transformation?	
What will improve, or be different as a result of the transformation?	
As a result of the transformation, which behaviors should be stopped, started and continued?	
How will employees' feedback play a role in defining the objectives of the culture transformation?	
What tools are in place to indicate when goals are met?	

KEY LEADERS/DEPARTMENTS & LOGISTICS

The lead drivers of any culture transformation must be senior management, however, the Human Resources team will also play a large role in training, communication, and recognition. After defining the “from” and “to” in the previous sections, you can start planning some of the specifics and logistics of the transformation. This section poses questions that will help clarify roles to avoid ambiguity and also create conviction across departments.

QUESTIONS TO CONSIDER	ANSWERS
Which departments will be affected? For a company wide transformation: is there any reason not to include everyone? For a particular area of the organization: which support areas should be included?	
Should an external consulting firm be used? Which one?	
Which leaders would be willing to “team teach” some of the content?	
Who will be responsible for communicating the process and expectations to employees?	
How will leaders demonstrate their support of the transformation?	

THE HR FUNCTION

QUESTIONS TO CONSIDER	ANSWERS
How will the HR function tie the culture transformation to performance management?	
How will the HR function tie the culture transformation into recruiting?	
How will the HR function tie the culture transformation into career and succession planning?	
How will the HR function tie the culture transformation into promotions?	
Which employees in HR will be responsible for arranging training for leaders?	
Which employees in HR will be responsible for arranging training for employees?	

TIMING

A small scale transformation for a single department can take several months, whereas a company-wide culture transformation can take up to four years. Deciding when to begin and how much time your organization will need for the entire transformation is a crucial part of the pre-planning process. Defining this timeframe will help ensure Leadership's commitment and accountability. This section will also help you determine checkpoints along the way so that you are prepared to make adjustments if necessary, and have success measures in place and ready to share with employees.

QUESTIONS TO CONSIDER	ANSWERS
Do all leaders have the willingness to demonstrate their full commitment?	
When will the culture transformation begin?	
At what points should we pause, reassess, and course correct if necessary?	
How frequently should line managers run reinforcement workshops with their direct reports?	
What is our deadline for completing the transformation?	

COSTS

The purpose for identifying the costs associated with your culture transformation is to not only allocate an appropriate budget accordingly, but also to help determine the benefit of the transformation from a financial perspective.

QUESTIONS TO CONSIDER	ANSWERS
Which metrics can we use to quantify the financial benefit of a successful culture transformation?	
How will we measure the non-financial benefits of a successful culture transformation?	
What are the external consulting firm's fees?	
How much will employee and leader training and post training retention, reinforcement and application cost?	
What will related communication initiatives cost?	
What will related recognition activity cost?	
What will be the cost of ongoing leadership coaching?	
Who holds the budget for this initiative?	



A successful organizational transformation requires support of all employees and managers at an early stage to obtain their conviction. By completing this worksheet with your Executive Team, you can recognize what next steps are needed to begin the transformation and determine where you'll need support along the way.

Eagle's Flight is a recognized expert in Culture Transformation and has partnered with organizations across many industries to successfully guide sustained culture change.

Contact our team to speak with an expert about your goals and strategy, and the tools and training your organization needs to complete a successful culture transformation.