

TOOLKIT

Building a Performance Culture

IN THE FACE OF GROWTH

Welcome to the “**Building a Performance Culture in the Face of Growth**” Webinar **Toolkit**. Here you will find brief activities and questions designed to spur new ideas around each of the core perspectives shared in the webinar. We invite you to explore this toolkit with curiosity!

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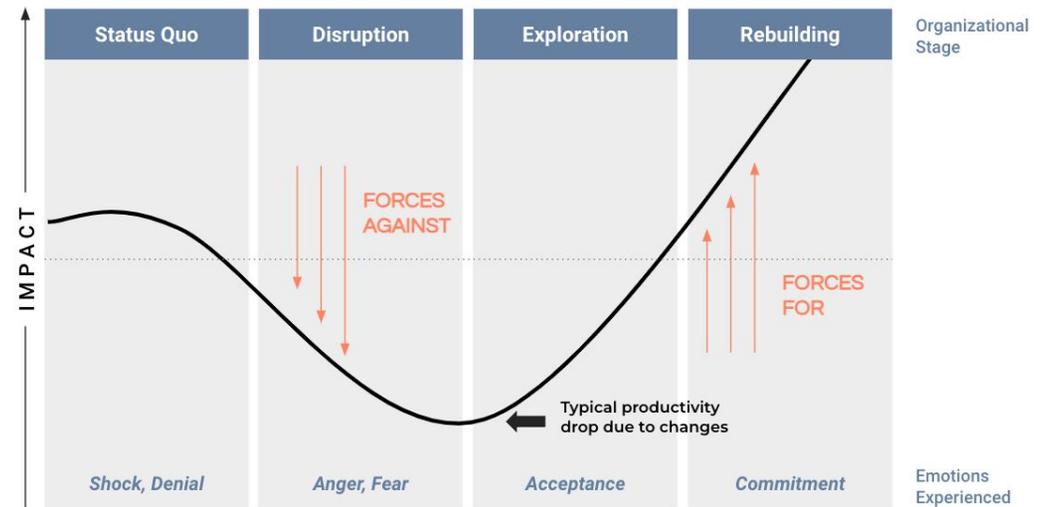
Examine and account for change at the human level.

The change journey curve illustrates how each employee moves through the change experience

20-30 MINS

The Challenge:

1. **Examine the Change:** Examine a current or upcoming change effort. Identify the key milestones of the change process, the main stakeholders impacted, and the desired outcome.
2. **List the Forces Against your Change Effort:** These are the doubts, risks, and pain points that folks are likely to experience.
3. **List the Forces that Can Help Drive your Effort Forward:** These are the stakeholders, resources, and opportunities that will impact your employees in a positive way.
4. **Identify Opportunities for Support:** Identify how you could support your employees throughout each stage of the change process as they experience different emotions.



Create a storytelling platform.

Critical shifts tell specific stories of how the organization is moving through change.

20-30 MINS

The Challenge:

1. **Identify Critical Shifts:** Identify 3-6 critical shifts that will help your stakeholders reach the desired future state of a change effort by answering the following questions:
 - a. Within targeted areas, what must we do more of? Less of?
 - b. What are the highest priority items?
2. **Finalize Your From-To Statements:** Draft from-to statements by taking the following steps:
 - a. Identify overarching themes from your answers above
 - b. Draft themes into "From-To" Shift Statements

CRITICAL SHIFTS

FROM: The Current State



TO: The Desired Future State

Critical shifts are the translation of your change strategy into specific "from - to" journeys that drive increased engagement and illustrate how employees will achieve goals.

EXAMPLE

Centralized
decision-
making



Empower
decision-making
at the right level

Identify change leadership capabilities.

Go deep and identify skills and capabilities needed for leaders to step into and lead your change efforts.

15-20 MINS

The Challenge:

1. **Let's start with our WHY:** Understanding the leadership capabilities and behaviors that will drive your change forward, starts by first understanding the values most important to your organization.
2. **Complete Your Values Architecture:** Spend 15 minutes completing the circle, starting with the 'WHY' and working your way out to uncover the key capabilities (how) and key behaviors (what).

Values Architecture

Translating values to aligned, lived behaviors.

Our Why = Company Values

The foundation of what our organization cares about

The How = Capabilities

The capabilities each employee needs to live into these values

The What = Behaviors

The observable behaviors needed to achieve our how & what.

WHY

Our **purpose**
driven by our
values

HOW

WHAT

Create inclusive meetings.

Encourage healthy dialogue about the change efforts and their impact.

10-15 MINS

The Challenge:

1. **Evaluate Your Current Meeting Structures:** How are you driving your meetings to be more inclusive? Reflect on the following questions:
 - a. How do you ensure folks arrive to each meeting with enough context to actively contribute and share?
 - b. What opening question might create the space for inclusivity during this meeting?
 - c. Do the voices in your meetings represent those within your firm? How so?
 - d. How do you elevate dissenting views and create space for healthy disagreement in meetings

Design your Meeting with Intention

5 MIN Connect

What do you know today as a leader that you didn't know 18 months ago?

***Here, we design the interaction!**

Remember to build in your transitions!

15 MIN Perspective

Create open space for sharing POV & perspectives

20 MIN Solution

Converge, challenge the team to go deeper

5 MIN Commit

Land on shared outcomes

IN ACTION

Identify Change Leadership Capabilities

Go deep and identify skills and capabilities needed for leaders to step into and lead your change efforts.



Create the space for reflection.

Quarterly Retrospectives allows for the entire organization to come together, celebrate success, report on key growth and change metrics and continuously call back to the broader strategy.

10-15 MINS

The Challenge:

1. **Build Your Quarterly Retro:** What would an ideal retro at your firm look like, through the lens of change management? Reflect on the following questions:
 - a. What core components make up your retro? Why?
 - b. How can you drive more transparency on the state of your business and vision for the future?
 - c. What core metrics are you using to measure success? Which of these metrics bring a human-centric lens?
 - d. How do you celebrate and share the successes of your teams?
 - e. How do you drive a feeling of ownership, coming out of each retro?



:00	Create the Space: A Moment to Arrive
:05	Our Business + Core Metrics
:20	Our Portfolio Performance
:35	2023 Focus Area Visioning Session
:55	Team Updates + Celebrations
1:10	Our Community & Brand
1:25	Reflect & Connect

Build personalized and scaled learning journeys.

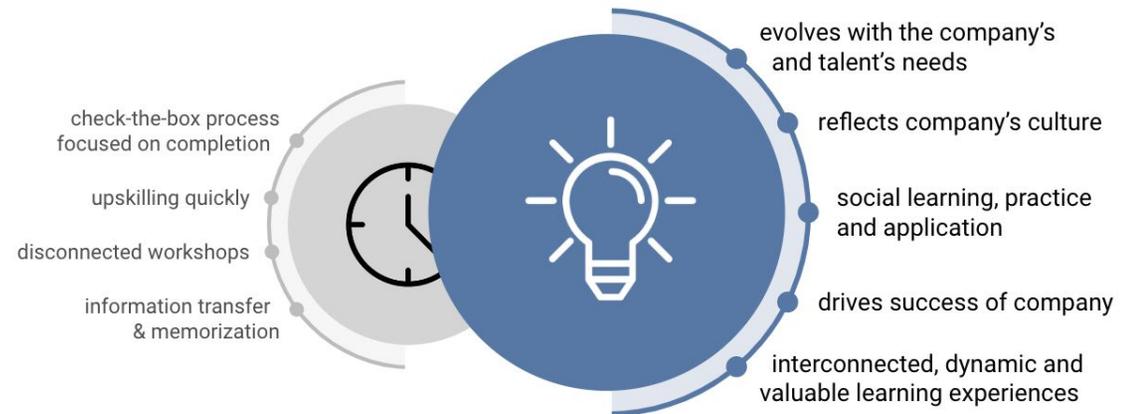
Success in change efforts doesn't happen overnight. Engage and align your workforce with the new direction by fostering a strong learning culture to drive success.

10-15 MINS

The Challenge:

1. **Examine Your Learning Culture:** Take time to step back and examine how you approach change through the lens of learning and development by exploring the following questions:
 - a. How do you approach learning at your firm? Does the approach take into account different perspectives, preferences, and learning styles?
 - b. How do you connect your learning programs back to the core objectives of your firm?
 - c. How do you ensure that your learners feel supported and involved in important change efforts and initiatives?

From Training Culture to Learning Culture



IN ACTION

Build Personalized + Scaled Learning Journeys

Success in change efforts doesn't happen overnight. Engage and align your workforce with the new direction by fostering a strong learning culture to drive success.



The Change Leadership Accelerator

LEAPKIT



Learning Change Fundamentals

We build foundational understanding of key change concepts

- Understanding Change
- Leading Yourself
- Leading Others



Building A Change Vision

We work collaboratively to align on a vision for change

- Change Vision
- Stakeholder Management
- Leading the Business



Leading In Change

We learn to lead change effectively through tools & sustainment techniques

- Tools & Frameworks
- Behavior & Mindset Shifts
- Measurement & Sustainment

Capstone →



**CREATE
THE SPACE**

We create the space for unique strategic experiences that meet your most critical business needs.

Thoughtium is a leading experience-driven company focusing on transforming individuals, teams, and organizations. Our approach is differentiated and our people are industry-leading. We love to create the space for our clients and community to expand and tell their story.

The Thoughtium Difference



Co-creation at the core of our design process



We invest in the personal relationship



A focus on measurable impact



Build from within mentality