



Program Glossary

“Day 1” Program Glossary

8-Step Process of Successful Change – Harvard University’s J. Kotter introduced this organizational change methodology in his 1995 book, *Leading Change*. Considered one of the most successful among current models, this system provides detailed guidance on critical steps required to achieve sustainable cultural change.

Action Planning Template – An organizing tool used by managers and supervisors to capture work assignments resulting from the “Change Leadership for Organizations in Transition” training.

Anchor Points – Values and organizing principles identified during an employee’s *Emotional Due Diligence* exercise, which are shared between the two merging organizations; foundation element for the “values mapping” process.

Attributes – An organization’s key characteristics; used interchangeably with values and principles.

Authenticity of Leadership – An amalgamation of characteristics, including transparency, consistency, integrity, fairness, and alignment of interests demonstrated by leaders toward their teams; essential element when asking organizations to undertake personal “risk” in support of change.

“Change Leadership for Employees in Transition” – A 4-hour version of the 3-day “Change Leadership for Organizations in Transition” course, this program is designed as a diffusion initiative occurring through “informal leaders” chosen with employee input from across the organization. The course emphasizes the key themes, objectives, and supporting rationale of the company’s change initiative.

“Change Leadership for Organizations in Transition” – An introductory training program for managers and supervisors on formal change methodologies as well as the underlying emotional and psychological drivers for change acceptance and resistance.

Day 1 – The day typically identified by organizations as the first day of a newly combined organization, generally following a major merger or acquisition.

“Day 1” – A platform of tools, developmental programs, and internal messaging strategies designed specifically for merger situations, both internal and external, with the objective of optimizing organizational performance while assisting employees in achieving a “forward-leaning” posture toward a pending integration.

“Day 1” Company Launch – The point at which the Executive Core Team introduces the “Day 1” initiative to the Organization-at-Large, preferably via a town hall forum.

Emotional Due Diligence – An analytical approach designed to assist employees in first discovering and deconstructing current company and individual values and then “mapping” these to corresponding “anchors” in the new organization. Once “mapped,” these shared values and principles form the basis by which affinity and goodwill can be transferred from the former to the new work environment.

Executive Core Team – A subgroup of the Senior Leadership teams for the two merging organizations; the Core Team should include the head executive for each organization, the integration leads, and an additional

member, typically the head of Human Resources or Corporate Training. The Core Team acts as the principal steering team for a “Day 1” implementation.

Foundations Session – The initial activity of a “Day 1” implementation, this joint exercise conducted by the Executive Core Teams of the merging companies is designed to deliver the Foundations Findings, an initial set of cultural attributes (values and principles) anticipated to be realized within the new organization.

Forward-Leaning – A descriptive phrase used to denote an organization that has assumed a positive and engaged posture toward a pending change process.

Foundations Findings (Values and Principles) – The primary deliverable from the Foundations Session, this summary of core values and organizing principles, developed as a joint effort by the Executive Core Teams of the merging organizations, provides the initial insight into the anticipated cultural attributes of the new company and forms the basis for the later employee *Emotional Due Diligence* efforts.

From-to-Because Statement – A simple, concise format designed for use by Senior Leaders for sharing their vision and supporting rationale while leading teams through a structured change process. The Master Template version of this tool, produced during the Pathfinders Training, serves as a guidance document for subsequent training by the managers and supervisors.

Informal (Thought) Leaders – Key influencers in non-managerial/supervisory positions across the organization; intended participants for the “Change Leadership for Employees in Transition” training, selected, in part, by recommendations from co-workers.

“Insights” – A twice-monthly publication, authored by members of the Joint Senior Leadership Team, which reviews individual perspectives on the Foundation Values & Principles. The format is designed to encourage participation by each member of the respective Senior Leadership teams.

Integration Transition Plan (ITP) – This is the formal planning document used by the Senior Leadership Team to guide the organization through the initial phases of the integration. Key elements include the Master Templates for the From-to-Because statement, the Logic Model, and the Action Planning Template, among others.

Integration Transition Plan Company Launch – Point at which the finalized ITP is introduced to the Organization-at-Large, preferably via a town hall forum.

Lewin, Kurt – (1890–1947) a leading pioneer of social, organizational, and applied psychology, who was recognized as the "founder of social psychology" and one of the first researchers to study group dynamics and organizational development. Considered one of the most eminent psychologists of the 20th Century, Lewin is credited with a number of breakthroughs, including his work on leadership styles and organizational freezing and unfreezing phases.

“Lunch, Learn, and Lead” – A monthly, voluntary development program designed for managers and supervisors emphasizing the needs of leaders in transition; the 90-minute sessions are limited to ~ 20 participants, include pre-meeting reading assignments with discussion questions, and are led by members of the Senior Leadership Team.

Logic Model – A visual image of the results to be achieved throughout the Integration Transition Plan; a deliverable of the “Change Leadership for Organizations in Transition” training, these documents are customized for utilization across the organization in department-specific applications supporting the ITP.

Master Templates – Company-wide versions of three program training-tools (From-to-Because statement, Logic Model, and Action Planning Template) developed as guidance documents by the Joint Senior Leadership Team during the Pathfinders Training.

Organization-at-Large – Refers to all employees across both merging organizations.

“Our Iceberg Is Melting” – A fable based on the award-winning work of Harvard's John Kotter, detailing the story of a penguin colony in crisis, the colony's initial resistance to change, and their ultimate success in adapting their behaviors to assure survival. The text features J. Kotter's “8-Step Process of Successful Change” and is utilized as a training aid for the Organization-at-Large.

Pathfinders Training – The Senior Leadership of each organization joins in this initial class of the “Change Leadership for Organizations in Transition” course. Key deliverables include Operating Principles in support of the “Foundations Findings,” development of the Master Templates for three program training tools, and feedback on program optimization for the subsequent training of managers and supervisors.

Scrum (The) – The period of time immediately following Day 1 or the launch of a newly merged organization and the first 6 months to follow.

Senior Leadership Team (Joint Senior Leadership Team) – The combined direct reports of the Executive Core Team for the two merging companies; ideally includes representation for all major departments.

“Succeeding in a Changing World” – A short film (24 minutes) by Harvard's J. Kotter describing generalities regarding organizational change and the implications of failure and success. As a key element of the “Day 1” Company Launch event, it also introduces the Organization-at-Large to Kotter's “8-Step Process of Successful Change.”

Unfreezing Methodology – An adaptation of Kurt Lewin's classic Change Model designed to assist organizations with letting go of existing behaviors so they can be replaced by new, more desirable behaviors. By later combining this element with Lewin's "Refreezing" techniques, organizations can establish and “root” these new behaviors as sustainable elements of a new company culture.

Values Mapping – A key element of the employee's *Emotional Due Diligence* initiative, this psychological process is designed to facilitate the transfer of affinity and goodwill from an existing organization to a new work environment through the identification of key values and principles with which the employees identify and desire association.

Window (The) – The period of time extending from the announcement of a pending merger, acquisition, or intercompany integration and leading up to Day 1, the formal first day of the combined organization.