# Leading for Proactivity Stress-Test

## Systematic Proactivity: Your key to sustainable, step-change results

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# Executive Summary

As a **Change Leader**, how are you and your organisation coping with the pressure to deliver more and better results, with tightening resources, in a TUNA (Turbulent, Uncertain, Novel and Ambiguous) world?

Doing more with less is a way of life for change professionals and we are constantly raising our skills to achieve, assure and facilitate delivery, innovation and benefits realisation directly and particularly through those we lead and influence.

The 'Leading for Proactivity Stress Test' unlocks the **power of systematic proactivity** as a learnable skillset for change professionals.

This equips you, your team and your stakeholders for a step change in:

**benefits** realisation, capability to deal with **high stakes change**, more sustainable personal and leadership **effectiveness** to greatly reduce the risk of **burnout** and the ability to **attract, retain** and gain the best **'repeatable bang for the buck'** from established and emerging change professionals.

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# Overview

As a **Change Leader you face unprecedented challenges** [1] [2] [3] in delivering benefits from major change. These include:

- The number of changes to be delivered, often concurrently
- The scale, pace, scope and timing of change
- Learning curves on emerging technologies
- Rising stakeholder complexity, conflict and expectations
- conflicting objectives such as customer and societal benefits and delivery cost
- International dynamics & social dilemmas
- Supply chain fragility
- Geo-political turbulence and ambiguity
- Complex financing requirements and interactions

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[1] Ahead of the Curve: Forging a Future-Focused Culture, Pulse of the Profession, Project Management Institute, 2020 and Project Management Job Growth and Talent Gap 2017-2027, Project Management Institute, 2017

[2] Tomorrow's Teams Today, Pulse of the Profession In-Depth Report, 2020

[3] How to Plan and Implement Change, IT Now, Spring 2020

- Raised performance standards and benchmarks[4] amid changing demographics
- Corporate Social Responsibility, reputation and sustainability imperatives
- Growing complexity in the 'subject matter' to deal with: legislation, policy, privacy, culture, technology, national and commercial security, organisational relationships and creation and use of information and assets, to name a few
- The increased variety of roles expected of change leaders even beyond the historical 'high-bar' of:

"Visionary, catalyst, mover and shaker, compelling case builder, risk assessor, team-builder, coalition former, ally seeker, implementation planner, action driver, deliverer, fixer-facilitator, wheeler-dealer, power broker, reviewer, critic, progress-chaser and auditor" (Buchanan & Story, 1997)

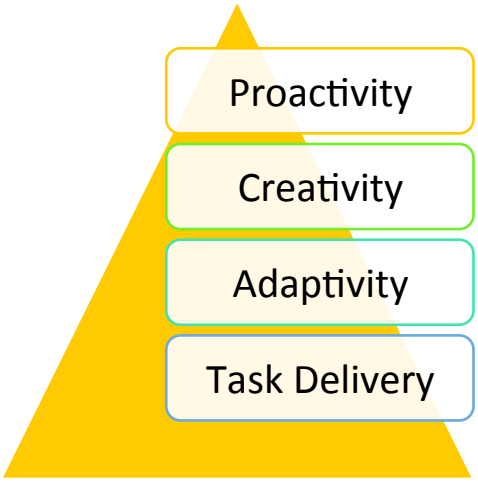
**Overall**, these trends have increased **uncertainty, complexity and demands on change leaders** because it is **impossible to pre-define**, plan and resource all work tasks in such a **dynamic environment.**

[4] Benchmarking Capability Tool Guidance, Infrastructure & Projects Authority, June 2020

## Hallmarks of Change Leader talent

**In such a scenario, successful change leaders** - employed or contracted-in – **combine their personal and leadership capabilities to facilitate**:

- Task delivery (to meet formalised delivery requirements)
- Adaptivity (to cope with change they cannot control)
- Creativity (to problem-solve, at pace) and
- Proactivity to lead themselves, and others, to anticipate, create, influence and drive the circumstances needed for success amid uncertainty.[5]




[5] Griffin M A, Neal A, Parker S K (2007) A new model of work role performance: Positive behaviour in uncertain and interdependent contexts, Academy of Management Journal, 50: 327-347

## So what?

While the **change community** (strategy specialists, portfolio, programme, project and business change leaders) invest heavily in task delivery (e.g. methodologies and technical skills), adapting and creative skills (e.g. risk management, issues resolution and negotiation), **building capability in proactivity is not explicit** in existing change leadership regimes.

## Proactivity neglected

While many organisations and change leaders seek to 'empower' their people, few test how the design and operation of their **change practices** support **personal and team proactivity**, based on **working smarter not harder,** [6]and **yet:**

1. The need for '**proactive freedom**' – the ability to exercise proactivity to make work more meaningful through adequate autonomy and self-determination, with scope to cause, 'own'

[6] Parker S K & Bindl U K (2017) Proactivity at Work: Making Things happen in Organizations, Routledge, New York.

and control change - is a **recurring theme** in recent studies and surveys of top performers and desirable talent, including change agents at all levels of seniority. [7] [8]

2. The perception and experience of such freedom – and therefore the level of proactivity - is heavily influenced by the **leadership behaviours** of local, and Executive, leaders. [9]

3. **Proactive**, intrapreneurial **behaviour** is known to deliver hard, **commercial results** [10] including:

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[7] Wu C-H (2019) Employee Proactivity in Organizations, Bristol University Press

[8] Top 100 Companies for Graduates to work for 2019/20, The Job Crowd

[9] Strauss K & Parker S K (2014) Effective and Sustained Proactivity in the Workplace: A Self-Determination Perspective. In M Gagne (Ed.) The Oxford Handbook of Work Engagement, Motivation and Self-Determination Theory: 50-71, New York, Oxford University Press

[10] Deloitte Digital (2015) Five Insights into Intrapreneurship: A Guide to Accelerating Innovation within Corporations

- bottom-line impact
- ground-breaking innovation
- productivity through effectiveness
- cuts in product development time and cost
- breeding and nurturing talent
- gaining competitive advantage
- boosting organisational cultures and sub-cultures
- raising benefits realisation from change
- attracting and retaining talent

**Therefore** if your **change leadership** practices and interactions have not been **stress-tested against** the needs of your high-performing change agents for **proactive freedom**, you are probably **missing out** on a whole area of change **results and discretionary effort** that make top change individuals and teams 'top' and that lead to superior **delivery, benefits realisation** and that **attract, retain and bring out the best in** your experienced and emerging change professionals.

"Companies that invest in their people also become talent magnets" (Harvard Business Review, February 5, 2020)

"Leadership is not defined by the exercise of power but by the capacity to increase the sense of power among those led. The most essential work of the leader is to create more leaders" (Mary Parker Follett)

## So, what to do?

### Introducing the Leading for Proactivity Sress-Test

### Aim

To deliver a **step change in capability for, and benefits from, the proactivity** of your change leaders and to release, more fully, your army of intrapreneurial, proactive, workstream leaders in business areas to enlarge your scope for delivering successful change.

## Who is this for?

This Test is designed for **Change Professionals** looking to make **more strategic impact**, in ways that are more sustainable for them, those they lead and others they depend on.

## Why?

1. To **raise the return on investment** from your change initiatives
2. To raise your capability for innovation and **landmark change**
3. To make the work life of your change professionals – contracted-in or employed - more sustainable, so that you can compete in retaining, attracting and gaining the most effective performance (**repeatable bang for the buck**) from such increasingly in-demand people, who will have an increasing range of career options. [2] [11]

[11] Why Competing for New Talent is a Mistake, Harvard Business Review, February 05, 2020, Seth Harris and Jake Schwartz

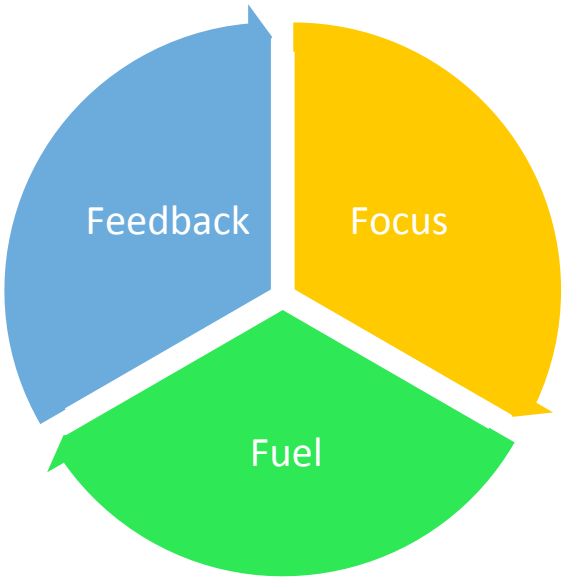
4. To provide **step-change insight** into what is enabling and motivating proactivity by your change leaders, and those they lead – formally or informally – is valuable to leaders who want to stimulate and support such behaviour in those staff and stakeholders, so that they reap the benefits, and manage any downsides, of this, for **better change outcomes.**

## Results

We deliver a tailored **Personal Proactivity Profile** ™ (PPP) to each Change Leader ('Nominee') that your organisation elects to participate in the Stress-Test.

This brings personal FOCUS, FUEL and FEEDBACK for more effective proactivity, at individual, team and organisational levels.

"No one should underestimate the scale and difficulty of the transition that's underway"
(Talent Trends 2019: Upskilling for a digital world, PwC)




**FOCUS** and self-awareness for participant on:

- how they are proactive
- the impact this has on them and those they lead
- the scope to extend their proactivity into areas they may not have considered previously.

**FUEL** to your self-starters, through raising their awareness of:

- the reasons they are proactive
- why they believe they can achieve their desired results through proactivity
- what energises and sustains them in their proactive endeavours

**FEEDBACK** to supervisors, leaders and change policy makers on:

- what curbs the proactivity of your change leaders and **what you lose out on** from this
- what would make them even more proactive

## Some of the science behind this…

## Proactive individuals

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| are more effective in their roles and tasks (Thompson 2005) |
| are more highly rated by their supervisors (Grant Parker & Collins 2009) |
| are more satisfied with their work (Thomas et al 2010) |
| experience constructive tension at work rather than distress (Crant 1995) |
| have less compassion fatigue and therefore are inclined to help others and be more collaborative (Ohly & Fritz 2007) |
| experience lower rates of sick absence (Greenglass & Fikensbaum 2009) |
| Suffer less burnout (Petitta & Vecchione 2011) |

## Teams influenced by proactive individuals enjoy:

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|---|
| Improved service performance (Belschak et al 2010) |
| Higher productivity than comparable teams (Druskat & Kayes 2000) |
| Superior work-group cohesion (Slatten et al 2013) |

## Organisational benefits from proactive behaviour by individuals include:

| |
|---|
| Superior financial performance (Frese et al 2000) |
| Strong staff retention (Fairlie 2011) |
| Improved decision quality (Argote & Ingram 2000) |
| Superior levels of emotional commitment by staff (Thomas et al 2010) |
| Improved group cohesion and effectiveness (through trust, collaboration and information sharing) (Greguras & Diefendorff 2010) |
| Effective risk management (Griffin et al 2007) |

"The people who get on in this world are the people who get up and look for the circumstances they want, and, if they can't find them, make them" (George Bernard Shaw)

The combined impact of these, and other effects not cited here, are to deliver favourable strategic impact on [9]:

- bottom-line
- innovation
- productivity
- speed and cost
- talent attraction, development and retention
- culture and sub-cultures
- benefits realisation from change

## Method

1. We meet with you to ensure that we **understand your** organisational, business and **change challenges** and context, and your purpose behind, and intended use of, the Leading for Proactivity Stress-Test results

2. We advise on and agree Terms of Reference with you on which of your change leaders (e.g. high performers, high-potentials or emerging) to interview

3. We send an Introduction letter, interview questions, a few definitions and a Consent Form (GDPR, ethics and privacy related) to each interviewee ('Nominee') for signature

4. We **interview** each Nominee in private, (now via Zoom due to Covid19). We record and transcribe all interviews to produce a 'Personal Proactivity Plan' (PPP) for each Nominee. (Recordings are kept securely and deleted once PPPs are finalised).

5. Interview findings are analysed using our **prize-winning** proactivity assessment model developed at Henley Business School in 2015-16 and updated annually.

6. We deliver a **tailored 'Personal Proactivity Plan'** to each Nominee. This comprises a personal SWOT analysis on their proactivity, tailored recommendations on areas in which to become more proactive and specific options and guidance on how to adopt and benefit from those recommendations.

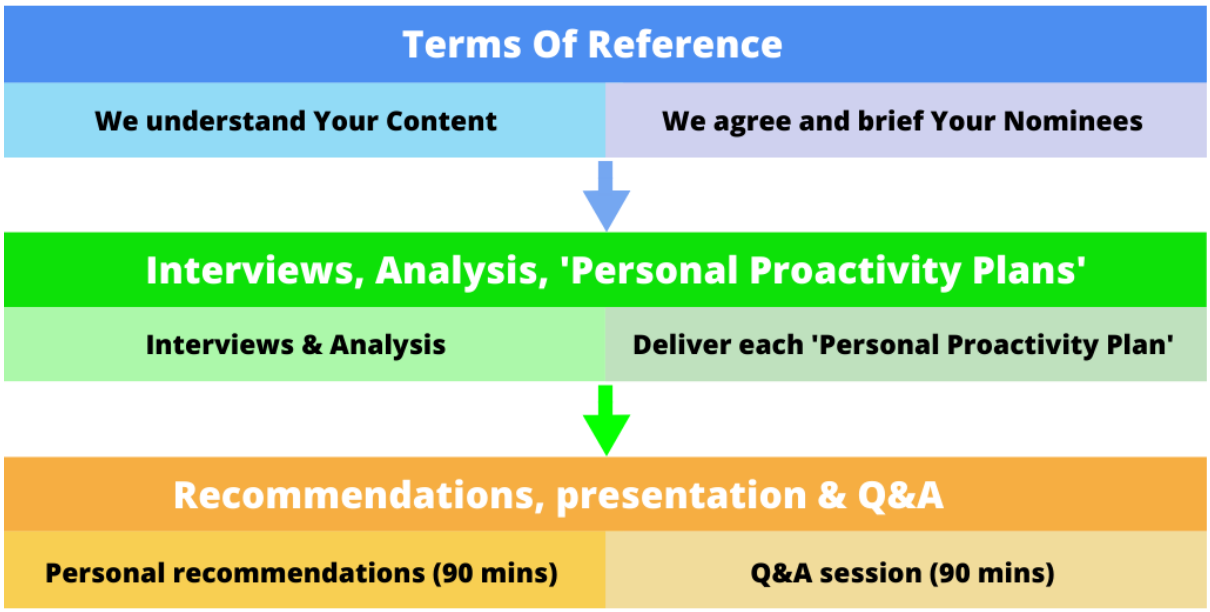
7. We summarise, anonymise and present findings to you visually, with non-attributable recommendations, to feedback key messages and perceived conflicts between what supports the proactivity by your people and what blocks it, in your organisational context. This is aimed at turning ‘Proactive Freedom’ and systematic proactivity into a competitive advantage in your change results and the emerging War for Talent over change professionals.

8. We offer you a 90minute Q&A session to discuss findings and Recommendations, including how ensure your ‘unleashed’ talent is aligned to corporate and team change goals.

9. Our results supplement, but do not duplicate, a range of well-known profiling methodologies (at individual and team levels).

10. We are happy to discuss Next Steps.

In summary:




Typical interview questions include:

1. For you, in your work, what does it mean to be 'proactive'?
2. In what ways are you, or have you been, proactive in your work?
3. Who do you think benefits, or has benefitted, from this proactivity, and how?
4. What do you think, or feel, motivates you to be proactive at work?
5. What makes you believe that your proactivity can make a positive difference to work results?
6. What energises you (gives you energy and enthusiasm) to be proactive at work?
7. Who do you find inspires you to be proactive at work? Why?
8. In your view, what factors support, or act as barriers to, your proactivity at work?
9. What sustains your proactivity when the going gets tough?
10. What would enable you to be more proactive at work?

Depending on the **Terms of Reference** you agree, we can change questions and can also test:

- To what extent your nominees exhibit skill in leading those **within** their formal authority for proactive behaviour. We do this through self-reported vs. 360-degree proactivity feedback.

- To what extent your nominees exhibit skill in leading those **beyond** their formal authority for proactive behaviour. We do this through self-reported vs. 360-degree proactivity feedback.

## This means you get:

- **A 'PROACIVITY' SNAPSHOT**: Clarity on where, why and how the individuals and teams you nominate are being proactive and how your organisation is benefitting from that.
- **'PERSONAL PROACTIVITY PLANS'**: tailored Recommendations for each Nominee.
- **DEEPER INSIGHT**: A level of practical insight not available from other methods or tools, to enable a step-change in your stakeholder engagement and communications, change design and delivery, business

change, benefits realisation, risk management, high-stakes decision-making and other aspects of change

• **'RETAIN' RECOMMENDATIONS**: Practical, inexpensive recommendations to help retain your top change professionals by fuelling their proactive behaviours and aligning those clearly to valued corporate and personal goals

• **'ATTRACT' RECOMMENDATIONS** Practical, non-money or low-cost options to attract and develop skilled staff with a proactive mindset and motivations, into your change talent pipeline, while reducing the risks of sourcing 'rogue' staff

• **HIGH PERFORMING TEAMS**. A transformed level of 'self' and 'other' awareness for your nominated individual, and teams of, staff to accelerate and multiply the formation and performance of 'high-performing' change teams.

• **DEPLOYMENT INSIGHT**. Specific opportunities to re-skill, re-deploy, re-assign or release individuals unable, or unwilling, to develop their ways of leading and working, to fit your current and future requirements.

• **MORE STRATEGIC IMPACT**: Enhanced impact and reputation for delivering high stakes change and benefits realisation.

## How long does this take?

- From agreeing Terms of Reference, to Final results being issued and presented: up to one month (depending on your requirements)
- Each staff interview: 60-80 minutes.
- Recommendations presentation and Q&A session: 90 minutes + 90 minutes (can be staggered)

## To get the most from this Stress-Test….

You and your organisation will get the most value from this Stress-Test if you:

- Have a vision for a step change in strategic impact
- Are open to leveraging unexpected findings
- Are willing to invest in your people and yourself as key sources of corporate and personal success

## Security, Confidentiality, Data Protection

- You will own all presentation materials.
- We will comply with Data Protection, commercial in confidence, confidentiality, professional research and other standards agreed with you.
- Your Facilitator is accustomed to working to UK Official Secrets Act standards.

# Pricing

As our focus is on delivering a significant result for you and your organisation, we like to negotiate and agree customised pricing based on a commission on the value you place on the results of this Stress-Test.

As the practical value of the Leading for Proactivity Stress-Test is unknown to you, we are happy to run a single Test for you (or another individual you nominate) as a sample, to help you to estimate the value to you and your organisation.

"All organizations need a discipline that makes them face up to reality" (Peter Drucker)

**Used with permission**

# Your Consultant: David Santineer

## Expertise

David is a change leadership specialist who has practiced in the private, public and third sectors.

In 2016 Henley Business School awarded him a Distinction and Prize for his applied MBA research on proactivity which underpins the 'Leading for Proactivity Stress-Test'.

David is also an Associate Partner of Humanostics, a PI Certified Partner authorised to use the science, assessment software, and curriculum of management workshops of The Predictive Index. This is a suite used by firms such as IBM, Maersk and Hugo Boss.

David was an OGC/MPA Medium Risk Reviewer, is a MAPM, Member of the Change Management Institute, MBCS, SIRM, FCMI, FCCA and has undertaken Change Leadership training and CPD at the UK Cabinet Office, Henley, Oxford, Cambridge, Harvard and Yale.

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# Contact Us

You can contact David for a chat on 07597 820678, via david@proactivebydesign.co.uk or on LinkedIn.

## Relevant personal background

David has delivered, and facilitated delivery of, change for over 25 years spanning financial services, construction and central government organisations, with up to 60,000 FTE staff and with annual revenue and costs of up to £600bn and £4bn, respectively.

He has led programme and project teams (largest benefits realisation of £200m over 4 years) and change teams on Rapid Action Team interventions on major programmes affecting £10bns and was an OGC/MPA Medium Risk Reviewer.

David formed and led teams in introducing Enterprise Risk Management in major areas of HMRC (over 40% of ExCom's risks) including linkage to Policy & Strategy, Tech, Finance, and Change Leaders' portfolios.

He represented HMRC on several x-government Programme Boards and advised on one of the largest people change programmes in the UK, including a multi-£bn Estates programme.

David has led programme, project and business change teams of up to 150 directly and up to 250 indirectly, including over 20 'rising star' PPM and Business Change professionals. He formed and led a change team in providing data and digital upskilling to over 200 senior change professionals in HMRC.

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