



Change Intelligent® Analysis & Action Planning Tool

This is a variant of the "Six Hats Thinking Exercise" used for problem-solving and decision-making. This exercise works best with an in-tact team jointly focused on a change initiative. It can be used:

- At the onset of a change process, during the “planning” stage, first to help analyze the situation from Heart, Head, and Hands perspectives, and then second to incorporate these insights into action plans.
- During the “doing” stage, to sense-check the proposed path forward and ensure no critical component has been neglected.
- After the change process during the “sustaining” stage, to guide the lessons learned debrief.

To use this tool, analyze the initiative in a sequential manner wearing a "hat" (literally or figuratively!) representing the perspective you are "coming from," using the charts below to capture insights/plans:

1. Red hat - Heart perspective - focusing on people - asking "who" questions - engaging, communicating, caring – to engage people to “want it”
2. Blue hat - Head perspective - focusing on purpose - asking "why/what" questions - vision, mission, strategy – to enlighten people to “get it”
3. Yellow hat - Hands perspective - focusing on process - asking "how" questions - plans, process, tactics – to equip people to “do it”

Begin by convening the team in charge of planning and/or executing and/or evaluating the change initiative. Use the chart on the next page to analyze the initiative in terms of the positives (what we have done well so far) and the opportunities (what we have not done as well so far & could do differently now and moving ahead). Then, identify actions based on your analysis (what are key next steps to take and key messages to communicate). After you have completed the tool, transfer your observations, insights, and actions into your project plan and/or team agendas, as appropriate. For optimum results, make this a “living document” – model continuous improvement by periodically reviewing, updating, and leveraging learnings to build your organization’s change leadership capability!

To learn your Change Leader style and obtain targeted, actionable developmental tactics, take the free, online CQ®/Change Intelligence® Assessment available in Change Intelligence: Use the Power of CQ to Lead Change that Sticks.



Got Change? Get CQ®! The CQ® Certification Program equips you to lead successful and sustainable change - Change Leaders who get CQ® get results for their organizations, teams, and careers! ACMP, ADT, HRCI, ICF, PMI & SHRM approved!



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Apply awareness of CQ® to analyze your change initiative and plan actions based on your analysis. Put on your Heart hat and answer the three questions, and then put on your Head hat and do the same, and end with your Hands hat:

CQ® Component	What Have We Done Well So Far?	What Have We Not Done As Well So Far & Could Do Differently Now and Moving Ahead?	What are Key Next Steps to Take and Messages to Communicate?
Leading the Heart (People, Teams, Culture)			
Leading the Head (Mission, Strategy, Metrics)			
Leading the Hands (Process, Tools, Training)			

Visit www.ChangeCatalysts.com to download two free chapters of Change Intelligence and our monthly ezine with CQ® tips and tools to lead successful and sustainable change!

