

DRIVING ORGANIZATIONAL CHANGE WITH DATA

Sep 24, 25, Oct 1, 7, 9 & 15, 2024 (Six Sessions)

Virtual

WORKSHOP FACULTY:

ALEC LEVENSON

MAURA STEVENSON

GUEST SPEAKER: PAUL TAFFINDER



AGENDA

USC CEO Driving Organizational Change With Data

Workshop faculty:

- Alec Levenson
- Maura Stevenson
- Guest Speaker: Paul Taffinder

Daily Schedule for All Six Sessions:

- 90 minute session
- 30 minute break
- 60 minute session

Day One September 24, 2024: 8am – 11am PT/11am – 2pm ET

Session objective: Introduce the framework & align with participant expectations

- Alec Levenson & Maura Stevenson

Topics covered:

- Introduce the workshop framework that integrates organization development (OD) with data and information
- Change models and change as a capability not just a process
- Diagnostics and change as a linear versus nonlinear process
- How to do a proper analysis

Learning outcomes from the session:

- What is meant by an integrated approach to business partnering
- Understanding the challenges, needs, expertise and processes of HR business partners, OD and people analytics
- Understanding the workshop framework

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Day Two September 25, 2024: 8am – 11am PT/11am – 2pm ET

Session objective: Review different change models, introduce new tools, and demystify data analytics

- Maura Stevenson & Alec Levenson

Topics covered:

- Deep dive into change models
- Using both qualitative and quantitative data and information iteratively, and parallels with market research
- Demystifying data analytics: what it really means, and how OD does more work with data and analytics than is usually recognized
- Introduce levels of analysis

Learning outcomes from the session:

- Understand that many different change models exist: some more individually focused, others more organizationally focused
- Understand difference of managing change process vs. change capability
- Complete a stakeholder analysis and use change tools
- Diagnose and understand why change efforts fail
- When to use qualitative vs. quantitative data, including when only qualitative is possible
- Awareness of levels of analysis, and how to think systematically and strategically about data and information

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Day Three

October 1, 2024: 8am – 11am PT/11am – 2pm ET

Session objective: Explore levels of analysis and different sources of business metrics

- Alec Levenson & Maura Stevenson

Topics covered:

- Deep dive into levels of analysis: how to go back and forth between them, and their interconnections
- Aligning the analysis with the appropriate business metrics: strategic, financial and/or operational
- Case study that illustrates key learning points
- Examples: Building capabilities at senior leadership level, including how individual leader capabilities impact the culture on their teams, plus the special qualities of 360 data

Learning outcomes from the session:

- Understand the data and information needed to address the participant's challenge
- Understand the importance of bringing data to life with a shared understanding
- How to use standard (readily available) data and information in creative ways

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Day Four

October 7, 2024: 8am – 11am PT/11am – 2pm ET

Session objective: See how the framework is applied in a variety of different business examples

- Maura Stevenson & Alec Levenson

Topics covered:

- Case study using business process with individual, role & team focus
- Example: What drives engagement and performance at the store level – individual vs. team vs. leader factors
- Peer coaching for your business opportunity in small breakout groups
- Large group sharing, key insights & next steps

Learning outcomes from the session:

- Understand what drives performance at the individual vs. group levels
- Understand how the work structure and business model drive the kind of analysis needed
- Understand the appropriate business metrics for the participant's case

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Day Five

October 9, 2024: 8am – 11am PT/11am – 2pm ET

Session objective: Address what is important to leadership and the C Suite and how to best engage them

- Guest Speaker: Paul Taffinder
- Alec Levenson & Maura Stevenson

Topics covered:

- C-Suite applications with guest speaker
- Influencing at leadership level
- Introduce using data to tell a story to drive change: The 4th step in the framework, which needs to include all of the other three elements
- Storytelling framework: Using storytelling throughout transformation, using both qualitative and quantitative data and information

Learning outcomes from the session:

- Understand the challenges and team dynamics amongst leadership
- Tips for working with leadership teams
- Qualitative & quantitative methodologies for working with leadership teams at all organizational levels

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Day Six October 15, 2024: 8am – 11am PT/11am – 2pm ET

Session objective: Bring the learning from all the previous sessions together and prepare to apply back on the job

- Alec Levenson & Maura Stevenson

Topics covered:

- Telling the story at all levels of the organization, where the work happens, and where the transformation has to take root
- Storytelling at the beginning to get stakeholder buy-in to do the framework the right way
- Storytelling at the end to summarize learnings and help drive change
- Synthesis of the entire workshop's learnings

Learning outcomes from the session:

- How to tell a story that best fits your organization's culture
- Apply the facts, feelings, beliefs, actions communications model to understand how much qualitative versus quantitative data is needed
- Understand how all the different pieces fit together and link to the overall model
- Completed personal action plan to begin to apply workshop learnings on the job