Enterprise Client Information and Registration Tracking System (eCIRTS)

Coaching Plan

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1 Coaching Plan

1.1 eCIRTS Project Overview

The current technology used by the Department of Elder Affairs (DOEA) to record and track client information and services, the Client Information and Registration Tracking System (CIRTS), is more than 25 years old and uses an obsolete technology that is no longer supported.

Continuing to depend on antiquated technology reduces the stability, dependability, extensibility, and supportability of DOEA’s most critical line of business application. This, coupled with some non-standardized processes, has resulted in significant inefficiencies and stagnant productivity.

The implementation of a next generation CIRTS (eCIRTS) will allow DOEA to achieve its goals of standardizing and optimizing processes, improving client service documentation, enhancing client data management, and increasing staff efficiency and accountability.

1.2 Coaching Plan Introduction

The eCIRTS Coaching Plan was developed for DOEA to employ the change management methodology developed by Prosci. The Prosci methodology requires that five plans be created to manage DOEA’s organizational change. The five plans developed to manage DOEA’s organizational change include the following:

1. Communications Plan;
2. Sponsor Roadmap;
3. Coaching Plan;
4. Resistance Management Plan; and
5. Training Plan.

Each of the above change management plans will help drive certain elements of the Prosci ADKAR® Model, including awareness, desire, knowledge, ability, and reinforcement. The Prosci methodology for managing individual change involves utilizing the ADKAR® Model as outlined in the diagram below.

![Figure 1: Alignment of Change Management Plans with the ADKAR® Model](image-url)
The Coaching Plan is designed for use by the eCIRTS Change Management (CM) Team and the Change Champion Network (CCN). The CM Team will utilize this plan as a guideline to coach the eCIRTS Project Sponsor Coalition and the CCN. In turn, the CCN will utilize this plan to coach the managers and supervisors affected by the eCIRTS Project. It is the responsibility of both the CM Team and the CCN to ensure that change is monitored and managed in DOEA, Area Agencies on Aging (AAAs), and individual provider agencies throughout the life of the eCIRTS Project.

1.3 Document Purpose

The purpose of this document is to provide information, training, and support for the eCIRTS CM Team and the CCN that will be used to empower managers and supervisors to do the following: (1) become effective change managers, and (2) work with employees during the organizational change.

As illustrated in the Prosci ADKAR® Model above, the Coaching Plan is essential for the individual change management (ADKAR®) phases. The desired outcomes from effective coaching of DOEA managers, supervisors, and employees during change include the following:

- **Awareness** of how a change affects a given employee and explains “what’s in it for me?” (WIIFM);
- **Desire** created through personal interactions with employees and the effective management of resistance;
- **Knowledge** supported through on-the-job training and mentoring;
- **Ability** fostered by creating the right environment for employees to develop new skills and behaviors; and,
- **Reinforcement** of the change supported through private recognition and rewards.

Managers and supervisors are closest to the employees who need to adopt the change. Ensuring that managers and supervisors have the necessary skills to coach their staff will play a vital role in helping employees transition successfully through the organizational change.

1.4 Change Management Team Organizational Chart

Organizational Change Management requires the DOEA CM Team to work together in transitioning the organization to the new eCIRTS solution. For the eCIRTS Project, DOEA has assembled the following CM Team:

![Figure 2: DOE AECIRTS Change Management Team](image-url)
1.5 Change Champion Network Organizational Chart

The CM Team will train the CCN to coach and assist the managers and stakeholders affected by the eCIRTS Project. Each CM Member has at least one Change Champion assigned to train and assist throughout the eCIRTS Project. The following charts are the breakdown of each CM member and their respective Change Champion(s).

Figure 3: AAA/ADRC Change Champion Network

Figure 4: DOE Change Champion Network
1.6 Coaching Guidance

Prosci studies show change management is most effective when key project messages are delivered in a timely manner from the direct supervisor of the employee or by executive management. The CM Team will coach the CCN to assist the managers and supervisors to become influential agents of change for the eCIRTS Project. By utilizing the Communications Plan and Sponsor Roadmap as guidance on when to communicate and which message to communicate, the CCN will coach the managers and supervisors to maintain consistent, open, and honest messaging throughout the eCIRTS Project.

The CCN will assist the managers and supervisors to understand and address the importance of their influence in the following areas:

- Their employees tend to have an inherent trust of leadership;
- They are closest to where the change happens;
- They can help mitigate resistance; and
- They can help build support.

The five primary roles required of the managers and supervisors affected by the eCIRTS Project during the organizational change are categorized under the acronym CLARC and are listed below:

- Communicator;
- Liaison;
- Advocate;
- Resistance Manager; and
- Coach.
According to Prosci studies of these five “CLARC” roles, the ones that managers struggle to fulfill during change are “Resistance Manager” and “Coach.” Therefore, the CM Team will focus its development of the Coaching Plan on the coaching and resistance management findings as listed in the details that follow.

1.7 Customizing the Coaching Plan

The eCIRTS Project Risk Assessment in APPENDIX A was completed by the eCIRTS Project Sponsor, Project Management Team, and Change Manager to profile the size and type of change and the attributes of the affected organization and groups. As a result, the eCIRTS Project was profiled as a “medium” people risk change. Because this change is considered medium risk, the following approach to coaching is recommended:

<table>
<thead>
<tr>
<th>Category</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training for supervisors/managers</td>
<td>Extensive</td>
</tr>
<tr>
<td>Amount of individual coaching</td>
<td>Medium</td>
</tr>
<tr>
<td>Amount of group coaching</td>
<td>Medium</td>
</tr>
<tr>
<td>Feedback</td>
<td>Strict, reactive</td>
</tr>
<tr>
<td>Compliance by coaches</td>
<td>Monitored with active follow-up</td>
</tr>
</tbody>
</table>

Table 1: eCIRTS Project Coaching Approach

A summary of the Coaching Plan customization guidelines for a medium risk change is shown in APPENDIX B.

1.8 Preparing the eCIRTS Project Coaching Plan

Coaching is a vital part of successful change management. Best practices research in change management identified employee resistance as a top obstacle to successful change. The influence that a manager or supervisor has on their employees is significant and will directly affect the overall engagement of employees in the change process.

To prepare managers and supervisors to effectively lead their employees through the change, they must first prepare themselves for the change as described in the diagram below:
Figure 6: Change Management Process for DOEA Managers and Supervisors

The CCN will work with the managers and supervisors to support them through the change process and assist them with interacting with their employees.

The steps for preparing the Coaching Plan include the following:

1. Ensure that the necessary sponsorship and communication activities are defined;  
2. Train and prepare managers and supervisors to lead change with their employees;  
3. Equip managers and supervisors to introduce, manage, and reinforce change with their employees; and  
4. Assess employees’ level of acceptance for the change.

The CCN is made up of the primary coaches for managers and supervisors affected by the eCIRTS Project as they build competencies as effective change leaders with their employees. This is an important distinction – a CM Team member can help develop the plans, but managers and supervisors do the bulk of change management work by routinely interacting with and directly influencing their employees.
2 eCIRTS Project Coaching Plan

2.1 Ensure That Necessary Sponsorship and Communication Activities are in Place

The CM Team ensures that the necessary sponsorship and communication activities are in place and visible to the CCN, managers, and supervisors by integrating the Organizational Change Management Plan into the eCIRTS Master Project Management Plan. The CM Team will use the eCIRTS Project Communications Plan and Sponsor Roadmap to ensure that all communication outreach is scheduled and delivered on track with the eCIRTS Project activities. The CM Team will continually gather feedback from project-related communications and use that information to train the CCN for coaching the managers and supervisors on their next scheduled activity.

2.1.1 Engage the Change Champion as the Managers’ and Supervisors’ Coach

The Organizational Change Manager will work with the Primary Sponsor to ensure that all senior leaders in the Sponsor Coalition reinforce the importance of building manager and supervisor competencies to lead change. This will require that they request managers and supervisors take time to attend the formal change management engagement activities. The CM Team will train the CCN for the responsibility of becoming the coach for the managers and supervisors in their area. The Organizational Change Manager will work with the Training Lead for the eCIRTS Project to get guidance on how to develop and deliver training sessions to optimize learning. The CM Team will work with the CCN to develop trainings and materials to deliver to the managers and supervisors based on the information provided by the Training Lead.

2.2 Prepare Managers to Lead Change with Their Employees

The CCN has the primary responsibility of facilitating the initial change management process for managers and supervisors. This effort includes assisting managers and supervisors with preparing themselves for change as shown in the diagram below:

![Preparing yourself for change diagram](image)

**Figure 7: Preparing Yourself for Change**

The CCN will deliver an initial three-part Learning and Activities Program for the managers and supervisors affected by the eCIRTS project. The program will be delivered in-person and via webinars (for all remote participants). To help ensure participation, the invitation to the program will come from the Project Sponsor via email with a brief discussion of the agenda for the program and focusing on the “what’s in it for me?” question.

The three-part Learning and Activities Program consists of the following:
1. Learning Activity 1 – Understanding the changes underway and the coaching role;
2. Learning Activity 2 – Adapting to change that is happening; and
3. Learning Activity 3 – Developing competencies for managing change.

Each learning activity is described in more detail in the following sections.

2.2.1 Learning Activity 1: Understanding the Changes Underway and the Coaching Role

Activity 1 will be scheduled to be completed during the second month of the eCIRTS project. In this activity, the managers and supervisors affected by the eCIRTS Project are given the opportunity to learn about the changes that are underway in DOEA in regard to the eCIRTS Project and to understand their role in leading change. Managers and supervisors will have the opportunity to learn why these changes are being made, the risks if the changes are not adopted, and how the changes will affect their group. This activity will challenge managers and supervisors to consider how each of the changes affect their area and to explore their current knowledge about why the changes are being made.

As managers and supervisors identify gaps in their own knowledge of the eCIRTS Project, the CM Team and CCN will help address and fill those gaps. The following worksheet will be provided to managers and supervisors to elicit their feedback during this first activity:

<table>
<thead>
<tr>
<th>List the changes with eCIRTS underway that affect you and your group</th>
<th>Do you know why these changes are being made and how they align with the direction for DOEA? (Yes/No)</th>
<th>Do you understand how this change will affect your direct reports? (Yes/No)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 2: Sample Activity 1 Worksheet for Change Inventory/Analysis

The focus of this activity will be around key aspects of the eCIRTS Project – why it is happening, why it is happening now, what are the risks of not changing, and “what’s in it for me?”. This session will also introduce the “CLARC” acronym (Communicator, Liaison, Advocate, Resistance Manager, Coach) to discuss each of the roles a manager or supervisor must fulfill as change leaders, including a discussion on the risks if the roles are not fulfilled.

At the completion of Learning Activity 1, the CM Team and CCN will develop and deliver an action plan for each change where the managers and supervisors answered “No” for any of the questions listed in the Activity 1 worksheet. These action plans must be completed prior to proceeding to Activity 2. The CCN will also follow up with the managers and supervisors before Activity 2 to answer any additional questions and gather feedback.
2.2.2 Learning Activity 2: Adapting to Change that is Happening

In Activity 2, scheduled for completion during the fourth month of the eCIRTS project, the managers and supervisors are asked to adapt to the change on a personal and professional level. This activity helps managers and supervisors understand that they are employees first and managers second.

Recognizing that managers and supervisors are employees first, the CCN will assist those who are resistant to a specific change related to the eCIRTS Project. Knowing the manager or supervisor may also be resistant to learning about how to lead that change with their employees, the CCN will focus on building their desire for change. The ability to engage in a specific change and managing the change are interconnected; therefore, the managers and supervisors must make the personal choice to support the changes underway before the CCN can train them on change management tools and processes.

In Activity 2, the CCN will ask the managers and supervisors to do the following:

1. Identify their own areas of resistance;
2. Discuss their objections or concerns; and
3. Make the personal choice to support and participate in the change.

2.2.3 Learning Activity 3: Developing Competencies for Managing Change

In Activity 3, scheduled for completion during the sixth month of the eCIRTS Project, the CCN will lead a more detailed training program for managers and supervisors using the information gathered during Learning Activities 1 and 2. This program will address the following:

- The roles of managers and supervisors (CLARC);
- How to talk with employees about change;
- How to coach each group through the change;
- How to coach individual employees through change using the ADKAR® Model; and
- How to manage resistance to change.

During Activity 3, the CCN will follow the change management coaching training template provided by Prosci (APPENDIX C). The key output from this session is that managers and supervisors understand it will be their role and responsibility to coach their direct reports during the change and give them the knowledge and skills to do so effectively.

The critical outcomes from this session to be validated from feedback forms, follow-up emails, and phone calls, include the following:

1. All managers and supervisors understand the concepts of change management;
2. All managers and supervisors know how to use the tools for managing change (ADKAR®-focused); and
3. All managers and supervisors develop specific action plans using the templates provided by the CM Team for coaching their employees through the change process.

Following the completion of the activities, each member of the CCN will work with the managers and supervisors to help them introduce their action plan for their employees. The CCN will continue to engage the managers and supervisors throughout the project, assisting them when necessary and guiding them through any resistance or issues that might arise.
3 Coaching Plan Implementation

3.1 Enable Managers to Introduce, Manage, and Reinforce Change with Their Employees

With the development and implementation of the learning activities in the above sections, the next step is for the CCN to assist the managers and supervisors in leading their employees through the change. As seen in the figure below, this includes:

- *Introduce* change to their employees;
- *Manage* employees through transition; and
- *Reinforce* and celebrating success.

![Leading employees through change](image)

**Figure 8: Leading Employees Through Change**

#### 3.1.1 Coaching Webinars

The CM Team will hold webinars to ensure that the CCN, managers, and supervisors have multiple opportunities for training to help them become effective coaches for their employees affected by the change. The table below lists the recommended webinars and the associated schedule for when available managers and supervisors should learn the material.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Responsible/Leaders</th>
<th>Managers/Supervisors</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ongoing Individual Coaching Webinars:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Fundamentals of Change Management</td>
<td>The Change Manager</td>
<td>Open to all managers</td>
<td>Months 3 &amp; 5, and months 7-11</td>
</tr>
<tr>
<td>2. The Prosci ADKAR® Model</td>
<td>will be responsible for the sessions. They will engage senior leaders from each of the affected areas to demonstrate visible sponsorship of the change.</td>
<td>and supervisors (recorded and made available on demand).</td>
<td>(during implementation)</td>
</tr>
<tr>
<td>3. The 5 Roles of Effective Change Leaders</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Group Coaching Tips &amp; Tricks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Individual Coaching Tips &amp; Tricks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Responding to and Managing Resistance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Coaching Feedback and Action Plans</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Table 3: Manager and Supervisor ‘Change Effectiveness’ Webinars**

#### 3.1.2 Group Coaching Assistance

The CCN will assist the managers and supervisors in preparing for and meeting with their employees as a group to discuss the eCIRTS change in the following areas:
• Review key messages with managers and supervisors to ensure that a consistent message is provided to every employee;
• Provide example exercises to be used with employees to demonstrate the ADKAR® Model;
• Review group presentation material to ensure message consistency;
• Provide Frequently Asked Questions documentation; and
• Provide information on where to get support when needed.

A recommended group session agenda is shown in APPENDIX D.

### 3.1.3 Individual Coaching Assistance

If a manager or supervisor determines that one or more of their employees is resistant to the change, it is recommended that the manager or supervisor schedule a one-on-one coaching session with the resistant employee. The CCN will assist the manager or supervisor with completing an ADKAR® Assessment Tool with the employee to identify their area(s) of concern. The CCN will use the output of this assessment to assist the manager or supervisor with the development of an action plan to help move the employee through the change. Focusing on the ADKAR® area the employee is in during the change will allow the manager to be more effective in their coaching needs for the employee. The table below displays the format of the assessment output.

<table>
<thead>
<tr>
<th>Employee</th>
<th>A</th>
<th>D</th>
<th>K</th>
<th>A</th>
<th>R</th>
<th>Notes/Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 4: Individual Coaching Using the ADKAR® Model

Managers and supervisors will meet with each change-resistant employee and discuss their progress in the ADKAR® process. Action plans with the employee begin with the first element to score a “3” or lower. The actions will be different for everyone. For example, if there is a low score on Ability, then mentoring on that process may be needed. If there is a low score on Awareness, then additional discussions on that change and the business reasons for the change may be necessary. If there are several employees with similar individual scores, then a group session may be appropriate to address that specific area or concern.

The CCN will assist the managers and supervisors in creating an individual action plan to help employees overcome their barriers to change as shown in table below.

<table>
<thead>
<tr>
<th>Employee</th>
<th>ADKAR® profile:</th>
<th>Actions to take</th>
<th>Follow up</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 5: Individual Coaching Action Plan

The CCN will assist and remind managers and supervisors to continue to follow up with their employees. The individual coaching sessions will be repeated as needed.
4 Measure Change Acceptance

4.1 Measure Coaching Effectiveness

4.1.1 Accountability for Manager and Supervisor Effectiveness
In addition to providing ongoing support, the Organizational Change Manager will be collecting data to assess manager and supervisor change effectiveness. This will include monitoring attendance at the training sessions; speaking with executive leadership, managers, and supervisors to gather feedback; and periodically reaching out to employees from each of the affected groups.

4.1.2 Gathering Feedback
The CM Team will continuously gather feedback from the employees affected by the eCIRTS Project using the various methods of communication documented in the Communication Plan. The feedback will be used to update and analyze the training methods and techniques utilized to ensure that the best information is provided.

4.1.3 Providing Follow-up
The CM Team will follow up with the managers and supervisors affected by the eCIRTS Project throughout the life of the project and into the maintenance and operations period. Prosci studies show that the primary area to focus on during post-implementation is reinforcing the change. To accomplish the reinforcement of the change, the CM Team will routinely reach out to the managers, supervisors, and employees to provide any guidance or assistance needed to ensure the eCIRTS Project is successful.
APPENDIX A: eCIRTS Project Risk Assessment Grid

The DOEA eCIRTS Project Team, Organizational Change Manager, and Project Sponsor completed a Change Characteristics and Organizational Attributes Assessment to determine the overall size of the change for the eCIRTS Project. This information is essential to properly scale the change management efforts and plans for the eCIRTS Project. The information provided out of this assessment determines the overall project risk seen in the diagram below.

Assessment scores and analysis:
- Change Characteristics: 39
- Org Attributes: 27
- Risk quadrant: Medium
APPENDIX B: Customization Guidelines – Medium Risk

Based on the information provided in Appendix A, this eCIRTS Project was classified as a Medium Risk Radical Change. The following table displays the best practice for customizing the Change Management Plans for this level of project.

<table>
<thead>
<tr>
<th>Risk Category</th>
<th>Medium Risk Customization Guidelines</th>
</tr>
</thead>
</table>
| **Approach**          | • Formally complete the Manager's Competency Assessment (ideally with each manager).  
• Provide training and individual coaching appropriate for everyone based on strengths and weaknesses identified as a result of the assessment.  
• Face-to-face workshop with managers recommended and refreshers as needed as system implementation approaches.  
• Include an ongoing support structure with coaching partners and access to Change Management support.                                                                 |
| **Individual Coaching**| • Focus on Resistance Management, application of ADKAR®, and CLARC roles (Communicator, Liaison, Advocate, Resistance Manager, and Coach).  
• Individual coaching sessions ideally take place face-to-face with a CM Team member in-person. If face-to-face is not an option, consider video conferencing. |
| **Group Coaching**    | Recommend face-to-face coaching workshop (virtual workshop at a minimum) for all managers. Focus the workshop on two main elements:  
1) How to lead themselves as managers through the change; and  
2) How to lead their employees through the change.  
The outcomes of this workshop include: a foundational understanding of change management and the critical role managers play, how to apply the Prosci ADKAR® Model, and action plans to move employees through individual change.  
Also include a system of ongoing touchpoints with the CM Team as part of this plan. |
| **Compliance by Coaches** | Monitor with active follow-up supported by Primary Sponsor, Manager, and CM Team.                                                                                                                                                        |
| **Feedback with Coaches** | Strict cadence of feedback following a predetermined schedule and reactive as necessary.                                                                                                                                                  |
APPENDIX C: Sample Change Management Coaching Outline

• Introduction and welcome

• What is the role of a manager or supervisor during change?
  o Create awareness about what it means to be an effective coach in a changing environment. Describe the role and expectations for the eCIRTS Project.

• Why is this level of coaching important during change?
  o Illustrate the importance of managers and supervisors in supporting and implementing successful change. Employees trust and look toward supervisors for candid and meaningful information, especially when things around them are changing.

• How to use ADKAR® with employees
  o The ADKAR® Model is an effective method for identifying where changes are failing and what actions can be taken. It is easy to understand and will give you a way to talk with employees about the change.

• Group change coaching guidelines
  o Distribute sample group meeting agenda. Use training methods such as role-playing and question-and-answer exercises to practice group coaching during a change.

• Individual change coaching guidelines
  o Distribute a sample individual change coaching plan. Present the ADKAR® profile and the corrective actions for each of the phases. Discuss the implications, frequency, and variations of individual coaching approaches.

• Prepare change management coaching timelines
  o Define timelines for specific group and individual coaching activities.

• Next steps and coaching support
  o Develop feedback mechanisms for returning information to the CM Team and adapting activities to meet the current situation. Tell managers and supervisors where they can get help.
APPENDIX D: Sample Group Coaching Agenda

- **Introductions and ice-breaker**

- **Explanation of the change**
  - Provide background and context for this change. Be honest about what is known and what is not known at this time.

- **ADKAR® introduction**
  - Introduce the ADKAR® Model using example changes and show how ADKAR® applies to these changes.

- **ADKAR® individual exercise**
  - Have employees complete the ADKAR® exercise for a personal change. Those who feel comfortable can share their experience

- **ADKAR® group exercise and presentation**
  - Work in small groups or as a whole team to look at the current change in terms of ADKAR®. Where are the barrier points? Brainstorm and capture feedback on flipcharts.

- **Question and answer session**
  - Facilitate a discussion about the change and about ADKAR®. Provide an open and safe environment for candid discussion about the change.

- **Next steps and where to get support**