

Organization Change System

Critical Early-on Decisions

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This publication was developed to inform top leadership and management (sponsors and clients) of our Organization Change System and to help them clarify early-on decisions that will improve implementation value (faster return-on-investment and improved results).

Not all of this system has to be used initially - or ever used for that matter.

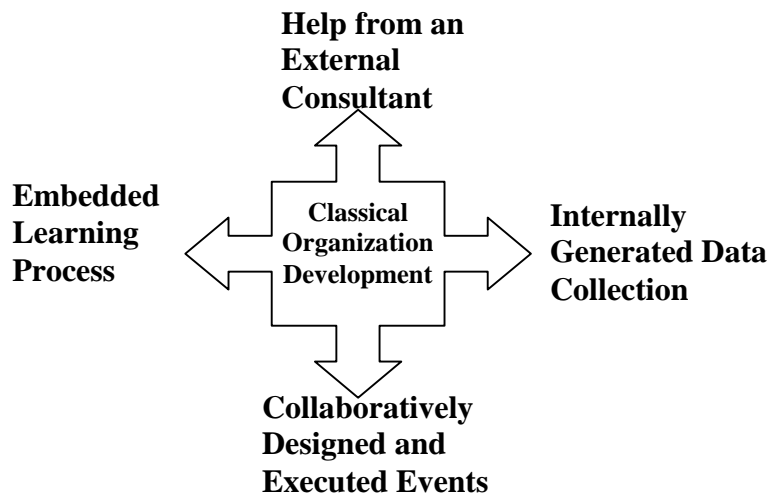
Organizations that are highly complex and encounter a high level of “change difficulty” need a Organization Change System that is up to the rigorous challenge facing them in order to achieve success.

*CapacityWare*TM (software, methodology, and literature) is a highly rigorous



Organization Change System that is up to the task presented by even the most complex organizations. We liken it to the tip of an iceberg. It has amazing depth that need not be visible at the outset or perhaps never visible at all.

Overview. *Classical organization development* is characterized by four activities: 1) help is initially provided by an external consultant, 2) data collection efforts are designed by members of the client organization, 3) a set of collaboratively designed systemic interventions are implemented primarily by internal members, and 4) an embedded process of learning that decreases reliance on the external consultant over time. This Organization Change system is a classical organization development approach.



The organization development profession, like any other profession, has a unique language. Users who are not accustomed to these unique terms may seem uncomfortable at first. It is important in the change process to adapt to a variety of new things, language is just one of those things that must be part of the change venue. An Internet-based glossary is provided as an aid. It is always important to distinguish between a process and a system. A process is a group of sequentially linked tasks with a beginning and an end that produces a specific result. The last step may recycle the linked tasks. A system, on the other hand, is a group of interacting, interrelated, or interdependent elements forming a complex whole. The system just is! Instead of a specific result, it yields a dynamic condition.

Many critical organization change decisions must be made before the change effort begins. Some decisions are better made “firm” while others may be tentative. By providing this guidance early on, change agents have a clear picture of what will likely transpire and are better able to communicate that to the workforce across the depth and breadth of the organization. Key decisions and the rationale for those decisions are spelled out in this document. Included are links to other documents that provide added detail – these extended references are available at our web site, the specific titles are provided in the text. This extended literature is provided to help top decision-makers make the right decision for the needs of their organization as the lead architect of change.

Presented here are options for consideration based on learnings with both large and small organizations spanning a 25-year period. The struggle has always been, as with most difficult decisions, the balance between developing capacity for doing more or improved work, and providing the products and services needed to generate revenue or sustain mission success.

Decisions concerning which elements of an organization should or should not participate in the *QWLC* Organization Change System are difficult to make. The criteria for making those decisions have been varied and imperfect – in hindsight riddled with thoughts like, “I wish we’d considered that a year ago.” The struggle has also been whether to include those organization elements that are working just fine along with those that are in dire need. Should the change effort be mandatory or voluntary? Is the organization ready for the change needed? Has the organization undergone so much change that it is seemingly incapable of another? Is this the right time? Is this the right “system” to use? What is really driving us to change anyway?

See www.LTODI.com/glossary.htm for more information about unique terms used in this system.

Part I – Why Change?

A. The Rationale for Change – Making the Case, Identifying a Theme. The most compelling case for implementing decisive change must be the notion that, in the absence of change, the organization will eventually fail or fall short meeting essential growth plateaus. Just as we have a strong desire to prolong viable life for ourselves, we also have a strong desire to prolong the viable life of an organization through the process of revitalization, reinvention, or by-any-other-term the continuation of the organization in some form. Change is taking place with or without any action on our part because an organization’s environment is constantly changing. The only real question remaining is the level of influence the organization’s leadership wants to exercise over the results.

In most organizations there is a need to restore “balance” between the priorities established by the often-competing interests of stockholders (or citizens), employees, customers, and the community. When the “balance” becomes too tilted in any one direction, the entire organization suffers in some way because of the chaos that follows.

In many cases, the loss of capacity among members of the workforce is overcome by the addition of new employees to fill the void. When this upsets the “balance” between productivity and revenue, the typical result is a reduction in personnel – and the last to enter the workforce are usually the first ones to leave. The condition that results from this roller coaster leaves the organization in another costly imbalance. It is always less expensive and traumatic for an organization to recover the lost capacity before making any other adjustments.



See more on these and related topics in [Symptoms Leading to the Need for Cultural Capacity Change, Themes, Diagnostic Options, and Pre-Diagnostic Assessment.](#)

Decisions:

What is the rationale for change?

Why are we undertaking this initiative now?

What will be some evidence that we have favorably changed?

B. Identifying the Theme. The *QWLC* Organization Change System focuses on an organization’s culture as its most complex subsystem. Although the cultural system is dynamic, it is paradoxically stable at the same time. The *QWLC* Organization Change System has several components or subsystems within it, and many processes within those subsystems. When changing culture, the new condition has some predictability, but cannot be predicted in its entirety. Trying to change the condition of a system can only be undertaken with a Organization Change System – a simple process won’t change a system!

Change initiatives normally are advanced using one or more “themes” that allow the workforce to quickly and easily identify with the intent. The initial theme or potential themes must be decided at the outset – as the initiative is announced. The activities that unfold as a result of the change initiative must be integrated within the organization structure wherein the theme might be expected to reside. If, for example, the theme is declared as “Leadership Development” then the activity ought to be closely associated with the on-going curriculum in the training department.



As the external change agent, *QWLC* is able to complete an initial assessment that reveals the potential barriers to the organization being successful in this Organization Change system. The organization’s top leadership team should take advantage of this capability and consider it seriously before planning goes too far. This assessment will help determine some of the initial approach strategy.

Given the theme selection, there are dozens of ways to collect data that help diagnose the systemic condition of an organization. Each method should be reviewed and understood before a final “set” of diagnostics is chosen.

See more on these and related topics in [Organization Change System](#), [The Organization Change System – *CapacityWare*TM](#), and [Themes](#).

Decisions:

What is the primary theme to be used universally across the organization for this effort?

To what level of candor (intensity and/or depth) will reports be created for delivery to specific audiences?

Is *CapacityWare*TM to be used as support for the Organization Change System?

Part II – The Change Architects.

C. The Decision-Maker(s). In any organization there is a group of people at or close to the top of the organization structure that have a legal obligation to make decisions, either “for” or “against” critical change initiatives. They often base this decision on fragmented information, gut feelings, or the voices of a favored constituency. The group may be the Board of Directors, a senior staff, or a group of empowered change agents. The result is the same. Some part of the organization begins a journey that will ultimately result in a decision to embark on a change effort or remain on the current path.



To be clear about it, there is a single body of people, or a single individual in some cases, that have legitimate authority to make the kind of decision needed to radically alter the path the organization is currently pursuing toward its future condition. There may be 500 people who see the need but normally only one who will champion and make the ultimate decision to alter the path.

For more information see [The Leaders Role in Organization Change Initiatives.](#)

Decisions:

Who is the “sponsor?”

Who are the clients?

Who is the Point-of-contact?

What, if any, are the boundaries of change?

How will *QWLC* access the top decision-maker when an urgent need arises?

What are the most significant reading that helped mold leadership potential?

D. Direct Report Functional Managers. The decision to significantly alter the organization’s cultural capacity is a difficult one. It would be foolhardy for any leader to make such a decision in isolation, and even more foolhardy without the commitment of a group of people who will have to implement that decision. This same group must take the lead on implementing an array of decisions and actions that will breathe life into the new direction. Not only must there be a high degree of desire, but also a high level of commitment on the part of those who will lead and guide the effort. Those same people will also have to be or become informed about the change process and how it will work best and understand the potential pitfalls. They must engage in research. They must interview and select external consulting change agents, and cultivate an internal group who will both lead and manage the effort at various levels across large organizations. These are complex tasks that require attention – many organizations believe that once the initial steps have been taken, the change will take care of itself. This is just not so. The initial stages are the easy ones. More difficulty arises when the organization begins to slip back into its old “habits” and tries to regain the business-as-usual processes and culture of the past. This is when those leading the change effort need all their strength and fortitude.

Both groups, direct reports and front line supervisors often contain individuals who will become subtle, and often unknowing, barriers to the changes being advanced. This is especially true if top leadership tends to rotate regularly and the need for change is not apparent. Throughout the change effort, special care must be taken to assure that both these groups are fully committed to both the urgent pressures of the day and the important nature of the change effort.

Access to top decision-makers is critical to success throughout the change effort. An instance of the effort going astray may not compel a meeting, but as trends become strong, a meeting and decision may well be appropriate. This is often difficult because points-of-contact may be reluctant to request and attend meetings to solve problems for which they might otherwise be held accountable. None-the-less access is an important issue throughout the change effort.

See more on these and related topics in [The Client/Consultant Relationship](#).

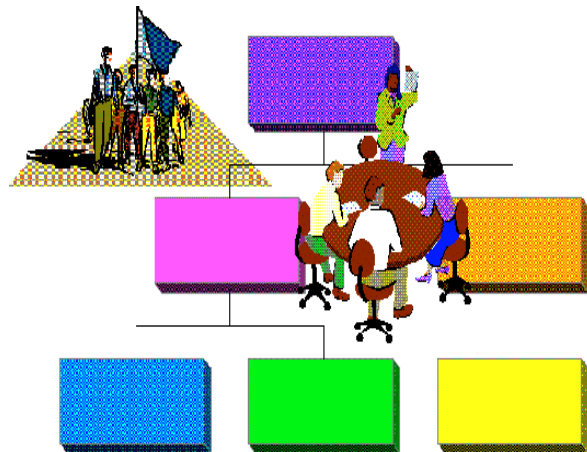
Decisions:

Will the LMS module in *CapacityWare*™ be used to communicate limitations?
How will an acceptable level of commitment be determined and measured?

E. The Change Agent Team. The relationship between the client and the *QWLC* consulting team is one of the most critical relationships in the entire system of change. The consulting team must have the credibility needed to win and keep the confidence of the client and members of the organization. As classical organization developers, *QWLC* consulting teams serve the entire system, management, workforce, stakeholders, and customers alike.



Internal groups must also become equal partners in the change effort. Certainly all direct reports and special advisors to the client are critical because they are capable of subtly siphoning off critical enthusiasm for change success if not fully on board. The internal change agent team must also include a group of people trained by *QWLC* to manage the change effort deep into the organization's culture. This cadre of cultural team facilitators is trained by *QWLC* and remains an adjunct consulting team throughout the change effort.



QWLC suggests the use of teams facilitated by a well-trained cadre of internal change agents – team or cultural facilitators. This job calls for a different skill set than is normally available for group facilitation, or training/learning facilitators. Assisting with the change of an organization's culture is difficult work.

Facilitators must know the scope of the task before they begin and must receive refresher training periodically to remain effective.

The *QWLC* Consulting Team is an integral part of the Change Agent Team. On some occasions, the *QWLC* Team will lead events. On other occasions they will play a supporting role. There is always opportunity for both *QWLC* and the Client Change Agent Team to partner in a seamless strategy.

See more on these and related topics in [Change Agent Selection Criteria](#), [Change Agent Selection and Use](#), and [Ad Hoc Realignment Teams](#).

Decisions:

Will there be supervisor-facilitators?

What criteria will be used to select, train, assign, and rotate assignments of facilitators?

How many facilitators will be trained and functional?

How will those who supervise facilitators be oriented and informed?

What “licenses” will the Change Agent Teams be able to rely on?

What access will Change Agents have to sponsors and clients?

To what “depth” will data be generated and shared with the organization?

Part III – Implementing Change.

F. Software Support – *CapacityWare*TM. Why is software support for Organization Change so critical? Because the nature of the task is so complex that it requires a system that never forgets and that links items of information together to form highly complex patterns that reach beyond our routine thought processes. The system must accommodate three essential tasks: 1) finding the issues that need attention (compatibility with a sophisticated triage algorithm), 2) helping create the strategies that will breathe life into the changes necessary for improvement, and 3) tracking progress until the work is done.

*CapacityWare*TM can be installed at any time during the Organization Change process, but the ideal time is at the beginning. When installed early adequate training can be completed, and the system can be used to begin the tracking process even before data collection is initiated.

Users are always welcome to visit our web site to determine if the latest edition of our software includes new features that would benefit them. While under “contract” there is no additional charge for *CapacityWare*TM upgrades.



See more on these and related topics in [The *CapacityWare*TM Manual](#), [CapacityWareTM Licensure Considerations](#), [CapacityWareTM Implementation Roles](#), and [CapacityWareTM Optimum Configuration Options and Technical Requirements](#).

Decisions:

What will be the timeline for *CapacityWare*TM installation?

What will be the configuration, stand alone or server-based?

Who will be the *CapacityWare*TM Administrator (or Administration Team)?

G. A Standard Approach Strategy. There is an approach strategy to a change initiative that works best. There are ten elements of this standard approach that may cause hesitation to decision-makers because some elements may be contrary to the "way things have been done" in their organization. It is far better to discover these potential barriers at the outset than have to deal with a missing piece of the puzzle months down the road. Although the ten elements are too voluminous to cover here in their entirety, the decision listed below are a culmination of understanding these elements and a beginning of the integration of them into the fabric of the new changed organization.

For additional information refer to [The *QWLC* Standard Approach](#).

Decisions:

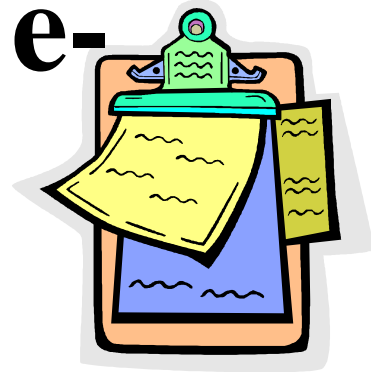
What will be done to develop leaders and followers in the same efforts?

What current and new teams will be directed at specific change initiatives?

How will data driven decision-making be integrated into routine decision?
How will every member of the organization directly serve this change initiative?
What assurances will be put in place to identify and learn from our marginal operations?
How will we develop the parallel organization in concert with our traditional structure?
What locations will we press into routine service to bring fresh perspectives?
How will we fully integrate decision-making without slowing progress?
How will we fully integrate current research findings into our organization culture?
How will we inform every stakeholder so that they become contributors to our success?

H. Client History And Remediation Technology (CHART).

The Client CHART is a web-based mechanism used to communicate with key members of the client organization. The CHART includes all the critical information about past and current activities that have taken place between *QWLC* and the client organization as well as “next step” suggestions. The CHART is password protected so that only those with an interest in being informed through this medium have access to this information. One person in the client organization is designated to monitor and administer the CHART from the client perspective.

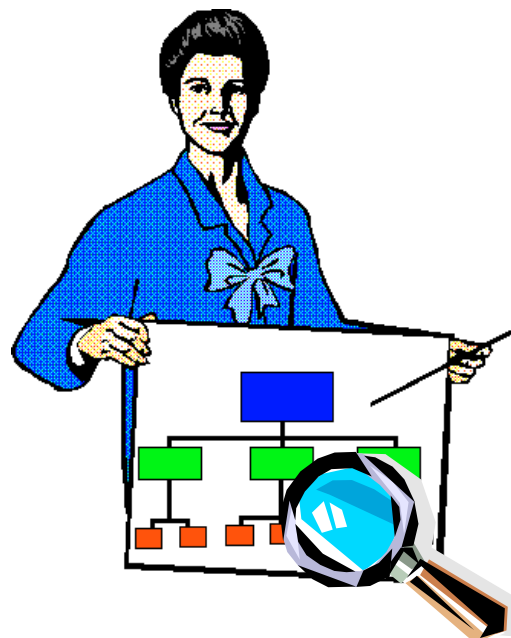


See more on these and related topics in [Client History And Remediation Technology](#).

Decisions:

Who will be the point-of-contact for the client CHART?
Will the CHART be used by other than specific managers? If yes, then by whom?

I. Selection of Organization Elements to Include in Change Efforts. New clients often want to pilot a change effort (this makes it more difficult for the whole organization, by the way). The topic then emerges in all potential change efforts, “Who should be included in our pilot program?” Decision-makers have a tendency to try the Organization Change System with one department initially, or even to contain the change effort to the organization where it has the greatest chance of success. These are options, of course, but lack the potential for real systemic return-on-investment. What happens most often with this approach is that the organization that is engaged does not have the available resources from the rest of the system upon which it relies to make true systemic change a reality. Thus the effort falls short. In addition, the organization learning



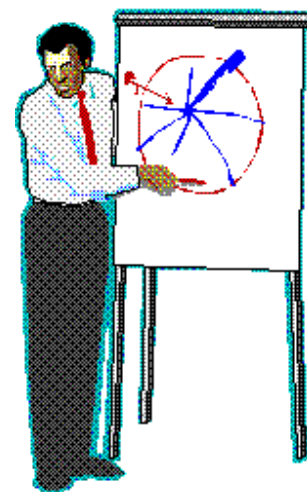
that takes place with a truly systemic intervention goes untapped by the rest of the organization. Our counsel has always been to include the entire organization in the initial intervention, and then prioritize follow-on activities based on criteria that the organization believes to be important.

When the initial orientations and data collection efforts have been completed the various departments begin to see potential benefits to their departments that might not otherwise be apparent. For any organization that seeks to drive improved decision-making with quality data, a holistic approach is a must from the outset. Although it is possible for data collection to begin from customers, stakeholders, and the like at the outset, we always recommend that the initial cycle be limited to the workforce. There is plenty of opportunity to extend the reach of data collection at a later date – normally the second or third cycle.

Decisions:

What organizational elements will be included?
What limitations on inclusion are there, or will there be?

J. Return-on-Investment. Typically, the ROI on classical organization development interventions is 5 to 1. This is an extraordinary investment, but it must be made wisely. The less complex courses of action will yield a far less return. The old saying is true, "If it's worth doing, it's worth doing right." There is an abundance of guidance to assist in planning and implementation so that expected returns can be realized. It will take true involvement both up front and during the entire process to assure the facts are captured that will allow accurate ROI calculations to be made at any point along the way. The most important step is the initial one. Planners must make a realistic connection between the selected "theme" and the financials that support the rationale for moving forward with the change effort.



See more on the topic of ROI in [Calculating Return-on-Investment](#).

Decisions:

What is the current-day financial profile that will be improved by this intervention?
What is this profile expected to be on the "end date" established?
Who are the essential people that must be involved in this parallel task?

K. Prioritizing Activity that Changes Organization Capacity - Triage. The medical profession uses a process for distinguishing between patients needing treatment so that the real life-threatening emergencies move to the head of the line while less severe ailments wait for attention. There is also a Classical Organization Development Triage (CODT) process of tending to organization development issues. The most urgent issues receive the first attention

while routine conditions may not be tended to at all. This places the burden on the change agent team to collect the right information quickly that will permit accurate and timely triage.



Once decision-makers have the information necessary to establish priorities, they will be able to design and implement change-producing activities. By establishing priorities and linking them carefully, decision-makers will be strengthening the organization’s alignment (vision, purpose, missions, strategies, goals, programs, etc), or eliminating barriers to achieving that alignment.

See more on these and related topics in [Smart Tailoring Triage](#).

Decisions:

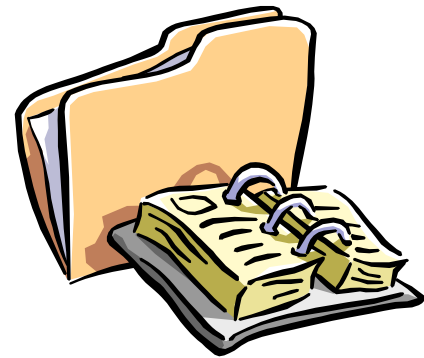
What will be the pace of the change effort?

What criteria will be used to determine top priority participation?

What timeline milestones are there?

Is there a “cut line” below which active participation will be curtailed? Explain.

L. Sustaining the Cycle of Change. There is a rhythm to organizational change efforts. It is the same rhythm and cycle as the organization’s routine financial reporting cycle. All else being equal, change efforts are about the financial well being of an organization and programs designed to achieve increased financial security for an organization must follow the same cycle and level of importance.



Regular “tag up” meetings should be scheduled that allow the principal change agents to get together and exchange information about the progress of the change effort. The agenda must include a calendar review that takes both a look back at the effectiveness of past activities and look forward at a list of future activities. The meeting ought to end with a clinic-evaluation, and everyone knowing what their responsibilities are until the next scheduled meeting.

See more on these and related topics in [Annual Cultural Capacity Maintenance Program](#), [Comprehensive Indexes](#), and [Data Collection Frequency](#).

Decisions:

To what degree will the organization’s ongoing change efforts be in synch with the Annual Maintenance suggestions of *QWLC*?

What will be the normal data collection cycle?

Will the established reporting protocol be used? If not, what will be the alternative?

Will the standard Diagnostic Report Template be used? If not, what is the alternative?

Who will attend tag-up meetings?

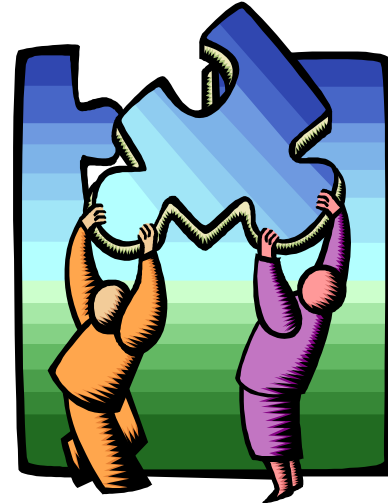
Will standard Handout materials be reviewed for consistency? Who will do the review?

How often will the Sponsor/Client team be briefed?

Part IV – Developing Confidence in your External Consulting Firm Selection.

M. Compatibility with Other Organization Change Technologies. The *QWLC* systemic approach to Organization Change technology engages elements of the best and most successful processes. Yet the *QWLC* approach contains features that are found in no other change technology – the system is truly proprietary in nature. The most recent “incorporation” involves the integration of the best features of “Balanced Scorecard” technology. This enables the “tracking” of correction activities to be linked with the “*assigned responsibilities, objectives, goals, strategies, missions, purpose, and vision*” chain.

One of the prime considerations is knowing what other technologies have been or are being used in the client organization. This is of paramount importance if two or more technologies are to be integrated into a seamless approach. Also of high priority is the potential for resistance from the organization to change based on the “immunity” developed through the repeated use of change technologies. This is especially true if past attempts at change have fallen short of expectations. It can be true even if past attempts have been successful. What seems to be more important is the repetition of attempts to change.



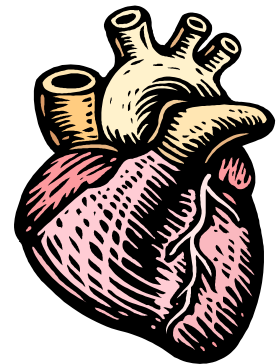
Decisions:

Will other organization development technologies be used concurrently?

Is *CapacityWare*™ used as a replacement for a current and viable technology? Explain.

N. Developing Confidence in your External Consulting Firm Selection. The needs of the organization must prevail. Although selections are often made based on familiarity or word of mouth referrals from a reliable source, these need not be the final determinant. Notwithstanding other considerations, a positive rapport must be present between the client team and senior organizational leadership. This is why many top leaders may invite a consulting firm to “interview” with a selection team, and leave the final decision to a top “group” of decision-makers.

Naturally the depth and breadth of the firm’s experience is important. Many organizations will make the mistake of focusing on industry experience rather than the needs of the organization. This would be like refusing to use a noted heart surgeon because they don’t specialize in treating patients who make their living in law enforcement. The specialty is the heart, not the occupation or domain of the patient.



QWLC specializes in the cultural capacity of organizations – all types of organizations. Because of this specialty, *QWLC* knows more about measuring, interpreting, and designing interventions that will improve organization culture than any other consulting firm. Not all clients use all the

features of the *QWLC* Organization Change System. One reality is apparent, the *QWLC* Organization Change System is up to the demands of the most complex and challenging of organizations. *QWLC* uses a proprietary comprehensive “system” of change created from over 25 years experience. This “change management system” includes a *CapacityWare*TM software package, 5 Client Library Manuals, and a well-documented approach that yields reliable results.

Summary

Changes to an organization’s cultural capacity are difficult to make without a firm foundation upon which further development can occur. This paper contains over thirty questions that will establish that firm footing and allow progress to be made. In four specific areas:

First, everyone in the organization must know why the change is taking place, why it is necessary. This is a message that will require repeating at every opportunity. Every member of the organization must have a familiarity with the rationale and what is at stake if the change effort fails. Those who are more directly involved must embrace the change effort with a passion – their words and actions are highly visible and will form the compass for the entire organization.

Second, the primary change architects and change agents must be “on stage” with the efforts at all times if the rest of the workforce is to follow. Where change is essential they must be relentless. Change agents must be highly trained and focused in their efforts to achieve the goals stated at the outset. The organization must develop a reserve of people to fill these roles whenever needed so that progress will not falter.

Third, the activities (events and initiatives) that are directed toward achieving the organization’s vision must be programmed in detail along a timeline well in advance and be implemented with precision. Monitoring progress at every opportunity will be an imperative if success is to be achieved on time and on budget. And budget will be an imperative. Progress will not be made without necessary resources. Every step along the way must be monitored to assure effective change strategies are in use and that the return-on-investment is positive.

Fourth, an external group of change agents engaging compatible or synergistic technologies must optimize performance. Everything they do across the organization must be directed at driving customer value. The effectiveness of every intervention strategy must be open to scrutiny to assure deliveries meeting their objectives. Finally, the organization’s leadership and the cadre of change agents must have confidence in those that serve in an external capacity. Credibility is essential to sustained momentum.

Questions

A. The Rationale for Change – Making the Case.

What is the rationale for change?

Why are we undertaking this initiative now?

What will be some evidence that we have favorably changed?

B. Identifying the Theme.

What is the primary theme to be used universally across the organization for this effort?

To what depth will reports created for delivery to specific audiences?

Is *CapacityWare*TM to be used as the systemic Organization Change system?

C. The Decision-Maker(s).

Who is the “sponsor?”

Who are the clients?

Who is the Point-of-contact?

What, if any, are the boundaries of change?

Will the LMS module in *CapacityWare*TM be used to communicate limitations?

How will *QWLC* access the top decision-maker when an urgent need arises?

D. The Change Agent Team.

Will there be supervisor-facilitators?

How many facilitators will be trained and functional?

What “licenses” will the Change Agent Teams be able to rely on?

What access will Change Agents have to sponsors and clients?

To what “depth” will data be generated and shared with the organization?

E. Software Support – *CapacityWare*TM.

What will be the timeline for *CapacityWare*TM installation?

What will the configuration be?

Who will be the *CapacityWare*TM Administrator (or Administration Team)?

F. Client C.H.A.R.T.

Who will be the point-of-contact for the client CHART?

Will the CHART be used by others? If yes, then by whom?

G. Selection of Organization Elements to Include in Change Efforts.

What organizational elements will be included?

What limitations on inclusion are there, or will there be?

H. Prioritizing Activity that Change the Organization Capacity – Triage.

What criteria will be used to determine top priority participation?

Is there a “cut line” below which active participation will be curtailed? Explain.

I. Annual Maintenance – Sustaining the Cycle of Change.

To what degree will the organization ongoing change efforts be in synch with the Annual Maintenance suggestions of *QWLC*?

Who will attend tag-up meetings?

How often will the Sponsor/Client team be briefed?

J. Compatibility with Other Organization Change Technologies.

Will other organization development technologies be used concurrently?

Is *CapacityWare*TM used as a replacement for a current and viable technology? Explain.

References

- A. The Rationale for Change – Making the Case.**
 - Symptoms Leading to the Need for Cultural Capacity Change.
 - Themes.
 - Diagnostic Options.
 - Pre-Diagnostic Assessment.
- B. Identifying the Theme.**
 - Change Management System.
 - The Organization Change System.
 - Themes.
- C. The Decision-Maker(s).**
 - The Client/Consultant Relationship.
- D. The Change Agent Team.**
 - Change Agent Selection Criteria.
 - Change Agent Selection and Use.
 - Ad Hoc Realignment Teams.
- E. Software Support – *CapacityWare*TM.**
 - The *CapacityWare*TM Manual.
 - CapacityWare*TM Licensure Considerations.
 - CapacityWare*TM Implementation Roles.
 - CapacityWare*TM Optimum Configuration Options and Technical Requirements.
- F. Client C.H.A.R.T.**
 - Client History and Remediation Technology.
- G. Selection of Organization Elements to Include in Change Efforts.**
 - None
- H. Prioritizing Activity that Change the Organization Capacity – Triage.**
 - Smart Tailoring Triage.
- I. Annual Maintenance – Sustaining the Cycle of Change.**
 - Annual Cultural Capacity Maintenance Program.
 - Comprehensive Indexes.
 - Data Collection Frequency.
- J. Compatibility with Other Organization Change Technologies.**
 - None

The references cited above can be obtained online (with a client password) at www.LTODI.com/monograph_gateway.htm. Call *QWLC* at (757) 591-0807 to obtain your client password.