

# Training Program Description

Updated June 2009

Content and pricing subject to change without notice

Copyright © 2009, SmartChange, LLC

## WHY SMARTCHANGE™ TRAINING IS THE SMART CHOICE

Our approach is built in the simple premise that great training is about increasing participant's knowledge, skills, and confidence. To that end, we worry less about flashy materials and PowerPoint's (though our materials are great) and more about making the learning experience engaging, hands on, and impactful. To that end, SmartChange™ training is 70% hands on application and engaging exercises (not PowerPoint-driven training) and facilitative in nature (not long lectures). Our hands-on approach uses the following simple but powerful training methodology.

**Explain:** brief explanation of the concept/tool

**Demonstrate:** live demonstration of the skill or tool in focus

**Practice:** hands-on practice on real life examples and applications

**Evaluate:** debrief of participant's experience with instructor's coaching and feedback

Participants will find SmartChange™ training packed with practical, relevant, and value-added materials, making it one of the best sessions they've attended. In fact most participants will leave wanting more.

**About the trainer:** Marcelino Sanchez is a certified professional trainer and master facilitator with over 15 years of experience training small and large groups. He has trained over 700 change agents and conducted train-the-trainer training and coaching for other trainers. He holds a master degree in organizational behavior and is the founder and managing director of SmartChange™ LLC.

## CHANGE IMPLEMENTATION FUNDAMENTALS (3-DAY WORKSHOP)

**Purpose:** qualify change agents to apply critical change implementation skills, concepts, and tools. Provide opportunity to practice and receive feedback to experience a measurable increase in change agent skills.

**Outcomes:** at the end of this workshop participants will...

- 1) Understand the SmartChange™ methodology for implementing and sustaining change
- 2) Understand and use the four phases of behavior change
- 3) Know how to apply the tools in the SmartChange™ Toolkit

| Day 1   | Day 2   | Day 3   |
|---|---|---|
| Introductions<br>Why change matters?<br>What SmartChange™ is<br>The Process of Behavior Change  | Check-in exercise<br><b>Application:</b> Prepare Tools<br><i>Stakeholder Engagement</i><br><i>The SmartStart™ Workshop</i>                                      | Check-in exercise<br><b>Application:</b> Integrate Tools<br><i>Leadership Modeling Plan</i><br><i>Feeding and Starving Plan</i><br><i>Monitoring Change</i> |
| <b>Lunch</b>  | <b>Lunch</b>  | <b>Lunch</b>  |
| <b>Application:</b> Prepare Tools<br><i>Leadership Readiness Plan</i><br><i>Seven Sources of Energy</i><br><i>Case for Change</i><br><i>Future State Definition</i> | <b>Application:</b> Implement Tools<br><i>Communications Plan</i><br><i>Acceptance Roadmap</i><br><i>Behavioral Tools</i><br><i>Systems and Structures Plan</i> | <i>SmartChange™ Lab (hands on real project work with expert coaching from instructor)</i><br>Evaluation and wrap-up   |

## CHANGE IMPLEMENTATION FOR CHANGE AGENTS (5-DAY WORKSHOP)

**Purpose:** qualify change agents to apply advanced change implementation and facilitation skills, concepts, and tools. Provide opportunity to practice and receive feedback to experience a measurable increase in change agent skills.

**Outcomes:** at the end of this workshop participants will...

- 1) Understand the SmartChange™ methodology for implementing and sustaining change
- 2) Know how to apply the four levers for behavior change
- 3) Know how to apply the tools in the SmartChange™ Toolkit
- 4) Know solid facilitation skills necessary to use the tools in the future\*
- 5) Know how to use the SmartChange™ diagnostics for major cultural change\*

| Day 1  | Day 2   | Day 3   | Day 4   | Day 5   |
|--|---|---|---|---|
| Introductions<br>Why change matters?<br>What SmartChange™ is<br>The Process of Behavior Change<br>The Role of the Change Agent | Check-in exercise<br>SmartFacilitation™ Tools<br><i>Managing Group Dynamics</i><br><i>Workshop Design</i><br>Facilitation & Change                                  | Check-in exercise<br><b>Application:</b> Prepare Tools<br><i>Stakeholder Engagement</i><br><i>The SmartStart™ Workshop</i>                                      | Check-in exercise<br><b>Application:</b> Integrate Tools<br><i>Leadership Modeling Plan</i><br><i>Feeding and Starving Plan</i><br><i>Monitoring Change</i> | Check-in exercise<br><i>SmartChange™ Lab (hands-on team practice on real projects with expert coaching from instructor)</i> |
| Lunch  | Lunch   | Lunch   | Lunch   | Working Lunch   |
| Influencing without authority<br>SmartFacilitation™ Tools<br><i>Information Gathering</i><br><i>Using Information</i>          | <b>Application:</b> Prepare Tools<br><i>Leadership Readiness Plan</i><br><i>Seven Sources of Energy</i><br><i>Case for Change</i><br><i>Future State Definition</i> | <b>Application:</b> Implement Tools<br><i>Communications Plan</i><br><i>Acceptance Roadmap</i><br><i>Behavioral Tools</i><br><i>Systems and Structures Plan</i> | Introduction to Diagnostics<br><i>Acceptance Index</i><br><i>Behavior Change Meter</i><br><i>Employee Engagement Index</i>                                  | <i>SmartChange™ Lab cont'd</i><br>Specific Applications<br>Evaluation and wrap-up   |

How is this option different from the 3-day session



Additional material to the 3-day offering. Also SmartChange™ Lab is longer allowing for additional work and feedback.

## CUSTOMIZED COACHING FOR CHANGE AGENTS (LENGTH TBD)

**Purpose:** qualify one to three change agents to apply change implementation facilitation skills, concepts, and tools. Provide opportunity to practice some of these skills in real projects with the help of expert on-site coaching.

**Outcomes:** during the course of this customized experience participants will have accomplished at least three or more of the following goals

- 1) Understand the SmartChange™ methodology and how to apply it in a real change project
- 2) Develop (and learn how to develop) a customized change plan
- 3) See/facilitate interventions that specifically move people through the Behavior Change process
- 4) Observe and/or facilitate 3-5 (or more) of the SmartChange™ tools and received expert feedback from coach
- 5) Observe and practice some facilitation skills (depending on length and nature of the project)

| Pre-work  | On-site Coaching   | Follow up   |
|---|--|---|
| 1) Preliminary discussion to establish needs, goals, and approach<br>2) Participant completes assigned reading and any other assignment (assessment, etc.)<br>3) Develop plan & objectives <ol style="list-style-type: none"> <li>a) Identify key challenges to address</li> <li>b) Identify desired key lessons</li> <li>c) Determine best developmental activities</li> <li>d) Schedule learning and coaching activities</li> </ol> | 1) Review plan & objectives<br>2) Conduct learning events (teaching)<br>3) Conduct coaching events (doing)<br>4) Debrief and document activities<br>5) Make additional plans and goals | 1) Participant updates coach on work & accomplishments<br>2) Coach's feedback and ideas<br>3) Identify next steps<br>4) Evaluate learning objectives<br>5) Document and close |

**Note:** coaching can be one or multiple days and cost is based on a daily rate.

## AFFORDABLE AND FLEXIBLE PRICING PACKAGES

Pricing includes Participant Manual and Training presentation. Cost of customized coaching depends on how many days coach is employed, based on regular consulting rates plus materials, and inclusive of pre-work and follow-up calls. Pricing excludes all travel, lodging, and meal expenses.

| Program Options                 | Cost per Session | Cost per Participant |       |
|---------------------------------|------------------|----------------------|-------|
|                                 |                  | 10                   | 25    |
| 3-day for up to 25 participants | \$15,500         | \$1,550              | \$620 |
| 5-day for up to 25 participants | \$18,000         | \$1,800              | \$720 |
| Customized Coaching             | TBD              |                      |       |

SmartChange™ reserves the right to change pricing without notice. Pricing only guaranteed after formal contract is signed by both parties.

# SMARTCHANGE™ PROCESS AND TOOLKIT OVERVIEW



The SmartChange™ Toolkit is a proprietary document based on the SmartChange™ Methodology. Consists of practical, powerful tools that have been tested and improved based on years of experience.

The SmartChange™ Toolkit is Excel-based with user-friendly and interactive templates to help trained users use effectively the SmartChange™ Methodology.

| SmartChange™ Element | Tool  | Purpose  |
|----------------------|---|--|
| <b>PREPARE</b>       | <a href="#">Change Strategy Wizard</a>                | Help decide how to proceed given current change needs            |
|                      | <a href="#">Roadmaps</a>                              | High level change management plans for various types of projects |
|                      | <a href="#">Leadership Readiness Audit &amp; Plan</a> | Generate necessary support from key leaders                      |
|                      | <a href="#">Case for Change</a>                       | Create clear, relevant, and urgent case for change               |
|                      | <a href="#">Future State Definition</a>               | Create compelling vision of the future                           |
| <b>IMPLEMENT</b>     | <a href="#">Stakeholder Engagement Plan</a>           | Facilitate efforts to create broad-based support                 |
|                      | <a href="#">Sources of Energy Audit</a>               | Ensure enough energy throughout the change                       |
|                      | <a href="#">SmartStart™ Workshop</a>                  | Create team alignment & clarity about project charter            |
|                      | <a href="#">Key Milestones Plan</a>                   | Document key activities and integrate into master plan           |
|                      | <a href="#">Communications Plan</a>                   | Create awareness and understanding about the change              |
| <b>INTEGRATE</b>     | <a href="#">Behavior Gap Analysis</a>                 | Identify critical behaviors for success                          |
|                      | <a href="#">Systems &amp; Structures Assessment</a>   | Identify key levers to reinforce desired behaviors               |
|                      | <a href="#">Behavior Modification Plan</a>            | Plan tactics to promote desired behaviors                        |
| <b>MONITOR</b>       | <a href="#">Leadership Modeling Plan</a>              | Create positive reinforcement & credibility by leaders           |
|                      | <a href="#">Force Field Analysis &amp; Plan</a>       | Promote forces for change & remove barriers                      |
|                      | <a href="#">Transition Plan</a>                       | Plan for continuity and follow up                                |
|                      | <a href="#">Acceptance Index</a>                      | Measure levels of acceptance of the change                       |
|                      | <a href="#">Behavior Change Meter</a>                 | Measure behavior shift along Behavior Change Process             |
|                      | <a href="#">Employee Engagement Index</a>             | Measure factors that produce discretionary effort                |



## CONTACT US

For more information email  
[info@smartchangesolutions.com](mailto:info@smartchangesolutions.com)  
or call 248-207-0344.

[www.smartchangesolutions.com](http://www.smartchangesolutions.com)