

Defining leadership roles

Leaders must be clear about what is expected of them and be equipped with the tools and support they need to deliver change. If they don't drive the project and fulfil their responsibilities, they become a force for resistance and provide their peers and followers with a compelling reason not to change.

How to do it

This section contains guidance on how to:

1. identify the role of formal and informal leaders
2. define your expectations of those leaders
3. communicate your expectations.

1. Identify the role of formal and informal leaders

There are six primary roles of formal leaders in driving change:

- 1. Owning the change agenda and dedicating sufficient time and energy to it**
Leaders must make time to contribute to the success of change and hold themselves and others accountable for effective implementation.

- 2. Demonstrating organisational values**
By demonstrating organisational values and behaviours leaders give employees a greater sense of stability and reassurance during change. Employees are also more accepting of difficult change decisions.

- 3. Creating a sense of urgency**
Complacency needs to be challenged by discussing urgent and current problems with employees, setting high yet attainable standards for success and celebrating success.

A complacent culture can exist when:

- problems precipitating change are not visible
- the organisation measures itself against low standards
- people focus on narrow functional goals rather than broad business ones
- evidence of a need for change results in finger pointing.

- 4. Removing obstacles**
Leaders must address competing commitments affecting their employees and overcome any obstacles. Research shows that personal fears, biases, embarrassments and preconceptions can prevent even the most committed employees from embracing change.

- 5. Building and maintaining trust**
To maintain the goodwill of employees, leaders need to be honest and factual about what change means for people, share information freely, set realistic expectations, deliver on promises and show respect for people's ideas and perspectives.



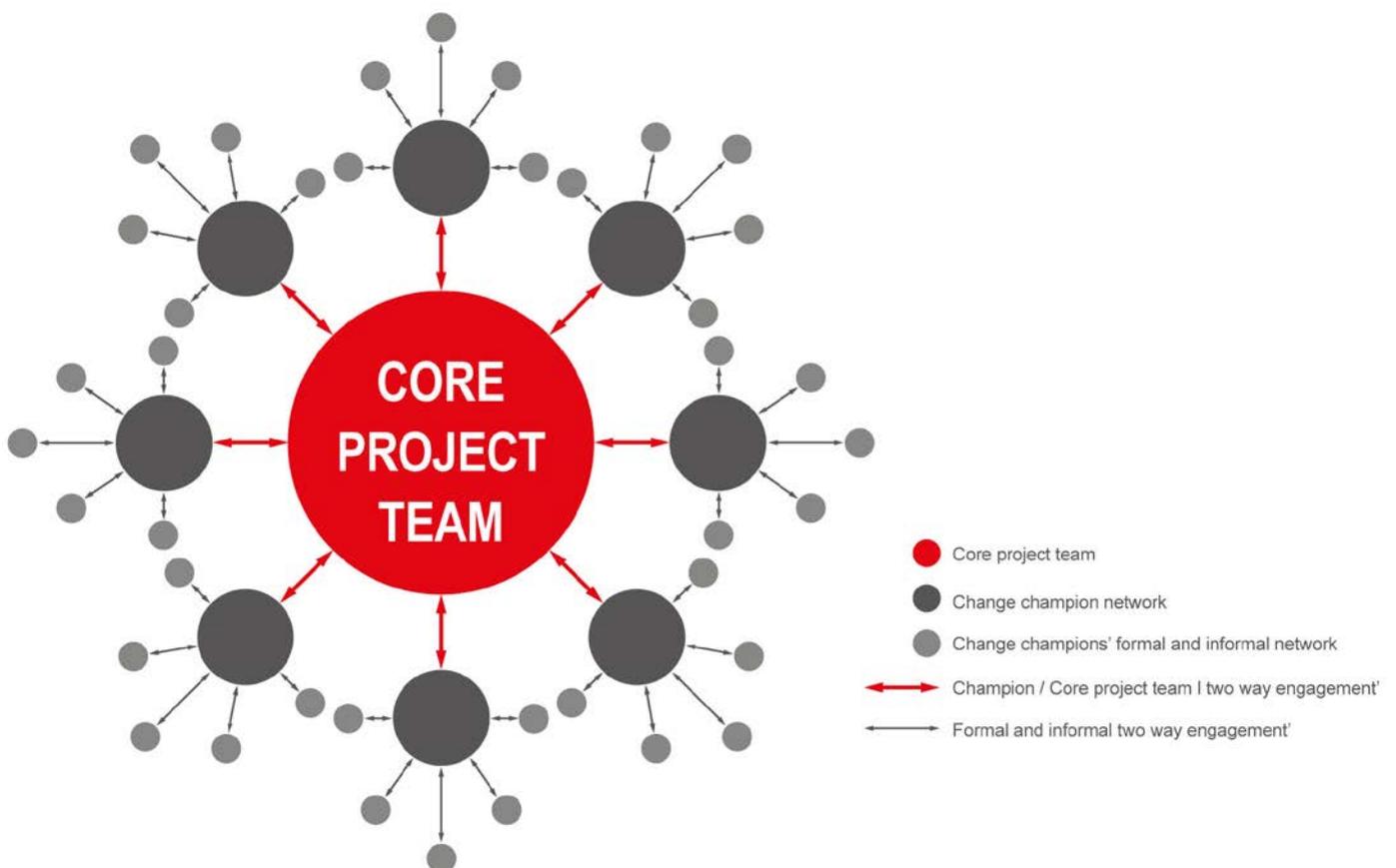
6. Collaborating

For large change and complex projects, leadership teams must work together, encourage participatory decision-making and remove unnecessary symbols of hierarchy. Hierarchy protects two enemies of change: bureaucracy (the protectors of 'how we do things around here') and a sense of entitlement.

The best way to foster collaboration and buy-in at the most senior levels is to involve leaders in the assessment of business performance and identification of issues, the consideration of alternatives and the endorsement of the case for change.

The role of informal leaders and change champions: The primary role of change champions is to spread the change throughout their networks and feed information back to the project team.

The role of change champions



You must clearly define the role of change champions before launching a change champion network. There are three primary roles that change champions can perform:

- **Model** the change
- **Transfer** information through informal and formal networks
- **Connect** the change project team to a wider network

Model	Transfer	Connect
<ul style="list-style-type: none"> • Understand the case for change and the change itself. • Learn the new processes, skills, behaviours and/or systems that are being implemented and use them day-to-day. • Model the positive attitude to change, and embody the appropriate values and behaviours. • You may want to select some change champions who initially do not support the change. By convincing them of the need for change and winning them over, a powerful message can be sent to dissenters. 	<ul style="list-style-type: none"> • Advocate the change. • Communicate the change in a way that will resonate with their networks. • Communicate events and logistics to end-users. • Help users to better understand the change through meetings, coaching and informal training. • Sometimes assist in delivery of formal training. 	<ul style="list-style-type: none"> • Meet regularly with the change team and each other. • Educate the project team about their networks about what they will respond to and what they may find challenging, etc. • Problem-solve as change is rolled out and escalate issues or challenges as appropriate. • Provide ongoing feedback to the change team. • Share knowledge with other change champions.

2. Define your expectations of these leaders

Work with your leaders to define specific expectations for the change project. This can be done either one-on-one or in a workshop. The aim is to:

- ensure they understand the case for change
- envision what the future will look like if this is achieved
- articulate what they want followers to be thinking, feeling and doing
- define what the leaders will have to do to ensure the vision is realised
- create a set of commitments to drive the change through the organisation
- demonstrate desired values and behaviours throughout the change.

Develop an expectations and behaviours agreement as a part of these conversations if you feel they need to be formally recorded. This may be necessary due to the scale of the change or the level of accountability required.





Templates to help with defining leadership expectations

[Expectations and behaviours record](#)

In practice, change leadership is difficult and leaders may not naturally display the right skills and behaviours. In such cases, for large-scale change to be effective, we recommend capability building.



Instructions for capability building

[Read more about supporting team development](#)

Expectations of informal leaders and change champions: The specific expectations of change champions will vary greatly depending on the change impact and your approach. Clearly set out the impact and approach as selection criteria when engaging in discussions with prospective change champions and consider carefully what their involvement looks like before convening your first meeting. Also ensure that you clarify:

- how the group will come together and how often
- the time commitment for individuals
- the level of support for the change
- any impact on the individuals' current role and future career
- how performance will be measured.

To answer these questions consider the outputs from your change impact assessment and stakeholder engagement plan, as well as your understanding of the organisation and the scale of the change.



Templates to help with defining leadership expectations

[Change impact assessment](#)

[Simple stakeholder engagement plan](#)

It is critical that you agree on these expectations with the change champion's line manager before convening the change network.

3. Communicate expectations to leaders

Once specific expectations for the project are agreed, they should be documented and communicated face-to-face.

Documenting expectations: For individual projects it is recommended that leadership expectations be documented as performance targets or other success measures. Ensure leaders are well informed of the expectations and obtain their formal endorsement and commitment, either as a group or individually. This provides a stronger platform for holding leaders accountable.

Another useful tool is a RACI analysis to articulate key areas:

- Responsible
- Accountable
- Consulted
- Informed.





Templates to help with defining leadership expectations
[Allocating leadership roles and responsibilities – RACI chart](#)

Completing a RACI analysis avoids common ambiguities. Leaders are often unclear about whether they are being given information as an interested bystander or because they are responsible for doing something. In the absence of clarity most will assume they are just being informed.

Communicating face-to-face: For large programs, communicate specific expectations to leaders face-to-face. Ideally the person they report to should do this. Find out what coaching or support leaders might require.

Communicating to informal leaders and change champions: Change champions may not be expected to drive change as part of their day-to-day work. They may need more support to understand and execute their role. An initial group ‘kick-off’ meeting should be held with change champions to:

- build understanding of the change
- create a group charter outlining agreed behaviours for the individual and group
- generate enthusiasm for taking on the change champion role
- raise awareness of change management theory and practice
- begin to build a high performing team
- begin to build change capability, focusing on elements that are most relevant for their role.

This meeting can range from an hour to a week-long session depending on the degree of capability which needs to be built, and the size and complexity of your project.

Adjust for scale

Scale of change	Guidance on how to apply this process
Small: Improving and refining methods, policies and procedures; the future state is not very different to the current ways of working	<ul style="list-style-type: none"> • Leadership activities should already be encompassed in everyday roles. Most actions in this section are not required because a change champion network is probably not needed. • The change instigator still needs to meet with individual leaders involved in the change to explain the initiative and ensure they support the direction.
Medium: Distinct modifications to strategies, structures and/or management processes	<ul style="list-style-type: none"> • Individual leaders important to the change should be identified and expectations set. For other leaders, any expectations should be encompassed in their day-to-day role. • A change champion network typically would not be required for changes of this size.
Large: Substantial realignment, restructuring and transformation of all or part of the organisation	<ul style="list-style-type: none"> • The process should be followed in full.



Success measures

Success for this step has been achieved when:

- leaders demonstrate commitment to the change
- leaders have an accurate, clear and common understanding of their role
- leaders agree with the expectations
- leaders can explain to employees how change decisions represent constructive organisational behaviours in action
- employees feel they are being well led through the change journey and trust their leaders
- change champions are positively influencing the change disposition of the workforce.

Formal measurement of these factors is best achieved through pulse surveys and discussions with leaders and followers.

