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of Training Excellence



# Pre-requisite Knowledge for Pink's Organizational Change Management Applied Certification Course

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## INTRODUCTION

Accredited training organizations (ATOs) often offer both lower-level and advanced courseware within their portfolios. The entry-level certification courses – also known as basic, foundation, or essential courses – are frequently a prerequisite for the more advanced certification courses. However, depending on the subject matter, ATOs such as Pink Elephant can waive the necessity for an entry-level prerequisite certification course by:

- Recognizing another accredited training organization's course
- Recognizing post-secondary studies at an accredited institution
- Allowing for a well-defined level of self-study (according to [Bloom's Taxonomy](#))

Accordingly, Pink Elephant is providing an opportunity for those who meet the above criteria to bypass Pink's Organizational Change Management Essentials (OCE) certification course and self-prepare for our Organizational Change Management Applied (OCA) certification course.

OCE is Pink Elephant's introductory-level course and OCA is our advanced-level course that focuses on the application of the theories learned in the essentials course. Pink's OCE course is a prerequisite for OCA but can be bypassed (as noted above). Here is a brief summary of each certification course:

### **Organizational Change Management Essentials**

Pink's two-day foundation-level course, Organizational Change Management Essentials will provide you with the core concepts and practices intrinsic to organizational change management, as well as advise you on how to gain employee commitment and overcome resistance. You will also gain techniques for inspiring your staff to embrace and sustain change to keep your organization moving in the right direction. For a full course description, [click here](#).

### **Organizational Change Management Applied**

Pink's two-day OCA certification course goes beyond what is learned in OCE and enables IT practitioners to actually apply OCE's concepts, theories, and models within their own organizations. This is accomplished by providing advice and tools to participants as they collaboratively work in small teams to perform specific exercises related to a generic case study.

The Pink Elephant 20/20 organizational change model – which focuses on several key components of leading others through change – uses experiential learning to implement the comprehensive activities that walk participants through the framework. For a full course description, [click here](#).

In this Pink paper, we will provide information on self-preparing to gain the requisite knowledge to take our Organizational Change Management Applied certification course, without the need to take the essentials course:

- We will explain the need for organizational change management (OCM) and why it's important.
- We will briefly summarize the necessary OCM concepts, theories, and models.
- We will direct you to resources where you can obtain the requisite information.

**Note:** Be advised that if you choose the self-study option, the onus will be on you to ensure you have the necessary and essential knowledge that is required before beginning the Organizational Change Management Applied (OCA) certification course. There is no review of the Organizational Change Management Essentials (OCE) concepts and models included in the OCA syllabus. Trainers will be instructed to strictly adhere to their designated training schedule and not allow interruptions about basic OCE knowledge.

## **Organizational Change Management Knowledge Requirements to Be Gained Prior to Beginning Pink Elephant’s OCA Certification Course**

If you do not complete OCE prior to taking Organizational Change Management Applied, you will need to acquire the following knowledge by researching the work of the following academics and subject matter experts and using the provided references...

### **PART ONE: What is organizational change management and why should we care?**

Organizational Change Management (OCM): Co-authors William and Susan Bridges identify OCM as “organizational change means moving from an old way of doing things to a new way that will bring positive outcomes”. Both a situational component related to structures, procedures, etc., as well as a people transition, which concerns the psychological effect of the new situation on the organization and its people, are required.

Reference: *Managing Transitions: Making the Most of Change, 4th Edition*

Why OCM Is Important: Organizational change management is a business discipline that focuses on the people side of change. This is vital knowledge because – according to research from McKinsey Solutions – 70% of change initiatives fail. The major reasons often cited for this level of failure are because:

- Leaders do not properly manage the process side of the change
- The people and cultural aspect of change is either forgotten or ignored

Reference: [70% of Transformation Programs Fail - McKinsey \(slideshare.net\)](#)

To increase the success rate for positive change initiatives, business leaders, line managers, and change agents from all levels of the organization must be equipped with the right skills and knowledge to effectively lead transformational change.

## **PART TWO: OCM Concepts, Models, and Theories**

Change affects each person, individually, and also impacts groups of people such as teams and organizations. The following are foundational to understanding how to successfully manage the people and cultural side of change.

One of the major references for the concepts, models, and theories is *The Effective Change Manager's Handbook: Essential Guidance to the Change Management Body of Knowledge*. We will use the abbreviation EMCH to identify the book and will note the applicable page numbers.

<b>Requisite models, concepts, and theories</b>	<b>Reason for inclusion</b>	<b>Reference/link</b>
<b>Resistance to change</b>	The initial response by most individuals, groups, and organizations is to resist change and maintain the <i>status quo</i> . Change needs to begin by addressing the psychological, economic, and/or social needs of each.	<a href="http://hrm-organization-change-resistance-3-638.jpg">hrm-organization-change-resistance-3-638.jpg (638x479) (slidesharecdn.com)</a>
<b>Maslow's Hierarchy of Needs</b>	Maslow's hierarchy of needs is a motivational theory in psychology that comprises a five-tier model of human needs and is often depicted as tiered levels within a pyramid. It helps us understand people's behavior when adapting to changing situations.	EMCH, pages 17-18  <a href="#">(PDF) A Theory of Human Motivation - Abraham H Maslow - Psychological Review Vol 50 No 4 July 1943   Alexis Ubilla - Academia.edu</a>
<b>The Conscious Competence Learning Model</b>	The conscious competence Learning model highlights two factors that affect our thinking as we learn a new skill: consciousness (awareness) and skill level (competence).  The four stages of competence (the conscious competence learning model) relate to the psychological states associated with progressing from incompetence to competence in a skill.	EMCH, pages 378-379  <a href="https://www.athleteassessments.com/conscious-competence-learning-matrix/">https://www.athleteassessments.com/conscious-competence-learning-matrix/</a>
<b>The Kübler-Ross Change Curve®</b>	Based on the five stages of grief identified by Elisabeth Kübler-Ross, this model represents an individual's defense or coping mechanism regarding change, grief, or shock. This is not a linear progression because a person may move back and forth between stages or become stuck in one.	EMCH, pages 9-12  <a href="https://www.ekrfoundation.org/5-stages-of-grief/change-curve">https://www.ekrfoundation.org/5-stages-of-grief/change-curve</a>

<b>Gleicher Change Formula or Beckhard-Harris Change Formula</b>	This formula explains the factors that need to be addressed to help an individual accept change and take the first steps toward implementing it.	EMCH, pages 292-293  There are also various sources available on the internet.
<b>Tuckman's Model of Team Development</b>	This model shows the five stages in a linear progression of team development – although a team rarely progresses linearly. It also shows the development of personal relationships and the completion of task functions.	ECMH, pages 502-504  <a href="#">(PDF) Bruce Tuckman's Team Development Model   Clara Hidalgo - Academia.edu</a>  <a href="https://www.lucidchart.com/blog/stages-of-group-development">https://www.lucidchart.com/blog/stages-of-group-development</a>
<b>Glaser and Glaser's Elements of Team Effectiveness</b>	This outlines the five elements that contribute to a team's effectiveness or ineffectiveness.	ECMH, pages 504-505
<b>Organizational Culture</b>	Organizational culture is how people collectively think and behave. It develops haphazardly over time and includes their shared values, beliefs, and experiences.	ECMH, pages 60-66  <a href="#">How Values-Based Leadership Transforms Organizational Cultures (forbes.com)</a>
<b>The McKinsey 7-S Framework for Organizational Change</b>	This identifies seven internal elements that need to be aligned and are mutually reinforcing for an organization to successfully implement change.	ECMH, pages 262-264  <a href="#">Structure is not organization - ScienceDirect</a>  <a href="#">A Brief History of the 7-S (McKinsey 7-S) Model - Tom Peters</a>
<b>Lewin's Three-Step Change Model</b>	Kurt Lewin's integrated three-step change model can be used to analyze, understand, and bring about change at the group, organizational, and societal levels.	ECMH, pages 36-38  There are also various sources available on the internet.
<b>Lewin's Force Field Analysis</b>	This explains the interaction of the driving forces (favorable to change) and the restraining forces (opposing change) and how they must be addressed.	ECMH, pages 93-94

<b>Bridges' Three Phases of Transition</b>	This model was designed to help individuals move through their personal transitions.	ECMH, pages 13-16 <i>Managing Transitions: Making the Most of Change, 4th Edition</i>
<b>Kotter's Eight-Stage Process for Leading Change</b>	This framework describes eight stages that, when used with effective leadership, can enable successful change initiatives.	ECMH, pages 38-40 <i>Leading Change</i>

### **PART THREE: Organizational Change Management Key Concepts**

The following key concepts are necessary for leading successful organizational change management (OCM) initiatives:

You must understand:

- Who your stakeholders are
- How to effectively engage them so they choose to adopt the 'new way(s) of working'
- How to effectively communicate
- How to develop a learning and development program

In OCE, the above OCM activities are defined and described at a high level. In OCA, the OCM activities are used to develop strategies and plans that are incorporated into your overall change management plan.

<b>Requisite models, concepts, and theories</b>	<b>Reason for inclusion</b>	<b>Reference/link</b>
<b>Organizational change management roles, particularly that of the change sponsor</b>	It is important to understand the various OCM roles, which can include a change initiator/advocate, change sponsor, change practitioner, project manager, change implementation team, change targets, and impacted stakeholders.	There are numerous roles, and the names often vary. We recommend researching them on the internet.
<b>Stakeholder management, especially persona and stakeholder power/interest grid</b>	A stakeholder is any individual, group, or organization with an interest in the change or its outcomes. It is essential to engage stakeholders because they are key to implementing and sustaining change.	ECMH, chapter 4

<b>Communicating Change</b>	Effective communication is crucial. Messaging must be clear and targeted to your various audiences, as well as easily received and understood.	ECMH, chapter 5
<b>Educating and training for change, especially Kolb's Experiential Learning Cycle</b>	Everyone plays a role in change, so to improve the chances of a change initiative being adopted and sustained, it's important to have everyone learn how they can best contribute to successful change initiatives.	ECMH, chapter 9

As stated in the introduction, the main purpose of this paper is to provide information so that individuals who have not taken Pink Elephant's Organizational Change Management Essentials (OCE) certification course can, if they want to, self-prepare for Pink's Organizational Change Management Applied (OCA) certification course. **Note:** The OCE concepts described above will not be reviewed during the OCA certification course, and instructors will not be accepting basic questions or allowing for disruptive discussion about them.

Pink Elephant strongly recommends that you either review all the concepts, models, and theories in this paper before attending our OCA certification course, or register for our OCE certification course and benefit from the instruction.



## **About Pink Elephant**

We Lead the Way!

A premier global training, consulting and conference service provider, Pink Elephant has an undisputed reputation for leading the way. We're proud of our pioneering and innovative spirit, which has enabled us to introduce and spearhead many revolutionary concepts and programs since our inception forty years ago.

## **Contact Us**

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